

Essential Max User Guide



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Get Support

For support, please call the Merchant Helpdesk on **1800 230 177**, 24 hours a day, 7 days a week, or visit commbank.com.au/merchantsupport

When calling us, please make sure you have the following information ready:

- Terminal ID (located at the top of your merchant receipt).
- Trading name.
- Trading address.
- Trading phone number.

Service Response Time

CommBank will endeavour to replace a faulty terminal within:

- 4 business hours in all locations except remote areas.
- 3 to 5 business days for remote areas. A remote area is not serviced by a technician and only phone support is available.

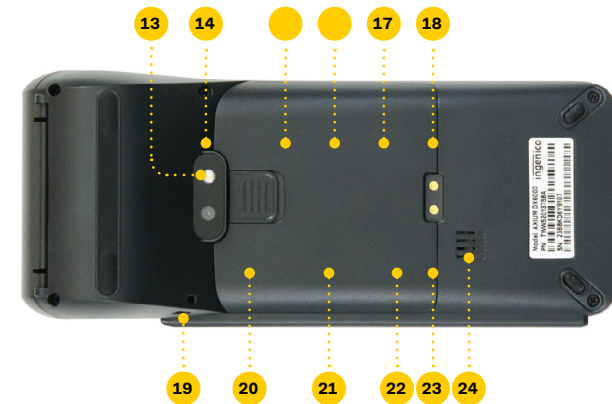
For more information on CommBank merchant services, please visit commbank.com.au/merchantservices.

Getting Started

Getting to know Your Essential Max Terminal



1. Contactless loading zone	2. Easy Loading Printer
3. LCD and touch screen	4. Buzzer
5. Magnetic Card Reader	6. Smart card reader
7. LEDs for Contactless Card	8. Front Scanner
9. Power Key	10. Volume Keys
11. Battery Cover	12. USB Type Connector



13. Rear Camera	14. Flash
15. Battery Socket	16. Battery and SIM cards compartment
17. Battery and SIM cards compartment	18. Base Charging interface+
19. Lanyard hole	20. Battery and SIM cards compartment
21. Battery and SIM cards compartment	22. Battery and SIM cards compartment
23. Base Charging Interface	24. Speaker

Parts and Accessories

Terminal base for charging	Standalone terminal stand with charging circuit	Integrated terminal stand	Charging cables for terminal base
			

Cables

USB A to USB C cable	USB B to USB A cable	Ethernet cable	Audio Jack Adapter
			

Powering On/Off, Rebooting and using Screen Saver Mode

- To power on: Press and hold the **Power button** for about 1.5 seconds until the screen turns on
- To power off: Press and hold the **Power button** for more than 2 seconds. When the options appear on screen, tap **Power Off**
- To restart: If the terminal is unresponsive, press and hold the Power button for 8 seconds to force a shutdown
- To activate screen saver mode: To save battery, briefly press the Power button (approx. 0.5 seconds) to turn off the screen

Charging the Battery

Note: When you receive your terminal, the battery may require charging.

How to Charge

1. Connect the power adapter to the USB-C port on the left side of the terminal, or if using the base, place terminal on base to charge
2. Plug the adapter into a power outlet
3. Look for the charging icon at the top of the screen



Navigating and Understanding the Status Bar

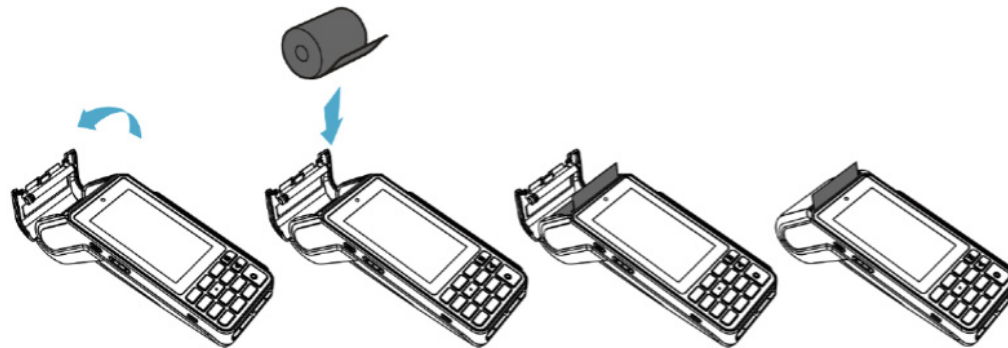
Your Essential Max terminal features a touchscreen interface like a smartphone, allowing intuitive navigation using the following gestures:

- **Tap:** Select an item or button
- **Swipe:** Scroll through screens or lists
- **Touch and Hold:** Access additional options or drag items
- **Drag and Drop:** Move items across the screen

Installing the Receipt Roll

To install/replace the paper roll in your terminal:

1. **Open cover** by lifting the catch at the top of the terminal and pulling the cover back
2. **Remove the used roll**
3. **Insert new roll**, ensuring it feeds from the bottom
4. **Pull paper through** past the top edge of the terminal
5. **Close cover** by pressing both upper corners of the cover until it clicks shut



Terminal passwords

Your terminal uses passwords to control access to certain functions and keep your business secure. These include sensitive actions such as refunds and configuration changes.

There are two password levels for your use:

- **Supervisor password:** Used by staff for day-to-day operations. It allows access to selected functions such as lower-value refunds and basic configurations.
- **Manager password:** Used by the business owner or authorised senior staff. It provides full access, including higher-risk transactions, terminal settings, and password management.

Admin password (support only)

Your terminal also includes an Admin password, which is used by CBA's support teams for troubleshooting or password recovery. If prompted for an admin password, please call the Merchant Helpdesk on **1800 230 177** for support on next steps.

Key things to know:

- The Manager password can access all Supervisor functions
- Supervisor and Manager password must be different
- You'll be prompted to enter a password when accessing certain features
- A forgotten Manager password will require contacting support to reset

Choosing a password:

- Use a minimum of 7 characters
- Must include at least one letter and one number

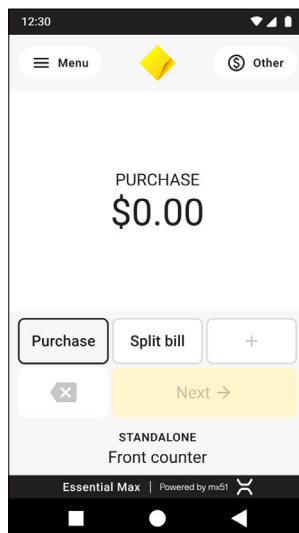
Changing your Manager or Supervisor password

You can change your Supervisor or Manager password at any time using the terminal settings.

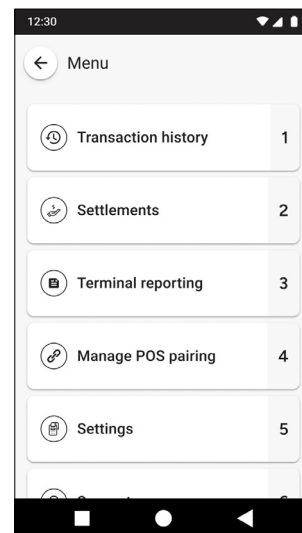
1. Select **Menu** in the top left-hand corner of the screen
2. Select **Settings**
3. Select Passcode management
4. Select Change passcode
5. Enter Manager password

*If you have forgotten your manager password, call the Merchant Helpdesk on **1800 230 177** to reset your password.*

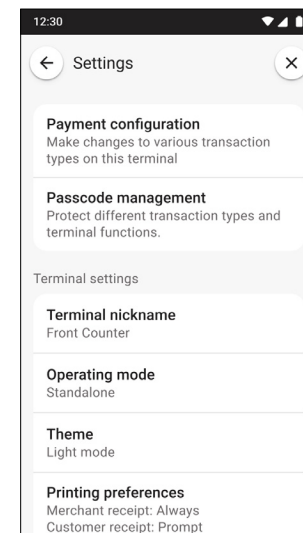
6. Select **Change password**



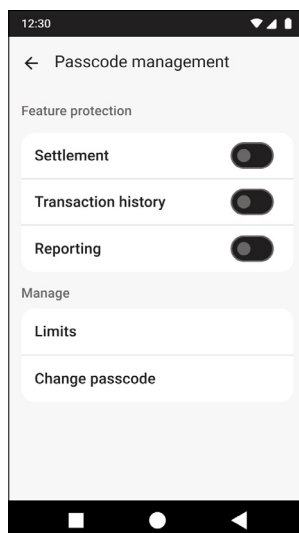
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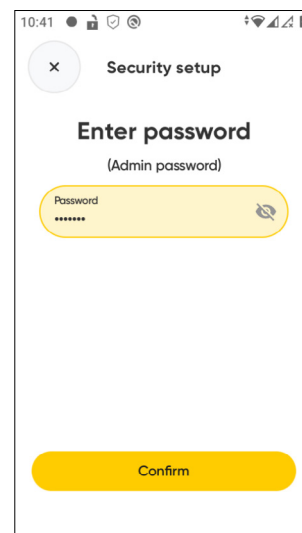
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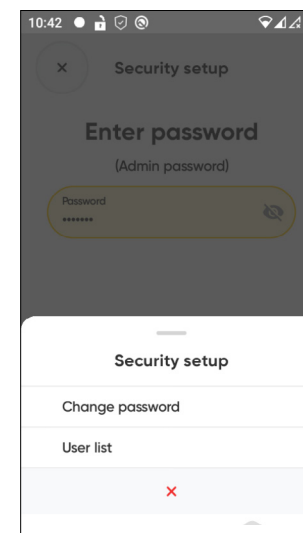
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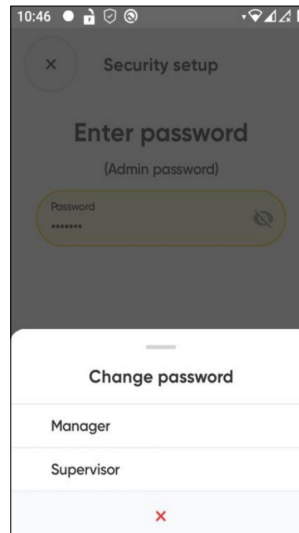


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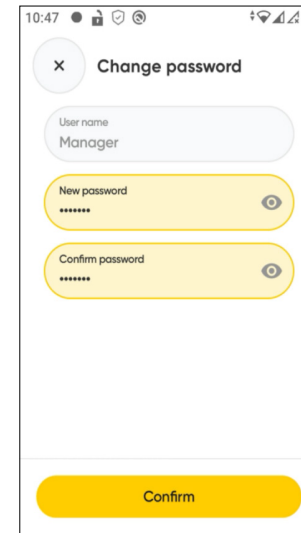


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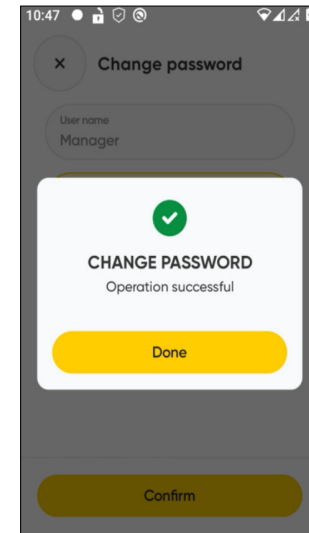
7. Select Manager or Supervisor
8. Enter and confirm the new password in the two text fields. The terminal will reject any password that:
 - a. Is less than 7 characters long
 - b. Does not include at least one letter and one number
9. The password change confirmation will appear on the terminal screen



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Connecting to 4G

Your terminal will automatically connect to a network using the installed Telstra or Optus SIM cards to maintain connectivity with CommBank.

Tips:

- If you experience connectivity issues, check the SIM card placement and reboot the terminal
- The terminal will automatically switch to the second SIM if there's a communication failure after three consecutive failed attempts to process a transaction

Connecting to Wi-Fi

Connect to a Wi-Fi network using the steps below:

1. Access Wi-Fi Settings

- Swipe down from the top of the touch screen twice and open the settings gear icon
- Select **Network & internet** → **Wi-Fi** to view available networks

2. Choose Your Network you want to connect to from the list and enter the password

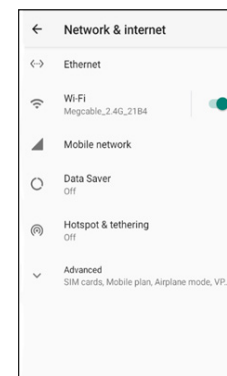
- Type in the Wi-Fi password when prompted
- Select **Connect**

3. Confirm Connection

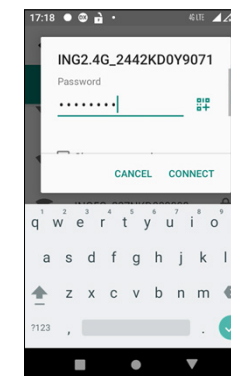
- Once connected, you'll see the Wi-Fi symbol in the status bar at the top of the screen

4. Navigate back to the payment app

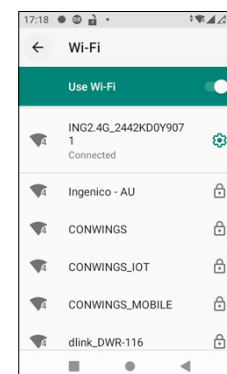
- Swipe down from the top of the touch screen twice and open the settings gear icon
- Select **Apps and notifications**
- Select the yellow icon for the **Essential Max** app
- Select **OPEN**



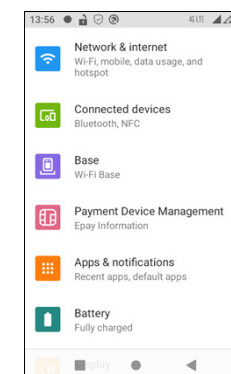
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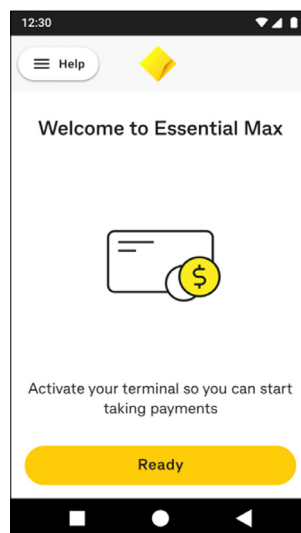
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Setting up your terminal

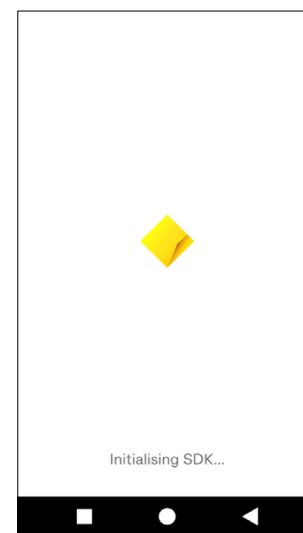
Setting up your terminal

When you switch on your device, it will prompt you through the steps to activate the Smart Sync app and accept permissions.

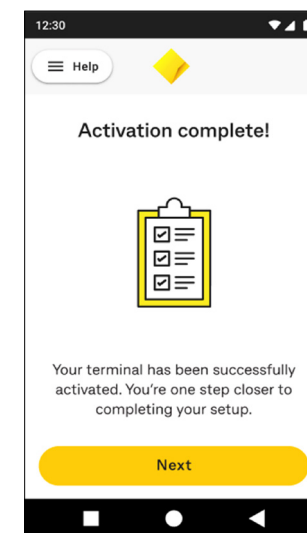
1. Select **Ready**
2. Wait for the self-activation to complete
3. Select **Next**
4. Review the Permissions → Select **Review**
5. Accept the permissions prompt with **ALLOW**
6. Your device is now ready to use



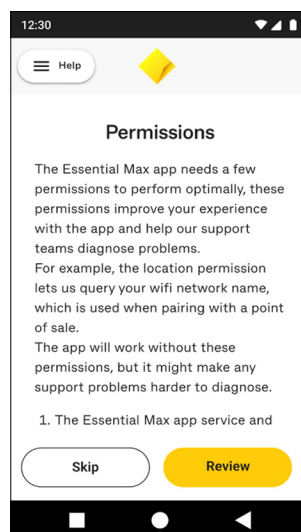
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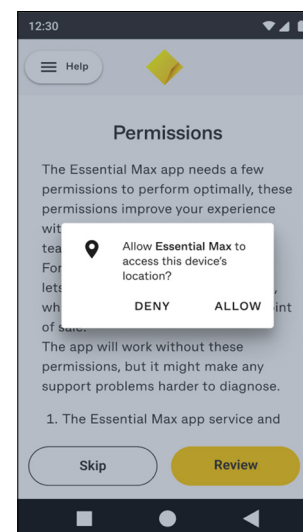
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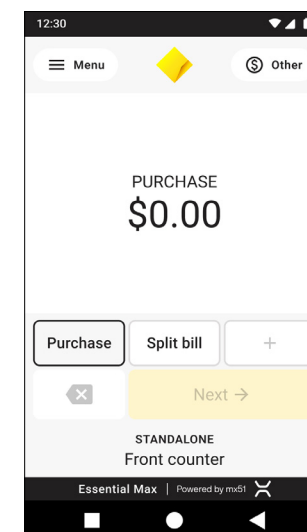
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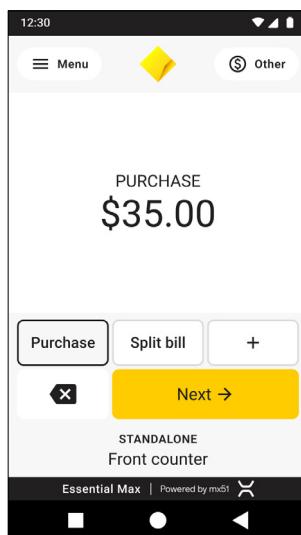


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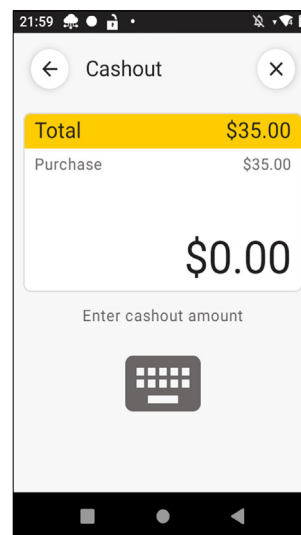
Standalone Mode

Standalone Purchase

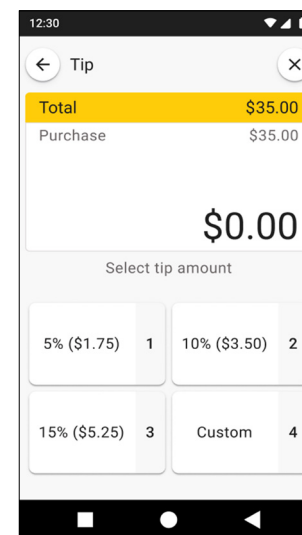
1. Enter amount → Press the **Enter** (O) button on the keypad or **Next** on the screen
2. Enter cashout amount (if prompted and applicable) → Press the **Enter** (O) button on the keypad
3. Present terminal to the card holder to enter tip amount (if prompted) → Press the **Enter** (O) button
4. Cardholder can then Tap, Swipe, or Insert card for payment
5. If prompted, have the cardholder enter their PIN
6. Confirm payment success on screen
7. Choose to print customer receipt: **Yes** or **No**



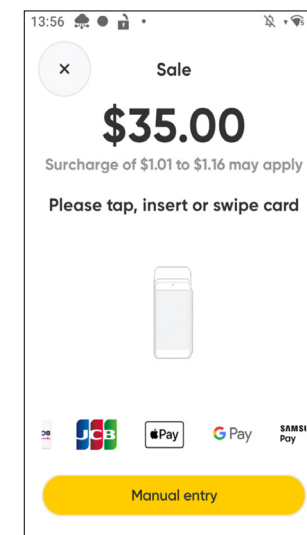
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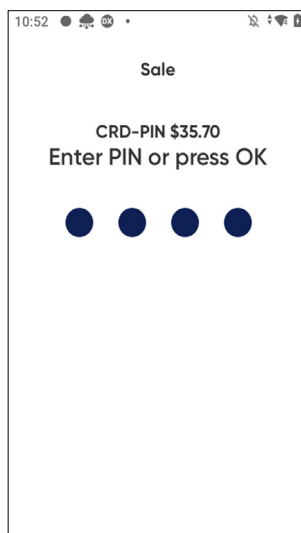
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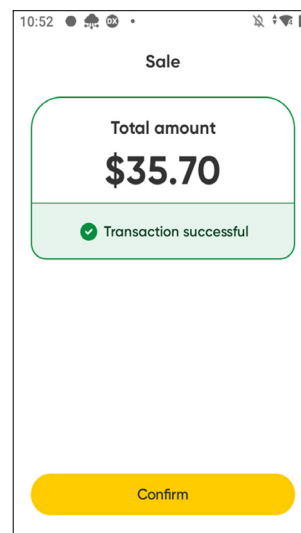
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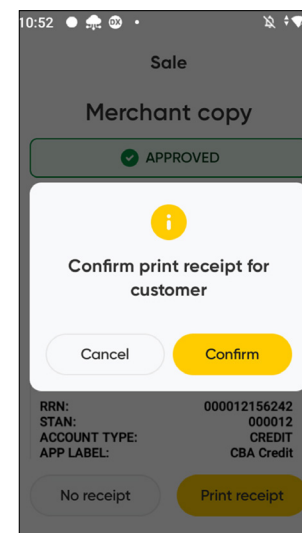
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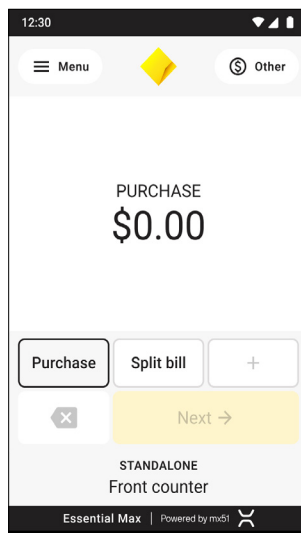
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Purchase with Tipping

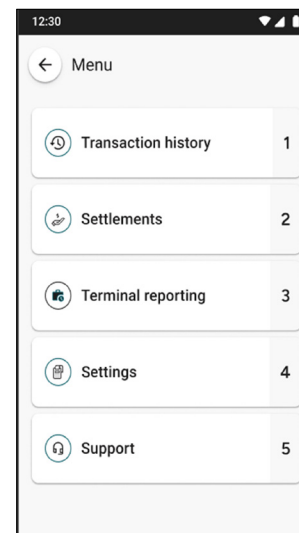
Follow the instructions below to enable tipping. If configured, tipping will appear in the transaction flow as outlined under **Standalone Purchase**.

Enable Tipping

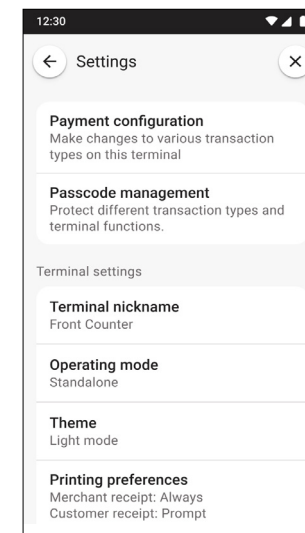
1. Select **Menu** in the top left-hand corner of the screen
2. Select **Settings**
3. Select **Payment configuration** and enter password if prompted



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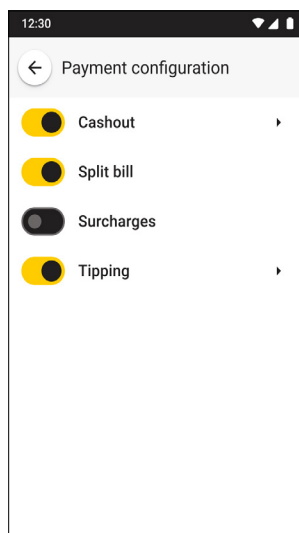


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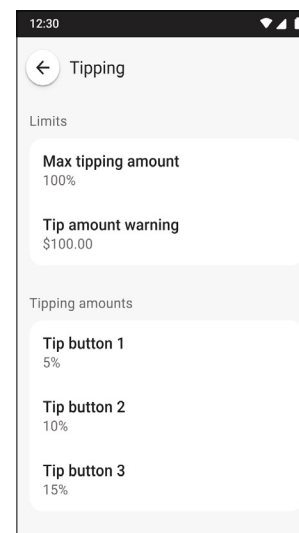


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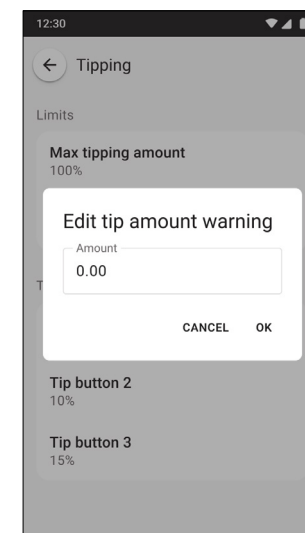
4. Ensure the **Tipping** toggle switch icon is yellow, which means 'ON' → Select **Tipping**
5. Select **Tip amount warning**
6. Configure when a tip warning is shown → Select **OK**
 - a. Where a **Tip amount warning** is applied, a warning will be displayed to the customer where a tip entered is equal to, or exceeds the set amount
7. Select the **Tip buttons** under **Tipping amounts** to customise the default tip percentages displayed to the customer



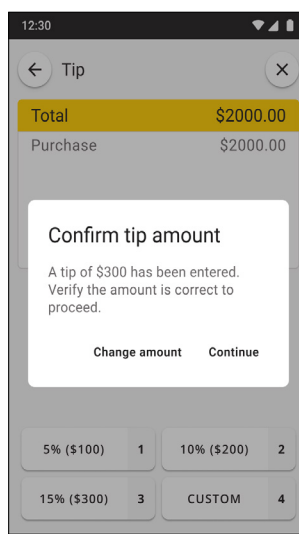
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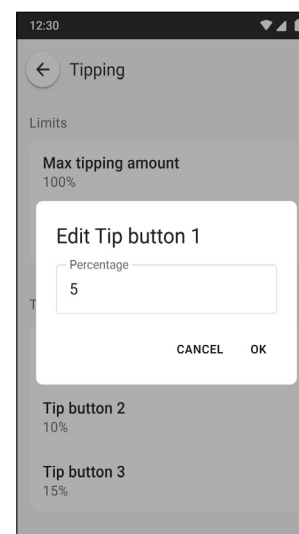
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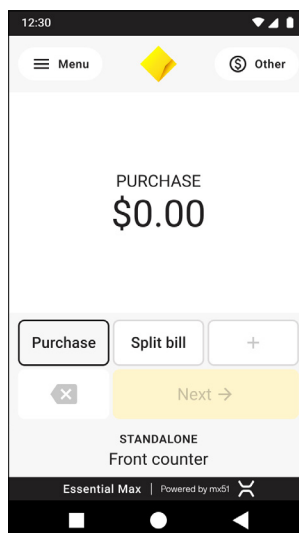
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Purchase with Cashout

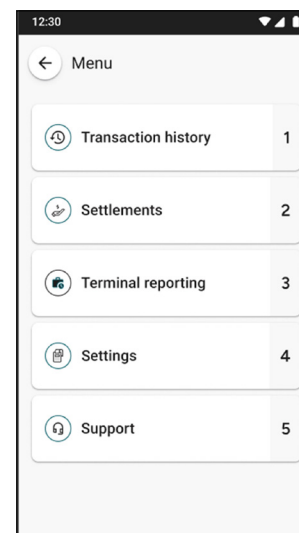
Follow the instructions below to enable cashout. If configured, cashout will appear in the transaction flow as outlined under **Standalone Purchase**.

Enable Cashout

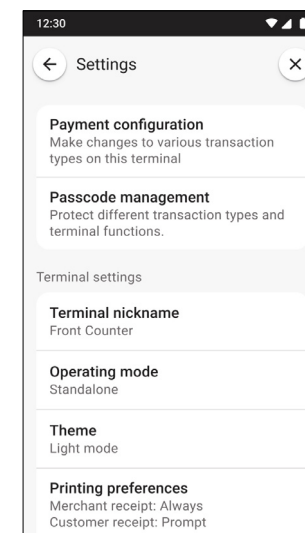
1. Select **Menu** in the top left-hand corner of the screen
2. Select **Settings**
3. Select **Payment configuration** and enter password if prompted
4. Ensure the **Cashout** toggle switch icon is yellow, which means 'ON'
5. To update the max cashout amount, select **Cashout** → **Max cashout amount**
6. Edit cashout amount and select **OK**



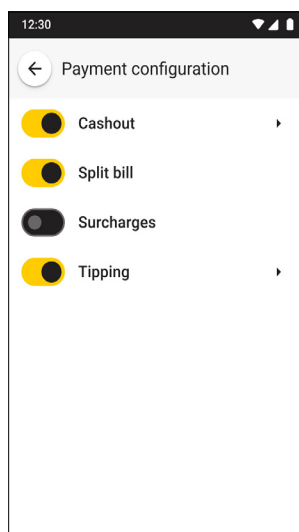
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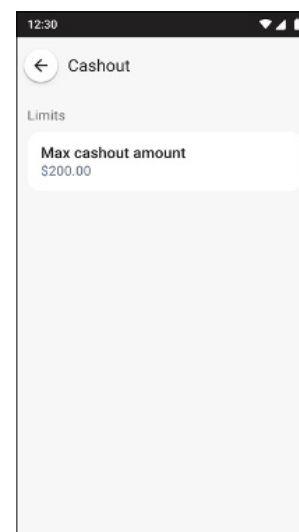
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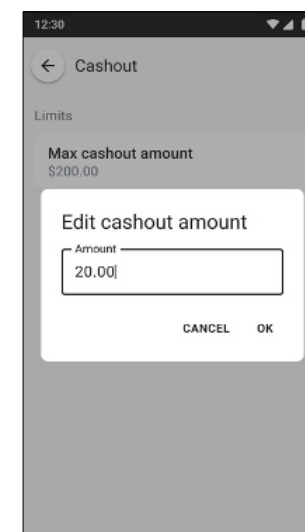
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Purchase with Split Billing

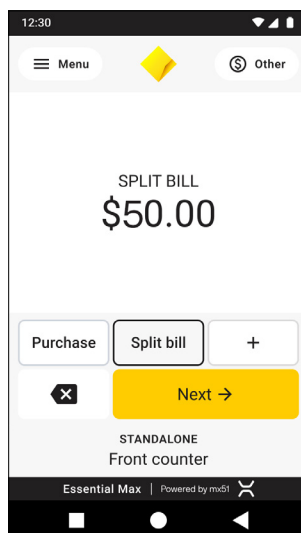
Follow the instructions below to enable cashout. If configured, cashout will appear in the transaction flow as outlined under **Standalone Purchase**.

Split Evenly

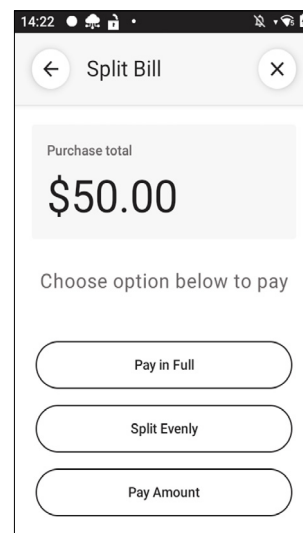
1. Select the **Split bill** and enter the full purchase amount → Press the **Enter** (O) button or Next on the screen
2. Select **Split Evenly**
3. Set number of splits → **Next**
4. Cardholder reviews amount → **Next**
5. Cardholder can then Tap, Swipe, or Insert card for payment
6. The cardholder is notified, "Your split is paid" → Select **Next**

When the payment is complete, the process can begin again for the next customer.

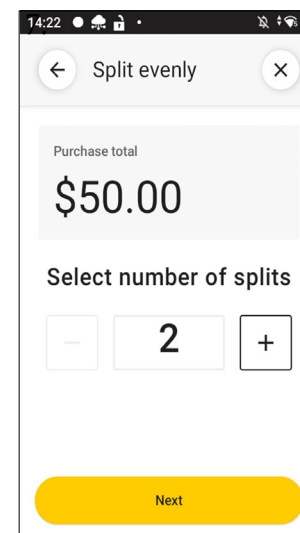
7. Once paid, a bill summary is displayed



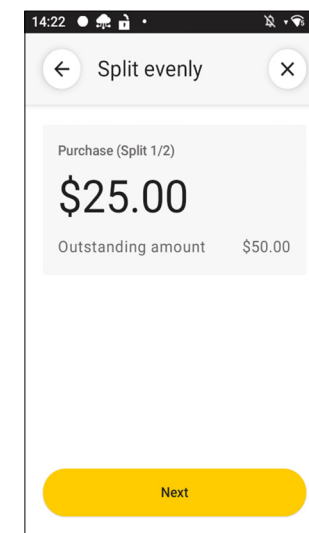
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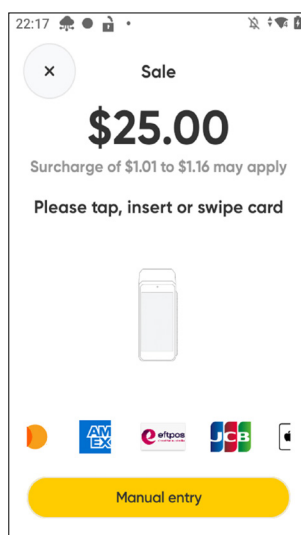
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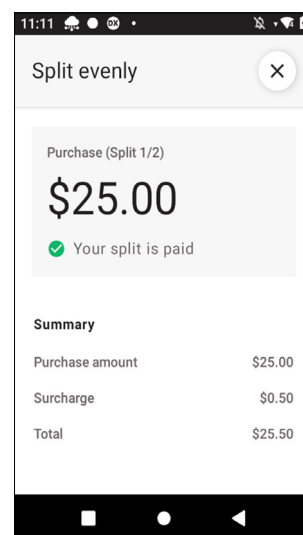
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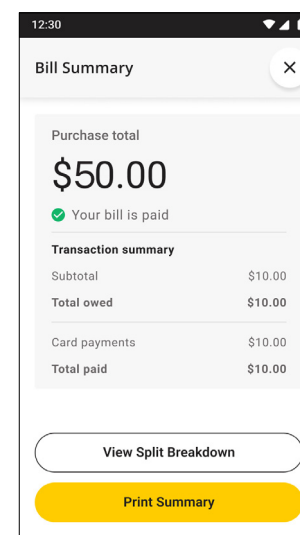
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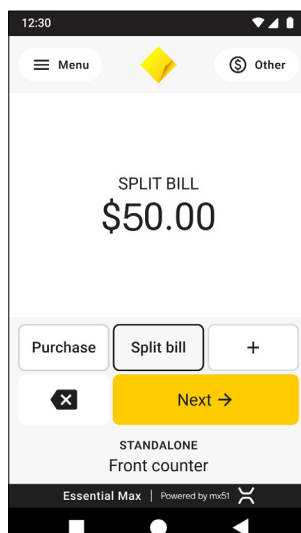
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Customised Split

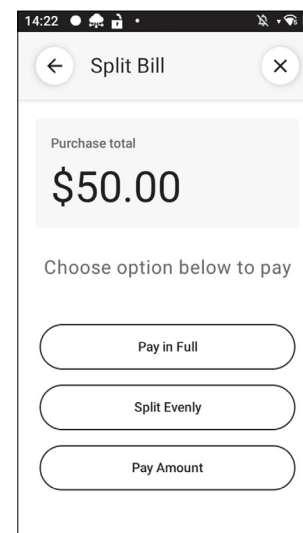
1. Select the **Split bill** and enter the full purchase amount → Press the **Enter (O)** button or **Next** on the screen
2. Select **Pay Amount**
3. Enter cardholder's portion → Press the **Enter (O)** button →
4. Cardholder can then Tap, Swipe, or Insert card for payment

When the payment is complete, the process can begin again for the next customer.

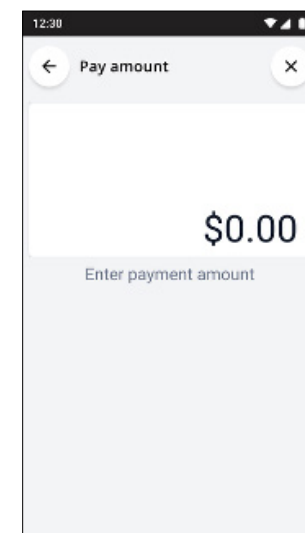
5. Once paid, a bill summary is displayed



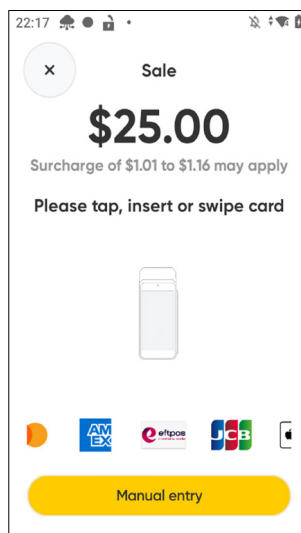
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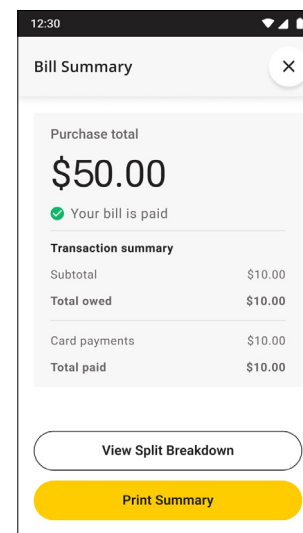
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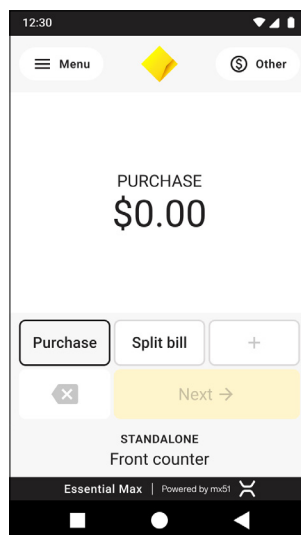


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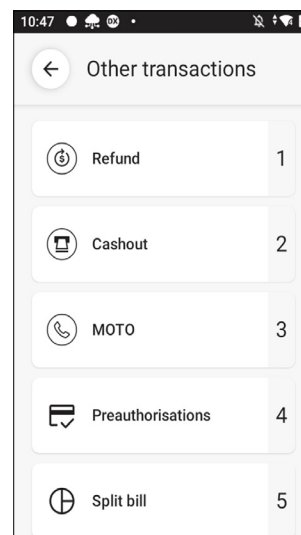
Create a Refund

1. Select **Other** in the top right-hand corner of the screen
2. Select **Refund**
3. Enter refund amount → Press the **Enter (O)** button on the keypad
4. Enter password to authorise
5. Present terminal for cardholder to Tap, Swipe, or Insert
6. Refund confirmation appears on screen
7. Choose to print customer receipt: **Yes** or **No**

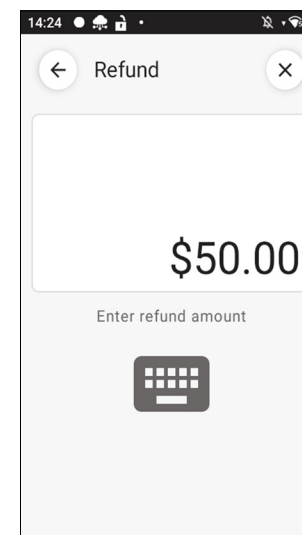
Note: The same card the original purchase was made on must be used to process the refund.



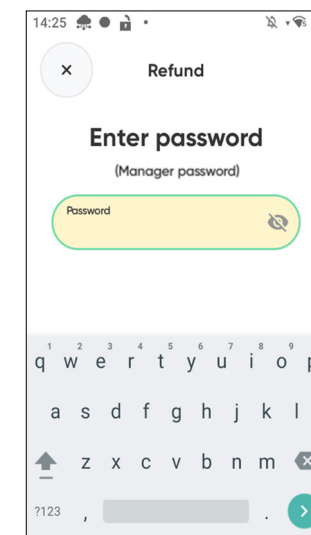
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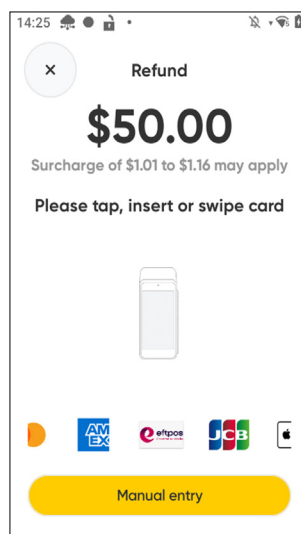
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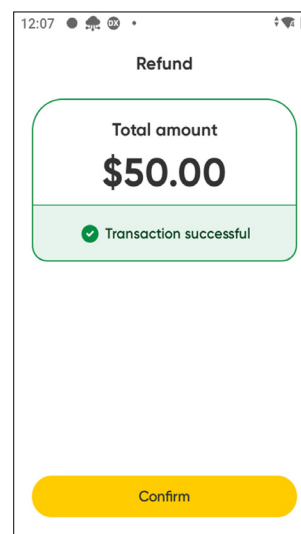
3



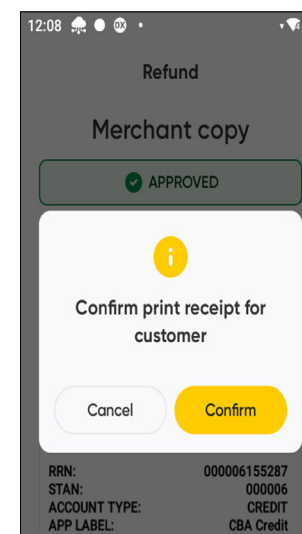
4



5



6



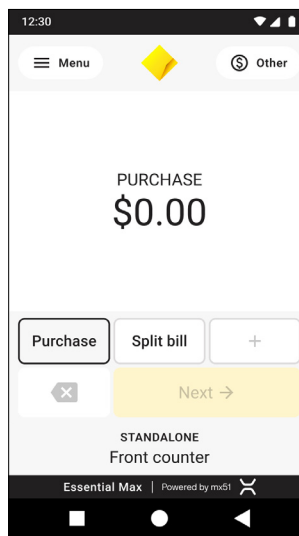
7

Mail Order / Telephone Order (MOTO) Transactions

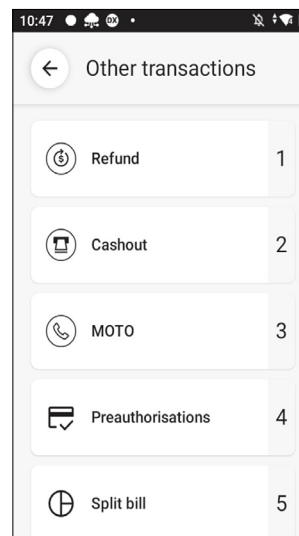
MOTO allows you to process payments where the card is not physically present (e.g. over the phone). This feature must be enabled by CommBank after eligibility criteria are met. Please contact the Merchant Helpdesk on **1800 230 177** if you require access.

Purchase with MOTO

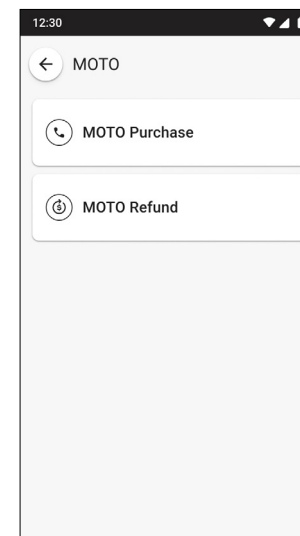
1. Select **Other** in the top right-hand corner of the screen
2. Select **MOTO**
3. Select **MOTO Purchase**
4. Enter purchase amount → Select **Next**
5. When prompted, enter either manager or supervisor password → Select **Confirm**
6. Enter the cardholder's card number and expiry date → Select **Confirm**
7. Enter the cardholder's Card Verification Code (CVC) → Select **Confirm**
8. Choose to print customer receipt: **Yes** or **No**



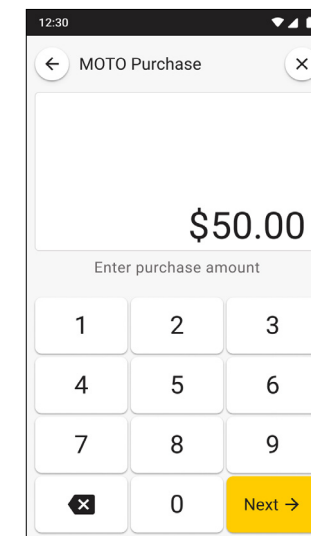
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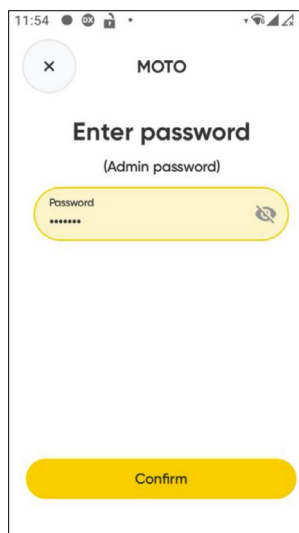
2



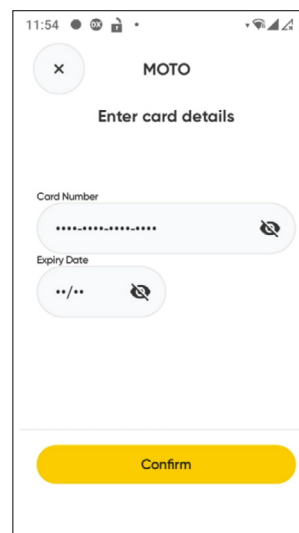
3



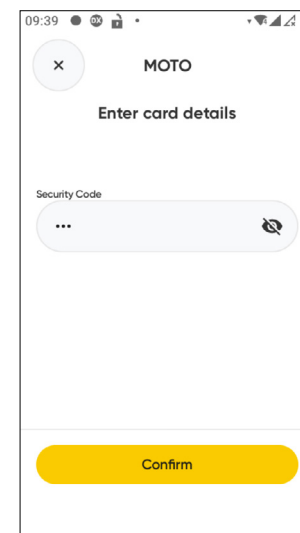
4



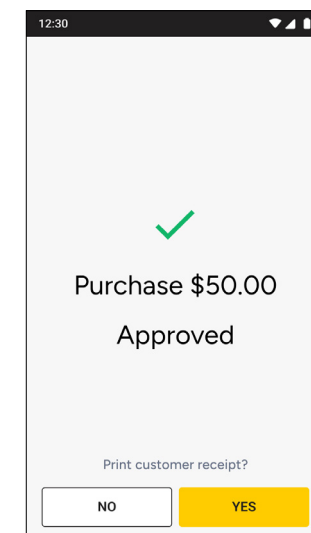
5



6



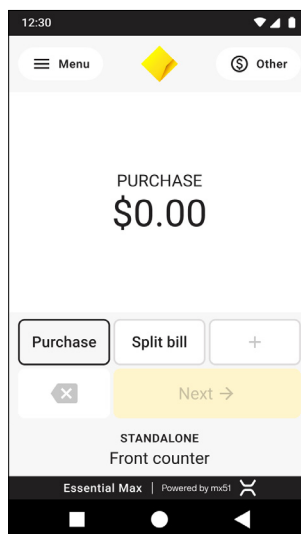
7



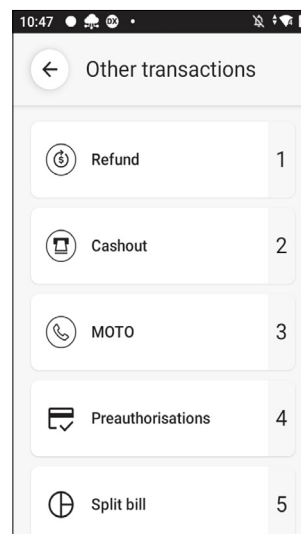
8

Refund with Mail Order / Telephone Order (MOTO)

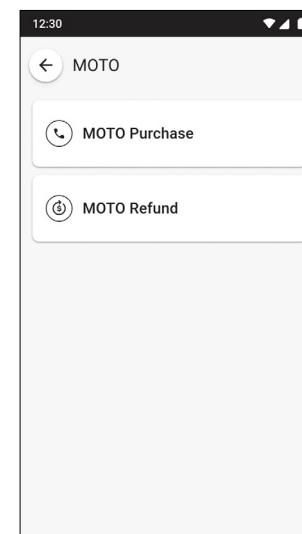
1. Select **Other** in the top right-hand corner of the screen
2. Select **MOTO**
3. Select **MOTO Refund**
4. Enter refund amount → Select **Next**
5. When prompted, enter either manager or supervisor password → Select **Confirm**
6. Enter the cardholder's card number and expiry date → Select **Confirm**
7. Enter the cardholder's Card Verification Code (CVC) → Select **Confirm**
8. Choose to print customer receipt: **Yes or No**



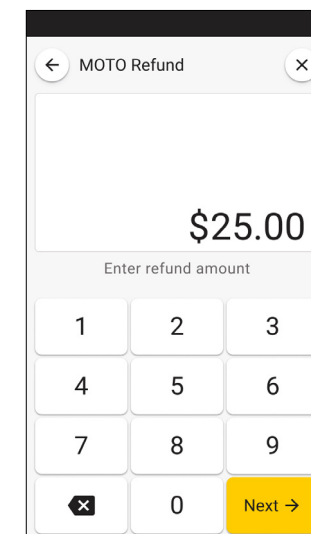
1



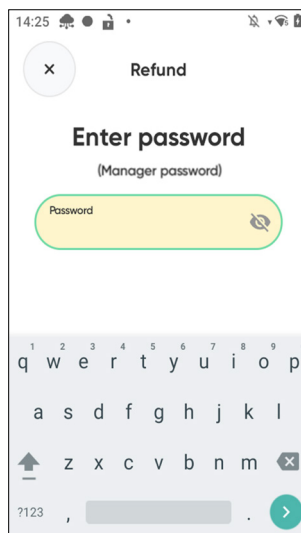
2



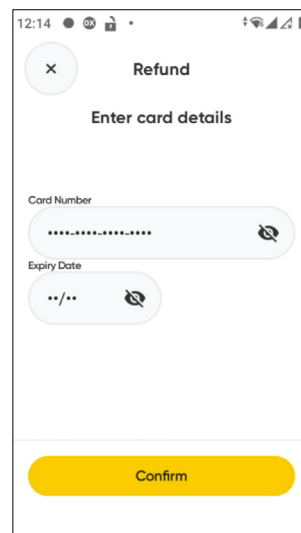
3



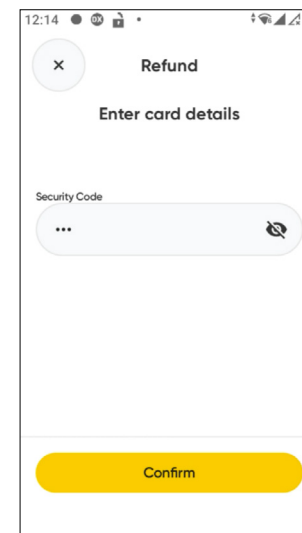
4



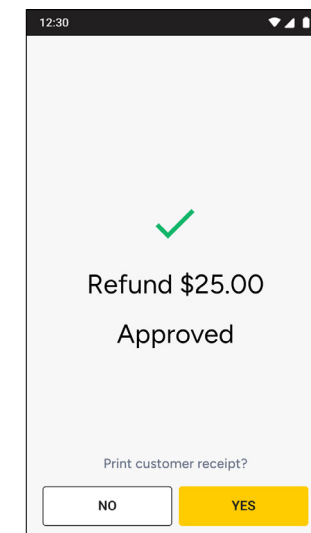
5



6



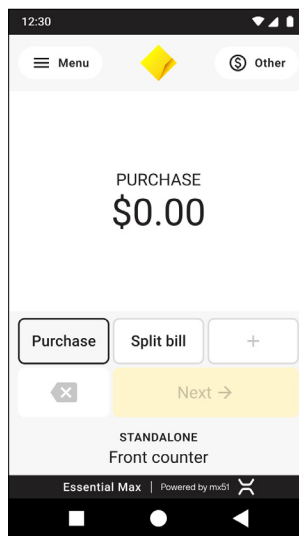
7



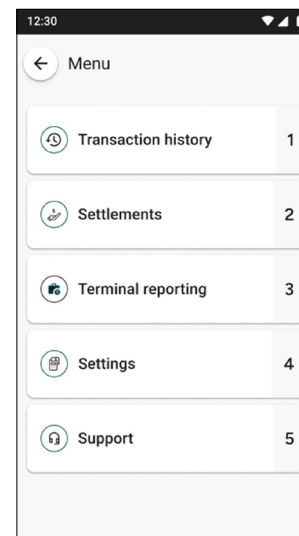
8

Set Refund and Mail Order/Telephone Order (MOTO) Limits

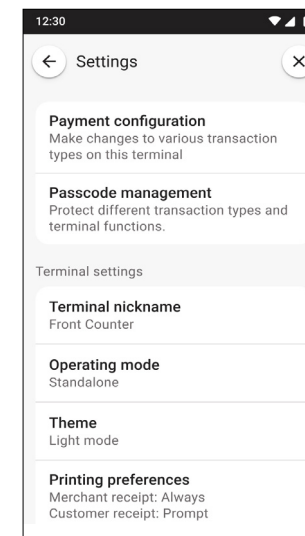
1. Select **Menu**
2. Select **Settings**
3. Select **Passcode management** →
If prompted, enter either manager or supervisor password
4. Select **Limits** → If prompted, enter either manager or supervisor password
5. Select **Max refund amount** or **Max MOTO amount** → Set the maximum amount that can be approved by a supervisor. Any higher amounts will require manager approval



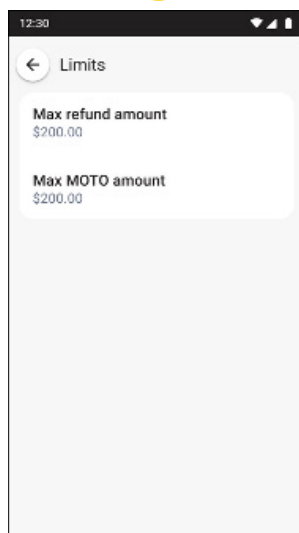
1



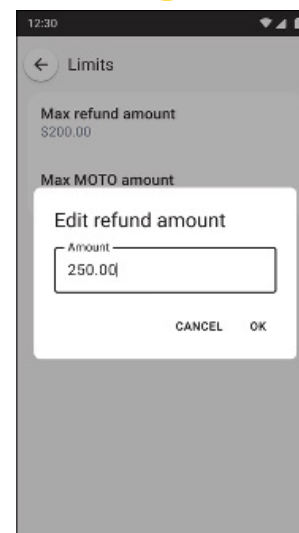
2



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Note: MOTO Limits will only be visible if the MOTO feature is enabled by CommBank. To request MOTO, contact the Merchant Helpdesk on **1800 230 177**. CommBank will enable MOTO if you meet the eligibility requirements for this feature.

Integrated Mode

Once your terminal has been integrated with POS, you will be able to initiate transactions on the POS then have the cardholder make the payment via the terminal. All transactions that occur when your terminal is linked to the POS will be sent to the Smart Dash portal.

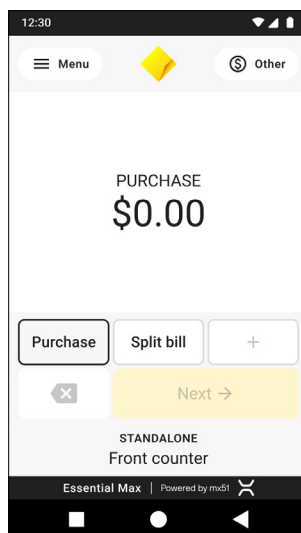
Receipts for transactions that occur on integrated terminals will be printed from the POS, not from the terminal.

Integration with the Point of Sale

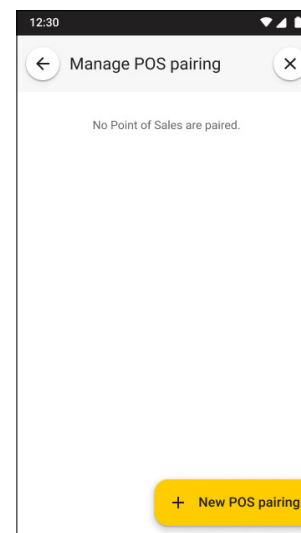
Setup a new POS pairing

1. Select **Menu** → **Manage POS pairing**
2. Select **New POS pairing**
3. Select the desired pairing method:
 - i. Simple Cloud Integration: Your POS and terminal communicate securely through the cloud, instead of needing to be physically connected in store
 - ii. Simple Payments Integration: Your POS and terminal are connected to the same local network, allowing the POS to send payments directly to the terminal
4. On the POS, enter in the details displayed on the screen
5. Ensure the code displayed matches what is displayed on the POS and select **Yes**
6. The terminal will confirm the pairing is successful

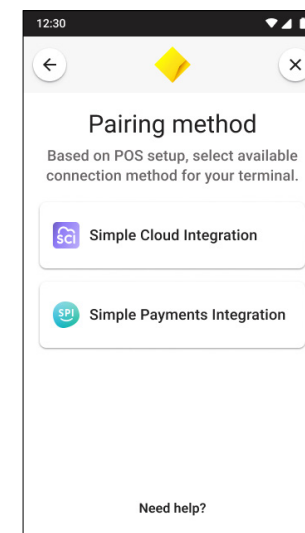
Note: For pairing in Simple Payments Integration mode, your terminal must be on the same network as the POS device.



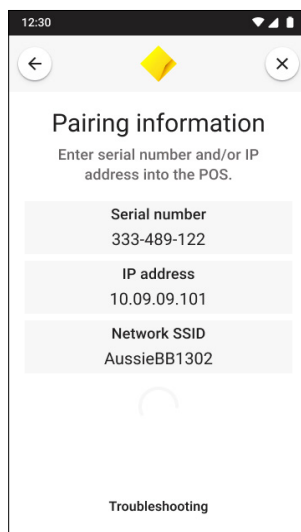
1



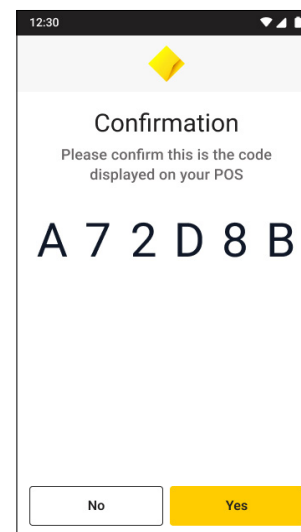
2



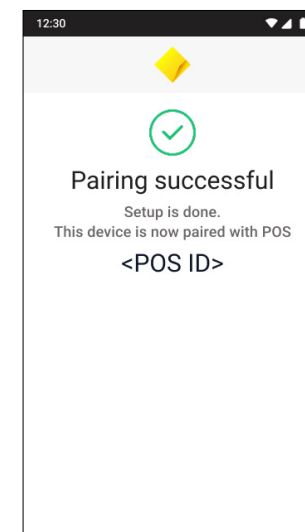
3



4



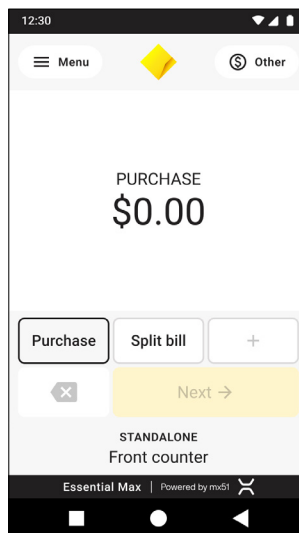
5



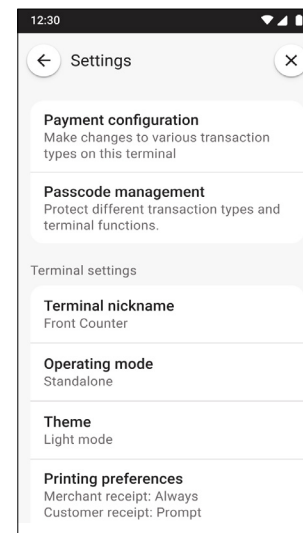
6

Switching operating mode

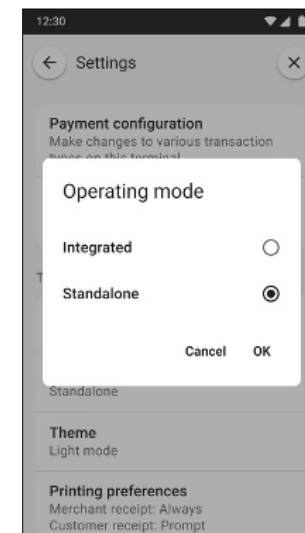
1. Select **Menu** → **Settings**
2. Select **Operating Mode**
3. Select **Standalone** → **OK**



1



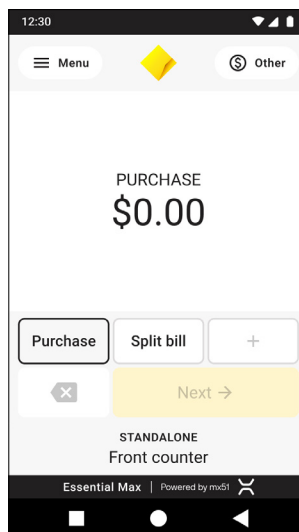
2



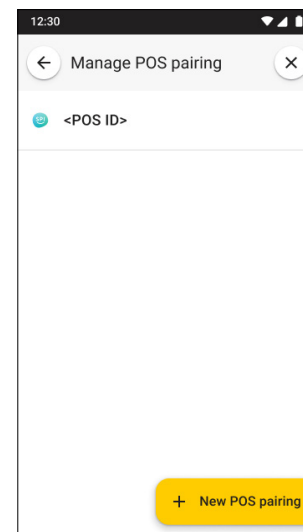
3

Unpair the POS from the terminal

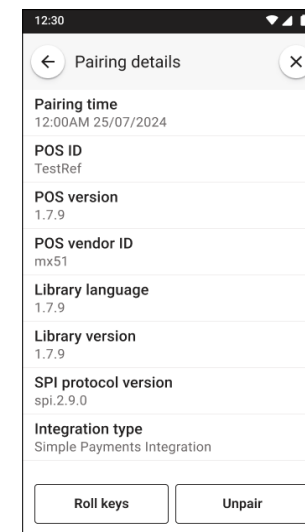
1. Select **Menu** → **Manage POS pairing**
2. Select the relevant POS name from the list
3. Select **Unpair**



1



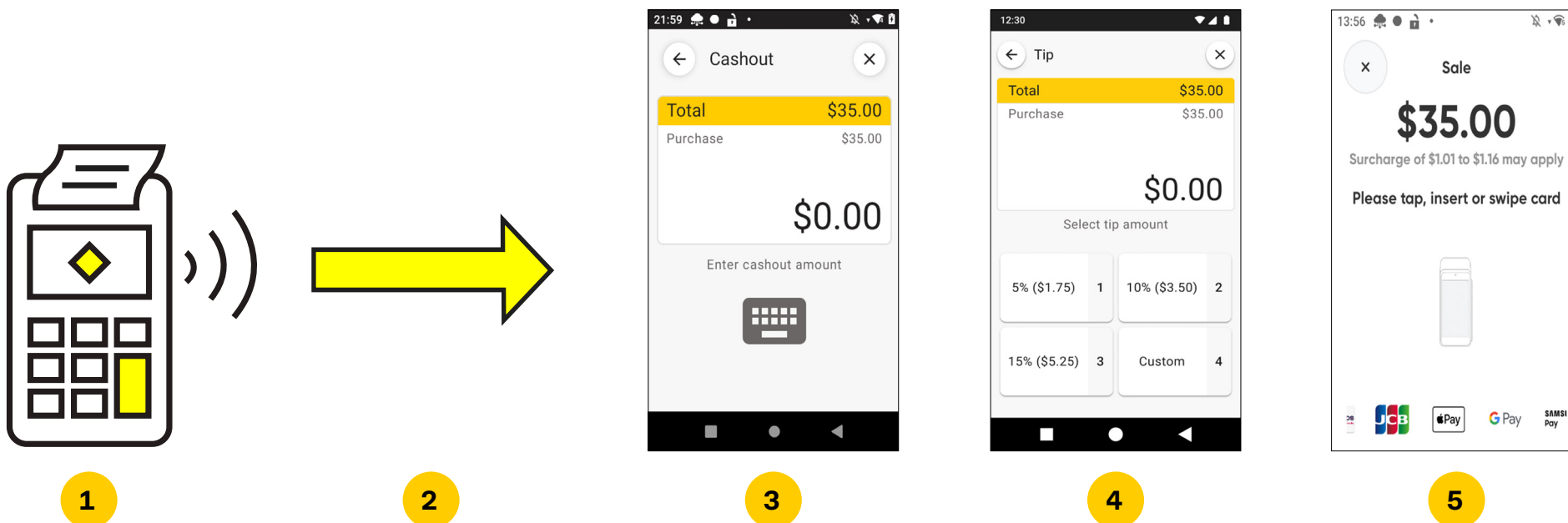
2



3

Integrated Purchase

1. **Start the sale on your POS** – Enter the purchase amount and initiate the transaction
2. **Details are sent to the terminal** – The terminal displays the transaction total
3. **Add cashout amount (if enabled)** – The cardholder enters a cashout amount and presses the Enter (O) button on the keypad
4. **Add tip amount (if enabled)** – The cardholder can select a preset tip or enters a custom amount
5. **Take payment** – The cardholder taps, inserts or swipes their card on the terminal
6. **Transaction completes** – Payment details are sent back to the POS and Smart Dash and the POS prints the customer receipt



Accessibility Features

The Essential Max terminal includes built-in accessibility options to support customers in securely completing transactions.

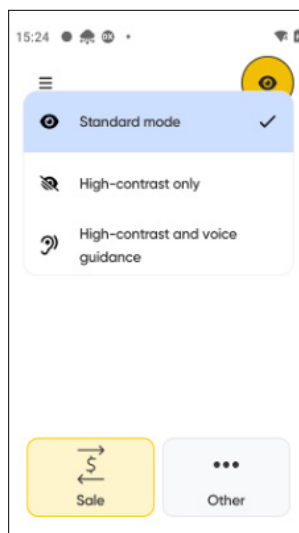
Understanding the Modes

1. **Standard Mode:** Standard display, no accessibility features
2. **High-contrast only:** High-contrast theme for better visibility
3. **High-contrast and voice guidance:** High-contrast theme with audio instructions for full accessibility

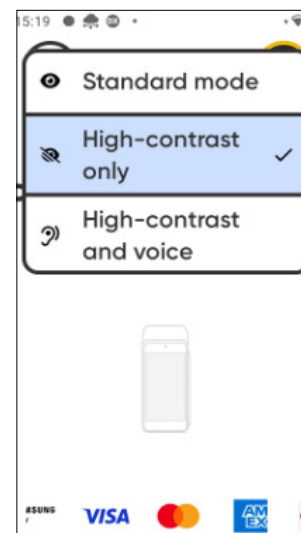
Turning on Accessibility Mode

1. After the transaction amount is entered, select the **EYE** icon and the desired accessibility mode
2. The screen will switch to high contrast with larger fonts, and will include audio prompts if the "high-contrast and voice" option is selected

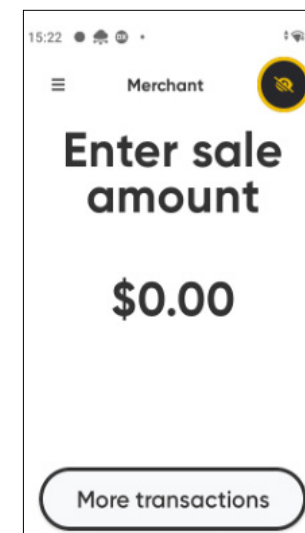
Note: To return to standard or high-contrast-only mode, press the **EYE** icon again and select your preferred mode.



1



2



3

Navigating the Terminal in Accessibility Mode

- **Audio Guidance:** Once activated, every screen provides spoken instructions
- **Keypad Orientation:** The keypad has a raised dot on the centre "5" key for customers to orient their fingers
- **Button Actions:** Each button press is confirmed by a beep or spoken feedback

Troubleshooting

Common Terminal Error Messages

Below is a list of common response codes you may encounter while using your Essential Max terminal. If you're unable to resolve an issue or receive a code not listed here, please call the Merchant Helpdesk on **1800 230 177**, 24 hours a day, 7 days a week, or visit commbank.com.au/merchantsupport.

Response Codes and Actions

Response Code(s)	What it means	What you should do
00, 08, 11, Y1, Y3	Transaction Approved	✓ No action required
55, 38, 75	Incorrect PIN or too many PIN attempts	Ask the customer to re-enter their PIN or use another payment method
19	Transaction needs to be retried	Retry the transaction
01, 02	Bank requires authorisation	Retry the transaction. If it still declines, use another payment method
51	Insufficient Funds	Ask the customer to use another payment method
33, 54	Card expired	Ask the customer to use another payment method
14, 56	Invalid or unreadable card	Ask the customer to use another payment method
57, 58, 62	Transaction not allowed	Ask the customer to use another payment method
61, 65	Card limit exceeded	Ask the customer to use another payment method
03, 13	Invalid merchant or amount	Check the transaction amount and retry. If the issue continues, contact Merchant Helpdesk
04, 05, 41, 43, 46	Card reported lost, stolen or restricted	Do not retry. Ask for another payment method.

Response Code(s)	What it means	What you should do
30	Format or date error	Restart the terminal and retry
82	Invalid software version	Restart the terminal. Contact Merchant Helpdesk if issue continues
90, 91, 92	Bank or network unavailable	Retry later or accept another payment method
96	System error	Restart the terminal. Contact Merchant Helpdesk if issue continues
T935, 416 (Logon Required)	Terminal needs to reconnect	Perform a network login or restart the terminal
T945, UNCLEARED SAF	Transactions waiting to upload	Restart terminal and allow time for the upload. Contact Merchant Helpdesk if unresolved
COMMS ERROR / NO RESPONSE / TIMEOUT	Connection issue	Check internet connection and retry
Any other decline code	Transaction declined by bank or system	Ask the customer to use another payment method

Sync to Manage 360

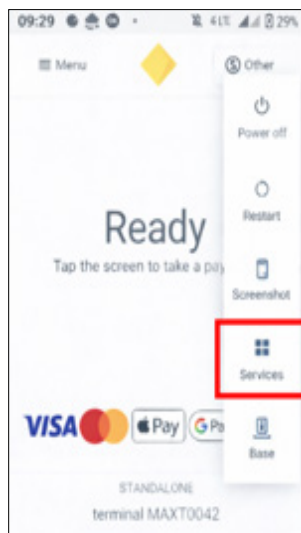
Use **Sync to Manage 360** to manually update your terminal when changes have been made in backend systems. This ensures your terminal receives the latest updates immediately, without waiting for the next scheduled automatic sync.

When to use this:

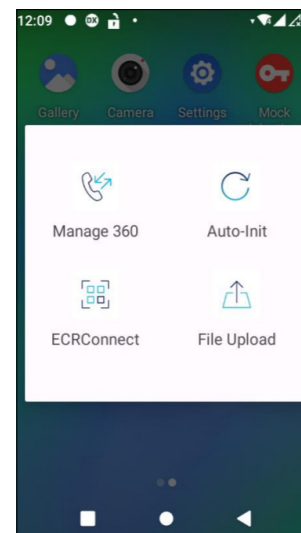
- After changes have been made to your terminal configuration (e.g. settings, parameters, or updates applied by the support teams)
- If your terminal is not reflecting recent updates
- When instructed by the Merchant Helpdesk

How to Sync to Manage 360:

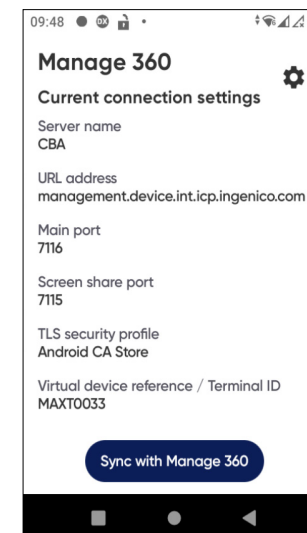
1. Hold down the power button or hold the FUNC and (O) on the keypad together until the Services menu appears → Select **Services**
2. Select **Manage 360**
3. Select **Sync with Manage 360**
4. Wait for the sync to complete
5. Once complete, select **Close** and return to the home screen and continue using your terminal



1



2



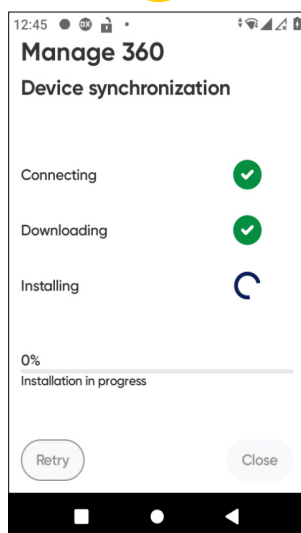
3

What to expect:

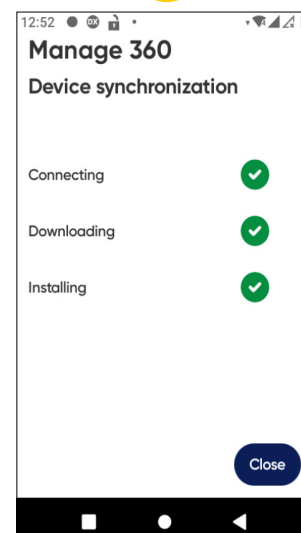
- The terminal may briefly display a loading message
- Some functions may be temporarily unavailable during the sync
- Once complete, your terminal will reflect the latest updates

If the sync does not complete:

- Check your internet connection
- Restart the terminal and try again
- If the issue continues, contact the Merchant Helpdesk



4



5

View Transaction and Settlement Reporting

View Transaction and Settlement Reporting

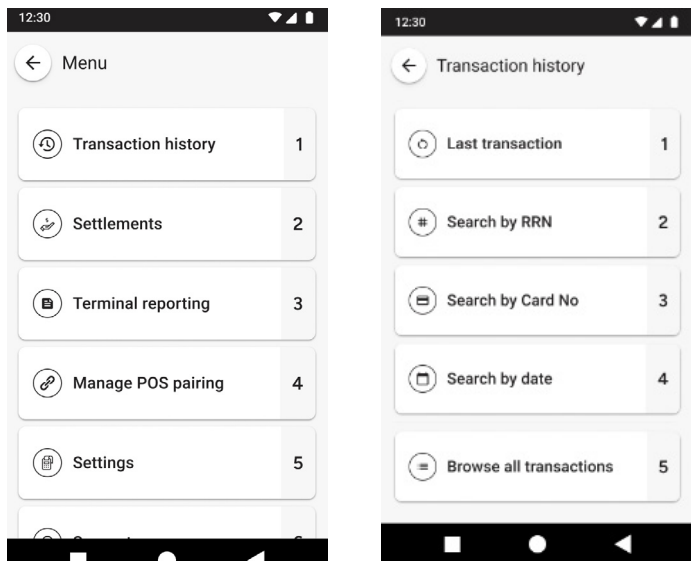
Your home screen has a Menu with the following options:

- Transaction history
- Settlements
- Terminal reporting
- Terminal settings
- Support

View your Transaction History

The Transaction History option allows you to search for previous transactions using specific search criteria.

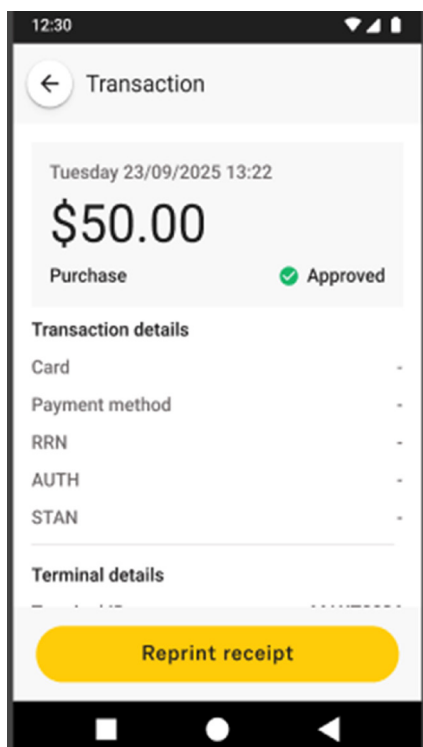
To view your transaction history, select **Menu → Transaction history**



The Transaction History menu will display the below options:

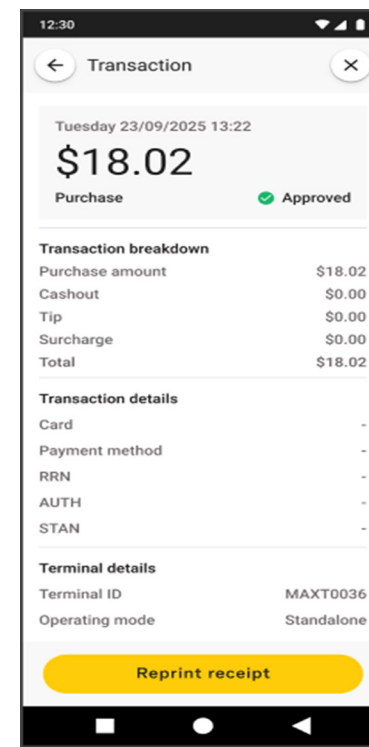
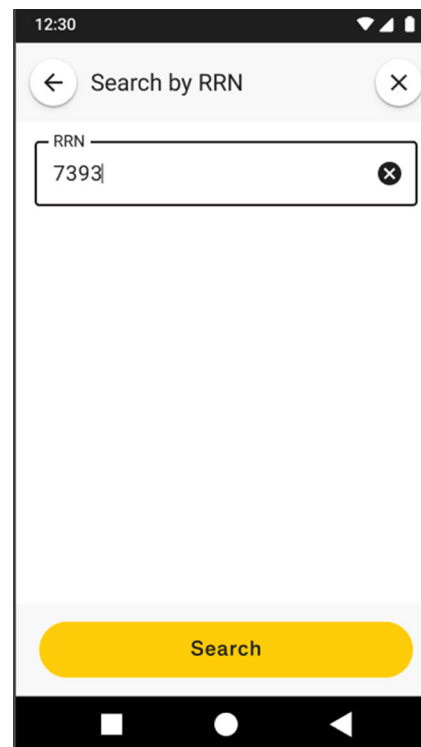
1. View Your Last Transaction

This option is a quick link to the transaction details of the last transaction that was processed on the terminal.



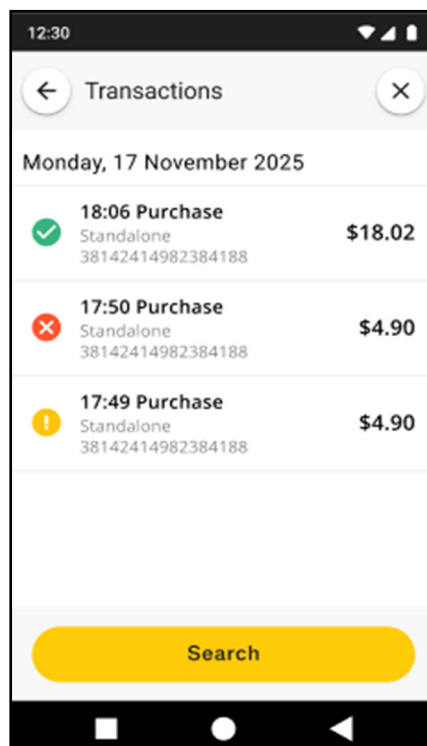
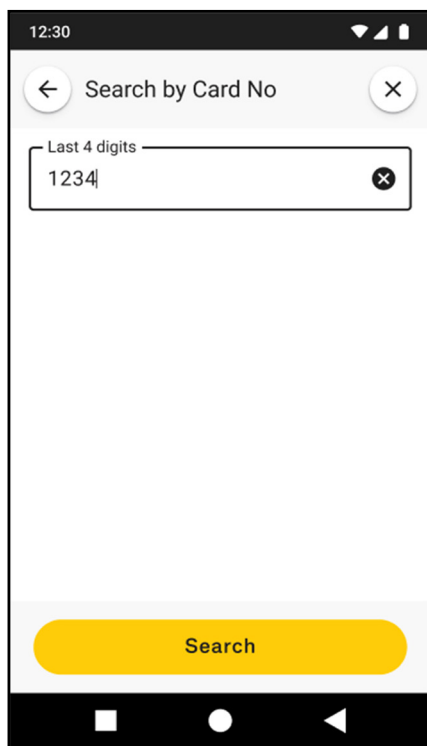
2. Search by Retrieval Reference Number (RRN)

The terminal will return the transaction with the matching RRN.



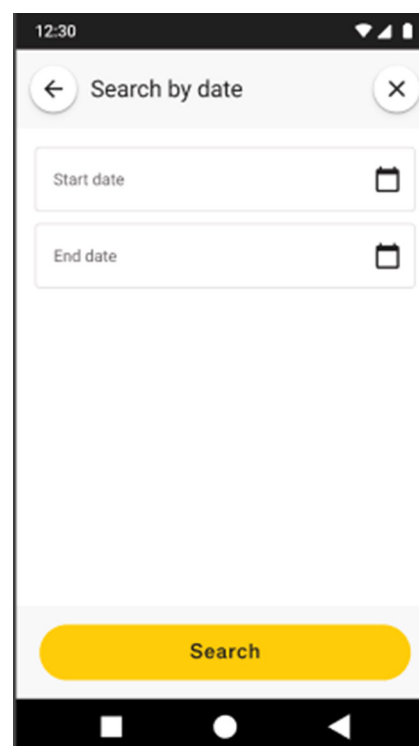
3. Search by Card Number

You can search by card number by using the last 4 digits of the card number. A list of the transactions that match the card details will be returned. Individual transactions can be selected to be viewed, or to reprint the receipt.



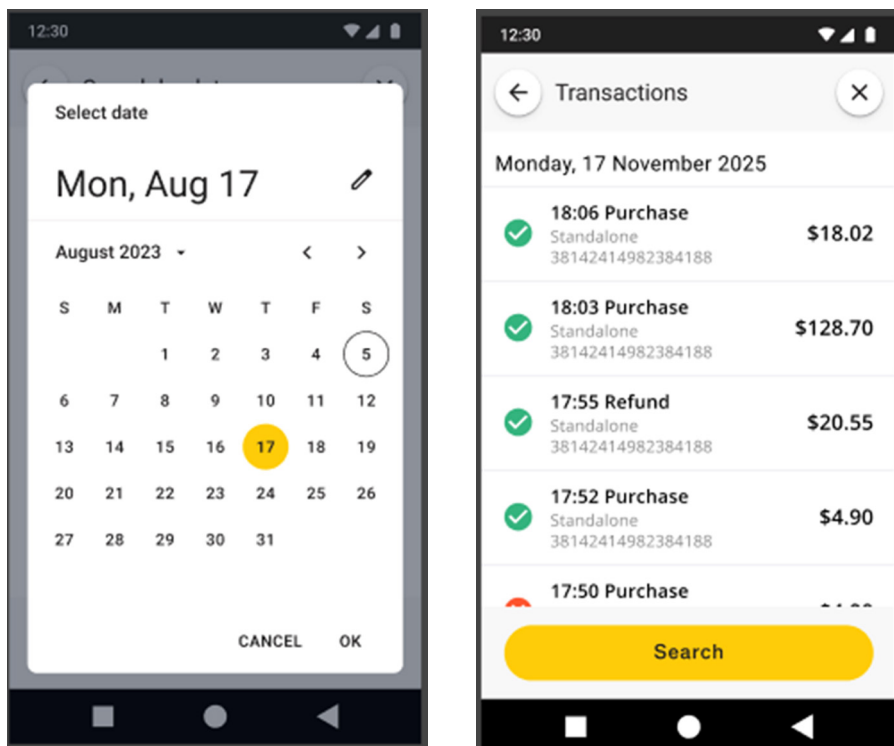
4. Search by Date

When searching by date, the transactions within the **Start** and **End** date entered will appear.



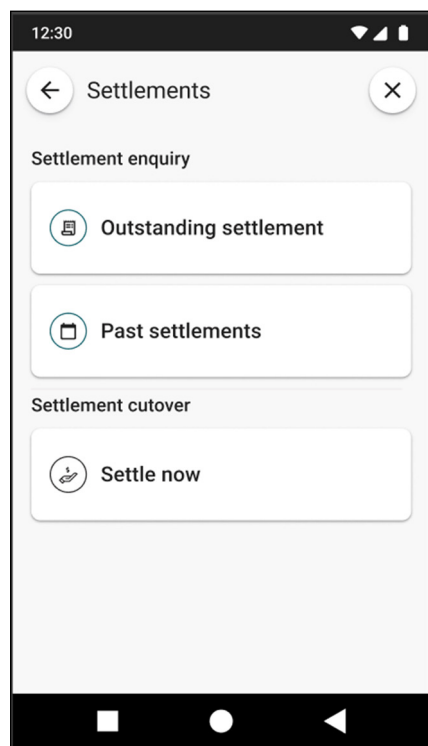
Browse all Transactions

Browsing all transactions will allow you to access transactions that occurred on the terminal in the last 12 months.



Managing Your Settlements – Enquiries and Cutover

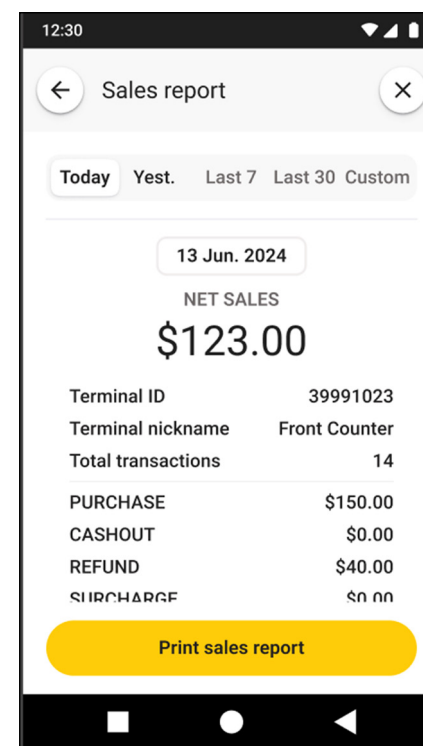
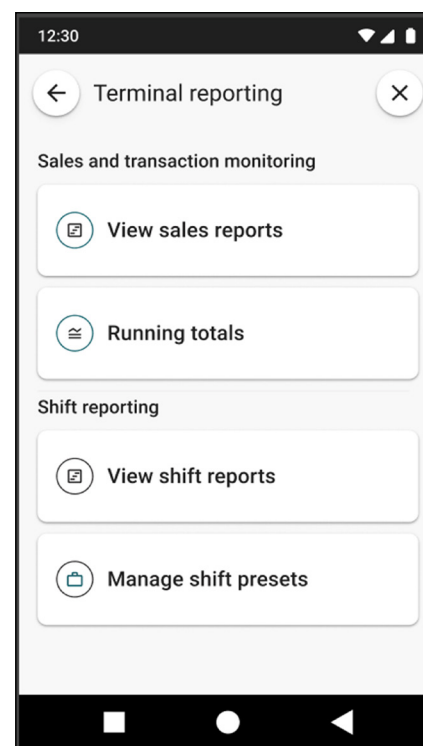
- **Outstanding Settlement:** Check how much is currently unsettled.
- **Past Settlements:** View settlement details for a specific day or access the last settlement quickly.
- **Settle Now:** Initiate a settlement (only once per day).



View Terminal Reports

View sales reports

This reporting allows you to view sales reports for a selected timeframe.



View running totals

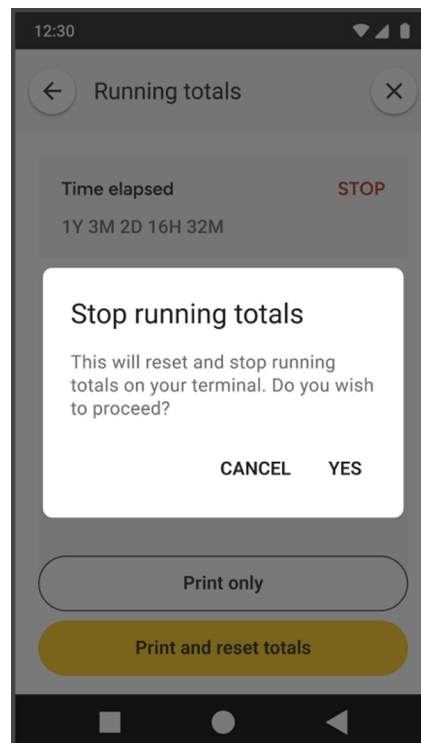
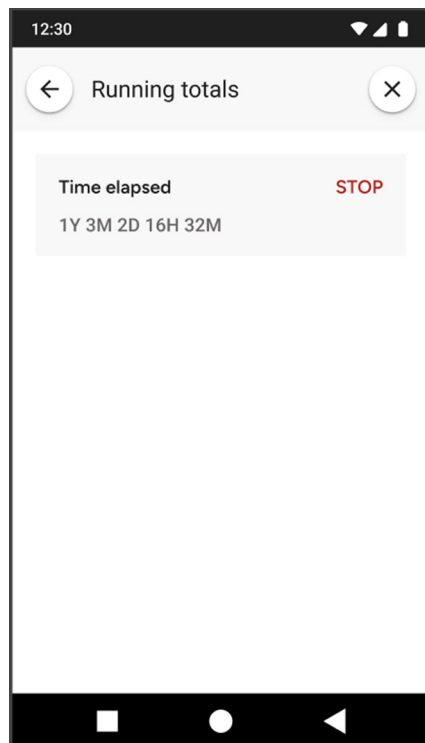
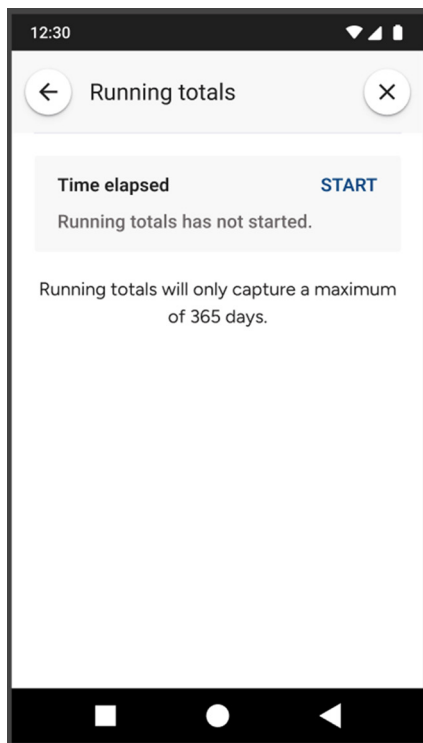
Running totals allow you to view the current total while the report is active.

To start a running totals report, tap **START**.

To end the report and generate the running totals:

1. Tap **STOP**
2. Then tap **YES** to confirm

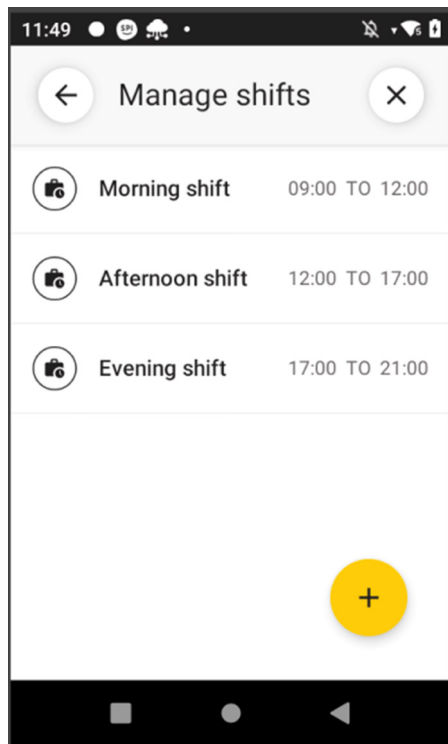
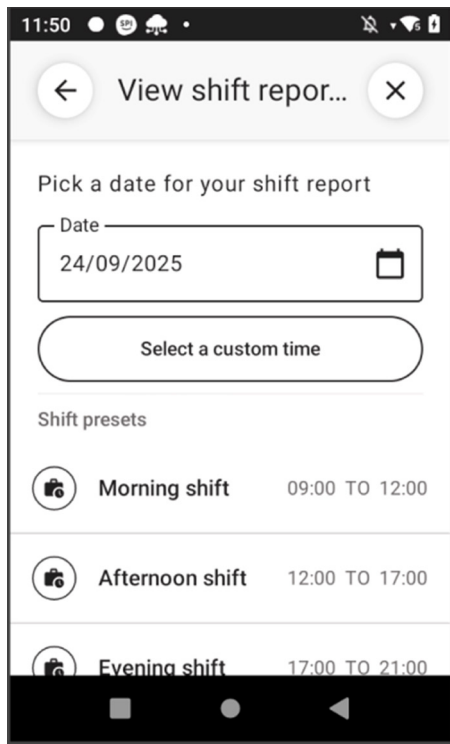
This will stop and reset running totals on your terminal.



Create, view and edit shift reports

View Shift Reports allows you to generate a shift report based on a date and a custom time or a preset shift.

Shifts can be preset in **Manage Shifts**.



Smart Dash

The Smart Dash merchant dashboard allows you to view real time transaction data from payments initiated via your Essential Max terminal.

Getting Started

Once you have set up your Essential Max terminal, you will receive an email with a link to the [Smart Dash portal](#).

Follow the instructions on the email.

- Enter your email address and the temporary password provided in the Smart Dash email
- Click **Continue**
- You will be sent a verification code to the mobile phone number provided
- Input the verification code then click on **Verify**



**Welcome to the
Merchant Dashboard**

Email *

Password *

Continue

[Forgot passwords?](#)

mxc51 reserves the right to do all kind of disclaimer things if it wants



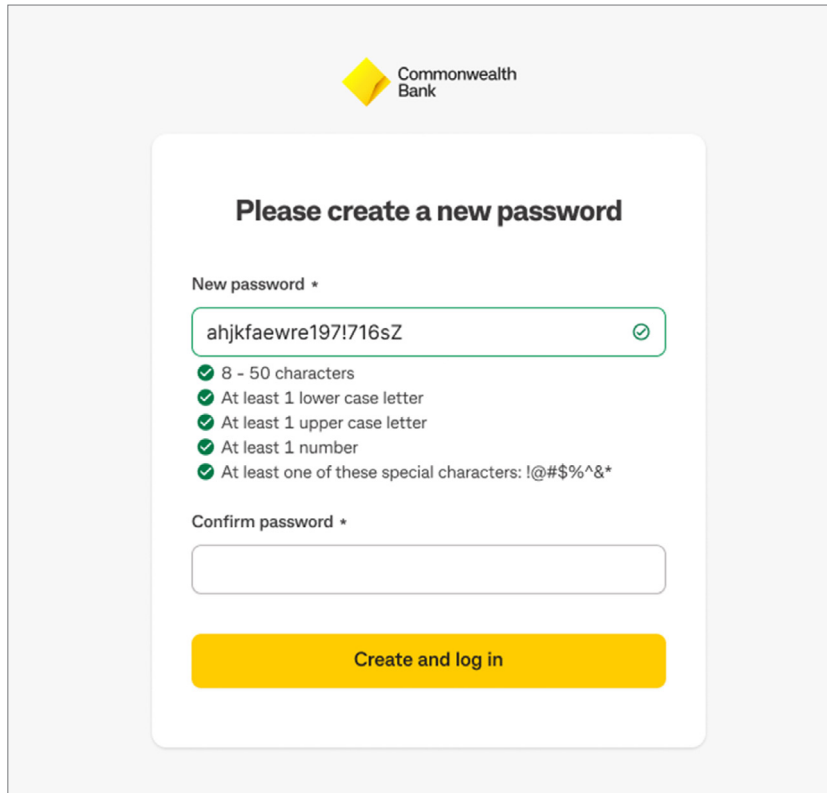
**Enter the verification code
sent to +61 XXX XXX 556**

Verification code *

Verify

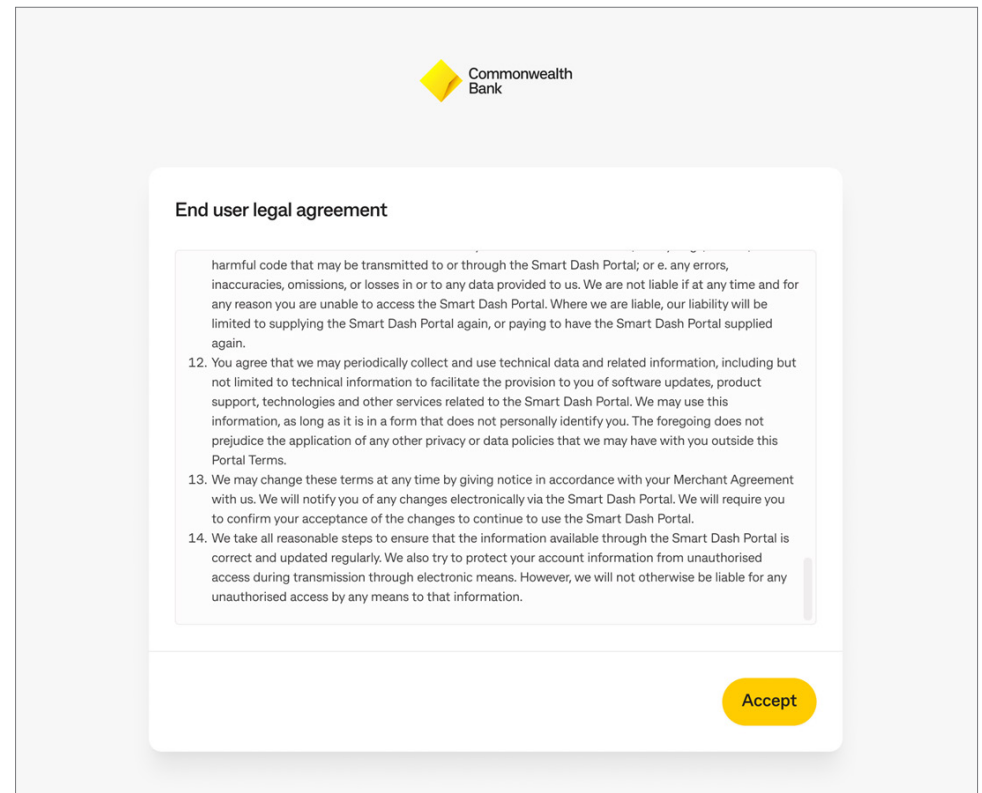
[Request new verification code](#)

- Create and confirm a new password



The screenshot shows the Commonwealth Bank logo at the top. Below it, the heading "Please create a new password" is centered. The form includes a "New password *" field with the text "ahjkfaewre197!716sZ" and a green checkmark icon. Below this field are four green checkmark icons with corresponding requirements: "8 - 50 characters", "At least 1 lower case letter", "At least 1 upper case letter", and "At least 1 number". Below these is a "Confirm password *" field. At the bottom is a yellow button labeled "Create and log in".

- Please review End User License Agreement, if you agree, please select **Accept**



The screenshot shows the Commonwealth Bank logo at the top. Below it, the heading "End user legal agreement" is centered. The form contains a scrollable area with the following text: "harmful code that may be transmitted to or through the Smart Dash Portal; or e. any errors, inaccuracies, omissions, or losses in or to any data provided to us. We are not liable if at any time and for any reason you are unable to access the Smart Dash Portal. Where we are liable, our liability will be limited to supplying the Smart Dash Portal again, or paying to have the Smart Dash Portal supplied again." Below this is a list of terms, including: "12. You agree that we may periodically collect and use technical data and related information, including but not limited to technical information to facilitate the provision to you of software updates, product support, technologies and other services related to the Smart Dash Portal. We may use this information, as long as it is in a form that does not personally identify you. The foregoing does not prejudice the application of any other privacy or data policies that we may have with you outside this Portal Terms." and "13. We may change these terms at any time by giving notice in accordance with your Merchant Agreement with us. We will notify you of any changes electronically via the Smart Dash Portal. We will require you to confirm your acceptance of the changes to continue to use the Smart Dash Portal." At the bottom right is a yellow button labeled "Accept".

- Tick the check box and click Continue to accept the Terms & Conditions



You acknowledge and agree that :

- While you are logged onto the Merchant Dashboard, we can monitor your activity and use of the Merchant Dashboard, including to ensure it is working as intended.
- We will also store and analyse this data and data entered by you on the Merchant Dashboard. We do this to help us improve and develop the Merchant Dashboard to provide a more efficient experience for you.

☒ I accept

Confirm

Cancel

- Click **Accept** to complete the activation of your account

Profile

Email [REDACTED]
Mobile number [REDACTED]
Password [REDACTED] [Update password](#)

Pending Invitations

CBA Test
Invited by [Accept](#)

Organisations

Organisation	Access type
TEST SMART ACCOUNT 18	Administrator

[Go to dashboard >](#)

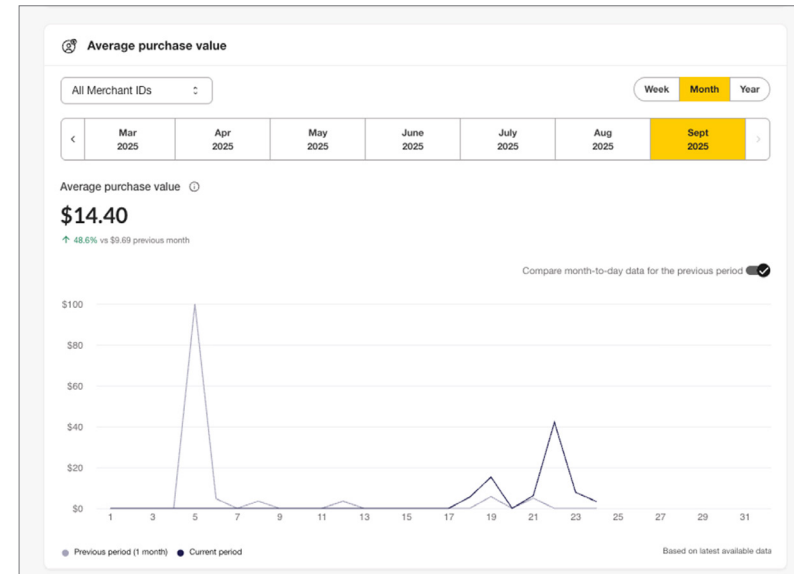
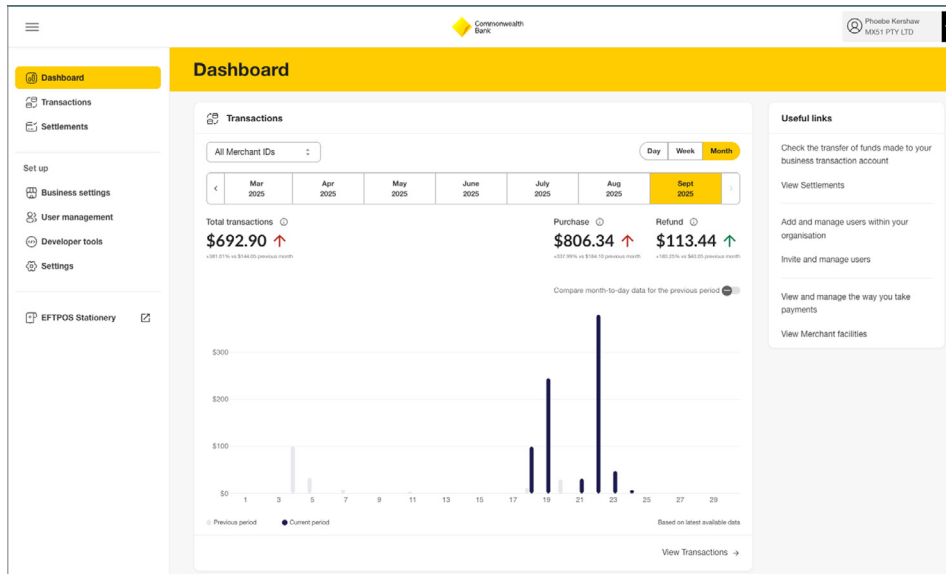
Dashboard

Once you have updated your details you will be taken to the Dashboard Landing Page. It provides a comprehensive overview of transactions, allowing you to monitor, analyse, and manage financial transactions.

Features include:

- Filter dashboard display by Merchant Facility
- Summarise transactions by day, week and month
- Drill down to specific days to see transaction totals per hour
- Filter by card schemes, approved and declined transactions and at a terminal level

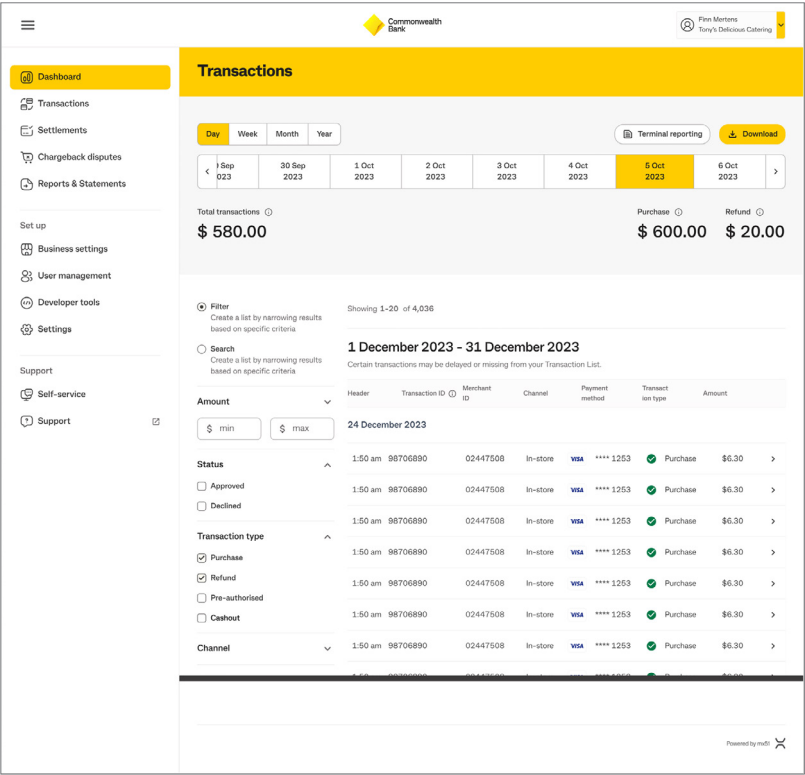
If you scroll down the dashboard, you will also see the average purchase value graph, this graph will also allow the user to filter the results on the graph by week, month and year.



Transactions

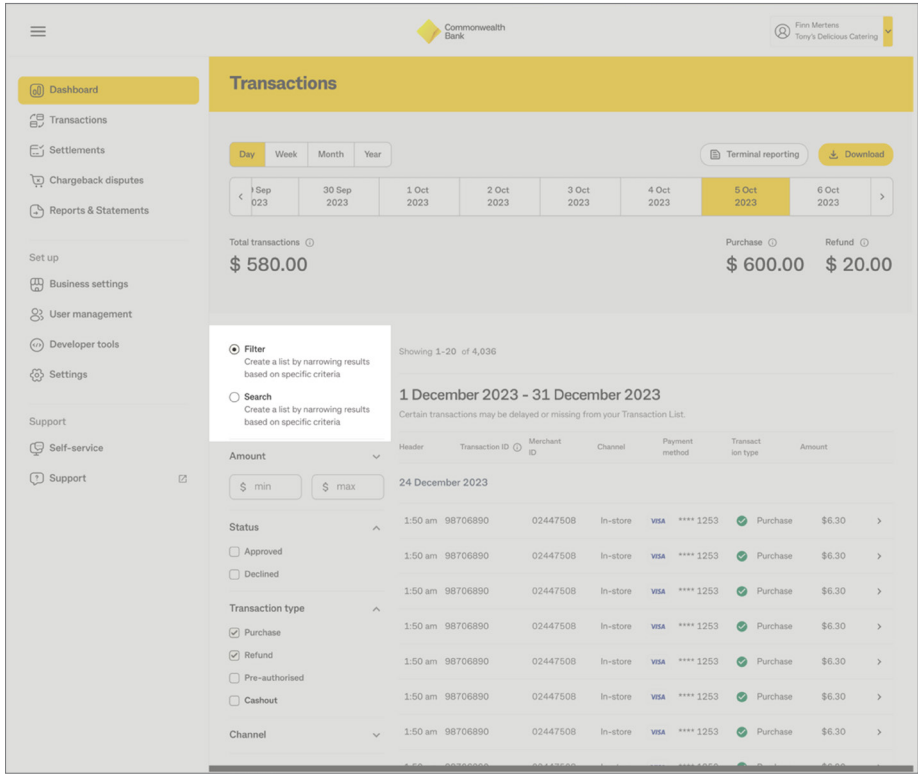
The Transactions tab allows you to review the transactions that have been made via your Essential Max terminal.

The dashboard displays the transaction history of the merchant facility, and you can tailor the view to a particular on day, week, month, or a customised period.



Filtering and searching to find what you are looking for

You can filter transaction by amount, transaction status, transaction type, channel, payment method or Outlet ID to facilitate a faster search for the transaction you want to view.



You can also search by transaction ID, amount, terminal ID, card ending in, merchant transaction reference.

☐ Filter

Create a list by narrowing results based on specific criteria

☒ Search

Find specific results using exact matches

Search transactions

Transaction ID

Amount

\$

Terminal ID

Card ending in

Merchant transaction ref.

Clear

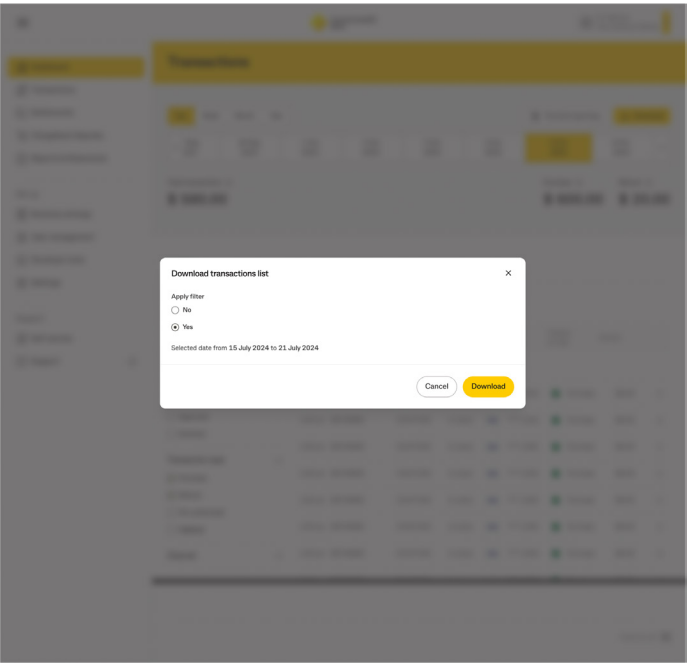
Search

25 Sep

Certain tra

Download transactions:

You can download the transactions that you are viewing into a csv file.



Dashboard

Transactions

Set up

Business settings

Store management

Developer tools

Settings

STP/POS Statement

Day Week Month Custom

12 May - 19 May 202419 May - 26 May 202427 May - 2 June 20243 June - 9 June 202410 June - 18 June 202417 June - 23 June 202424 June - 30 June 20241 July - 7 July 20248 July - 14 July 202415 July - 21 July 2024

Total transactions 12 of 12

Purchase \$246.79Refund \$0.00

Filter by date or select Merchant location

Merchant ID

15 July 2024 - 21 July 2024

Showing 12 of 12

Merchant ID	Date	Transaction ID	Merchant ID	Channel	Payment method	Transaction type	Amount
1035 aw	15 July 2024	#A20010002220	...	In-store	**** 0007	Purchase	\$140
1026 aw	15 July 2024	#A20010002220	...	In-store	**** 0007	Purchase	\$110
1036 aw	15 July 2024	#A20010002220	...	In-store	**** 0007	Purchase	\$402
1025 aw	15 July 2024	#A20010002227	...	In-store	**** 0005	Purchase	\$620
1024 aw	15 July 2024	#A20010002226	...	In-store	**** 0000	Purchase	\$115

Business Settings

The business settings enable you to review the merchant facilities held under your business. When accessing the business settings, you will be presented with a table that displays the merchant facility information for each outlet, this includes:

- Outlet ID
- Status
- Trading name
- Nickname
- Address

The arrow to the right of the merchant facility allows you to access the merchant facility details.



Merchant facilities					
< Back to Settings					
Merchant ID			Trading name	Nickname	Address
 0000000000000001	Active		CBA PIV	CBA PIV	1 Darling Park Sydney NSW 2000
 0000000000000002	Active		SMART PRODUCTION FACILITY	SMART PRODUCTION FACILITY	Level 5 CBP North 1 Harbour St Sydney, NSW 2000
 0000000000000003	Active		SMART PRODUCTION FACILITY	Melbourne	Level 5 CBP North, 1 Harbour St Sydney NSW 2000

Merchant Facility Details

When you open the merchant facility details screen, you will be able to view the details of your merchant facility and edit the merchant nickname.

On this screen you will find:

- Outlet ID
- Trading name
- Address
- Date Created
- Available card schemes
- Active terminals
- Users, and user access permission

Merchant facility details

Merchant ID	Trading name	Merchant nickname
00000001234	CBA PIV	CBA PIV

[← Back to Merchant facility list](#)

Merchant facility details

To update your merchant facility details, enable additional card schemes or to close this merchant facility, please contact Technical support

Merchant ID	0000000000000001
Trading name	CBA PIV
Short trading name	CBA PIV
Merchant nickname	CBA PIV
Address	1 Darling Park, Sydney NSW 2000
Trading phone number	132221
Created	26 Apr 2022
Last updated	26 April 2022, 3:28 pm

Accepted/enabled card schemes
For additional cards, please contact your payment provider.

Active terminals

Terminal ID	Terminal nickname	Serial number	Real time monitoring
00000001234	Terminal 00000001234	999-999-999	Not connected

Users

User	Access type
User A UserA@cba.com.au	Administrator
User B UserB@cba.com.au	Administrator
User C UserC@cba.com.au	Administrator
User D UserD@cba.com.au	Administrator
User E UserE@cba.com.au	Administrator
User F UserF@cba.com.au	Administrator
User G UserG@cba.com.au	Employee
User H UserH@cba.com.au	Administrator
User I UserI@cba.com.au	Employee

User Management

User management allows you to review, create, and disable access to Smart Dash.

The user management screen will display all users and users with pending invitations i.e. they have not yet logged on.

User management

Users [Add user](#)

User	Type	Status	Merchant facility access	
Sean Mertens You sean.mertens@email.com	Administrator	Active	Unrestricted	
Alex Nguyen alex.nguyen@email.com	Administrator	Active	Unrestricted	
Emily Russo emily.russo@email.com	Employee	Active	3 Merchant facilities	
Rachel Green rachel.green@email.com	Employee	Active	1 Merchant facility	
James Smith james.smith@email.com	Employee	Active	4 Merchant facilities	
Lisa Brown lisa.brown@email.com	Employee	Active	4 Merchant facilities	

Pending invitations

User	Type	Status	
Sean Mertens sean.mertens@email.com	Administrator	Invitation sent	
Alex Nguyen alex.nguyen@email.com	Administrator	Invitation sent	
James Smith james.smith@email.com	Employee	Invitation sent	

Powered by mds

Adding a User

To add a user, click on the add user icon in the top right of the screen, this will cause the add user pop up to appear.

 Add user

Once the pop up appears, create the new user, by inputting the new users:

- Email address
- Access type
- Merchant facility access

An email will be sent to the user providing them with instructions on how to access the Smart Dash portal.

×

Invite new user

Enter new user details below and choose access type.

Email address *

Access type

☒

Administrator

Best for system administrators and managers. Complete access to all available features.

i

☐

Employee

Standardised access best for most employees.

i

☐

View only

View only access for users that cannot perform any actions.

i

Merchant facility access

☒

Unrestricted

An unrestricted user has access to all current and future merchant facilities.

☐

Restricted

A restricted user has access to only the merchant facilities that are explicitly listed. They will not get automatic access to newly created merchant facilities.

Cancel

Invite

×

Edit user

Edit the user details below, select the type of access, and specify the Merchant facilities to which the user has access.

First name *

Last name *

Email *

Phone *

🇺🇸

+61

▼

For SMS authentication (e.g. +61423123433)

Access type

☒

Administrator

Best for system administrators and managers. Complete access to all available features.

i

☐

Employee

Standardised access best for most employees.

i

☐

View only

View only access for users that cannot perform any actions.

i

Merchant facility access

☒

Unrestricted

An unrestricted user has access to all current and future merchant facilities.

☐

Restricted

A restricted user has access to only the merchant facilities that are explicitly listed. They will not get automatic access to newly created merchant facilities.

Cancel

Update

Editing or removing a user's access

A Smart Dash portal user's details can be edited by clicking on the pen icon or be removed by clicking on the rubbish bin icon.

The screenshot displays the Commonwealth Bank Smart Dash portal's 'User management' section. The interface includes a sidebar with navigation options: Dashboard, Transactions, Settlements, Chargeback disputes, Reports & Statements, Set up, Business settings, User management (highlighted), Developer tools, and Support. The main content area features a yellow header bar with the title 'User management'. Below this, there is a 'Users' section with an 'Add user' button. A table lists the following users:

User	Type	Status	Merchant facility access ⓘ
Sean Mertens You Sean.mertens@email.com	Administrator	Active	Unrestricted
Alex Nguyen alex.nguyen@email.com	Administrator	Active	Unrestricted
Emily Russo emily.russo@email.com	Employee	Active	3 Merchant facilities
Rachel Green rachel.green@email.com	Employee	Active	1 Merchant facility

The 'Alex Nguyen' row is highlighted, and the 'Add user' button is visible. The 'Status' column for all users shows 'Active'. The 'Merchant facility access' column shows 'Unrestricted' for administrators and specific facility counts for employees. The 'Add user' button is located at the top right of the table.

Settings

The settings screen will advise the organisation details and provide access to the business settings and user management screens. For more information, please refer to the App Marketplace User Guide at commbank.com.au/merchantsupport.

The screenshot displays the Commonwealth Bank Settings interface. The top navigation bar includes the Commonwealth Bank logo and the user profile 'Bob Smith CBA TEST'. The left sidebar contains navigation links: Dashboard, Transactions, Settlements, Set up (with sub-links for Business settings, User management, and Developer tools), and Settings (which is currently selected and highlighted in yellow). The main content area, titled 'Settings', shows the organisation name 'CBA TEST' and a note: 'To update your organisation details, contact Technical support'. Below this, the 'Organisation reference' is listed as 'cba-ref-test'. A list of settings options is provided, each with an icon, a title, a description, and a right-pointing arrow: 'Business settings' (Manage your merchant facilities and terminal settings and view the health of your fleet of terminals), 'User management' (Add new users and manage roles and access for team members within your organisation), and 'Instore API keys' (Manage your private access keys to enable external access to transaction data in the dashboard). At the bottom of the sidebar, there is a link for 'EFTPOS Stationery' with an external link icon.

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