



Smart Reference Guide



Please keep this guide with your terminal for easy reference.

How to process a sale

1. To quickly navigate to the Payment screen, tap the Payment screen key
2. To initiate the transaction, enter the transaction amount
3. Tap 'Purchase (\$amount)'
4. For contactless cards, tap the card on the contactless reader once 'Present Card' sign is displayed
5. For swipe and chip, select the account by pressing the CHQ, SAV or CR button and entering PIN
6. The Smart terminal will process the transaction and display an 'Approved' or 'Declined' message
7. By default the terminal will print a customer receipt and ask if you would like to email a copy to the customer
8. The customer can now enter their email address and a copy of the receipt will be sent to the nominated email

How to do a Settlement

1. From the Payment screen, tap the hamburger menu on the top left side of the screen
2. Tap 'Settings'
3. Tap 'Account'
4. Tap 'Settlement'
5. Tap 'Settle Now'
6. Settlement report will display on screen. Swipe up to scroll through the report or press 'Print' to print a settlement receipt
7. The terminal will start a new settlement period

Note: If your business operates outside of typical trading hours, you can change your settlement time by calling our Helpdesk on **1800 230 177**.

How to process a refund

1. Enter transaction amount
2. Tap 'Other'
3. Tap 'Refund'
4. Enter Cashier or Manager passcode and tap 'Enter'
5. Tap Card or Mobile
6. Customer presents card or device and enters their PIN (if required)
7. If the card was inserted, the terminal will prompt to remove the card from the chip card slot
8. Merchant receipt prints
9. Select 'Print' to print a customer receipt, or 'No Thanks' to continue back to the Payment screen

View Cumulative Totals (pre-settlement)

1. From the Payment screen, tap the hamburger menu on the top left side of the screen
2. Tap 'Reports'
3. Tap 'Pending Settlement'
4. To print, tap the printer icon on the top right
5. Tap the Back button to go back to the 'Reports' menu or the Payment screen key to go back to the Payment screen

Quick Reference Guide

For further support, please call the Merchant Helpdesk on **1800 230 177**, 24 hours a day 7 days a week or refer to the online user guide.

commbank.com.au/business/merchant-services

Set Passcodes

1. Passcodes can be set up to securely access the following terminal functions
 - Connect Express settings
 - Settlement
 - Settlements History
 - Settlement Pending Report

Note: By default, passcodes are not required for any of these functions

2. To apply passcodes to any of the above:
From the Payment screen tap the hamburger menu on the top left side of the screen and then tap 'Settings'
3. Tap 'Security'
4. Enter the manager passcode to continue
5. Tap the function you want to assign passcode access to
6. Select 'Manager' to assign manager passcode access or 'Cashier' to assign cashier passcode access

Changing the receipt roll

1. Open the receipt roll cover
2. Remove the used receipt roll
3. Insert the new roll so the paper feeds from the top, leaving a length of paper sticking out of the terminal
4. Close the printer door, pressing down gently until it clicks shut

Note: There are small slots located on each side of the receipt roll cover. The easiest way to open the receipt roll compartment is to put your thumbnail in one of the slots and push/flick the slot to open the cover. Order more receipt rolls online at commbankstationery.com.au/stationery.

How to switch between SIM Cards

1. Place your finger on the top of the screen and drag your finger down. Do this twice
2. Swipe right to view more icons
3. Simply tap on the 'SIM 1' icon
4. When tapping you will notice it will change to display 'SIM 2'. When changed this will indicate that the carrier has been changed
5. Simply tap the icon again to swap back to 'SIM 1'

How to connect and configure Wi-Fi

1. Place your finger on the top of the screen and drag your finger down the screen
2. Do this twice
3. Press and hold the Wi-Fi icon
4. Find or scan Wi-Fi network
5. Select the appropriate Wi-Fi network
6. Enter password
7. Check Wi-Fi strength by looking at top left corner of screen and viewing signal strength

Note: To configure the terminal to Wi-Fi, the Wi-Fi network must be password protected and not publicly shared

How to update your refund limits

1. On the CommBank app select your EFTPOS terminal
2. Select **Manage, Refund limits** then **Edit amount**
3. Choose a new limit amount and confirm

Note: If you're not eligible to update your refund limits on the CommBank app, you may need to apply for a refund limit increase or contact us to get help processing the refund. To apply for a refund limit increase or decrease, download and complete the **Refund limit change request form** found here: commbank.com.au/business/payments/help

Support

Offline Authorisation over the Floor Limit

For Offline Authorisation on all over Floor Limit debit card transactions please call **1800 813 700**.

For Offline Authorisation on all over Floor Limit credit card transactions, please call **13 26 36**.

Stationery orders

For stationery orders please visit commbankstationery.com.au/stationery or call **1800 230 177**. If placing an order online, please ensure you have your CommBank Merchant ID and trading address postcode available to sign in.