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</tbody>
</table>
Introducing Albert.

Meet Albert, a new portable and secure payment solution for your business.

1. **Simple**
   Albert is easy to set up and use for all your customer payments.

2. **Portable**
   With 3G, WiFi and Bluetooth connectivity, you can take Albert anywhere.

3. **Personal**
   Customise Albert to suit your business, and keep your data safe with password protection.

4. **Accessible**
   Albert allows people who are blind or have low vision to complete secure PIN payments.

We’re here to help

If you need help using Albert, call **1800 230 177**, 24 hours a day, 7 days a week.
1. Getting started

We’ve designed Albert to be easy to navigate and use.

Getting to know the hardware

Rear view

- Merchant Feedback light
- Merchant Context Menu button
- Power button
- Printer door
- Receipt perforator

Side view

- Printer door release
- Cover for micro USB and power outlets
Finding your way around

Home screen

- **Home screen**: The home screen allows for three pages of different app icons. Swipe left or right to move between pages.

- **App icons**: Albert comes with several pre-installed apps. To open an app, just tap the icon.

Information bar

- **Connection provider**: The top left of the screen shows the type and strength of the current connection.

- **Time**: The top right shows the time, which updates automatically.

- **Battery**: The top right shows how much battery is left.

- **Charging**: The charge icon appears when Albert is charging.
**Merchant Context Menu**
Access all the different app functions here, or move between apps and the home screen.
- To open, press the **Merchant Context Menu** button on the back right corner of the device, or swipe down the screen using two fingers.
- To hide, press the **Merchant Context Menu** button or swipe up the screen.

**Password screen**
Control access to different apps and functions by setting up passwords.
- **Password screen:** Once you’ve set up a password for an app, use the touch screen keypad to enter your password when prompted.

**Tips**
- To find out how to change passwords, go to Section 3.
- To learn more about specific Albert apps, check out the app user guides at: [www.commbank.com.au/merchantsupport](http://www.commbank.com.au/merchantsupport)
Using Albert

**Touch screen**
Tap and swipe the touch screen to move between apps.

**Navigating**

- **Between home and apps:** Tap an icon to open an app from the Albert home screen. To leave the app, tap **Home** in the Merchant Context Menu.

- **Within apps:** All apps have their own navigation buttons. To find out how to navigate within a CommBank app, see the relevant user guide.

- **Navigation buttons:** On pages where the Navigation Bar appears, tap the **Back** or **Home** buttons to move around.
Albert comes with three card readers for different customer payment options. Follow the prompts when using the Payment app.

- **For swipe:** Use the magnetic strip card reader at the top of the device.
- **For tap:** Use the contactless NFC card reader at the top of the screen.
- **For insert:** Use the chip card reader at the bottom of the device.
2. Working with Albert

Powering Albert

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switch on</td>
<td>Press and hold the <strong>Power</strong> button to switch on Albert.</td>
</tr>
<tr>
<td>Wake up</td>
<td>If Albert is switched on but the screen is blank, press the <strong>Power</strong> button once.</td>
</tr>
<tr>
<td>Switch off</td>
<td>Press and hold the Power button until the prompt appears.</td>
</tr>
</tbody>
</table>

Charging Albert

| Charge Albert with a dock | 1. Connect the charging cable to the dock.                                   |
|                          | 2. Place Albert on the dock.                                                 |

| Charge Albert without a dock | 1. Remove the power outlet cover on the left side of the device.             |
|                             | 2. Connect the charging cable to the power outlet.                           |

Get battery alerts

- Albert uses on-screen messages and sound alerts when the battery level reaches 20%, 10% and 3%.
- When the battery level reaches 3%, you cannot continue with a transaction until you start charging Albert, with either the charging dock or cable.

Note

Albert comes with a partly charged battery.
Changing the receipt roll

1. Open the printer door by sliding down the button on the left. The door will pop down.
2. Remove the empty roll and any leftover paper.
3. Prepare the new roll by loosening the end of the strip.
4. Drop the new roll into the compartment. Make sure the end of the strip of paper feeds over the roll and above the door.
5. Close the door by pressing it towards Albert. When closed properly it will click into place.

Note
Albert will be installed with a full roll of paper.
Recognising Albert’s alerts

**Merchant Feedback light**
The LED Merchant Feedback light changes colour and flashes to indicate warnings, errors, processing and successes.

**Sound**
Albert has multiple sounds for warnings, errors and successes.

**On-screen messages**
Albert uses on-screen messaging to let you know what you need to do next.

<table>
<thead>
<tr>
<th>STATE</th>
<th>LIGHT</th>
<th>SOUND</th>
<th>MESSAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Success</td>
<td>Green</td>
<td>Sound</td>
<td>Message</td>
</tr>
<tr>
<td>Processing/Standby</td>
<td>White</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Warning/Error</td>
<td>Red</td>
<td>Sound</td>
<td>Message</td>
</tr>
</tbody>
</table>
3. Customising Albert

Every business is different. That’s why we’ve designed Albert so you can adapt your device to work best for you.

Choosing display features

<table>
<thead>
<tr>
<th>Brightness</th>
<th>1. To change the screen brightness, tap Display then Brightness. 2. Slide the bar to the left or right then tap OK.</th>
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<tr>
<td>Automatic lock</td>
<td>1. Tap Display, then Automatically lock. 2. Choose the length of time that can pass before you’re prompted to enter a password to wake up Albert. 3. Tap Time.</td>
</tr>
</tbody>
</table>

Tip

Different options may be available depending if you use a Manager or Operator password to access Settings.

Customising sounds

<table>
<thead>
<tr>
<th>Volume</th>
<th>1. To change the volume of alerts and other sounds, tap Sound then Volumes. 2. Slide the bars to the left or right, then tap OK.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touch sounds</td>
<td>1. Choose if you want Albert to make a sound when the screen is touched. 2. Tap Touch sounds to check or uncheck the box.</td>
</tr>
</tbody>
</table>
Setting up communications

WiFi
- Tap **Communications** then **WiFi**.
- To turn WiFi on, slide the tab on the Status Bar from Off to On. Choose your WiFi network from the list. You can also **Add network** or **Scan for a network** using the tab on the Status Bar.
- To turn WiFi off, slide the tab on the Status Bar from **On** to **Off**.

3G
When no WiFi is available or selected, Albert will automatically use the inbuilt 3G Telstra service.

Bluetooth
- To connect to a Bluetooth device, tap **Communications** then **Bluetooth**.
- To turn Bluetooth on or off, slide the **On/Off** tab on the Status Bar.

Tip
Albert has both WiFi and 3G enabled. While you can choose to use Albert in either mode, we recommend WiFi as default, with 3G as backup. This will give faster access and transactions on the device and apps, and also provide a back-up in the event of connectivity issues.

Connecting an email account

**Outgoing email account**
1. To add an existing email account, tap the input field to enter the email address and password.
2. Tap **OK**.

**Manual setup**
The Manual tab is for advanced settings only, and is not needed for general use.

Changing passwords

**Manager password**
1. Tap in the **New** field to enter a new password.
2. Use the **Next** button to **Re-enter new**.

**Operator password**
1. Tap in the **New** field to enter a new password.
2. Use the **Next** button to **Re-enter new**.
## Accessing other options

| Battery | 1. To check which functions use up most of your battery life, tap **Battery**.  
2. You can choose an individual function then tap **Use Details** or **Adjust Power Use** to change your battery usage. |
| Time and date | To choose your time zone, tap **Date and Time** then **Select time zone**. |
| Technical information | Tap **About Albert**. |
4. Accessibility

Albert has the capability to be accessible to the 350,000 Australians who are blind or have low vision through the use of text to speech technology.

Albert does this by providing a way for people who are blind or have low vision to complete PIN entry within the Albert payment app.

Within this guide, you will learn about Albert’s enhanced accessibility solution and be walked through the end to end payment process when utilising the accessibility solution.

We’re here to help

If you need help using Albert, call 1800 230 177, 24 hours a day, 7 days a week.

It is important to note that Albert will only be accessible to people who are blind or have low vision, when the payment app is loaded.
Accessible Mode

Albert has been designed to be easy to navigate and use. As such, we want to make the payment process for people who are blind or have low vision as easy as possible.

How to use Accessible Mode

Home screen

Launch the Payment app:
The accessibility solution explained herein only applies to the CommBank Payment App.

Merchant Context Menu

Enter Accessible Mode from the Merchant Context Menu.

Accessible Mode

From this screen, press the slider to turn Accessible Mode On:

- Toggle Accessible Mode ON or OFF.
- Launch the Tutorial app.
- Adjust the volume played by Albert.
- View a quick summary of gestures.
- Start or stop the voice guide narration.
- Return back to the previous screen.
Card Presentation Screen

1. Upon returning back to the Payment app, the standard card prompt screen will show.
2. Text to speech will prompt the customer to insert, swipe, or tap their card.
3. As the merchant, you are expected to insert, swipe or tap their card if required.

Account Type Screen

1. The standard account type selection screen will now display.
2. Text to speech will prompt the customer to select Cheque, Savings, or Credit.
3. Once selected, text to speech will notify the customer of the selection.
4. As the merchant, you are expected to select the correct account type if required.

Pin Entry Screen

1. When on this screen, the voice prompts will instruct the customer to enter their PIN, based on the instructions below.
2. An asterisk will display in the box for each successfully entered digit.
3. Pressing the Merchant Context Menu Button on this screen has no effect.
## Entering a PIN

1. There will be no UI on the screen, to prevent anyone from seeing what is entered.
2. Every time a customer starts entering their digits, the virtual cursor begins on “5”.
3. Swiping up, down, left, right, or diagonally moves the virtual cursor. A two finger tap, or a double tap confirms the input.

*For example, from 5,*

- **Swipe left + confirm** = 4
- **Swipe down, swipe down + confirm** = 0
- **Swipe up, Swipe right + confirm** = 3

## Confirming a PIN

Long press anywhere on the screen with two fingers to submit the PIN.

**Important:** Customers will get 3 chances to enter a PIN correctly before their account is locked.

## Confirmation

1. Upon confirmation the standard receipt screen will be shown.
2. A voice prompt tells the user to hand the terminal back to the merchant, both upon a successful or declined transaction.

## Cancelling Purchase

Long press with three fingers to cancel, and return to the previous screen.
### What if my customers are uncomfortable using the Accessible Mode?

<table>
<thead>
<tr>
<th>Tap and Pay (NFC)</th>
<th>Using the NFC reader on Albert, your customers are able to pay for purchases using ‘Tap and Pay’, for purchases less than $100.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click Clack</td>
<td>For purchases over $100, Tap &amp; Pay (NFC) is not allowed. An alternative if the customer is uncomfortable using Tap and Pay, or Chip and PIN as a payment method is to use the Click Clack machine, provided with the terminal when it was installed.</td>
</tr>
</tbody>
</table>
5. Caring for Albert

It’s easy to look after Albert, and keep it in good condition.

Caring for your device

**Do**
- Regularly use the cloth provided to clean Albert’s case, screen and camera.
- Keep Albert safe to avoid theft.
- If any liquid spills on Albert, clean it immediately with a dry cloth.

**Don’t**
- Never attempt to open Albert yourself.
- Keep Albert out of extreme temperatures. Avoid areas below -5 degrees Celsius or above 45 degrees Celsius.
- Never allow Albert to get wet.
- Dropping Albert could damage the screen or hardware. If this happens, and any solution leaks out of Albert, do not touch it.
The Payment App.
1. Getting started

The Payment app and Split Bill app can be accessed by clicking the relevant icon.

Getting to know the Payment app

The Purchase screen

- When you open the Payment app, the Purchase screen displays.
- You can use the Payment app to process all standard payments.
Merchant Context Menu

- The Merchant Context Menu gives you access to Payment app functionality, including:
  - Split Bill.
  - Purchase.
  - Cash Out.
  - Refund.
  - History and Totals.
  - Tip Reports.
- To open the menu, press the Merchant Context Menu button on the back right corner of the device, or swipe down from the top of the screen using two fingers.
- To exit the Merchant Context Menu, tap the bottom bar, swipe upwards, or press the Merchant Context Menu button.

Tip

You can use the Merchant Context Menu to exit the Payment app by tapping Home.

The buttons

**Back**: Tap to go back to the previous screen. This will clear any unsaved data.

**Clear**: Tap once to clear one digit.

**Note**: The buttons are disabled until you enter data on the payment screen.

Merchant Feedback lights

The LED Merchant Feedback light changes colour and flashes to let you know the status of a transaction.

<table>
<thead>
<tr>
<th>COLOUR</th>
<th>FLASHING</th>
<th>TRANSACTION STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>Solid</td>
<td>Idle screen</td>
</tr>
<tr>
<td>White</td>
<td>1 flash per second</td>
<td>Waiting for user interaction</td>
</tr>
<tr>
<td>White</td>
<td>1.5 flashes per second</td>
<td>Transaction in progress</td>
</tr>
<tr>
<td>Green</td>
<td>3 flashes in the first second, then solid</td>
<td>Transaction completed successfully</td>
</tr>
<tr>
<td>Red</td>
<td>3 flashes in the first second, then solid</td>
<td>Transaction failed / Pop-up message displayed / Non-pop up message displayed / Merchant Context Menu displayed / Application crash</td>
</tr>
</tbody>
</table>
2. Customising the Payment app

Your business provides a unique customer experience. So we’ve created a Payments app that can be tailored to suit your business needs.

Access the Settings app

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To find settings that help you tailor the Payment app for your business needs.</th>
</tr>
</thead>
</table>
| Access the Settings app | 1. On the Albert home screen, tap the Settings app icon to display the Settings app.  
2. In the Payment section, tap Options. The Payment Options screen displays. |
Payment app options

Receipt printing

Always print Merchant copy
- To automatically print a merchant copy of a transaction receipt, tap or slide the bar to ON.
- To disable automatic printing of a merchant copy, except where a signature is required, tap or slide the bar to OFF. If this is turned off, you won’t ever be prompted to print a merchant receipt.

Always print Customer copy
- To automatically print a customer copy without prompting, tap or slide the bar to ON.
- To disable automatic printing, tap or slide the bar to OFF. If this is turned off, you will be asked whether you want to print or email a receipt at the end of each payment (if email is enabled).

Refund Limit

Operator Limit
This is the maximum that can be refunded without the manager password.
1. To set an operator limit, tap in the Operator Limit entry field and use the keypad to enter the operator refund limit.
2. Tap Next to enter a Manager Limit, or tap Done.

Manager Limit
This is the maximum that can be refunded on the terminal by entering the manager’s password. This must be higher than the operator limit.
- In the Manager Limit field, enter the maximum refund a manager can approve, then tap Done.

Tipping

On-screen Tipping
- To allow tips to be added to payments, tap or slide the On-screen tipping bar to ON.
- To disable tipping, tap or slide the On-screen tipping bar to OFF.

Multiple Servers
- To track tips and transactions for multiple staff members using the device, tap or slide the Track multiple servers bar to ON.
- To turn off the multiple staff feature, tap or slide the bar to OFF.

Manage Servers
Create, edit and delete server profiles to track their tips and transactions.
- Tap Manage Servers to display a list of all server profiles. Active profiles display in yellow, while inactive profiles will be grey. Active profile will be available to select when entering a tip for a payment.
- To add a profile, tap add and enter your server’s Given Names and Surname. Tap Done.
- To edit a profile, tap to select it, then tap the [PENCIL] icon, update details as needed, then tap Done. Tap OK.
- To delete a profile, tap the [PENCIL] icon, then tap delete.
3. Accepting payments

Our flexible payment options make it easy for you to accept and track payments quickly and securely.

Processing card payments

<table>
<thead>
<tr>
<th>Purpose</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>To process a payment to a card, when the card is available. Depending on your settings in the Payments app, you may also choose to track the server making the transaction or add a tip.</td>
<td></td>
</tr>
</tbody>
</table>

Enter payment

1. In the Payments app Purchase screen, use the keypad to enter the payment amount.
2. Tap OK.
   - If prompted, select the name of the server completing the transaction.
   - If prompted, enter the amount of tip the customer wants to give. See Adding a tip on page 40 for details.

The Card Present screen displays.
3. Either:
   - Tap the card at the top of the Albert device (for transactions which apply for this functionality). Go to step 7.
   - Insert the card in the chip reader at the base.
   - Swipe the card from left to right along the card reader at the top of Albert.

1. Ask the customer to select the account type by tapping Cheque, Savings, or Credit. The PIN authorisation screen displays. If a sign option is allowed for the card, tap Sign to skip PIN entry and print a receipt for the customer to sign.
2. Ask the customer to enter their PIN using the touch screen keypad, then tap OK. Once the payment is accepted, the receipt will display.
3. Tap Email or Print to give the customer a copy of the receipt, or tap Finish for no receipt. See page 32 for details.

Tips
   - To track a transaction by server, see Payment app options, Track multiple servers on page 27.
   - To enable a tip to be added to a transaction, see Payment app options, On screen tipping on page 27.
   - To change the defaults for printing receipts, see Payment app options, Receipts on page 27.
Processing mail or telephone order (MOTO) payments

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To accept card payments where the card isn’t available, such as mail or phone orders.</th>
</tr>
</thead>
</table>

Process mail and telephone orders

1. From the Card Present screen, press the **Merchant Context Menu** button or swipe down the screen to open the Merchant Context Menu.
2. Tap **MOTO** to display the MOTO screen.
3. Use the keypad to enter the credit card number then tap **Next**.
4. Enter the card’s expiry date and CVV (if needed), and tap **OK**.
5. Once the payment is accepted, the receipt will display.
6. Tap **Email** or **Print** to give the customer a copy of the receipt, or tap **Finish** for no receipt.

Note: MOTO is available on request by contacting the Merchant Helpdesk on 1800 230 177.
## Cancelling payments

<table>
<thead>
<tr>
<th>Purpose</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cancel a payment from the PIN entry screen</strong></td>
<td>From the PIN entry screen, tap <strong>Cancel</strong>. You will be returned to the Payment app home screen.</td>
</tr>
</tbody>
</table>
| **Cancel a payment at card process point**   | 1. Press the **Merchant Context Menu** button or swipe down the screen to open the Merchant Context Menu.  
                                        | 2. Tap **Cancel Purchase**. You will be returned to the Payment app home screen. |

**Tip**

If the payment has already been processed, you need to refund the payment. See **Section 5** for details.
Viewing, printing and emailing receipts

Purpose
To provide a printed or emailed receipt for your customer or records. Whenever a payment, refund or cash out transaction is processed, a receipt will display on screen.

Viewing, printing and emailing receipts
- To print a customer receipt, tap **print**. The receipt will print from Albert’s receipt printer.
- To email a customer receipt, tap **email**. Using the keypad, enter the customer’s email, then tap **Send**.
- If no receipt is required, tap **finish**.

Tips
- Emailed receipts are sent as .jpeg attachments.
- The subject of the email is ‘Card Payment Record from {Merchant Name – Date Time}’, and the body content of the email is ‘Please find attached your card payment record from {MERCHAND NAME}. Thank you’.
4. Cash out transactions

Give your customers cash out in just a few taps, either on its own or with a purchase.

**Entering cash out amount**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To provide cash out to a customer as a stand-alone payment or part of another purchase.</th>
</tr>
</thead>
</table>

**Cash out only**

1. Press the **Merchant Context Menu** button or swipe down the screen to open the Merchant Context Menu.
2. Tap **Cashout Only**.
3. Use the keypad to enter the cash out amount, then tap **OK**.
4. The Card Present screen displays. You can now process the cash out payment from a card.
Purchase and cash out

1. Press the **Merchant Context Menu** button or swipe down the screen to open the Merchant Context Menu.
   - If the payment has already been entered, tap **Add Cashout**.
   - If the payment has not been entered, tap **Purchase and Cashout**. Enter the payment amount first, and then tap **OK**.

2. Using the keypad, enter the cash out amount then tap **OK**.

3. The Card Present screen displays. You can now process the cash out payment. See **Processing the cash out transaction** on page 34.
## Processing the cash out transaction

<table>
<thead>
<tr>
<th>Process cash out</th>
<th>Purpose</th>
<th>To process the cash out transaction to a card. You cannot use cash out with Tap to Pay, MOTO (card not present) or manual payment methods.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. From the Card Present screen, either:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Insert the card in the chip reader on the bottom of Albert.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Swipe the card from left to right along the card reader at the top of Albert.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Ask the customer to choose their account type by tapping <strong>Cheque</strong> or <strong>Savings</strong>.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. The authorisation PIN screen will then appear. The customer can input their PIN using the touch screen keypad, and then tap <strong>OK</strong>.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. When payment is accepted, you will see the receipt displayed on the screen.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4. Tap <strong>Email</strong> or <strong>Print</strong> to give customer a record. If the customer doesn’t want a receipt, tap <strong>Finish</strong>.</td>
<td></td>
</tr>
</tbody>
</table>
5. Processing refunds

Our Payment app makes refunds simple.

**Entering the refund details**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To refund a payment. If required you can refund a specific transaction. To do this, you’ll first need to find the transaction record — see Section 7 for details.</th>
</tr>
</thead>
</table>

**Enter refund details**

1. Find the transaction. To do this:
   - Press the **Merchant Context Menu** button or two finger swipe down the screen to open the Merchant Context Menu.
   - Tap **History and Totals**. The Transactions tab displays transactions by date in reverse chronological order by default.
   - Tap the transaction to open its receipt. Or tap **Search** to search for the transaction by amount, date or last two card digits. See page 23 for details.
2. Press the **Merchant Context Menu** button or swipe down the screen to open the Merchant Context Menu.
3. Tap **Refund**.
4. Using the keypad, enter the refund amount, then tap **OK**.
   - If the amount is under the operator limit, enter the operator password.
   - If the amount is above the operator limit specified in the settings, enter the manager password.
If the amount is above the manager limit, you will be prompted to enter a lower refund amount.
The Card Present screen displays. You can now process the refund payment.
5. Choose the payment method:
   • Card present. See page 28.
   • Card not present. See page 30.
   • Manual payment. See page 30.

### Processing card-present refunds

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose</td>
<td>To refund a payment to a card where it is available to swipe, insert or tap.</td>
</tr>
</tbody>
</table>

#### Process refund with card present

1. From the Card Present screen, either:
   - Tap the card at the top of the Albert device (for transactions which apply for this functionality). Go to step 4.
   - Insert the card in the chip reader at the base of Albert.
   - Swipe the card from left to right along the card reader at the top of Albert.

2. Ask the customer to select the account type by tapping **Cheque**, **Savings**, or **Credit**.

3. The PIN authorisation screen displays. If there is no PIN assigned to the card, tap **Sign** to skip PIN entry and print a receipt for the customer to sign.

4. Ask the customer to enter their PIN using the touch screen keypad, then tap **OK**.

5. Once the payment is accepted, the receipt will display.

6. Tap **Email** or **Print** to give the customer a copy of the receipt, or tap **Finish** for no receipt.
Processing mail or telephone order (MOTO) refunds

Purpose
To process refunds to a card where the card isn’t available, such as mail or phone refunds. Please note that MOTO is only available to merchants if they contact the Helpdesk and request this functionality to be enabled. It is not auto-enabled on all devices.

Process mail or telephone order refunds

1. From the Card Present screen, press the Merchant Context Menu button or swipe down the screen to open the Merchant Context Menu.
2. Tap MOTO to display the MOTO screen.
3. Use the keypad to enter the credit card number then tap Next.
4. Enter the card’s expiry date and CCV (if needed), and tap OK.
5. Once the refund is accepted, the receipt will display.
6. Tap Email or Print to give the customer a copy of the receipt, or tap Finish for no receipt.

Processing manual refunds

Purpose
To process refunds manually, for example, where there is a problem with the card.

Process refund manually when card will not register

1. From the Card Present screen. Press the Merchant Context Menu button or swipe down the screen to access the Merchant Context Menu.
3. Use the keypad to enter the credit card number then tap Next.
4. Enter the card’s expiry date and CCV (if needed), and tap OK.
5. Once the refund is accepted, the receipt will display.
6. Tap Email or Print to give the customer a copy of the receipt, or tap Finish for no receipt.
Cancelling refunds

Purpose
To prevent a refund you started entering from being processed.

Cancel a refund from the PIN entry screen

1. From the PIN entry screen, tap Cancel. You will be returned to the Payment app home screen.

Cancel a refund at card process point

1. Press the Merchant Context Menu button or swipe down the screen to open the Merchant Context Menu.
2. Tap Cancel Refund. You will be returned to the Payment app Purchase screen.
# 6. Tips and Split Bills 🥉

Want to add a tip, track tips by staff member, or split a payment between customers? With the Payment and Split Bill apps, it’s easy.

## Adding tips

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To add a tip to a payment, as a percentage or manual amount. You can only add a tip if On-screen tipping is turned on in the Payment app settings. See page 27 for details.</th>
</tr>
</thead>
</table>
| Add a tip | 1. Enter payment details as usual. See page 28 for details.  
2. When prompted for a tip, the customer can either:  
   - Tap **Percent Tip**, and choose a tip of 0%, 5%, 10% or 15% of the payment amount.  
   - Tap **Manual Tip**, then use the keypad to enter the tip amount.  
3. Tap **OK** to add the tip to the payment.  
4. Process the payment as usual. |

### Tips

- If a customer enters a tip that’s higher than the purchase amount, the apps assume the amount is the total payment, including a tip.  
- Any amount less than the total purchase amount is assumed to be a tip to be added to the purchase.
Creating tip reports

**Purpose**
To track tips by staff member or report on total tips. The reports cover current shift tips since last settlement.

**Create a tips report**
1. Press the **Merchant Context Menu** button or swipe down the screen to open the Merchant Context Menu.
2. Tap **Tip Reports**.
3. Enter the Manager Password, then tap **OK**.
   - To view tips by Server, tap **Server Tip Report**. Then tap the **server name**.
   - To view a total tips report, tap **Tip Totals**.
4. To make a copy of the tips report, tap **Print**.

---

Server Tip Report button  Tip Totals button  Server names buttons  Print option
Splitting bills

**Purpose**
To split payment for a single purchase across multiple payments, for example, when customers share the cost of a meal. You can access the Split Bill app either from the Albert home screen icon, or when entering payment details in Payment app.

**Open Split Bill app**

- **From the Payment app:** press the **Merchant Context Menu** button or swipe down the screen to open the Merchant Context Menu, then tap **Split Bill**.
- **From the Albert home screen:** tap the **Split Bill** app icon.

![Split Bill via Merchant Context Menu from Payment app](image)

![Split Bill via Split Bill app](image)
**Split a payment**

1. Using the keypad, enter the payment amount, then tap **OK**.
2. The Split Bill screen displays with a default setting of two customers.
3. Add or subtract customers as needed by tapping the + or – buttons (or allow the customer to do so).
4. Adjust the payment amount for each customer by tapping on the dial and swiping to change the value of each portion.
   - To increase the amount, tap a portion and swipe the dial clockwise.
   - To decrease the amount, tap a portion and swipe anti-clockwise.
5. If a customer is paying multiple shares, tap the additional portions to select them. You can view the total and adjust the dial from here.
6. When the amount is correct, tap the payment amount at the bottom of the screen.
7. Tap **Cash Payment** to accept cash, or tap **Card Payment** for processing a card payment.
8. Once the payment is accepted, select the next portion, and process additional payments until the total has been received.

**Tips**

- When you change the amount of one share, all the other shares will adjust equally. You can adjust each share individually after you process the payments.
- On-screen tipping is not available for cash payments.
- When tipping is enabled, customers are prompted to enter a tip after selecting their individual payment amount and type (if card payment).
- The minimum amount for Split Bill is $2.00.
7. Tracking transactions

Create instant reports to help you track your transactions, see your totals, or find a specific payment.

**Viewing transactions**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To view a quick report of transactions.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>View a list of transactions</strong></td>
<td>1. Press the Merchant Context Menu button or swipe down the screen to open the Merchant Context Menu.</td>
</tr>
<tr>
<td></td>
<td>2. Tap History and Totals. The Transactions tab displays transactions by date in reverse chronological order.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="History and Totals" /></td>
</tr>
</tbody>
</table>

**Tips**

- Tap on a transaction in the list to view its receipt on screen. Refunds can be processed from here.
- The list of transactions will provide time, transaction type, card/account type, and amount.
- Icons beside each transaction show the transaction status. A tick indicates the transaction (purchase, refund, or cashout) was successful, a cross indicates a declined transaction, and circular arrows indicate a refund if processed from transaction history.
Creating a daily totals report

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To view a list of daily totals over a specified date.</th>
</tr>
</thead>
</table>

**Daily totals report for selected date**

1. From the Transactions tab, tap the **icon** next to the date row to display the Daily Totals report.
2. To print, tap **Print**.
3. To move to a different date:
   ✦ Swipe right for future reports.
   ✦ Swipe left for past reports.
4. Tap the **Back** button to return to the History and Totals screen.
# Finding a specific transaction

**Purpose**
To find a specific transaction.

### Find a specific transaction

1. From the Transactions tab, tap **Search**.

2. Tap in the fields to enter the details you wish to search on, including:
   - **Amount**. Enter the transaction value and tap **Exact** or **Approx**.
   - **Date**. Enter the transaction value and tap **Exact** or **Approx**.
   - **Last two digits of card**. Enter the last two numbers on the card used in the transactions.
   - **Transaction type**. Select the type of transactions from the list.

3. Tap **Search**. A list of transactions meeting the search criteria displays.

4. Tap the transaction you need, to view its receipt.

5. If needed, tap **Print** to reprint the receipt, or **Email** to send the receipt.

6. Tap **Finish**.

### Tips

- The list of transactions will provide time, transaction type, card/account type, and amount.
- To process a refund for a specific transaction, tap the transaction and click **refund**.
- Icons beside each transaction show the transaction status. A tick indicates the transaction was successful, a cross indicates a declined transaction, and circular arrows indicate a refund if processed from transaction history.
- Using the **Approx** icon for Amount will show transactions within 20% of the search value. Using the **Approx** icon for Date will show transactions within one day of the search date.
8. Tracking shifts

Need to know the total for an individual shift? Find out how.

Viewing shift details

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To see total transactions for different shifts.</th>
</tr>
</thead>
</table>

1. Press the **Merchant Context Menu** button or swipe down the screen to open the Merchant Context Menu.
2. Tap History and Totals.
3. Tap **Shifts** to display a list of shifts and their details, including the date, time, number of transactions, and totals for the shift.
   You will see most current shift at the top of the list. The end time will appear open until you add a new shift or the next auto-shift begins.
4. To view a specific Shift Report, tap the row. You’ll be prompted to enter the Manager Password.
5. Enter the Manager Password and tap **OK**.
6. The Shift totals report displays a list of totals for each transaction type for the shift.
7. To print the report, tap **Print**.
8. To view the shift report for a different date:
   - Swipe right for future reports.
   - Swipe left for past reports.

Modify past shifts

1. Tap **Edit** to adjust the shift period.
2. Tap the input fields to adjust the date and time using the keypad and buttons, then tap **OK**.
## Entering new shifts

### Purpose
To create a new shift for tracking transactions. You can have multiple shifts within a single settlement period. You can also set up shifts to start and end automatically.

### Enter a manual shift
1. From the Shifts tab, tap **Start New Shift**. You’ll be prompted to confirm the start of the shift.
2. Tap **Start Shift Now**. Your new shift will start immediately.

### Create an automatic shift
1. From the Shifts tab, tap **Start New Shift**.
2. Tap Set auto-shift.
3. In the Auto-Shift screen, tap Auto-Shift bar from **OFF** to **ON**.
4. Use the keypad to enter shift details, including:
   - **Event name.** Enter a name for the shift, for example, ‘Weekday’.
   - **Day.** Enter the day range the shift applies to.
   - **Enter the times that apply to the shift.** Tap the + or – buttons to add times within the shift.
5. Tap **Add Event** to add multiple events, or tap **Delete Event** to delete.
6. Tap **OK** when you have finished entering all events.
7. The Shifts screen will show the next set shift period at the top of the screen.

### Tips
- Use 24-hour time to enter shift times.
- Shifts will change automatically. If starting a shift early, tap **Start New Shift**. Confirm that the next shift period is starting by tapping **Start Shift Now**.
- To change your auto-shift selections, tap **Personalise** then edit shift details as needed.
9. Settlement

Perform manual settlement to your business account, or view cumulative totals for the open settlement period.

Viewing settlement history

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To see the cumulative totals for the current open settlement period, or settlement reports for other closed periods.</th>
</tr>
</thead>
</table>
| View past settlements | 1. Press the Merchant Context Menu button or two finger swipe down the screen to open the Merchant Context Menu.  
2. Tap History and Totals.  
3. Tap Settlements to open a list of settlements for the device, including date, time, number of transactions and total settlement amount.  
4. The Open row shows the cumulative totals for the open settlement period.  
5. To view a specific Settlement Report, tap the row.  
6. Tap Print to print the report.  
7. To move to a different date:  
   ◆ Swipe right for future reports.  
   ◆ Swipe left for past reports.  
8. Tap the Back button to return to the History and Totals screen. |

Tip

To view the cumulative total since the last settlement, without settling, tap Open.
# Entering manual settlements

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To manually transfer the day's takings for settlement to your business account. If you don’t do this within 24 hours since the last settlement, Albert will automatically perform settlement for you.</th>
</tr>
</thead>
</table>
| Perform a manual settlement | 1. From the Settlements tab, tap **Settle** to settle all open transactions. The settlement report for the period displays.  
2. Tap **Print** to print a record. |
| Tips | Only one settlement is allowed in a 24-hour period. Settlement will fail if you have already settled within the past 24 hours. |
# Need help?

We’re here to assist — whenever you need us.

| Help with Albert, App bank and CommBank Apps | 1800 230 177  
Commonwealth Bank Business Service Centre  
24 hours a day, 7 days a week  
|-------------------------------------------------|------------------------------------------------|
| Help with third party apps | On Albert, tap the App bank app or visit piappbank.com.au  
Select Apps, then search the relevant app name. Click into the app to see App Details and expand Support to see the contact details for the developer responsible. |