Which guide should I use?

There are two versions of the Albert User Guide. To identify the correct version for you, please refer to the Information bar on the top of your Albert terminal screen.

- If the Information bar is similar to the one below, please refer to this guide.

- If it is similar to following, please view the Albert User Guide, 2016 (PDF, 3.2MB).
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Introducing Albert
Meet Albert, a new portable and secure payment solution for your business.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Simple</strong></td>
<td>Albert is easy to set up and use for all your customer payments.</td>
</tr>
<tr>
<td>2</td>
<td><strong>Portable</strong></td>
<td>With 3G, Wi-Fi and Bluetooth connectivity, you can take Albert anywhere.</td>
</tr>
<tr>
<td>3</td>
<td><strong>Personal</strong></td>
<td>Customise Albert to suit your business, and use password protection to keep your data safe.</td>
</tr>
<tr>
<td>4</td>
<td><strong>Accessible</strong></td>
<td>Albert allows people who are blind or have low vision to complete secure payments using their PIN.</td>
</tr>
</tbody>
</table>

**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 button
- Printer door
- Power button
- Receipt perforator

**Side view**
- Printer door release
- Cover for micro USB and power outlets

**Bottom view and charging dock**
- Camera
- Headphone jack
- Microphone
- Charge connection points
Finding your way around

**Home screen**
- **Home screen**: This screen allows for up to three pages of app icons. Swipe left or right to move between pages.
- **App icons**: Albert comes with a number of pre-installed apps. To launch an app, just tap the icon.

**Information bar**
- **Connection details**: The two left-hand icons show the type of connection and its strength.
- **Battery**: This icon shows the remaining battery power.
- **Charging**: The charge symbol appears within the battery icon when Albert is charging.
- **Time**: The clock, in the top right corner, updates automatically.

**Merchant Context Menu**
Access the different app functions here, or move between apps and the Home screen.

- To open, press the Merchant Context button on the back right corner of the device, or swipe down on the screen using two fingers.
- To hide, press the Merchant Context button or swipe up on the screen.
# Finding your way around

<table>
<thead>
<tr>
<th>Password screen</th>
<th>Control access to different apps and functions by setting up passwords.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• <strong>Password screen</strong>: Once you’ve set up a password, use the touch screen keypad to enter your password when prompted, then press <strong>OK</strong>.</td>
</tr>
</tbody>
</table>

## Tips

- To find out how to change passwords, go to **Section 3**.

# Using Albert

<table>
<thead>
<tr>
<th>Touch screen</th>
<th>Tap and swipe the touch screen to access and move between apps.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="image.png" alt="Tap and swipe screen" /></td>
</tr>
</tbody>
</table>
Using Albert

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:** Each app has its own navigation buttons. To find out how to navigate within a specific Commonwealth Bank app, see the relevant user guide.

- **Navigation button:** On pages where the Navigation bar appears, tap the **Back arrow** to return to the previous screen.

Card readers

- 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 near-field communication (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>Instructions</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> or <strong>Merchant Context Menu</strong> button once.</td>
</tr>
<tr>
<td>Switch off</td>
<td>Press and hold the <strong>power</strong> button. When the 'power off' prompt appears, tap it to switch off Albert.</td>
</tr>
</tbody>
</table>

Charging Albert

<table>
<thead>
<tr>
<th>Method</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charge Albert with a dock</td>
<td>1. Connect the charging cable to the dock.</td>
</tr>
<tr>
<td></td>
<td>2. Place Albert on the dock.</td>
</tr>
<tr>
<td>Charge Albert without a dock</td>
<td>1. Remove the power outlet cover on the left side of the device.</td>
</tr>
<tr>
<td></td>
<td>2. Connect the charging cable to the power outlet.</td>
</tr>
</tbody>
</table>

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, using either the charging dock or the 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 top left. The door will pop open.

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 paper feeds over (not under) the roll and sits above the door.

5. Press the door shut. When closed properly it will click into place.

Note

Albert will come with a full roll of paper already installed.
Recognising Albert’s alerts

**Merchant feedback light**  The LED merchant feedback light changes colour and flashes to indicate warnings, errors, processing and successful transactions.

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

**On-screen messages**  Albert uses on-screen notifications 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></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>

**Reboot prompt**  When the terminal requires rebooting to perform a software update, the following pop-up alert will appear, giving you an option to reboot straight away, in 15 minutes, in one hour or at a time of your choosing.
3. Customising Albert

Every business is different. That’s why Albert lets you adapt your device to work best for you.

<table>
<thead>
<tr>
<th>Note</th>
<th>Different options may be available, depending on whether you use a Manager or Operator password to access Settings.</th>
</tr>
</thead>
</table>

Choosing display features

| Brightness | 1. To change the screen brightness, tap the **Settings** app, then **Device Settings**, then **Display**.  
2. Tap **Brightness level**. The slide bar will appear at the top of the screen.  
3. Slide the bar to the left or right as required. |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tip</td>
<td>In the <strong>Display</strong> screen you can also turn on <strong>Adaptive Brightness</strong>, which will automatically adjust the brightness level to suit the available lighting.</td>
</tr>
</tbody>
</table>

Customising sounds

| Volume | 1. To change the volume of alerts and other sounds, tap the **Settings** app, then **Device Settings**, then **Sound** to open the **Sound and Notification** screen.  
2. Slide the volume bars to the left or right as required. |
|---------|--------------------------------------------------------------------------------------------------|
| Touch sounds | 1. Choose if you want Albert to make a sound when someone touches the screen.  
2. Tap **Other Sounds** in the **Sound and Notification** screen.  
3. Slide the **Touch Sounds** bar to the right to turn them on. |

Setting up communications

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

| Wi-Fi | - Tap the **Settings** app, then **Communications** then **Wi-Fi**.  
- To turn Wi-Fi on, slide the button on the **Status Bar** from **Off** to **On**. Choose your Wi-Fi network from the list and enter the password.  
- To turn Wi-Fi off, slide the tab on the **Status Bar** on the Wi-Fi settings screen from **On** to **Off**. The Wi-Fi symbol 📱 will be displayed in the Information bar when you have established a connection. |
Setting up communications

**Note** To connect via Wi-Fi, the network you are connecting to must have the following minimum level of security: WPA-PSK (AES), WPA2-PSK (AES) or mixed WPA2/WPA-PSK (AES). If the selected Wi-Fi network does not have the required security level, the following message will appear: ‘Selected Wi-Fi network does not have enough security. Please select a Wi-Fi network with at least WPA2-PSK’.

**Tip** Albert can connect via Wi-Fi or 3G. Although you can choose to use Albert in either mode, we recommend Wi-Fi as the default setting, with 3G as a backup. This will provide faster access for transactions and apps on the device, and a backup if there are connectivity issues.

Connecting an email account

**Outgoing email account**

1. Tap the **Settings** app, then **Device Settings**, then **Email**. 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

- You must log in with your Manager password to change either the Manager or Operator password.
- Tap the **Settings** app, then **Device Settings**, then **Change Passwords**.
- Enter your Manager password and tap **OK**.

**Manager password**

1. Tap **Change Manager Password**. Enter a new six-digit password.
2. Once you have completed the sixth digit you will be asked to re-enter the password.

**Operator password**

1. Tap **Change Operator Password**. Enter a new six-digit password.
2. Once you have completed the sixth digit you will be asked to re-enter the password.

**Tip** If staff members use the Albert terminal, we recommend that you use your Manager password to manage the settings and establish an Operator password that staff members can use to process payments. This provides added security to your settings, including transaction limits.
Forgotten Manager password

You can reset your Manager password on the Albert terminal if you have forgotten it or entered it incorrectly three times. To enable this feature you must first set your secret answers.

**Set your secret answers**

To set your secret answers:

1. Log into Albert with your Manager password.
2. Tap the Settings app, then Device Settings, then Change Passwords.
3. Enter your Manager password and tap OK.
4. In the Change Passwords screen, tap Set your Secret Answers.
5. Type answers for all five questions. After completing each answer, tap and hold the return key for two seconds to go to the next question.
6. Once you have completed all five answers, the OK button will be enabled. Tap OK to successfully complete this task.

**Forgotten Manager Password**

The Forgotten Manager Password function allows you to reset your Manager password. You can access it in one of two ways:

1. If you enter the Operator or Manager password incorrectly three times you will receive a warning message.
   
   You will be advised that you can re-enter the Manager password in 10 minutes, call the helpdesk or tap Forgotten Manager Password.

2. If you cannot remember the password and you would like to reset it immediately, tap Forgotten Manager Password in the menu.

In the Forgotten Password screen:

1. Enter your three secret answers. After you have entered each answer, tap Next.
2. You will be asked to enter a new Manager password. You will then be asked to type it in again to confirm the new password.
### Accessing other options

<table>
<thead>
<tr>
<th><strong>Battery</strong></th>
<th>To check which functions use up most of your battery life, tap <strong>Battery</strong>.</th>
</tr>
</thead>
</table>
| **Date and Time** | 1. To choose the date, time and time zone, tap **Date and Time**.  
  2. To allow Albert to automatically set the date, time and time zone, slide the button on the Status bar for **Automatic date and time** and **Automatic time zone** from OFF to ON (recommended).  
  3. Alternatively, you can set these manually on the same screen. |
| **Technical information** | Tap **About Albert**. |

### Notifications and the Quick Settings Menu

| **Notifications** | 1. To view notifications, swipe down from the top of the screen with one finger.  
  2. To close the menu, swipe up from inside the menu. |
|-------------------|---------------------------------------------------------------|
| **Quick Settings** | 1. This menu allows you to quickly access and adjust the **Brightness** and **Volume** settings.  
  2. Swipe down from the top of the screen with one finger, then swipe again.  
  3. The **Brightness** and **Volume** settings will appear. Slide the bars under each to the required level.  
  4. To close the menu, swipe up from inside the menu. |
4. Accessibility

Albert’s speech-to-text technology makes it possible for the 350,000 Australians who are blind or have low vision to enter their PIN using the payment app. This guide will walk you through using this enhanced 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 once the Payment app is loaded.**
Accessible Mode

In this section:
• Getting to know the Accessible Mode
• Ensuring your customers are familiar with the Accessible Mode

4.1 Learn how to use the solution

Home screen

Launch the Payment App:
The accessible mode explained in this section only applies to the CommBank Payment App.
You can access the Accessible Mode:
• From the Merchant Context Menu, or
• From the Card Presentation screen, or
• By swiping from the bottom of the screen with two fingers. This can be done by the merchant or the customer.

The following three accessibility options will appear when you enter the accessible mode. Ask your customer which of the following accessibility options they wish to select:
• PIN entry only
• PIN entry and account selection
• Complete transaction
4.1 Learn how to use the solution

**Merchant Context Menu**

In the purchase amount screen, access the merchant context menu. To do this, either swipe with two fingers from the top of the screen downwards or press the button at the rear top right of the terminal.

![Merchant Context button]

Tap the **Accessible Mode** option.

In the **Accessible Mode** screen, press the slider to turn Accessible Mode **On**.

On this screen you can:

- Toggle Accessible Mode **ON** or **OFF**. Selecting **ON** will display the accessible mode options from which to select:
  - Adjust the volume played by Albert
  - View or listen to a quick summary of gestures
  - Start or stop the text-to-speech guide narration
  - Return back to the previous screen
4.1 Learn how to use the solution

<table>
<thead>
<tr>
<th>Card Presentation Screen</th>
<th>In the Payment App, enter the Accessible Mode by swiping from the bottom of the screen with two fingers. This can be enabled by the merchant or the customer. The Albert text-to-speech will advise that the accessible mode has been enabled. The options to select the payment steps they wish to complete in the accessible mode will appear on the screen.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Tap the Accessible Mode icon.</td>
<td></td>
</tr>
<tr>
<td>• The Albert text-to-speech will advise that the accessible mode has been enabled.</td>
<td></td>
</tr>
<tr>
<td>• The three Accessible Mode options will appear. Ask your customer which of these they wish to proceed with.</td>
<td></td>
</tr>
<tr>
<td>• The Albert text-to-speech will advise that the accessibility mode has been enabled.</td>
<td></td>
</tr>
<tr>
<td>• The accessible functionality will be enabled in the Card Presentation Screen only when the Complete transaction accessible mode option is selected.</td>
<td></td>
</tr>
<tr>
<td>• The customer follows the spoken instructions.</td>
<td></td>
</tr>
</tbody>
</table>
4.1 Learn how to use the solution

Account Type Screen

- The standard account type selection screen will display if the PIN entry only was selected.
- If the PIN entry and account selection & Complete transaction options were selected the Account Type screen will appear in the accessible mode.
- Text-to-speech will prompt the customer to select Cheque, Savings, or Credit, or for EFTPOS EMV (Europay, MasterCard and Visa) cards. The account selection will be displayed on a continuous loop allowing the customer to locate the correct account by swiping left or right. To confirm the correct account selection the customer will double tap the screen with a single finger.
- Once selected, text-to-speech will notify the customer of the selection.

PIN Entry Screen

- When on this screen, the text-to-speech prompts will instruct the customer to enter their PIN, based on the instructions below.
- A dot will display in the box when each digit is entered.
- Pressing the Merchant Context Menu Button on this screen has no effect.
- There will be no instructions or display on the screen, to prevent anyone from seeing what is entered.
### 4.1 Learn how to use the solution

#### Entering a PIN

The virtual cursor sits at the middle of the keypad, at **number 5**. Each number requires a specific gesture, followed by a **double tap** with a single finger.

The below demonstrates the insertion of a 4 digit PIN using the numbers 1,0,9 and 3.

**Step 1**
Starting at number 5, swipe up and then swipe left. Double tap with a single finger.

**Step 2**
Starting at number 5, Swipe down twice. Double tap with a single finger.

**Step 3**
Starting at number 5, swipe down and then swipe right. Double tap with a single finger.

**Step 4**
Swipe up and then swipe right. Double tap with a single finger.

**Note:** Diagonal swipes are not supported or allowed.
4.1 Learn how to use the solution

<table>
<thead>
<tr>
<th>Entering a PIN (continued)</th>
<th>Enter your PIN using the following swipe motions.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>One</strong></td>
<td>Swipe up and then swipe left. Double tap with a single finger.</td>
</tr>
<tr>
<td><strong>Two</strong></td>
<td>Swipe up. Double tap with a single finger.</td>
</tr>
<tr>
<td><strong>Three</strong></td>
<td>Swipe up and then swipe right. Double tap with a single finger.</td>
</tr>
<tr>
<td><strong>Four</strong></td>
<td>Swipe left. Double tap with a single finger.</td>
</tr>
<tr>
<td><strong>Five</strong></td>
<td>Double tap with a single finger.</td>
</tr>
<tr>
<td><strong>Six</strong></td>
<td>Swipe right. Double tap with a single finger.</td>
</tr>
<tr>
<td><strong>Seven</strong></td>
<td>Swipe down and then swipe left. Double tap with a single finger.</td>
</tr>
<tr>
<td><strong>Eight</strong></td>
<td>Swipe down. Double tap with a single finger.</td>
</tr>
<tr>
<td><strong>Nine</strong></td>
<td>Swipe down and then swipe right. Double tap with a single finger.</td>
</tr>
<tr>
<td><strong>Zero</strong></td>
<td>Swipe down twice. Double tap with a single finger.</td>
</tr>
</tbody>
</table>

- **Submit PIN**: Press and hold the screen with two fingers until transaction starts processing.
- **Cancel Purchase**: Press and hold the screen with three fingers.
- **Restart PIN entry**: Tap once with three fingers.

**Note**: Diagonal swipes are not supported or allowed.

**Confirming a PIN**

Long press anywhere on the screen with 2 fingers to submit the PIN. For security reasons, the PIN entry time allowance on the terminal is 20 seconds.

**Important** – Customers will get 3 chances to enter a PIN correctly before their account is locked.
4.1 Learn how to use the solution

Confirmation
Upon confirmation the standard receipt screen will be shown.
If the transaction is approved, text-to-speech will advise that the transaction has been approved for what amount and from what account or application it was paid from, then advise the customer to remove their card if it was inserted into the chip card reader.
If the transaction has been declined, text-to-speech will advise that the transaction has been declined, then advise the customer to remove their card if it was inserted into the chip card reader.

4.2 What if my customers are uncomfortable using the Accessible Mode?

Tap and Pay (NFC)
Using the NFC reader on Albert, your customers are able to pay for purchases using ‘Tap and Pay’, for purchases less than $100.

Offline Vouchers
For purchases over $100, Tap & Pay (NFC) is not allowed.
An alternative if the merchant is uncomfortable using Tap and PIN, or Chip and PIN as a payment method is to use the offline vouchers provided, which can be completed manually.
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.  
• Clean Albert immediately with a dry cloth if any liquid spills on the device. |
| Don't | • Never attempt to open Albert yourself.  
• Never expose Albert to extreme temperatures. Avoid areas below –5º Celsius and above 45º Celsius.  
• Never allow Albert to get wet.  
• Do not drop Albert, as this could damage the screen or other hardware. If you do drop Albert and any liquid leaks out of the device, do not touch it. |

As with other electrical equipment, do not allow the power cables to become frayed, snagged or entangled. If these are damaged or distressed, or if you are concerned for any other reason, contact us immediately and we will replace your cables or power pack free of charge.

It is important to care for your payment terminal and equipment, and to keep them in good condition and unobstructed. For further tips on maintaining your equipment, please refer to the FAQs on our website.

Please call the helpdesk on 1800 230 177 if you need us to replace or repair your equipment.
The Payment app
1. Getting started

You can access the Payment app and Split Bill app 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 and Cashout
  - Cashout Only
  - Refund
  - Pre-Auth *(available later in 2018)*
  - Completion *(available later in 2018)*
  - Refund
  - History and Totals
  - Tip Reports
  - Accessible Mode.
- To open the menu, press the Merchant Context 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 button.
### Getting to know the Payment app

<table>
<thead>
<tr>
<th>Tip</th>
<th>You can exit the Payment app by tapping <strong>Home</strong> while the <strong>Merchant Context Menu</strong> is open.</th>
</tr>
</thead>
</table>

#### 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 Purchase screen.

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

<table>
<thead>
<tr>
<th>COLOUR: White</th>
<th>FLASHING: Solid</th>
<th>TRANSACTION STATUS: Idle screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>COLOUR: White</td>
<td>FLASHING: 1 flash per second</td>
<td>TRANSACTION STATUS: Waiting for user interaction</td>
</tr>
<tr>
<td>COLOUR: White</td>
<td>FLASHING: 1.5 flashes per second</td>
<td>TRANSACTION STATUS: Transaction in progress</td>
</tr>
<tr>
<td>COLOUR: Green</td>
<td>FLASHING: 3 flashes in the first second, then solid</td>
<td>TRANSACTION STATUS: Transaction completed successfully</td>
</tr>
<tr>
<td>COLOUR: Red</td>
<td>FLASHING: 3 flashes in the first second, then solid</td>
<td>TRANSACTION STATUS: Transaction failed/Pop-up message displayed/Other 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 Settings

<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 | 1. On the Albert Home screen, tap the **Settings** app to display the settings.  
2. In the **Payment** section, tap **Payment Options** to display the **Payment Options** screen. |
Payment app options

<table>
<thead>
<tr>
<th>Receipt printing</th>
</tr>
</thead>
</table>
| **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 (if email is enabled) a receipt at the end of each payment. |

<table>
<thead>
<tr>
<th>Refund Limit</th>
</tr>
</thead>
</table>
| **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 the green arrow to proceed to the **Manager Limit**. Tap the tick symbol if you don’t wish to also change the manager limit. |
| **Manager Limit** | This is the maximum that can be refunded on the terminal by entering the Manager password. This value must be higher than the operator limit.  
  • In the **Manager Limit** field, enter the maximum refund a manager can approve, then tap the tick symbol to finish. |

<table>
<thead>
<tr>
<th>Tipping</th>
</tr>
</thead>
</table>
| **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 **Multiple Servers** bar to **ON**.  
  • To turn off this 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 profiles 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, 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>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.</th>
</tr>
</thead>
</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 tip the customer wants to give. (See ‘Adding tips’ on page 42 for details).  
3. The **Card Present** screen will be displayed. |
|  | ![Card Present Screen](image) |
|  | ![Payment Entry](image) |
|  | ![Tap or Swipe](image) |
| 4. | Either:  
   • tap the card at the top of Albert (for transactions that can use this functionality)  
   • insert the card in the chip reader at the base  
   • swipe the card from left to right along the card reader at the top. |
|  | ![Insert Card](image) |
Processing card payments

5. The screen displays Cheque, Savings, or Credit under the purchase total.

For **EFTPOS EMV** (Europay, MasterCard and Visa) cards, a list of available applications will display instead of the below types of accounts. For example:

When a card is tapped the account type defaults to Credit, skipping this step.

6. The PIN authorisation screen will be displayed. If the card allows a signature option, tap **Sign** to skip PIN entry and print a receipt for the customer to sign.

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

8. Once the payment is accepted, the receipt will appear.

9. Tap **Email** or **Print** to give the customer a copy of the receipt, or tap **Finish** if the customer doesn't want a receipt (See page 35 for details).

**Tips**

Refer to page 27 of this guide to learn how to:

- track a transaction by server
- add a tip to a transaction
- change the defaults for printing receipts.
## Processing mail or telephone order (MOTO) payments

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To accept card payments when the card isn’t available, such as in mail or phone orders.</th>
</tr>
</thead>
</table>
| Process mail and telephone orders | From the [Card Presentation](#) screen, press the [Merchant Context](#) button or swipe down on the screen to open the [Merchant Context Menu](#).  
1. Tap MOTO to display the [MOTO](#) screen.  
   Use the keypad to enter the credit card number, then tap [Next](#).  
2. Enter the card's expiry date and CCV (if needed) and tap [OK](#).  
3. Once the payment is accepted, the receipt will appear.  
4. Tap [Email](#) or [Print](#) to give the customer a copy of the receipt, or tap [Finish](#) if the customer doesn't want a receipt. |
Cancelling payments

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To stop processing a payment.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancel a payment from the PIN entry screen</td>
<td>1. 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 as it is being processed | 1. Press the **Merchant Context** 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 will need to refund the payment. See page 38 for details. |
### Viewing, printing and emailing receipts

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To provide a printed or emailed receipt for your customer or your records. Whenever a payment, refund or cashout transaction is processed, a receipt will appear on the screen.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Viewing, printing and emailing receipts</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• To print a customer receipt, tap <strong>print</strong>. The receipt will print from Albert’s receipt printer.</td>
</tr>
<tr>
<td></td>
<td>• To email a customer receipt, tap <strong>email</strong>. Using the keypad, enter the customer’s email, then tap <strong>Send</strong>.</td>
</tr>
<tr>
<td></td>
<td>• If no receipt is required, tap <strong>finish</strong>.</td>
</tr>
</tbody>
</table>

**Receipt appears on screen**

![Receipt image](image.png)

**Tips**

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

Allow your customers to withdraw cash in just a few taps – on its own or with a purchase.

Entering the cashout amount

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To provide cash to a customer as a standalone payment or as part of another purchase.</th>
</tr>
</thead>
</table>
| Cashout only     | 1. Press the Merchant Context button or swipe down on the screen to open the Merchant Context Menu.  
|                  | 2. Tap Cashout Only.                                                                  
|                  | 3. Use the keypad to enter the cashout amount, then tap OK.                           
|                  | 4. The Card Present screen will be displayed. You can now process the cashout payment from a card. |

| Purchase and cashout | 1. Press the Merchant Context 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, then tap OK.  
|                      | 2. Using the keypad, enter the cashout amount, then tap OK.                            
|                      | 3. The Card Present screen will display. You can now process the cashout payment.      |
Processing the cashout transaction

**Purpose**
To process the cashout transaction to a card. You cannot use this facility with Tap to Pay, MOTO (card not present) or manual payment methods.

**Process cashout transactions**

1. From the Card Present screen, either:
   - insert the card in the chip reader at the bottom of Albert
   - swipe the card from left to right along the card reader at the top
   - ask the customer to choose their account type by tapping Cheque or Savings.

2. The authorisation PIN screen will then appear. The customer can input their PIN using the touch screen keypad, then tap OK.

3. When payment is accepted, you will see the receipt displayed on the screen.

4. Tap Email or Print to give the customer a record. If the customer doesn’t want a receipt, tap Finish.
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 necessary, you can refund a specific transaction. To do this, you’ll first need to find the transaction record. See page 46 for details.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enter refund details</strong></td>
<td><strong>Find the transaction. To do this:</strong></td>
</tr>
<tr>
<td></td>
<td>• Press the Merchant Context button or swipe with two fingers down the screen to open the Merchant Context Menu.</td>
</tr>
<tr>
<td></td>
<td>• Tap History and Totals.</td>
</tr>
<tr>
<td></td>
<td>• Enter the Manager password. By default, the Transactions tab will display transactions by date in reverse chronological order.</td>
</tr>
<tr>
<td></td>
<td>• Tap the transaction to open its receipt, or tap Search to search for the transaction by amount, date or last two card digits.</td>
</tr>
<tr>
<td></td>
<td><strong>2. Tap Refund.</strong></td>
</tr>
<tr>
<td></td>
<td><strong>3. Using the keypad, enter the refund amount, then tap OK.</strong></td>
</tr>
<tr>
<td></td>
<td>• If the amount is under the operator limit, enter the operator password.</td>
</tr>
<tr>
<td></td>
<td>• If the amount is above the operator limit, enter the Manager password.</td>
</tr>
<tr>
<td></td>
<td>• If the amount is above the manager limit, you will be prompted to enter a lower refund amount.</td>
</tr>
<tr>
<td></td>
<td><strong>4. The Card Present screen will be displayed. You can now process the refund.</strong></td>
</tr>
<tr>
<td></td>
<td><strong>5. Choose the payment method:</strong></td>
</tr>
<tr>
<td></td>
<td>• Card present. See page 31.</td>
</tr>
<tr>
<td></td>
<td>• Card not present. See page 33.</td>
</tr>
<tr>
<td></td>
<td>• Manual payment. See page 33.</td>
</tr>
</tbody>
</table>
Processing card-present refunds

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To refund a payment to a card that is available to swipe, insert or tap.</th>
</tr>
</thead>
</table>
| Process refund with card present | 1. From the **Card Present** screen, either:  
   - tap the card at the top of Albert (for transactions that allow this functionality). Go to step 4.  
   - insert the card in the chip reader at the base  
   - swipe the card from left to right along the card reader at the top  
2. Ask the customer to select the account type.  
3. The PIN authorisation screen will be displayed. 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 be displayed.  
6. Tap **Email** or **Print** to give the customer a copy of the receipt, or tap **Finish** if the customer doesn't want a receipt. |

If there is no pin.  
If there is a PIN, the sign button will change to **OK**
Processing mail or telephone order (MOTO) refunds

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To process refunds to a card where the card isn’t available, such as refunds via mail or over the phone. Please note that MOTO is only available to merchants if they contact the helpdesk to ask that this functionality be enabled. It is not auto-enabled on all devices.</th>
</tr>
</thead>
</table>
| Process a refund manually when the card is not present | 1. From the Card Presentation screen, press the Merchant Context button or swipe down on 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), then tap OK.  
5. Once the refund is accepted, the receipt will be displayed.  
6. Tap Email or Print to give the customer a copy of the receipt, or tap Finish if the customer doesn’t want a receipt. |
Cancelling refunds

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To stop processing a refund.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cancel a refund 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 refund as it is being processed**

1. Press the **Merchant Context** button or swipe down on 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? The Payment and Split Bill apps make it all easy.

Adding tips

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To add a tip to a payment as a percentage or manually entered dollar amount. You can only add a tip if On-screen tipping is turned on in the Payment app settings. See page 29 for details.</th>
</tr>
</thead>
</table>
| Add a tip | 1. Enter payment details as usual.  
2. A pop-up window will appear asking if the customer would like to leave a tip.  
3. Ask the customer and select Yes or No as per the customer’s response.  
4. If you select No, you will proceed directly to the card reader screen.  
5. If you select Yes, the tipping function will appear, defaulting to the Manual Tip screen.  
6. 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.  
7. Tap OK to add the tip to the payment.  
8. Process the payment as usual. |
| Tips | • If a customer enters a tip that’s higher than the purchase amount, Albert will assume the amount is the total payment, including a tip.  
• Any amount less than the total purchase amount is assumed to be a tip and will be added to the purchase amount. |
Creating tips reports

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To track tips by staff member or report on total tips. The reports cover current shift tips since the last settlement.</th>
</tr>
</thead>
</table>

**Create a tips report**

1. While in the Payment app, press the **Merchant Context** button or swipe down on 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’s name.
   - To view a total tips report, tap **Tip Totals**.
4. To make a copy of the tips report, tap **Print**.
## Splitting bills

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To split a single purchase across multiple payments; for example, when customers share the cost of a meal. You can access the Split Bill app from the Albert Home screen icon, or when entering payment details in the Payment app.</th>
</tr>
</thead>
</table>
| Open the Split Bill app | • **From the Payment app:** press the **Merchant Context** button or swipe down on the screen to open the **Merchant Context Menu**, then tap **Split Bill**.  
• From the Albert Home screen: tap the **Split Bill** app icon. |
Splitting bills

**Split a payment**

1. Using the keypad, enter the payment amount, then tap **OK**.
2. The Split Bill screen will appear 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 for the highlighted portion, swipe the dial clockwise.
   - To decrease the amount for the highlighted portion, swipe anti-clockwise.
   - To manually type the amount, tap the portion, enter the amount and tap **OK**.
5. When the amount is correct, tap the payment amount at the bottom of the screen.
6. Tap **Cash Payment** to accept cash, tap **Card Payment** to process a card payment or Accessible Card Payment to enter the Accessible mode.
7. 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 remaining share individually after you process each payment.
- On-screen tipping is not available for cash payments.
- The minimum amount for a 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>View a list of transactions</td>
<td>1. In the Payments app, press the Merchant Context button or swipe down on the screen to open the Merchant Context Menu.</td>
</tr>
<tr>
<td></td>
<td>2. Tap History and Totals. The Transactions tab will display transactions by date in reverse chronological order.</td>
</tr>
</tbody>
</table>

Tips

- Tap on a transaction in the list to view its receipt on screen. Refunds can be processed from the receipt screen as well.
- The list of transactions will provide time, transaction type, card/account type, and amount.
- Icons beside each transaction (Last 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 was processed via the transaction history screens.
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 a 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**.  
To move to a different date:  
- swipe right for future reports  
- swipe left for past reports.  
3. Tap the **Back** arrow to return to the **History and Totals** screen. |
# Finding a specific transaction

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To find a specific transaction.</th>
</tr>
</thead>
</table>
| **Find a specific transaction** | **1.** From the **Transactions** tab, tap **Search**.  
2. Tap in the fields to enter the details you wish to search for, 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 transaction.  
   - **Transaction type:** select the type of transaction from the list.  
3. Tap **Search**. A list of transactions meeting the search criteria will be displayed.  
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 was processed via the transaction history screens.**  
**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? Albert makes it easy.

Viewing shift details

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To see total transactions for different shifts.</th>
</tr>
</thead>
</table>
| **View past shifts** | 1. In the Purchase app, press the **Merchant Context** button or swipe down on 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.  
4. You will see the 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.  
5. To view a specific Shift Totals Report, tap the row. You’ll be prompted to enter the Manager password.  
6. Enter the Manager password and tap **OK**.  
7. The Shift Totals Report displays a list of totals for each transaction type for the shift.  
8. To print the report, tap **Print**.  
9. To view the Shift Totals 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

<table>
<thead>
<tr>
<th>Purpose</th>
<th>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.</th>
</tr>
</thead>
</table>
| **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. |
9. Settlement

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

Past settlement dates

Settle buttons for all open transactions

Print Settlement Reports
Viewing settlement history

<table>
<thead>
<tr>
<th>Tip</th>
</tr>
</thead>
</table>
| • To view the cumulative total since the last settlement, without settling, tap Open.  
• When the Multi-merchant functionality is enabled, Albert will maintain separate transaction counters and amount accumulators for each active merchant. |

Entering manual settlements

<table>
<thead>
<tr>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>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 the settlement for you.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Perform a manual settlement</th>
</tr>
</thead>
</table>
| 1. From the Settlements tab, tap **Settle** to settle all open transactions.  
2. The Settlement Report for the period will be displayed.  
3. Tap **Print** to print a record. |

<table>
<thead>
<tr>
<th>Tips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only one settlement is allowed in each 24-hour period. The settlement will fail if you have already settled within the past 24 hours.</td>
</tr>
</tbody>
</table>
10. Pre-authorisation and completion

Albert allows you to pre-authorise transactions to guarantee payment for goods and services (available later in 2018).

Pre-authorisation

| Purpose | A pre-authorisation transaction checks that there are funds available on the customer’s credit card and puts a hold on these funds. No actual funds are debited from the customer’s card account until the transaction is ‘completed’. Pre-authorisation is only available for credit card transactions. The card must be present to complete the process. |

Process a pre-authorisation transaction

1. From the Payment app: press the Merchant Context button or swipe down on the screen to open the Merchant Context Menu, then tap Pre-Auth.
2. Enter the pre-authorisation amount and tap OK.
3. The Card Present screen will appear.
   - The customer’s card must permit credit transactions.
   - Enter or swipe the card. (Contactless payments are not accepted for pre-authorisation transactions.)
   - MOTO and manual entry are also available for pre-authorisation, if enabled. To access this option, go to the Merchant Context Menu and tap MOTO.
4. Ask the customer to select the account type from the available options.
Pre-authorisation

4. The PIN authorisation screen displays
   • If a sign option is available for the card, you can tap SIGN to skip PIN entry and print a receipt for the customer to sign.

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

6. If the PIN is entered correctly or you have verified the signature and tapped YES, a tick will verify the transaction has been processed successfully.

7. A merchant receipt will be printed with the Pre-Auth Number and other details, which you can refer to for a ‘Completion transaction’.

Tips

Approved pre-authorisation transactions are stored for seven days.

Completion

Purpose
To get the value of a pre-authorisation transaction credited to your settlement.

Process a Completion transaction

1. From the Payment app: press the Merchant Context button or swipe down on the screen to open the Merchant Context Menu, then tap Completion.
2. Enter the Completion amount and tap OK.
3. The Password entry screen will appear. Enter the Operator or Manager password.
4. A pop-up will ask if you wish to carry out a cardless completion. Select No if you have the customer with you and can process the completion with a card.
Completion

Card-present completion

1. The Card Presentation screen will appear (the customer’s card must permit credit transactions):
   - Enter or swipe the card. (Contactless payment is not available for Completion transactions).
   - MOTO and manual entry are also available for Completion, if enabled. MOTO will not be permitted if the card has already been presented. Go to the Merchant Context Menu and tap MOTO to access this option.

2. If the terminal has found more than one matching pre-authorisation transaction for the card number, you will be prompted to enter the six-digit reference number (STAN) from the pre-authorisation transaction receipt.

3. If the terminal has not found a matching pre-authorisation transaction for the card number, you will be further prompted to enter the authorisation date, time and number from the pre-authorisation transaction receipt.

4. On the Confirmation screen, review the details and tap OK.

5. Albert will print a merchant receipt for the customer to sign.

6. Verify the signature and tap OK if it matched or NO if it doesn’t.
Completion

Cardless Completion

1. If you selected Cardless Completion, you will be prompted to enter the six-digit reference number (STAN) from the pre-authorisation transaction receipt, then tap OK.

2. On the Confirmation screen, review the details, then tap OK.

Tips

The approved pre-authorised transaction is stored for seven days.
11. Multi-merchant

Do you need to process payments for more than one account from the same terminal? With Albert you can credit up to nine separate accounts *(available later in 2018)*.

Processing a payment on a multi-merchant–enabled terminal

<table>
<thead>
<tr>
<th>Purpose</th>
<th>To process transactions for multiple merchants or to different nominated accounts. The Multi-merchant functionality is not automatically enabled. Please contact the Helpdesk to request this functionality to be enabled.</th>
</tr>
</thead>
</table>
| Process a payment | 1. In the **Payment app**: 📲 enter the transaction amount and tap **OK**.  
2. A list of merchants will appear.  
3. Tap the merchant that the customer is paying. If you wish to settle this payment to the primary facility owner’s account, select ‘Generic Account’.  
4. Complete the transaction. |
| Note | Currently, daily settlement receipts are not available for each individual merchant on a multi-merchant terminal.  
Please contact the Merchant Helpdesk on 1800 230 177, 24 hours a day, 7 days a week for further details. |
## Need help?

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

<table>
<thead>
<tr>
<th>Help with Albert, App bank and CBA apps</th>
<th>1800 230 177</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commonwealth Bank Merchant Helpdesk</td>
<td>24 hours a day, 7 days a week</td>
</tr>
<tr>
<td>For detailed guides on each of the CBA apps, please visit piappbank.com.au.</td>
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</tbody>
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<td></td>
<td>2. Select <strong>Apps</strong>, then search the relevant app name. Click on the app to see <strong>App Details</strong> and expand <strong>Support</strong> to see the contact details for the responsible developer.</td>
</tr>
</tbody>
</table>