Quick Reference Guide

DX8000

CHASE ⬡

Getting Started

To help you get started, this Quick Reference Guide outlines some of the most common transactions for the DX8000 terminal solutions.

For more information and guides, visit: **chase.ca**

Contents

Navigating Your DX8000 Terminal

1. Contactless landing zone
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6. App overview
7. Home
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10. LEDs for contactless card
11. Front scanner
12. Power button
13. Volume buttons
14. Battery cover
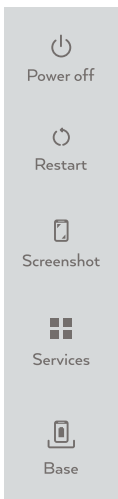15. USB Type-C connector

Use of the Terminal

To power on:
Press and hold the <Power> button for about 1 second until the Chase screen appears.

To power off:
Press and hold the <Power> button for more than 2 seconds until the display shows the figure below, then press <Power off>.

⏻
Power off

↻
Restart

▯
Screenshot

▦
Services

🔋
Base

All devices come with a battery, so ensure it is charged each day.
If the battery is empty, the terminal automatically shuts off.
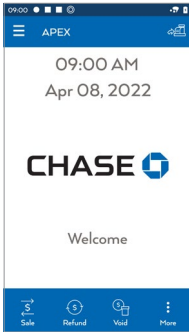
Screen saver mode:
Press and hold the <Power> button for 0.5 seconds, the terminal display will be turned on or off.
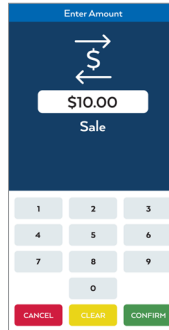
How to Process Basic Transactions

Below are some common transactions to help you start processing right away.

Sale

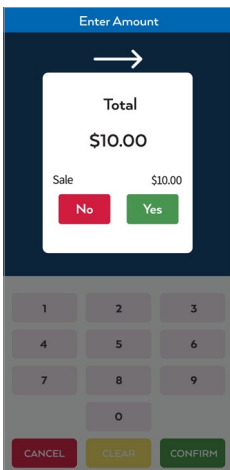Perform a credit or debit card sale transaction when the card is present.

From the idle screen, select Sale.

Then key in amount and press CONFIRM.

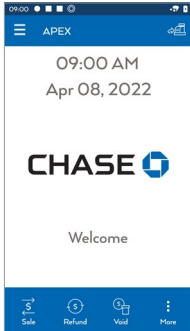## What the customer sees

Customer is prompted to Tap/Insert/Swipe

1. Customer confirms the sale amount.
2. Customer selects Chequing or Savings (Debit Only).
3. Customer enters PIN and presses CONFIRM.
4. Receipt prints and approval is displayed.
   Press CONFIRM to print the customer copy.

For contactless (tap) transactions, the customer holds their card over the terminal until the reader flashes and/or beeps.

* Follow prompts until sale is completed.

Return/Refund

Perform a return to refund money to a cardholder's account from a sale completed in a closed batch (e.g., previous day).

From idle screen, select Refund.

Then key in amount and press CONFIRM

What the customer sees

Customer is prompted to Tap/Insert/Swipe

1. Customer confirms the refund amount.
2. Customer selects Chequing or Savings (Debit Only).
3. Customer enters PIN and presses CONFIRM.
4. Receipt prints and approval is displayed.
   Press CONFIRM to print the customer copy.

For contactless (tap) transactions, the customer holds their card over the terminal until the reader flashes and/or beeps.
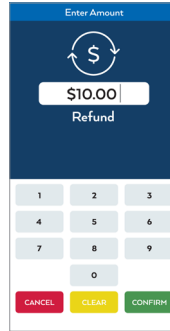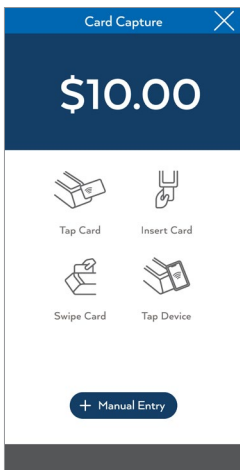
* Follow prompts until refund is completed.

Void

Perform a void to reverse a credit or debit sale, force, or return transaction and prevent any funds from transferring from the cardholder's account. Only available for transactions in the current batch (e.g., same day).

Display	DX8000
Idle Screen	Select Void
Void Pre-Auth (if applicable) Yes/No	Press [1] for Yes to void an open pre-auth, or [2] for No and follow screen prompts. Note: This prompt appears even when there are no open pre-auth transactions.
Select Search Criteria	All records Last record Invoice RRN RefNumber Approval Code
Acct: XXX Ref: X Auth: XXX TR: Credit Sale Total: XX.XX 1/4 [↓] Select	Review the transaction to delete. Press [F4] to select the transaction to void.
Confirm Void $XX.XX Yes/No	Confirm the amount to be voided Press [F1] for Yes or [F4] for No
APPROVED XXXXXX Press CONFIRM	Receipt prints and approval is displayed . Press CONFIRM to print the customer copy. Terminal returns to Main Menu.

More Information and Support

Below is some helpful information about transactions and functions on your terminal.

Other Transactions /Access Reports/Reprint a Receipt

Scroll through the screens to navigate to the transaction/function you wish to perform. Press the screen to start the transaction or function.

Settling the Batch

Your terminal batch contains all the daily transactions that need to be settled. Settlement is the process of managing your transactions so they are funded to your banking account.

For the DX8000 terminal, there are three settlement options:
- Manual Settlement
- Auto Settlement
- Terminal Auto Settlement

Manual Settlement

If your terminal is set to Manual Close, press CONFIRM to access the Main Menu, navigate to Settlement and press CONFIRM to select Settlement. Then follow the prompts displayed on the terminal display.

Host or Terminal Auto Settlement

If your terminal is set to either Host or Timed Auto Settle, it will automatically settle transactions in the current batch at a specific, predetermined time, within a 24-hour period. If the terminal is unplugged or turned off before the set time, the auto settlement will occur when the terminal is turned on again.

Password Management

To begin accepting payments, we require you to set up your terminal passwords. Here is some information to get you started.

Password privileges

Before you begin, think about the password(s) you will need to provision for your manager and staff:

- Ideally, each member of your staff should have credentials for the terminal based on their level of responsibility

- As an added layer of security, only managers and supervisors can perform the following password protected transactions: Refund, Void, and Manually Keyed Card

To protect your business, use discretion when sharing passwords and consider changing them on a regular basis.

Three levels of passwords

The DX8000 terminal supports three levels of passwords:

1. **Manager**
2. **Supervisor**
3. **Clerk**

The terminal has the ability to support 10 Supervisor and 10 Manager IDs

- Each ID can support a unique password

- The IDs and the passwords are configured manually on the terminal by accessing the **Security Menu**. To access the security menu, please call
  our 24/7 Merchant Support at **1.800.265.5158**.

- We recommend the creation of unique ID/Passcode for each of the 3 password levels
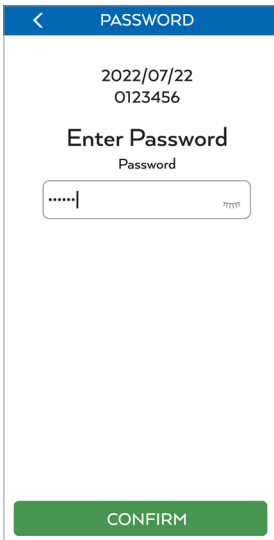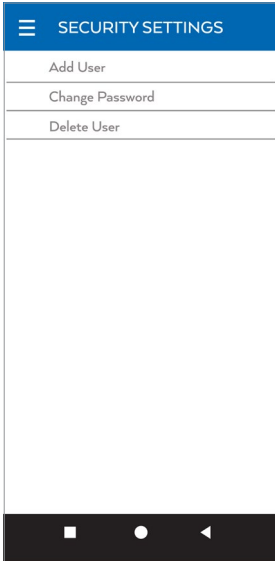
Setting Up Your Passwords

From main screen, choose the menu icon in the upper left corner and select Security Settings.

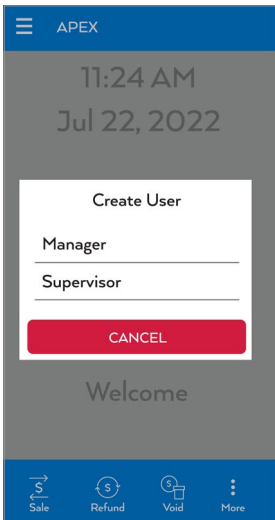The Password screen appears and will prompt you to enter a 6-digit temporary password.
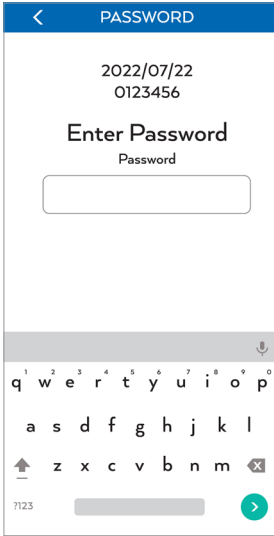
Key in the Dynamic Password and press CONFIRM

SECURITY SETTINGS

Add User

Change Password

Delete User

In the Security Settings you may Add User, Change Password or Delete User. Press the desired function and follow the prompts.

APEX

11:24 AM
Jul 22, 2022

Create User

Manager

Supervisor

CANCEL

Welcome

Sale Refund Void More

When creating a user you will be prompted to select the level of password you may create.

ADD MANAGER

User Name *

Enter Password*

Confirm Password*

q w e r t y u i o p
a s d f g h j k l
z x c v b n m
?123

Enter the desired User Name & Password.

- Name – Alpha/Numeric
  (Max 10 characters)
- Password – Must be 7 characters and
  must include a minimum of 1 number/
  alpha character.
- Alpha characters can only be entered
  using the keyboard.

Notes

Notes

The Information You Need, When You Need it.

For Guides and Helpful Information:

https://www.chase.ca/en/support

Call Merchant Support 24/7:

1.800.265.5158

(English & French)