WIRELESS POINT OF SALE (POS) TERMINAL

If you require the use of the Wireless Point of Sale Terminal, please use the ONLINE BOOKING FORM or contact Jessica Gerlach directly at (807) 343-8010 ext 8428 | jgerlach@lakeheadu.ca for arrangements. Please read the procedure below for details.

PROCEDURE

STEP 1 - USE THE ONLINE BOOKING FORM TO PROVIDE THE FOLLOWING:

- Your Name & Contact Number
- Date of pick up
- Anticipated return date
- Department Name & Alternate Contact Number

STEP 2 - ENSURE *ALL* ITEMS ARE PICKED UP and RETURNED

- Terminal
- Power adapter
- Spare paper roll
- Include items in STEP 4 with return of equipment

STEP 3 - PROCESS TRANSACTIONS (see next page for Instructions)

STEP 4 - SUBMIT "SUMMARY REPORT", "SETTLEMENT REPORT" & EVENT REPORT

- To CLOSE and PRINT your terminal reports, please see "End of Day Procedure"
- Event Report is on page 3 of this document

Your event revenue will be recorded in the Colleague system and allocated to your budget. To facilitate this, you will be required to provide the complete budget code(s) and appropriate distribution amounts.

Power On

1. Press green "Enter" key

Power Off

1. Press yellow "Correction" button and "Admin (#)" button at the same time and hold for 1 second until terminal is powered down

Purchase

1. To begin the transaction, press the green "Enter" button and then select "0" for sale
2. Key in the purchase amount and press OK then follow the prompts on the terminal.

Purchase Correction (Void)

IMPORTANT: The correction MUST be performed in the same batch as the original transaction.

1. To begin the transaction, press the green "Enter" button and then select "2" for void
2. Enter in Manager ID "2" and then Manager Password "3438141"
3. Select "2" for reference number and then enter in reference number from merchant sales receipt and press green "Enter" button
4. If correct transaction, press green "Enter" button
5. Pass terminal to customer so they can insert/swipe card.
6. It will then ask "Confirm Void?" - Press "yes" on touch screen or "1" button for yes.
7. Customer to follow prompts on terminal.

End of Day Procedure

At the end of each day you must close your batch using the following procedure:

1. Select "REPORTS" (Manager ID: 2, Password: 3438141)
2. Select "SUMMARY" from the list of reports and then "Print"
3. Select "SETTLEMENT" on bottom right corner of touch screen
4. Enter in Manager ID and Password and then press green "Enter" button
5. Close batch and deposit funds? - Press "Yes" on touch screen or "1" button for yes
6. Press "Accept" on touch screen or "1" button for yes
7. Print reports? - Press "Yes" on touch screen or "1" button for yes

EVENT REPORT

Event Date: _____

Event Description: _____

Contact Person:

Name (print): _____

Department: _____

Signature: _____

Phone Number: _____

Event Coordinator (if different than contact person):

Name: _____

Phone Number: _____

Budget Codes:

HST Amount (if applicable):		
Total (must exactly match *Settlement Report* total):		