CHASE DX8000 Terminal Solutions User Guide

CHASE 🔷
Quick Reference Guide
DX8000

Contents

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**

Navigating Your DX8000 Terminal

1. Contactless landing zone

2. Easy loading printer

3. LCD and touch screen

4. Magnetic card reader

5. Buzzer

6. App overview

7. Home

8. Back

9. Smart card reader

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

|	
⏻ Power off	**To power on:** Press and hold the <Power> button for about 1 second until the Chase screen appears.
↻ Restart	**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>.
Screenshot ▪▪ Services	All devices come with a battery, so ensure it is charged each day. If the battery is empty, the terminal automatically shuts off.
Base	**Screen saver mode:** Press and hold the <Power> button for 0.5 seconds, the terminal display will be turned on or off.

Wireless Network Configuration

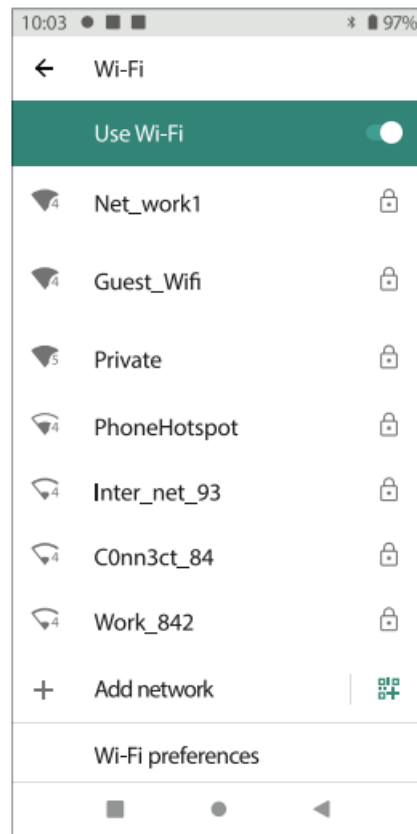The following information will assist you in setting up the network on your terminal.
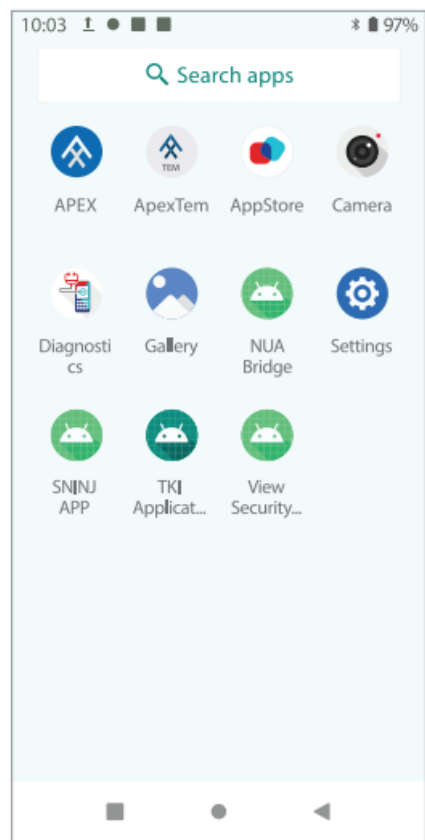
From the Android OS, select Settings.
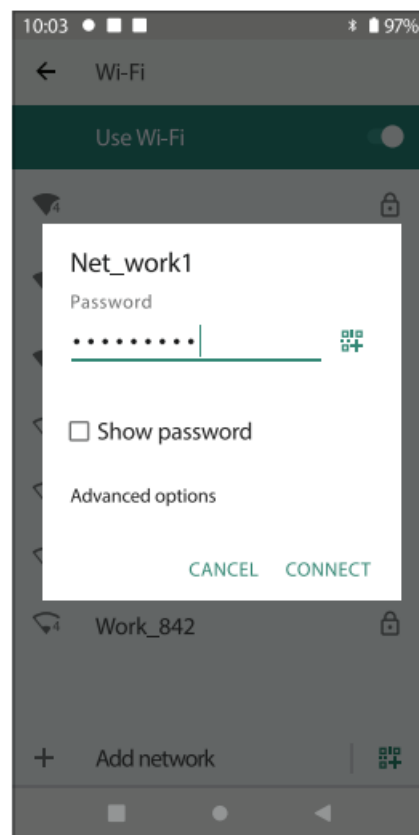The Settings main screen appears.
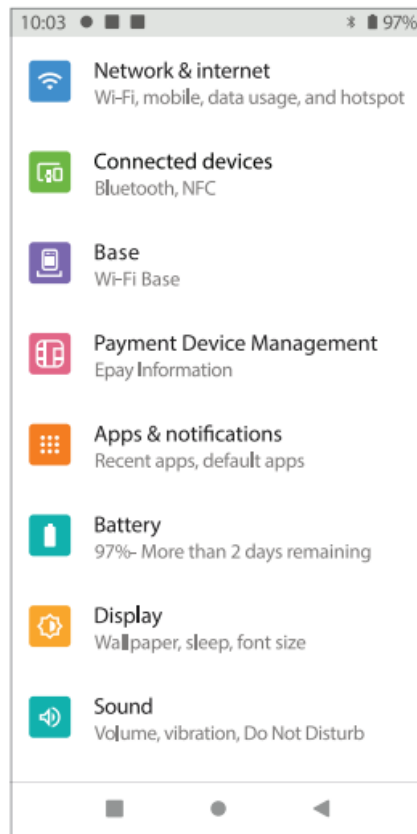
From the Settings main screen, Select Network & Internet.
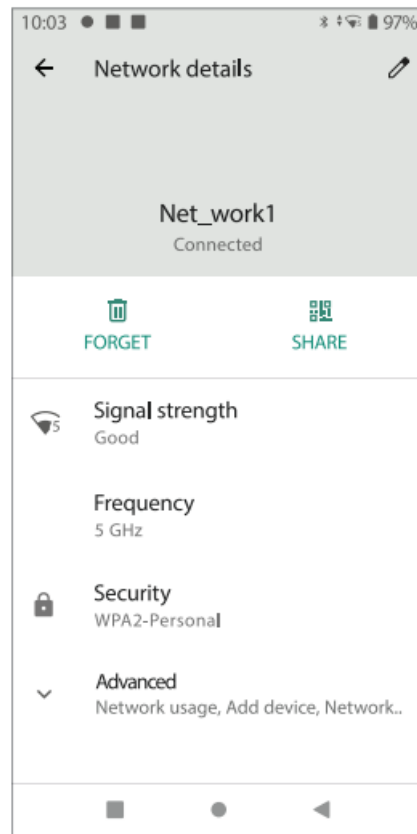The Network and Internet screen appears.
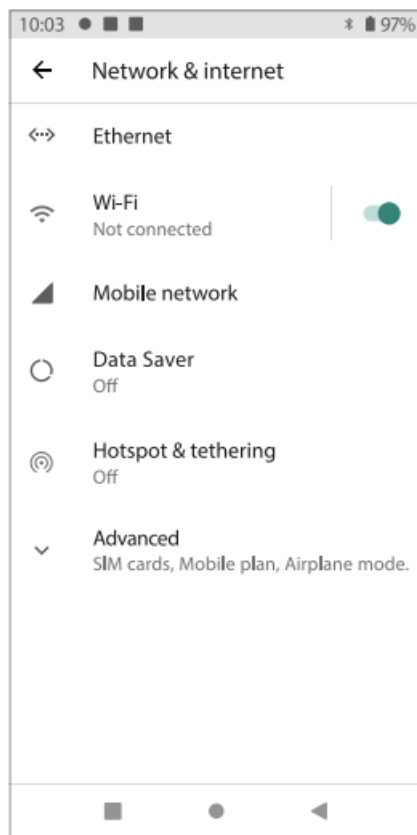
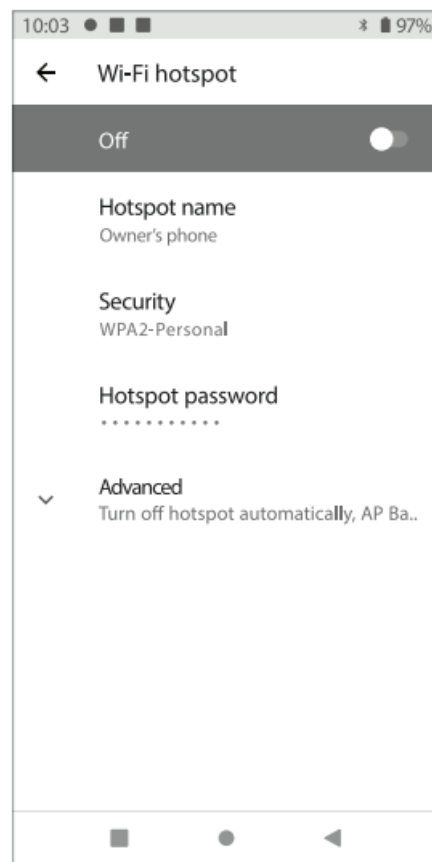From the Network and Internet screen, select Wi-Fi.

The WI-FI screen appears, listing available networks.
Select the network that is managed by your business.

A pop up window appears, using the floating keyboard, enter the password to your business Wi-Fi network.

The terminal will confirm whether your password entry was successful and that the terminal is authenticated to your network.

In the event your Wi-Fi network is unavailable, you can connect your terminal to your personal cellular device until your Wi-Fi network becomes available.

From the Network and Internet screen, select Wi-Fi Hotspot, then enable to ON.

A pop up window appears, using the floating keyboard, enter the password to your personal hotspot network.

Disclaimer: Please note that by connecting to your cellular device, you are using your personal data plan and are responsible for any additional charges on your cellular plan.

Basic Terminal Configuration

The following section will assist you in setting up some basic features on your terminal.
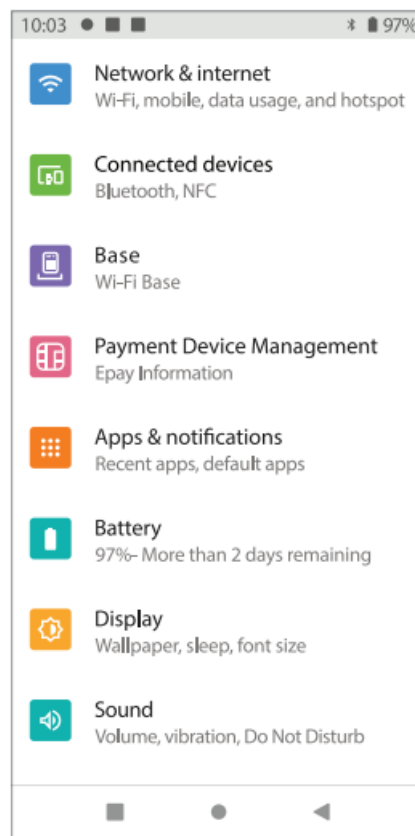
You can return to the Settings menu by pressing ⬤ on the bottom of your terminal screen.
From the settings screen you can select from several menus including; Battery, Display and Sound.
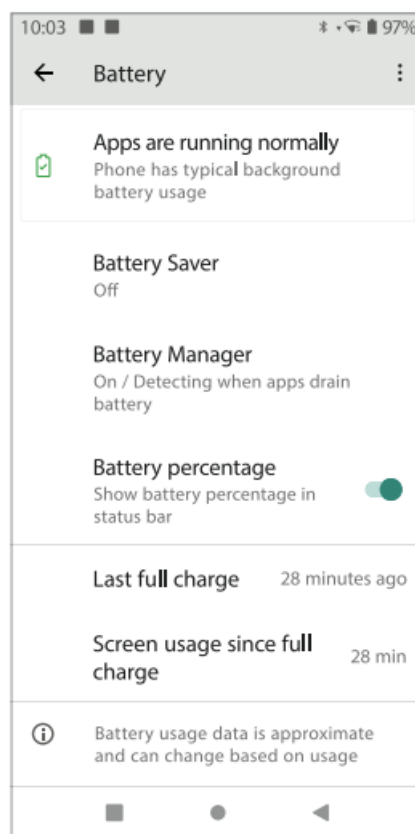
From the Battery menu you can enable the following; Battery saver Battery manager Battery percentage
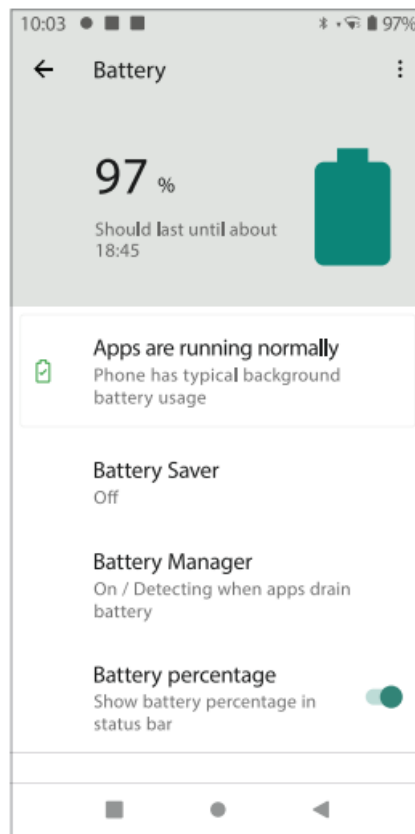
Enabling Battery Percentage ensures a permanent display of the battery life on the main screen of your terminal.
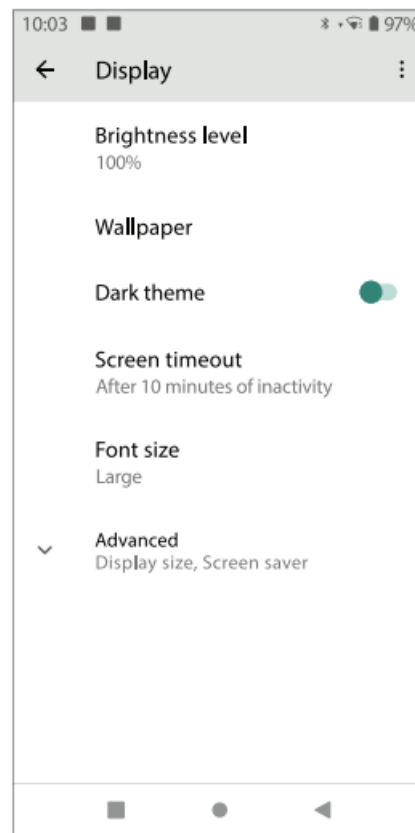
From the Display menu you can adjust the following; Brightness level Screen timeout Font size (does not impact payment application font)
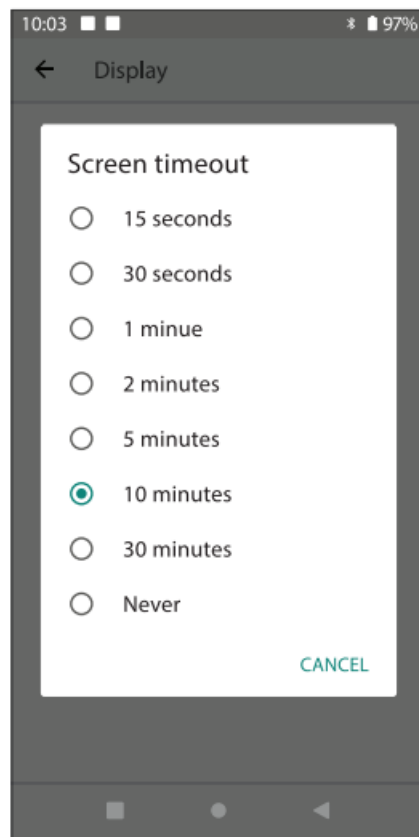
In the Screen Timeout menu you can select how long the screen can be left inactive before locking.
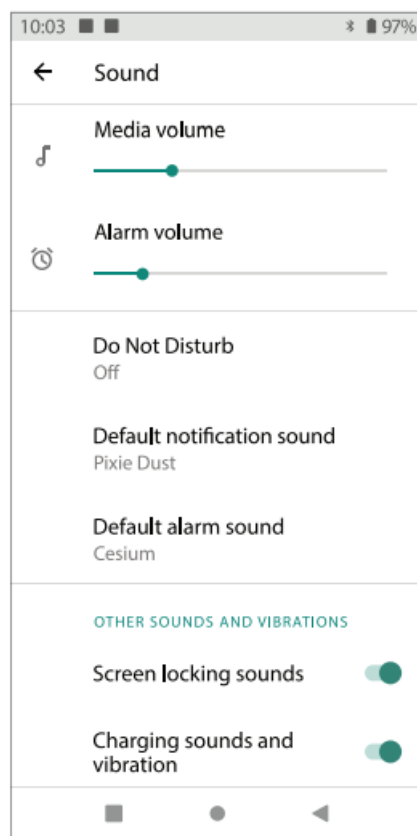
In the Sound menu you can adjust the volume and sounds of the terminal.

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

What the customer sees

Customer is prompted to Tap/Insert/Swipe

1. Customer confirms the sale amount.
2. Customer selects Chemung or Savings (Debit Only).
3. Customer enters PIN and presses [CONFIRM] .
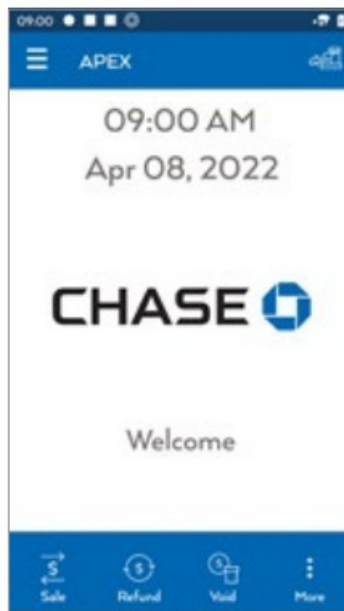4. Receipt prints and approval is displayed.

   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).
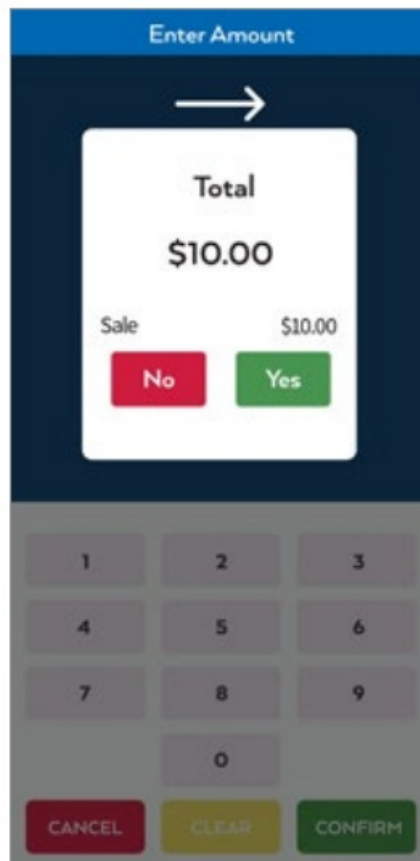
From idle screen, select Refund.

Then key in amount and press

What the customer sees
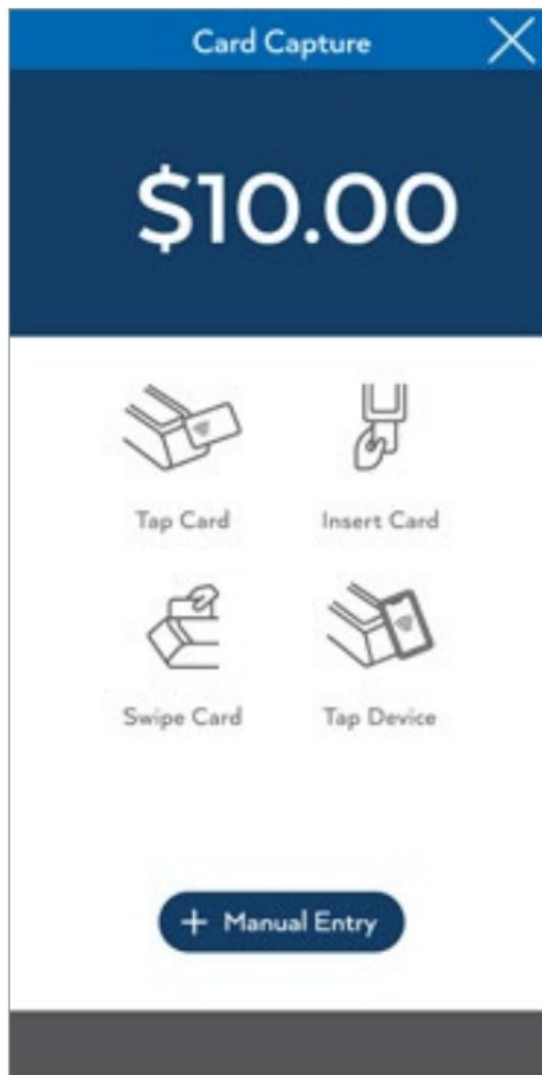
Customer is prompted to Tap/Insert/Swipe

1. Customer confirms the refund amount.
2. Customer selects Chemung or Savings (Debit Only).

3. Customer enters PIN and presses **CONFIRM** .

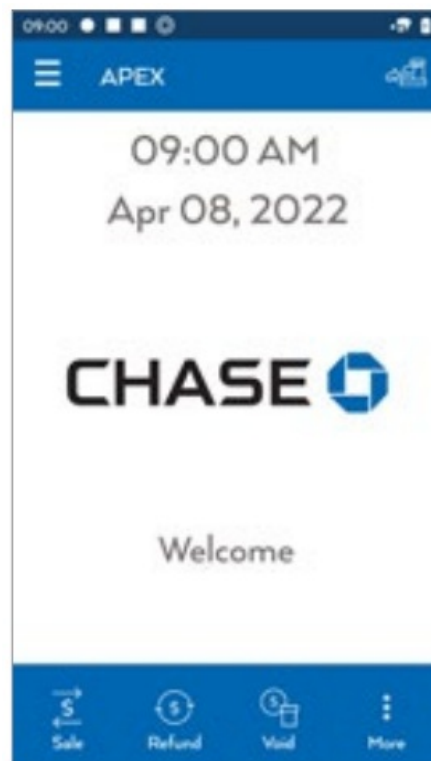4. Receipt prints and approval is displayed.

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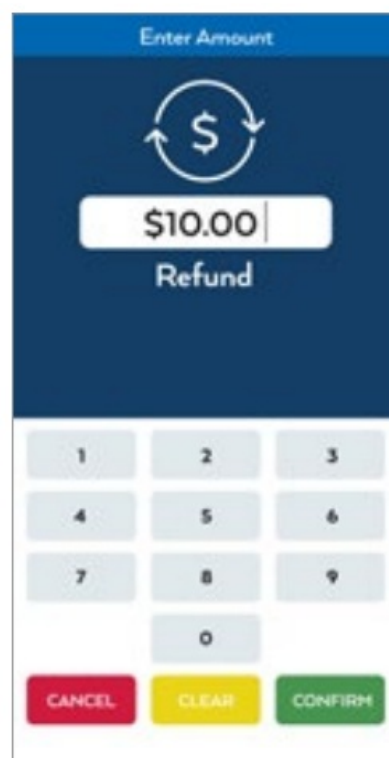
Void
Perform a void to reverse a credit or debit sale, force, or return transaction and prevent any funds from transferring from the cardholder's account. Only available for transactions in the current batch (e.g., same day).

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 Ref Number Approval Code
cct: XXX Ref: X	Review the transaction to delete.
Auth: XXX TR: Credit Sale Total: XX.XX 1/4 [↓] Select	Press [F4] to select the transaction to void.
Confirm Void SXX.XX Yes /No	Confirm the amount to be voided Press [Fl] 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 follow the steps below

Go to your web browser and login to Merchant Center. From the Device
Menu, select the device that needs the passcode: **https://home.wepay.com/referral/signup?
app_id=394250&country=CA**

▼ Your Devices		View Billing	Rent Devices

Devices	Total Rental Fee (tax excluded)
3	$109.97 / month

Serial Number	Model	Connectivity	Monthly Rent
111-111-1111 >	DX8000	Wifi	$29.99
222-222-2222 >	DX8000	Wifi + 4G (Telus)	$39.99
333-333-3333 >	DX8000	Wifi + 4G (Telus)	$39.99

Once the device has been selected, click on the "Generate Dynamic Passcode" button:

The Passcode is generated:

New Dynamic Passcode has been assigned as:

9 0 1 5 7 4

This POS device has been equiped with the new passcode above.
This passcode will be valid until Jan 21, 11:59pm.

Enter this passcode onto your device.

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.
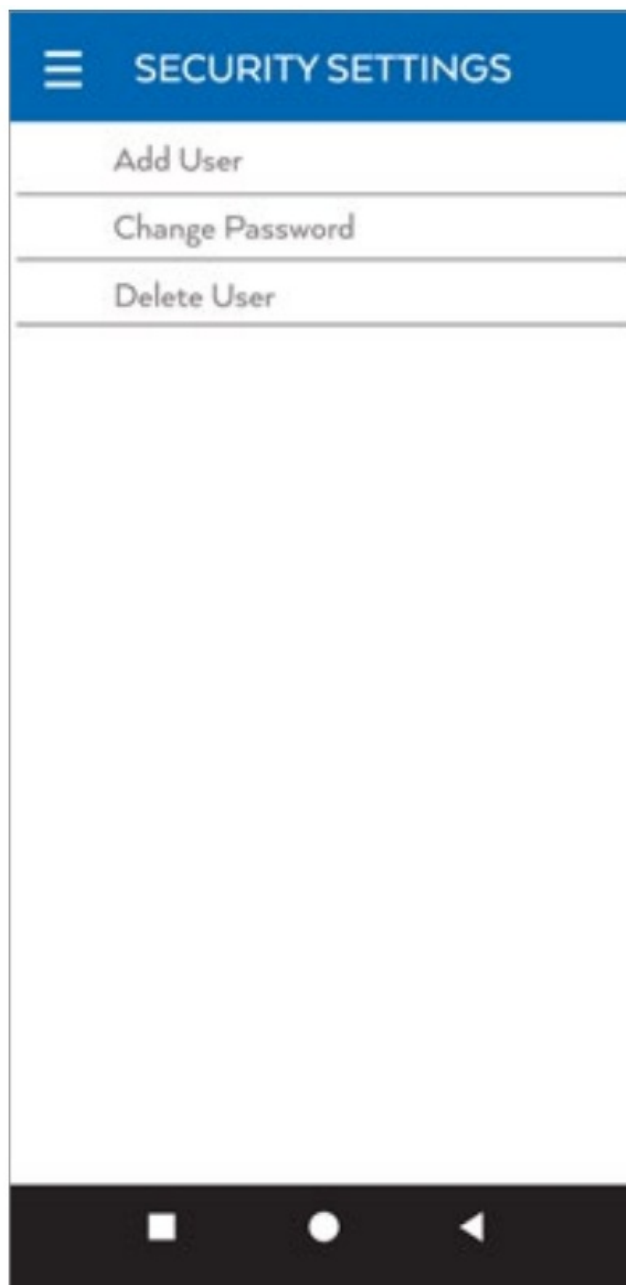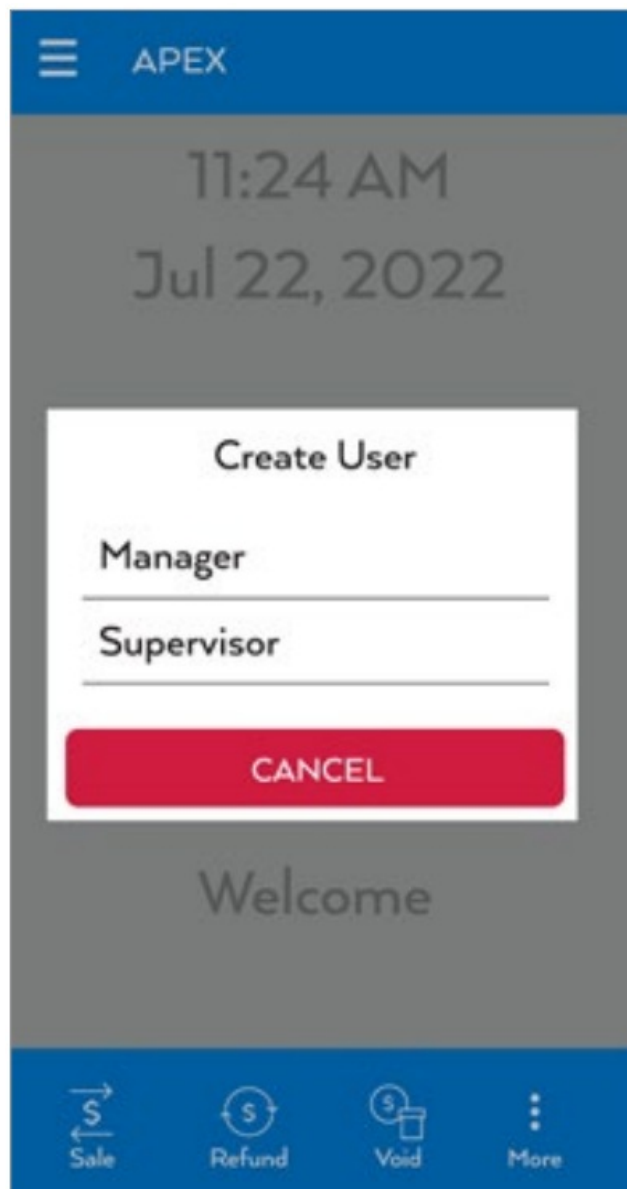

Key in the Dynamic Password and press

In the Security Settings you may Add User, Change Password or Delete User.
Press the desired function and follow the prompts.
We recommend the creation of unique ID/Passcode for each of the 3 password levels

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.

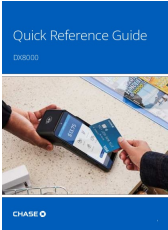**The Information You Need, When You Need it.**
For Guides and Helpful Information: **https://www.chase.ca/en/support**
Call Merchant Support 24/7: 1.866.814.2769

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Documents / Resources

CHASE DX8000 Terminal Solutions [pdf] User Guide
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