First Data
EFTPOS

User Guide

8006L2-3CR Integrated PIN Pad

First Data™

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Get to know your PIN pad

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Get to know your PIN pad

Introduction

Your **First Data Integrated PIN Pad** is designed to interface with selected POINT of Sale (POS) systems without the need for double keying the same information into both your POS and an EFTPOS terminal.

The First Data integrated PIN Pad enables the completion of EFT transactions through the PIN pad.

The First Data integrated PIN Pad has been specifically designed to effortlessly connect to POS solutions that have been accredited by PC-EFTPOS, one of Australia's leading supplier s of Integrated EFTPOS payment solutions in Australia.

When configured to be used in conjunction with a PC-EFTPOS accredited POS system, all the EFTPOS functionality is initiated through the POS.

If necessary, please consult your POS provider on the operation of EFTPOS transactions through your POS.

PIN Pad location and PIN privacy

The physical location of a PIN Pad is important in protecting a customer's PIN privacy.

When your new PIN Pad is installed or relocated within the premises, you must take care to ensure:

- the PIN Pad is in a position that allows the customer to enter their PIN so it cannot be observed by employees or other customers
- the PIN Pad has not been placed at an angle or height that prevents customers from shielding their PIN entry
- the placement of mirrors and other reflective materials do not allow the customer's PIN entry to be observed through reflection
- security cameras can't make a visual record of a customer's PIN entry.

You should communicate these guidelines to any staff members that process EFTPOS transactions using the First Data PIN Pad.

It is also important to remind staff members that customers should never be asked to disclose a PIN.

PIN Pad ownership

All physical equipment provided by First Data remains the property of First Data.

Your PIN Pad layout

First Data 8006L2-3CR Integrated PIN Pad

Transaction processing options

The First Data PIN Pad has a chip card reader, a magnetic stripe reader and an integrated contactless reader for processing transactions.

All chip cards must be inserted into the chip card reader as shown below.

- Insert the credit card into the card reader with the gold contact pad facing upward, as shown below.
- Leave the chip card in the reader until the transaction is completed and you are prompted to remove it.
- The screen prompts will guide you through the transaction process.

If the card is capable of performing a contactless transaction, place the card over the contactless reader, as shown below.

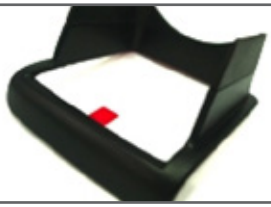
If the card does not have a chip or contactless capability, you can process transactions by swiping the magnetic stripe through the PIN Pad.

Smart card reader — The integrated circuit card (ICC) reader is located at the bottom end. Please make sure that the gold ICC contact pad is facing upward when inserting the card into the slot.

Magnetic card reader — The card reader slot is on the right side of the PIN Pad. With the magnetic stripe facing [inwards], slide the card in either direction through the slot without stopping. If the card swipe fails, check the position of the magnetic stripe and slide the card again.

Contactless card reader —The contactless card reader antenna is embedded behind the display and PIN pad. The reader's lights will show blue when the PIN Pad is powered on to indicate the reader is working normally. To process a contactless payment, place the contactless card near the card reader antenna during a transaction.

Installing the privacy shield



You can choose to add a privacy shield to the terminal to provide customers with additional security when entering their PIN.

Remove the adhesive tab around the privacy shield.

Carefully place the privacy shield's adhesive side around the keypad.

Overview of the Integrated PIN Pad and PC-EFTPOS Software Installation

PC-EFTPOS Hardware Installation and Configuration

The PIN Pad is used to encrypt sensitive data within financial transactions, and perform all (logical) communications with First Data. To this end, the First Data 8006L2-3CR PIN Pad is certified compliant with the PCI and EMV (Level-1 and Level-2) security standards.

The method of connecting the First Data 8006L2-3CR PIN Pad to your POS solution will be either a RS232 serial or USB connection.

The First Data 8006L2-3CR PIN Pad can be installed by an authorised technician but if you chose to perform installation yourself or arrange for installation to be performed by your POS provider, the following information is provided to assist.

Determine the POS configuration required at your site. Is a Back Office PC to be configured with PC-EFTPOS Gateway details? If not, which POS is to be configured with the PC-EFTPOS Gateway details?

If you intend to configure to a back office PC which hosts the Gateway connection

Run PC-EFTPOS Setup.exe
Select No PIN Pad
Select First Data as the Bank
At Comms to Bank select PC-EFTPOS Gateway on this PC
Enter Gateway User Name and Password
When Setup complete check that the line status in EFT Server reflects 'Connected'

If you intend to configure a POS unit to host the Gateway connection

Run PC-EFTPOS Setup.exe
Select PIN Pad and Server
Select First Data as the Bank
In Client select a Comms Port for PIN Pad
At Comms to Bank select PC-EFTPOS Gateway
Enter Gateway User Name and Password
When Setup complete check line status in EFT Server reflects 'Connected'
Connect a PIN Pad
In Client confirm that the correct Comms Port is assigned

If you intend to configure any other POS (which does not host the Gateway connection) for connection via one of the above options to access the gateway

Run PC-EFTPOS Setup.exe
Select No PIN Pad and Server
In Client select a Comms Port for PIN Pad
At Comms to Bank select another PC on the Network
At Server Config enter IP Address of PC-EFTPOS Gateway PC
When Setup complete check line status in EFT Server reflects 'Connected'
When Setup complete check that the line status in EFT Server reflects 'Connected'
Connect a PIN Pad
In Client confirm that the correct COM Port is assigned
Configure the PIN pad by entering the CENTRiQ ID **(if unknown please contact the helpdesk on 1800 243 444)** by keying in the 5 digit ID and press Enter.
A software download will occur and will be complete when the PIN Pad displays 'Transaction / Admin'
Open PC-EFTPOS Client / Control Panel / Logon – PIN Pad and Logon will occur

All chip cards must be inserted into the chip card reader as shown below.

- You must contact your POS provider to configure the POS Software for Integrated EFTPOS and to set up receipt printing.
- If your POS Solution does not have the latest PC-EFTPOS software installed, install the software from the PC-EFTPOS installation CD or the setup file available for download from the website.

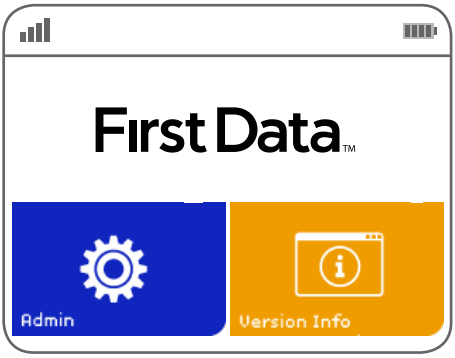
http://www.pceftpos.com/media/PC-EFTPOS%20Setup.exe

How to configure the PIN Pad

The default comms mode when first powering on the PIN Pad will be pre-set at the factory according to the cable already connected to the PIN Pad:

First PIN Pad screen	Second PIN Pad screen
CONFIGURE 1-WIFI (restart needed) 2-SERIAL (POS integration) 3- PSTN 4- DIAL: PREFIX 5- BLIND DIAL ENTER-CONTINUE	ENTER **CENTRiQ ID**
Press ENTER to continue.	**CENTRiQ** is the First Data supported Terminal Management System (TMS). Enter the **CENTRiQ ID** to connect to the TMS. The **CENTRiQ ID** will be provided to you by First Data. Enter the **CENTRiQ ID** using the PIN pad's keypad then press the green enter key.

The PIN Pad will perform a software download and go the idle screen when the download is completed.



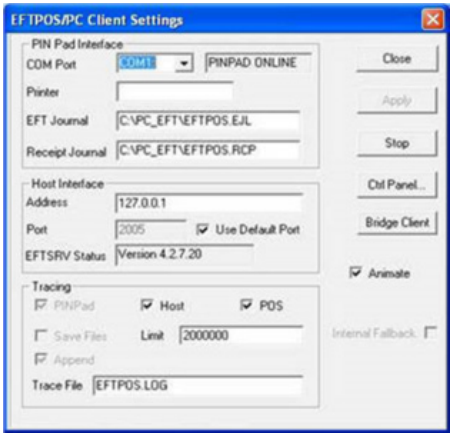
How to log on

Go to the Windows Task Bar and open the PC-EFTPOS Client by double clicking on the C Icon with the Green dot.

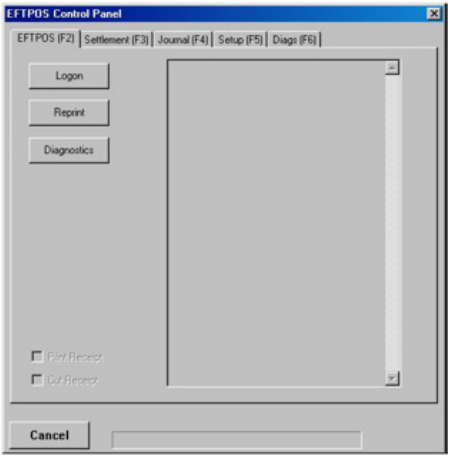
This will bring up the PC-EFTPOS Client Graphical User Interface (GUI)

Confirm that the Status of the PIN pad is ONLINE (PIN PAD ONLINE)

Click on CTRL Panel to open the PC-EFTPOS Control Panel

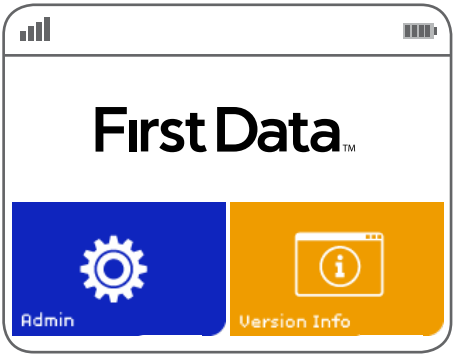


Click "**Logon"** button to initiate a Logon

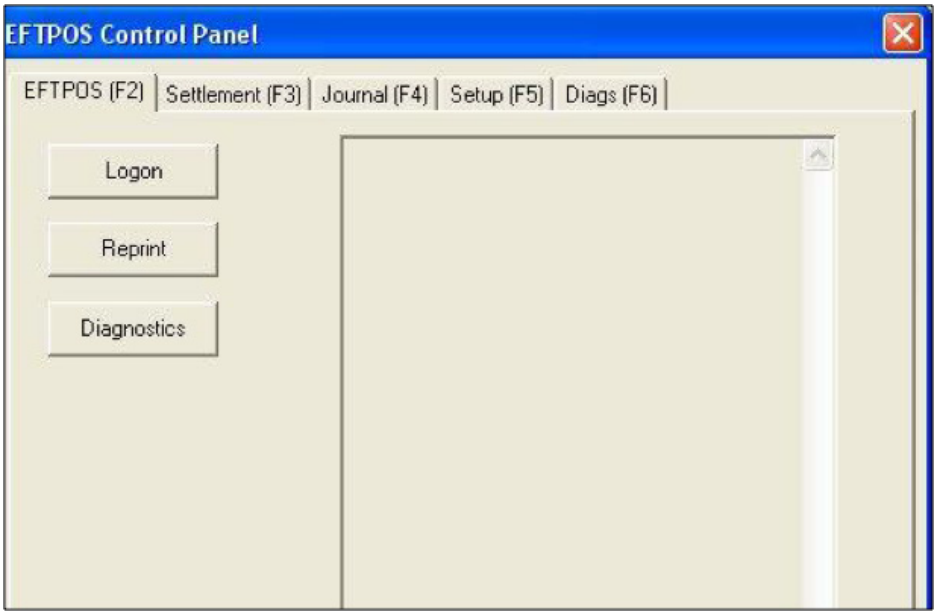


The First Data PIN Pad is now ready.

Please note: If the previous steps were successful the PIN Pad will return to the Idle Screen.



The PC-EFTPOS control panel



Through the PC-EFTPOS Control Panel, you will be able to perform:

Logon – Performs a Logon to the Host
Reprint- Reprints last receipt
Diagnostics – Provides reports on software configuration and version

Operating your Integrated PIN Pad — samples of transaction flows

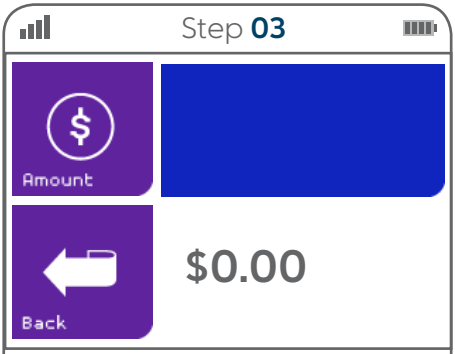
The rinciple of the integrated PIN Pad is that all EFT transactions are instigated from your POS solution to prevent the need for double keying. The PIN Pad is in essence a "slave" to your POS serving the purpose of enabling the customer's PIN to be entered and to build a secure EFT transaction for processing.

Purchase transaction

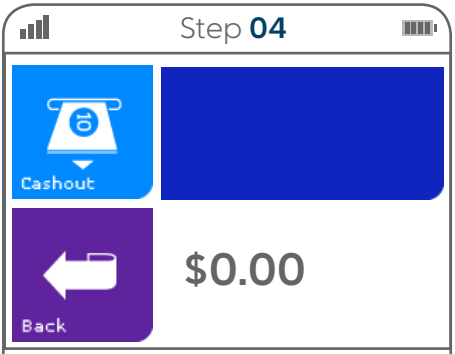
In this sample transaction flow, all transaction data is collected at the ECR/POS, and sent down to the terminal in the PC-EFTPOS Transaction command.

Select **'Purchase'** from the main screen. If it is configured as a hot key. (Refer to page 76 for details.)

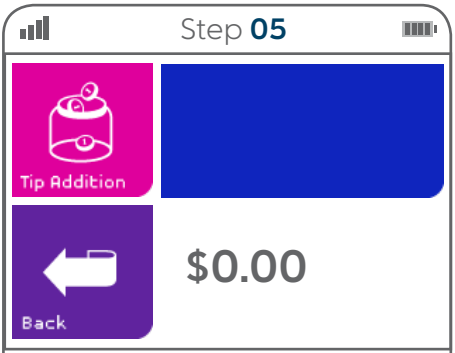
Alternatively, if 'Purchase' is not a configured hot key, select '**Transaction**', then select 'Purchase' from the transaction list.



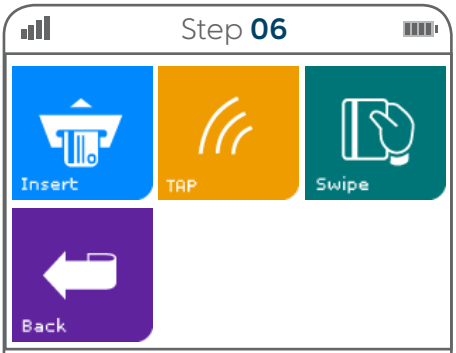
Key in the purchase amount and press the green **ENTER** key on the keypad.



Key in the cash out amount if required.



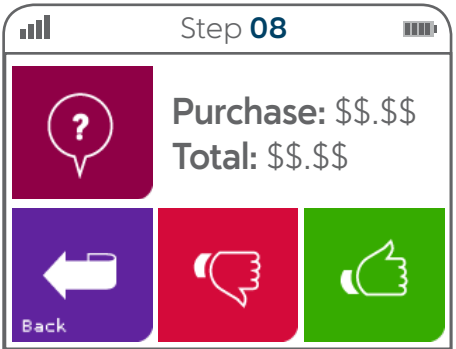
Key in the tip amount if required.



Insert, tap or swipe the card.

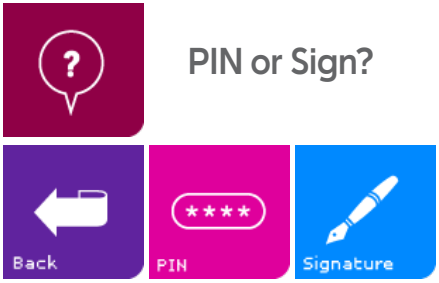
Note: If the value for a contactless transaction is $100 or greater, the terminal will prompt the customer to enter a PIN or insert their card.

Select the account type.



Confirm the transaction amount.

Step **09**



Ask the customer if they would prefer to enter their PIN or sign the receipt. Press **'PIN'** or **'Signature'** accordingly.

Step **10**

EFTPOS in progress.
Please wait

This screen indicates the terminal is attempting to process the transaction. The screen will update to reflect the status, eg 'APPROVED'.

Step **11**

Approved

If the transaction is '**APPROVED'** this screen will appear

Step **12**

⟨STATUS⟩
⟨MESSAGE⟩

If the transaction is **'DECLINED'** this screen will appear with an audible double beep sound to draw attention to the screen

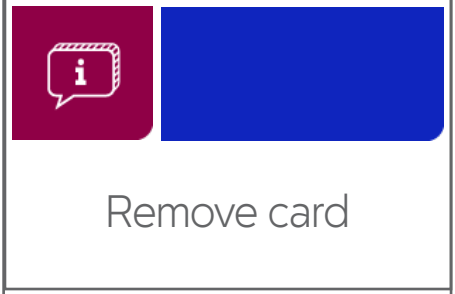
⟨MESSAGE⟩ is optional depending on the reason for the declined transaction.

Step **13**

If the customer requires a copy of the receipt, press the green 'thumbs up' button.

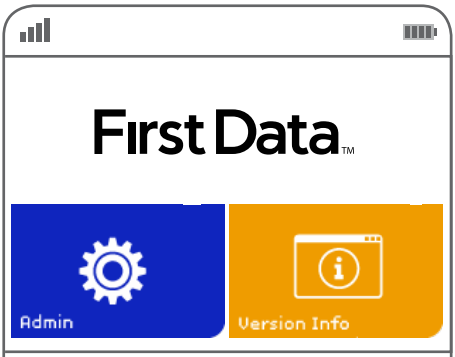
If the customer does not require a copy of the receipt, press the red 'thumbs down' button.

Step **14**



If the customer used a chip card to process the transaction, you can now remove the chip card.

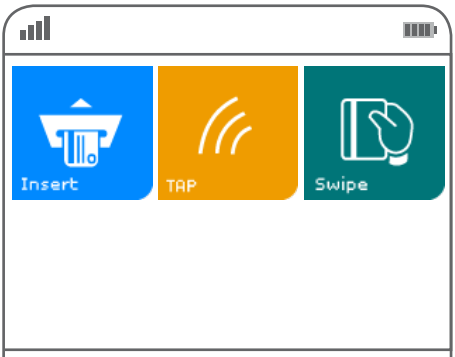
Refund transaction



All transaction data (ie: card data, transaction-type, purchase amount, cash-out amount, account type) is collected at the POS.

Enter the **Refund Amount**

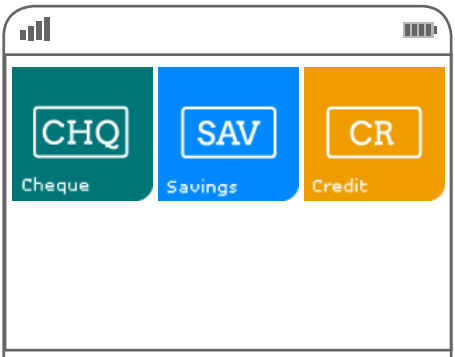
At this point the PIN pad will be displaying the First Data/Admin/Version Info display on the screen.



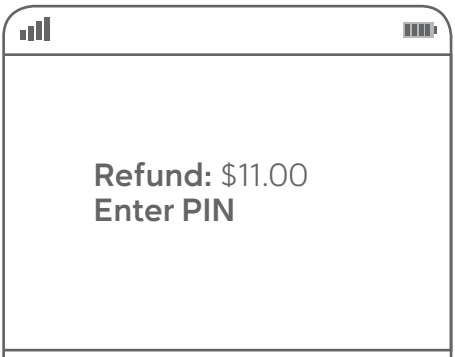
The EFT Transaction is initiated from the POS Software. The POS will display

'Please Present Card'

The PIN Pad will ask the cardholder to Insert/ Tap or Swipe



Select Account on PIN Pad and the PIN Pad will display Transaction in progress



The PIN pad prompts for the customer PIN to be entered/ or press **ENTER**.

Customer enters their PIN, and the PIN pad continues processing the transaction.

After the customer enters their PIN, the PIN pad continues processing the transaction with the acquirer.

How to complete a settlement

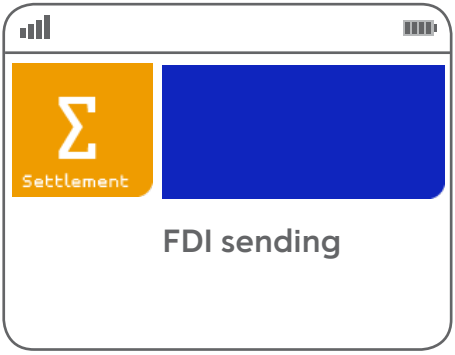
You can initiate settlement manually any time before 1730 local time. You can also configure your PIN Pad to automatically settle any time between 0001 and 1800 local time.

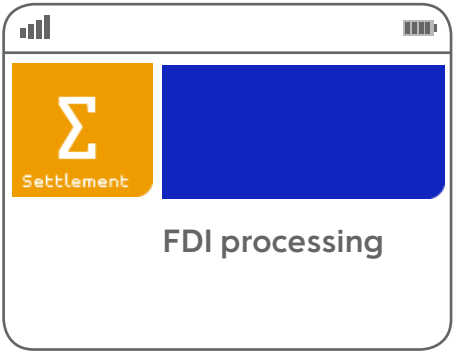
If you want to change your settlement terminal cut off time to allow for longer trading hours, please visit the client support page to download a form and email your request.

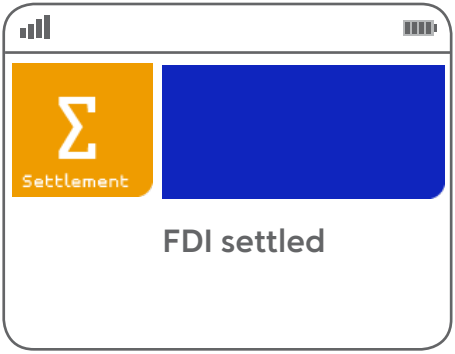
If you do not complete settlement using one of these methods, you will be prompted to manually settle when processing the first transaction after 1800 local time. You can perform multiple settlements a day at any time, but the first settlement of the day (after 0301 and before 1730) will be the only settlement processed that day.

Performing a manual settlement must be initiated from your POS. Please refer to your POS vendor for instructions.

During the settlement process, the PIN Pad screen will display:





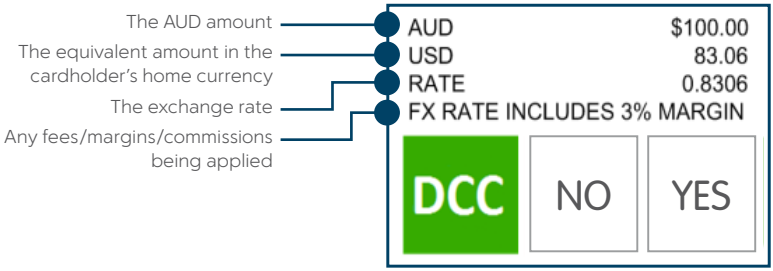


GlobalChoice Dynamic Currency Conversion

GlobalChoice DCC is offered to your Visa and MasterCard international cardholders when making their purchase on the First Data EFTPOS terminal. When the card is presented to the terminal, the terminal will determine whether the card is a candidate to offer DCC and if so, will automatically prompt the merchant by loading the DCC particulars onto the screen.

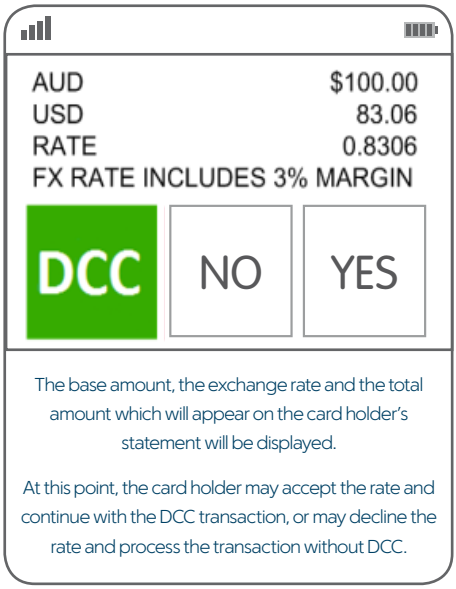
A typical DCC transaction flow therefore reflects:

- International cardholder presents a Visa or MasterCard for payment
- The EFTPOS terminal determines whether the card presented for payment is an international card.
- If it is, determine whether the card falls into one of the eligible currencies for DCC.
- Obtain an exchange rate.
- Display the pertinent details on the EFTPOS screen as per below



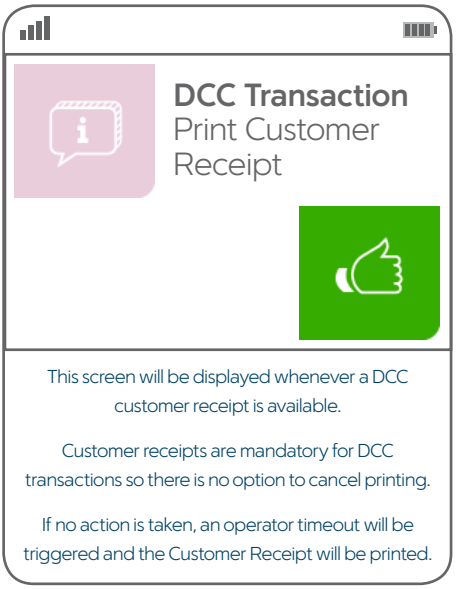
Merchant and cardholder receipts will be generated as usual, however, additional information will be printed on the receipt in accordance with the scheme requirements. It is therefore mandatory to provide the cardholder their copy of the receipt for a DCC transaction.

Mastercard example



The base amount, the exchange rate and the total amount which will appear on the card holder's statement will be displayed.

At this point, the card holder may accept the rate and continue with the DCC transaction, or may decline the rate and process the transaction without DCC.



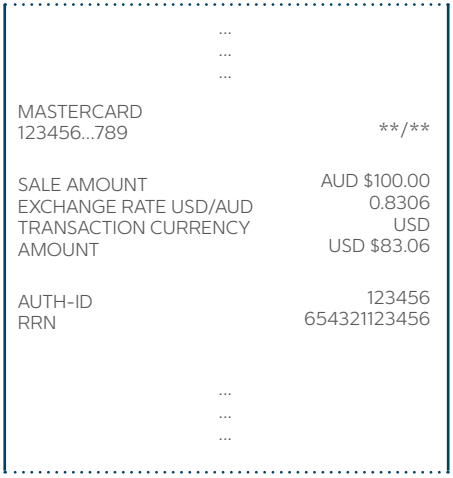
This screen will be displayed whenever a DCC customer receipt is available.

Customer receipts are mandatory for DCC transactions so there is no option to cancel printing.

If no action is taken, an operator timeout will be triggered and the Customer Receipt will be printed.

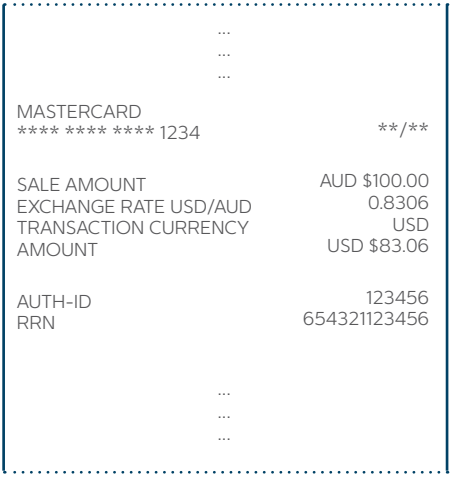
Merchant Receipt for Mastercard and non VISA (i.e. default receipt)

DCC rate, DCC currency and DCC Total inserted into the standard receipt

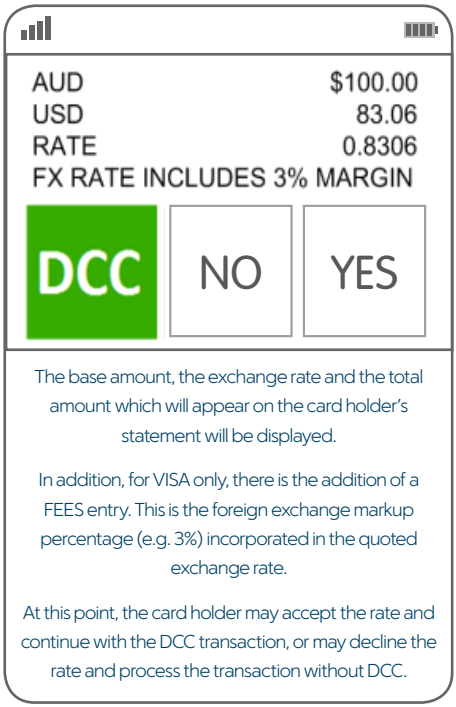


Customer Receipt for Mastercard and non VISA (i.e. default receipt)

Note: printing of this receipt is mandatory; the customer/merchant will not be prompted as to whether they require a copy.



VISA example



The base amount, the exchange rate and the total amount which will appear on the card holder's statement will be displayed.

In addition, for VISA only, there is the addition of a FEES entry. This is the foreign exchange markup percentage (e.g. 3%) incorporated in the quoted exchange rate.

At this point, the card holder may accept the rate and continue with the DCC transaction, or may decline the rate and process the transaction without DCC.

Merchant Receipt for VISA

The DCC exchange rate, the foreign exchange markup percentage, the transaction currency and the DCC Total are inserted into the standard receipt.

...

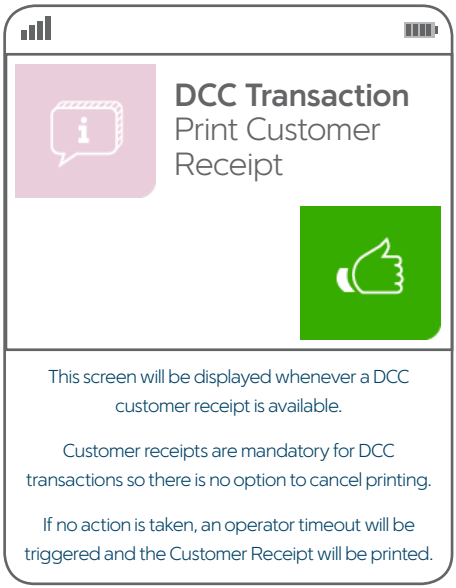
MASTERCARD
123456...789 **/**

SALE AMOUNT	AUD $100.00
EXCHANGE RATE USD/AUD	0.8306
% MARGIN INCLUDED	3
TRANSACTION CURRENCY	USD
AMOUNT	USD $83.06
AUTH-ID	123456
RRN	654321123456

The service to pay in your own currency is offered by First Data

This transaction is based on Reuters Wholesale Interbank exchange rate.

...



This screen will be displayed whenever a DCC customer receipt is available.

Customer receipts are mandatory for DCC transactions so there is no option to cancel printing.

If no action is taken, an operator timeout will be triggered and the Customer Receipt will be printed.

Customer Receipt for VISA (i.e. default receipt)

Note: printing of this receipt is mandatory; the customer/merchant will not be prompted as to whether they require a copy.

...

VISA
**** **** **** 1234 **/**

SALE AMOUNT	AUD $100.00
EXCHANGE RATE USD/AUD	0.8306
% MARGIN INCLUDED	3
TRANSACTION CURRENCY	USD
AMOUNT	USD $83.06
AUTH-ID	123456
RRN	654321123456

I have been offered a choice of currencies including AUD and agreed to pay in (USD).

The service to pay in your own currency is offered by First Data

This transaction is based on Reuters Wholesale Interbank exchange rate.

...

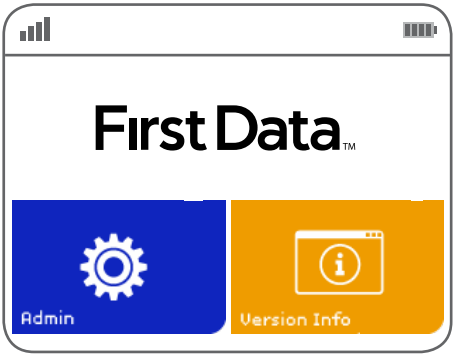
ACe Acceptance

Your terminal supports the eftpos Australia ACe chip for both contact and contactless transactions which provides consumers with more payment choices and improves security. When an eftpos Australia ACe chip is presented at the terminal, the available application names for that cardholder's card will be shown instead of the cheque, savings and credit options. This allows the cardholder to choose the account themselves similar to the example screen below.

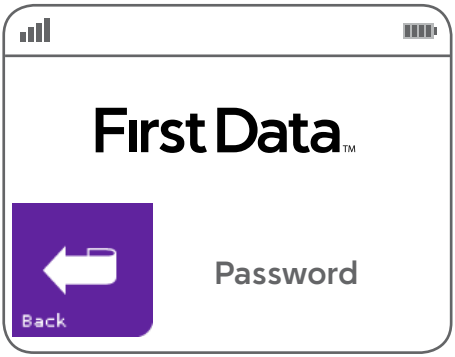
Note: Application names and order can vary depending on the card.

Admin functions

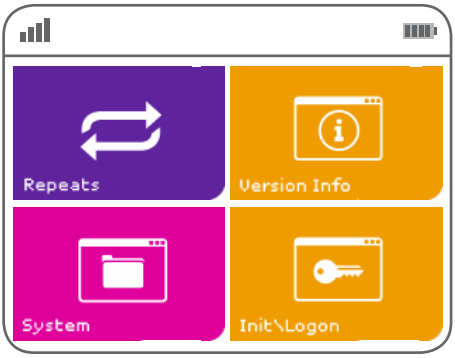
Certain administration functions can be instigated from the PIN Pad. These administration functions are performed by selecting the 'Admin' button on the idle screen

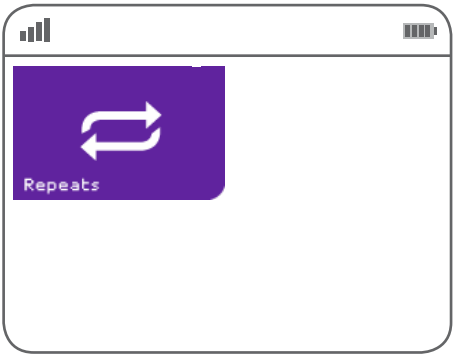


Having selected the 'Admin' button, you will be requested to enter password

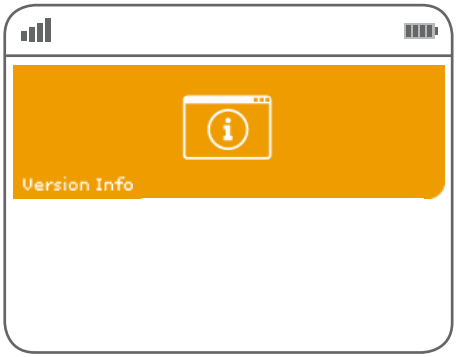


Having entered the correct password, you will be offered the following options.
Note: An incorrect password will clear for retry.

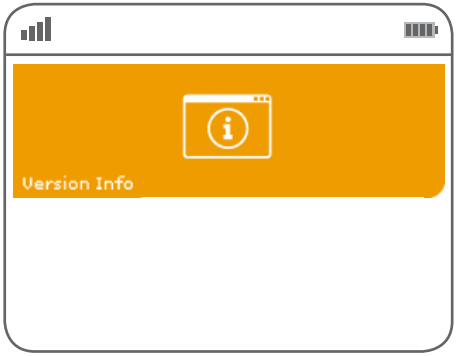




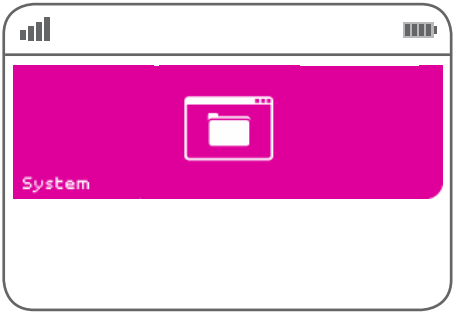
Repeats will process outstanding actions such as check for outstanding reversals.
Note: If there are no repeats to process there is no prompt or noticeable response from the PIN Pad.



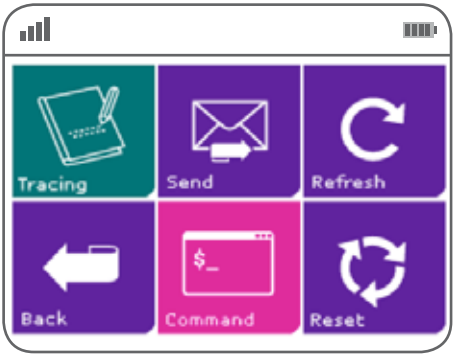
Version Info will display the current Version of PIN Pad software being run.



This will perform a logon of the PIN Pad connecting it to First Data.

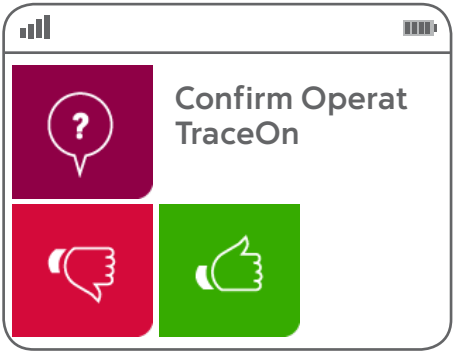


The System button will allow the user to navigate to a series of lower level functions. After pressing the System button, the selection reflects.



Tracing is a means to send log files to First Data for analysis. This function is usually undertaken when troubleshooting is required.

Tracing should only be turned on when requested to do so by First Data. When turned on a confirmation screen will be displayed as follows:



Send is a means to turn tracing off and send the resulting log files back to First Data for analysis. This function is usually undertaken when troubleshooting is required.

Tracing should only be turned on when requested to do so by First Data. When turned on a confirmation screen will be displayed as follows:

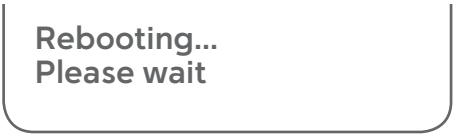
Refresh is a means to download any updates to the PIN Pad software.

A refresh should only be performed when instructed to do so by First Data.

Note: during the refresh process the PIN Pad will reboot, re-connect to the POS and logon.

The PIN Pad will display:

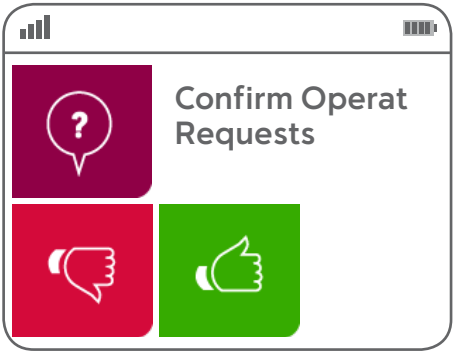
Then:



Command is a means to download any commands to the PIN Pad software.

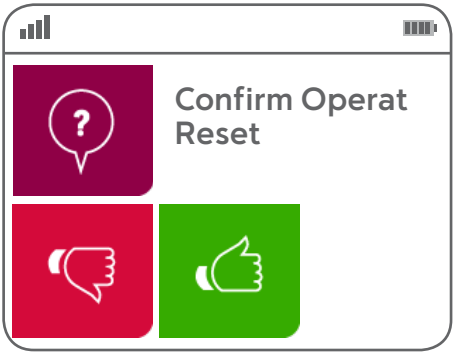
A command should only be performed when instructed to do so by First Data.

When selected, a confirmation screen will be displayed as follows:



Reset will complete a full reset of the PIN Pad.

A Reset should only be performed when instructed to do so by First Data.



Where to get help

First Data client support

Visit the client support page at **firstdata.com.au**

The site is equipped to keep you up to date with tips and articles, forms and guides, security and fraud prevention information and so much more.

Or call

Service and support	**1800 243 444**
Fraud and risk support	**1800 372 838**

Keep your merchant ID number handy when you call, this can help speed up your enquiry.

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