

# **Point of Banking Handheld Unit**

user manual



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# Introduction

Your new POB handheld payment terminal is an amazing device with the ability to accept payments anywhere that your company goes. Around the store or around the town (With optional cellular data service), your POB device is able to function when and where you need it.

Your device should be pre-setup when it arrives to you, however there are a few things that you will need to complete before using it.

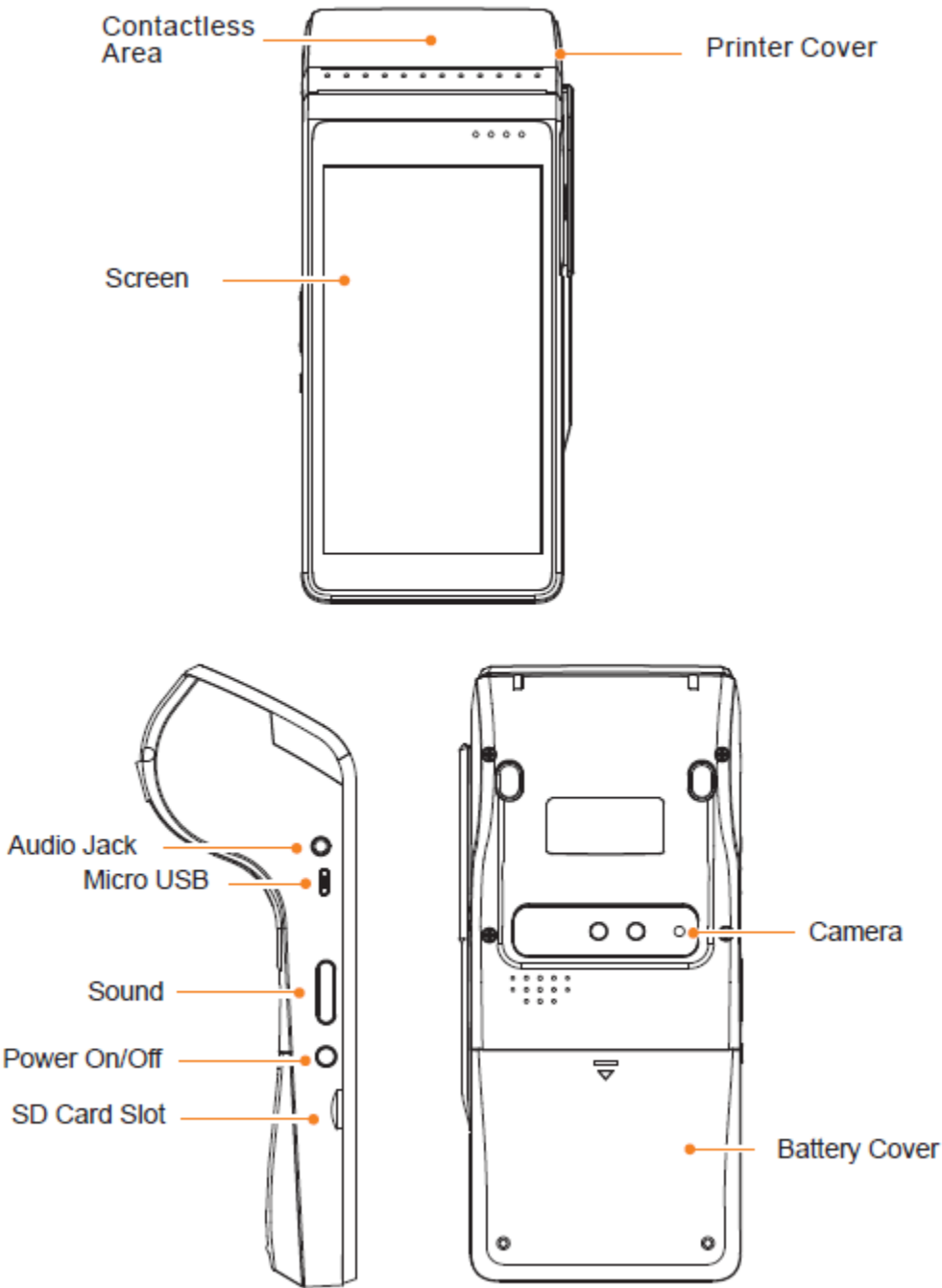
This manual will guide you through the following:

- Getting to know your device – Buttons and other functionality.
- Initial setup – Connecting to WIFI, opening the payment app, verifying the Terminal ID, Merchant Name and Software Version (**These are required steps**)
- Accepting payments – available payment options.
- Troubleshooting – The most common issues are outlined for you.



*This manual does not include technical specifications or programming of the sim card options. If you would like to add a sim card for cellular data service, or need to double check sim card programming, you will need to reach out to your account rep for assistance.*

# Powering on and Basic Operation

## Device Features



## Powering on the device

1. Power On: press the power “” key for 2-3 seconds to power on terminal.
2. Power Off: press the power “” key until it shows menu “power off; reboot; airplane mode.” Select “power off” to enter menu “your POS terminal will turn off; cancel; ok.” Press “ok” to confirm.

## Loading Paper

1. Open printer cover (Figure 1)
2. Remove the tape from the paper roll (Figure 2)
3. Place into paper tray according to installation guide picture with paper rolling from underneath towards the exit (Figure 3)
4. Close the cover and tear off the paper. Take hold of the printer paper with your hand, tearing down the paper in the direction shown in the graphic below. Maintain a uniform force and quickly remove the paper.

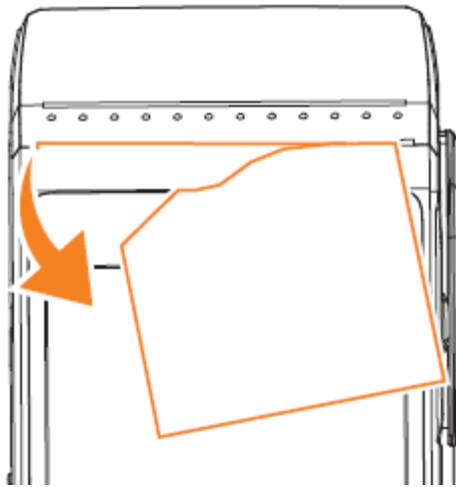


Figure 1



Figure 2



Figure 3

## Lock Screen

When you first power on or reboot the device, it will start on a lock screen. To unlock, simply swipe up from the bottom of the screen.



# Initial Setup

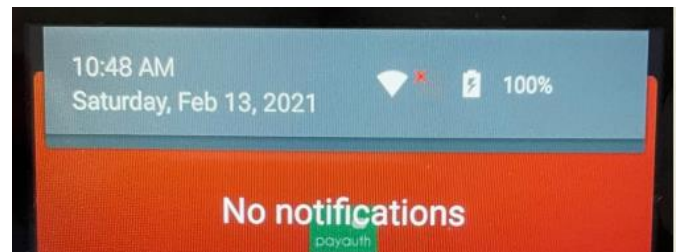
## Pull Down Menu

There are 2 different pull-down menus on the POB device.

The first time you swipe down from the top of the screen it will bring up a quick status bar.

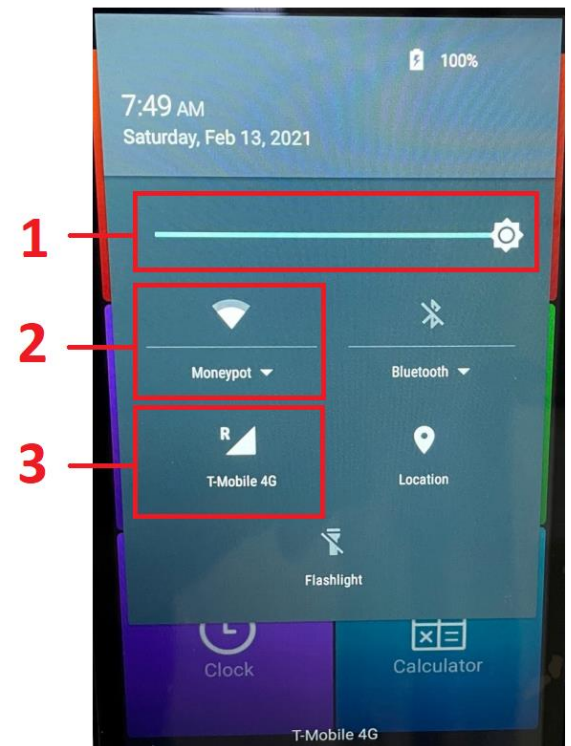
This quick status bar shows:

- Time/Date
- Cell connection status (If available)
- WIFI connection status
- Battery condition and percentage
- Any device notifications



A second swipe down from the top will show the more detailed pull down menu. On this menu there are only 3 settings that you will need to be familiar with.

1. Bar to adjust the brightness.
2. Icon for WLAN (Wi-Fi)
  - a. If it is colored white, then it is turned on.
  - b. If it is colored grey with a line through it, it is turned off.
  - c. if connected to a network, it will show the network name.
  - d. If not connected, it will show 'WLAN'Gen1.
  - e. If there is an "!" above the icon there was a problem connecting to the network.
3. Icon for Cellular Connection
  - a. If it is colored white, then it is turned on.
  - b. If it is colored grey, it is turned off.
  - c. if connected to a cellular network, it will list the carrier.
  - d. If not connected, it will show 'no service'.
  - e. If the icon is not showing in the pull-down menu, then the device is not recognizing the sim card.
  - f. If there is an "!" above the icon it has an issue connecting to the network

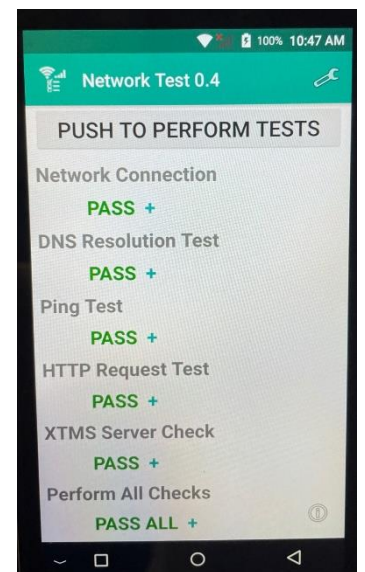
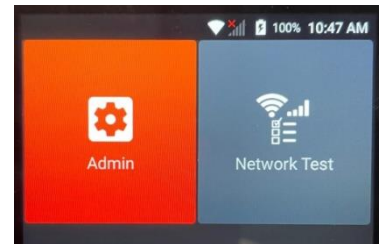


## Connecting to Cellular


If your device includes the optional sim card for cellular data, then it should be pre-programmed and setup before shipping from the warehouse.

To check and test cellular connection before connecting to WIFI.

1. Swipe down from the top 2 times to show the detailed pull-down menu.
2. Verify that the icon shows for cellular and is white with good signal and a carrier name is shown.
  - a. Icon may or may not have an R for roaming, this is perfectly fine and should not affect the service.
3. Once you verify it shows connected, swipe up on the screen to close the pull-down menu, then swipe the screen to the left until you see the app for Network Test.
4. Click on Network Test app icon to open it.
5. Click the button at the top labeled "PUSH TO PERFORM NETWORK TESTS"
6. It will take a few moments, but all tests should come back as "PASS +"
7. If any return as failed, you likely need to reboot the device so it can reconnect to the cell network or move to where the device receives a better cellular signal and try again.
8. If it continues to fail network test over cellular only, please contact your sales rep for further assistance.



## Connecting to WIFI

1. Swipe down from the top of the screen
  - a. NOTE: Do not enter through settings app; if you are receiving an "Input Password" popup, hit cancel and then swipe down from the top of the screen.
2. Touch and hold the Wi-Fi icon (labeled WLAN) 
3. Turn on Use Wi-Fi (labeled WLAN)
4. Tap a Listed network and enter the password.

### PLEASE NOTE:

- Device only connects to a 2.4ghz Wi-Fi network, it does not connect to 5ghz Wi-Fi. It may experience troubles if both network 2.4 & 5g have the same SSID.
- For advanced settings – hidden networks, assigning Static IP, etc. – press and hold the WLAN button until "Advanced Settings" shows.

## Network Test

You can use the network test app to test both WIFI and cellular connections. If trying to troubleshoot one specifically it is best to first shut the other connection off while doing the test.

To disable cellular (If your device has that optional function)

1. Swipe down from the top of the screen twice.
2. Click on the cell icon and it will open a sub menu.
3. There will be a mint green toggle button for cellular data on the top right that you can switch off by pressing it.
4. When done testing WIFI you can enable cellular data again by repeating the same steps, this time pressing the greyed-out toggle button to turn the cellular data back on.

To disable WIFI

1. Swipe down from the top of the screen twice
2. Click on the WIFI symbol to disable it.
3. To re-enable simply repeat the same steps but this time you will click the greyed out WIFI icon with the line through it
  - a. You can also click the dropdown arrow next to the WIFI network name to open a submenu where you can then press the mint green toggle button on the top right to disable WIFI, then repeat the same steps and press the greyed-out toggle button to re-enable it.

To perform the network test from the home screen

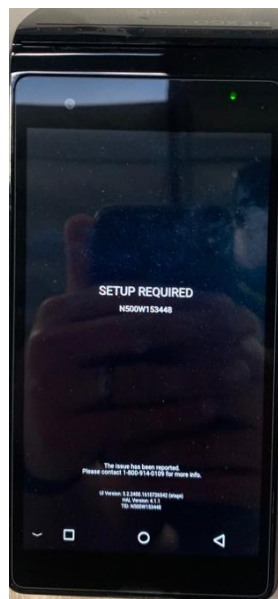
1. Swipe the screen to the left until you see the app for Network Test.
2. Click on Network Test app icon to open it.
3. Click the button at the top labeled "PUSH TO PERFORM NETWORK TESTS" it will take a few moments, but all tests should come back as "PASS +"
4. If any return as failed you likely need to reboot the device so it can reconnect to either the cell network or the WIFI, or you may need move to where the device receives a better cellular or WIFI signal and try again.
5. If it continues to fail network test, please contact your sales rep for further assistance.



## Opening Payment App and Checking the Version

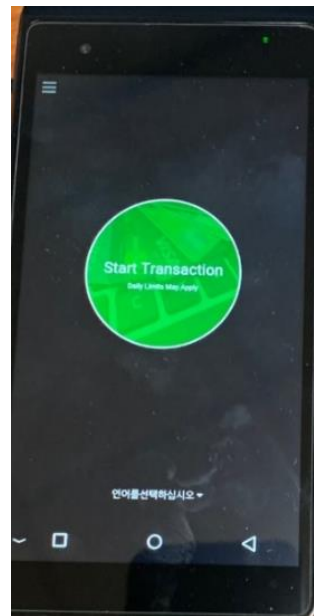
Once connected to WIFI (Or optional cellular network) – open the PAYAUTH App from the home screen.

1. PAYAUTH App
2. Once loaded, the device needs to be assigned a terminal prior to going live. This is done by contacting the software provider.
  - a. This should be completed prior to you receiving your device, however if it needs done, reach out to your sales rep for assistance right away.



If your terminal has not been assigned to a merchant, it will state 'setup required'.

Contact the software provider to assign the terminal to a merchant. In order to assign to a merchant, please provide the serial number on the screen. Once assigned to a merchant, software licensing fee apply.



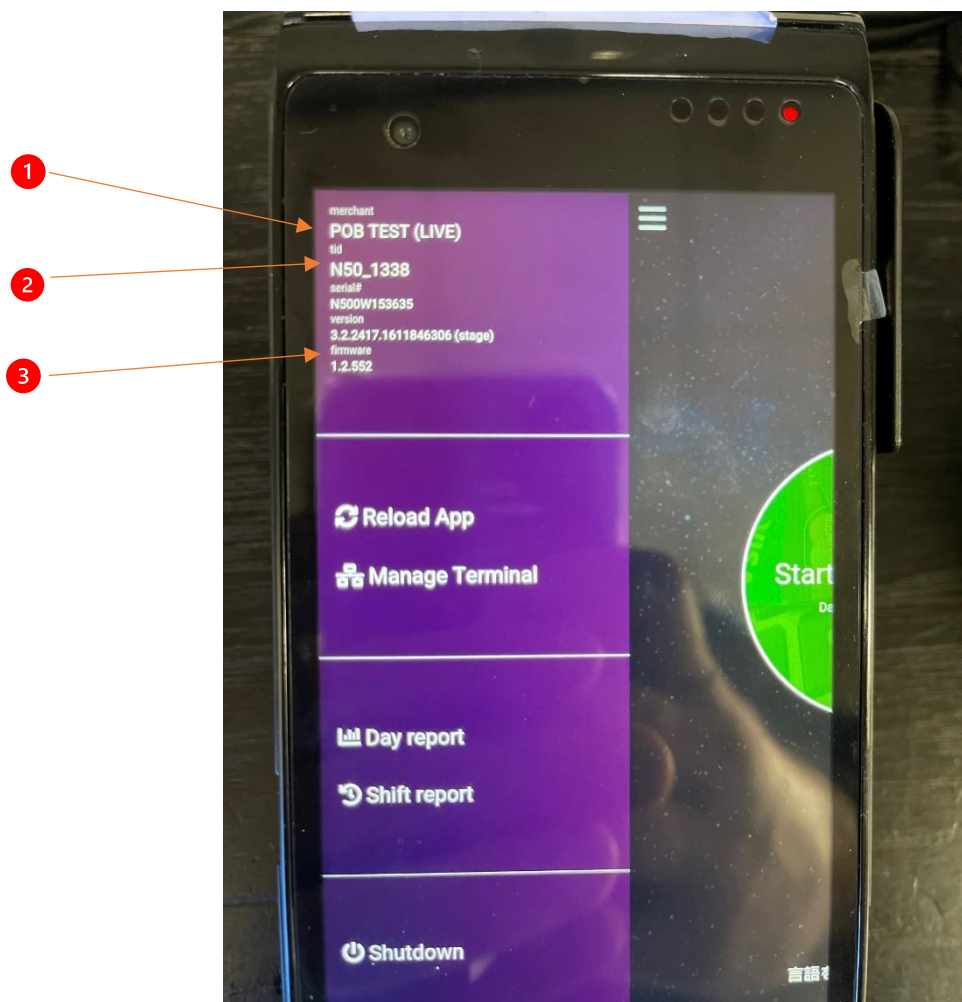
If your device has been assigned to a merchant, it will be on the 'start transaction' screen.

## Verify Your Terminal ID and Firmware

Once you have loaded PAYAUTH, prior to processing transactions verify these three items from the cashier menu (swipe left to right or tap 3 lines in top left corner):

1. Merchant Name is correct and matches your location (Top arrow on picture below)
2. Terminal ID (TID) listed matches what is provided by distributor (Middle arrow on picture below)
  - a. Your Sales rep will need to verify your Terminal ID (TID) matches what has been assigned in the merchant portal online, prior to going live.
3. Firmware set to 1.2.552 (Bottom arrow on picture below)

*It is the deployer's responsibility to validate the terminal ID programmed in the device is deployed to the correct merchant.*



# Accepting Payments

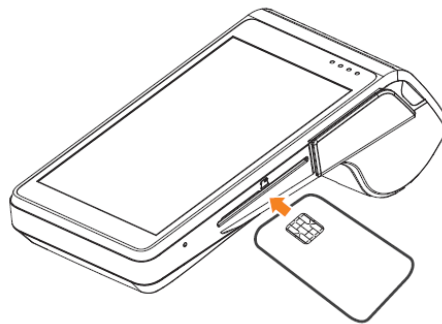
## EMV Transactions

EMV (Smart Card / Chip) transactions are completed by pressing the Start transaction then inserting the card into the EMV slot on the right side of the terminal.

The IC Card Slot is on the right side of the main unit.

To insert a card, hold the opposite side of the IC chip with chip facing up and insert the IC card into the slot. During the transaction process, the IC card should remain in the slot. See graphic below.

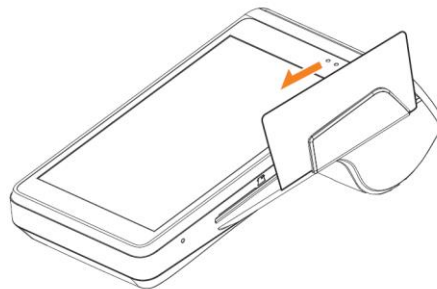
Note: If the contact point of the IC chip is damaged or oxidized, the transaction may fail.



## Magswipe Transactions

Swipe card in magstripe card slot as demonstrated below in steady motion, making sure the magstripe faces the device.

Note: Any damage to the magstripe or incorrect swiping may lead to transaction failures.



*NOTE: Contactless payments are not currently supported.*

# Troubleshooting

## Will not connect to cellular

1. Ensure that you have the optional sim card installed.
  - a. Open back battery cover by sliding down (Figure 4)
  - b. Remove battery (Figure 5)
  - c. Sim card should be installed into lower center slot with the notched corner facing to the right (Figure 6)
2. If it is installed correctly you can try reseating the card and then rebooting the device
3. If after rebooting the device it is still not connecting to cellular, try disabling wifi and rebooting again.
4. If it is still failing to connect, try moving to an area with better signal to see if it picks up cellular in a different location.
5. Once it does show connected, proceed with the Network Test app to check connectivity (Page 8)
6. If after doing all of this it is still not connecting to cellular, then you will need to contact your sales rep for further assistance.



Figure 4



Figure 5



Figure 6

## Will not connect to WIFI

1. If you already went through the Connecting to WIFI section and it is still unable to connect you will need to try to remove all saved networks and connect from scratch
2. Swipe down from the top of the screen twice to show the detailed Pull-Down menu.
3. Click the dropdown arrow next to the network name or WLAN if not connected.
4. Select "More Settings" at the bottom of the WIFI list.
5. Click on the 3 dots to the top right to pull up a dropdown menu with "SAVED NETWORKS"
6. Click on Saved Networks
7. Click on each network here and in the pop up that opens, click on forget.
8. Repeat this until you have forgotten all networks in the list.
9. Reboot the device.
10. Swipe down twice from the top again and click the dropdown under the WIFI symbol.
11. Choose your network.
12. Enter the password.
13. It should authenticate then connect to the network and will show your network name and say connected.

14. If it simply goes back to the list and shows "SAVED" under the network name and not "CONNECTED" then there is an issue with either the network or the password.
  - a. Device only connects to a 2.4ghz Wi-Fi network, it does not connect to 5ghz Wi-Fi. It may experience troubles if both network 2.4 & 5g have the same SSID
15. If you are still unable to connect after doing this, press the square at the bottom of the screen and this will pull up all open apps, swipe right on all to close them or hit the "CLEAR ALL" button on the top right, then try to repeat removing the saved network and reconnecting.
16. Once the device does connect, perform a network test following the steps above (Page 8)
17. If the device will still not connect to WIFI after following all of these steps, please contact your sales rep for further assistance.

## Will not open payment app

- The PAYAUTH app will only open if it is connected to WIFI or optional cellular network. If you click on the app and it simply goes back to or remains on the home screen, it is likely due to no connection. Troubleshoot your connections and perform a network test (Page 8)
- If you are connected and pass the network tests and the app still fails to open, reboot and try to open again.
- If it continues to fail to open after network test passes and a reboot, please contact your sales rep for further assistance.

## Fails network test

- See the sections above on connecting to optional cellular network or connecting to WIFI. If you are connected and the network tests continue to fail, call your sales rep for further assistance.

## Will not print

1. Ensure paper is installed.
2. Make sure that paper is installed correctly rolling from underneath to the front and out the exit.
3. Check that the printer cover is firmly closed.
4. Check that the printer roller is still intact towards the inside front of the printer cover when open.
5. Reboot device
6. If the device has 20% or less battery life the printer will not print.
7. If you have done all of these steps and it is still not printing, please contact your sales rep for further assistance.

## Will not power on

- Make sure that device has charged properly. Make sure you are plugging the device in securely to either the included power supply and cord or optional base charging station.
- If you are plugging it in correctly and the unit is still not taking a charge, open the rear battery cover and ensure the battery has not come unplugged.
- When powering on make sure you are holding in the power button for 2-3 seconds straight.
- If you still are unable to power the device on following these steps, please contact your sales rep for further assistance.

## Will not complete software update

- For the device to take an update if you are told that it needs one, it must be connected to WIFI and have at least a 50% charge.
- Make sure to do these two things prior to rebooting for the update.
- If it is charged over 50% and connected to WIFI and still will not take an update if you are told one is required, please contact your sales rep for further assistance.

## Will not read debit/credit cards

- If the device is not reading a chip card, after multiple tries you should be allowed to swipe it and receive approval as fallback from a defective chip.
- If it is once card not reading, try a different card and see if the issue persists.
- If the issue is with multiple cards the chip or mag swipe reader might be dirty and need cleaned
  - Contact your sales rep for further assistance.

## Other misc. issues

- Any other issues not previously mention will need to be brought to the attention of your sales rep for further assistance.