

# Pairing and Transaction User Guide

Created: 23 Jan, HMS

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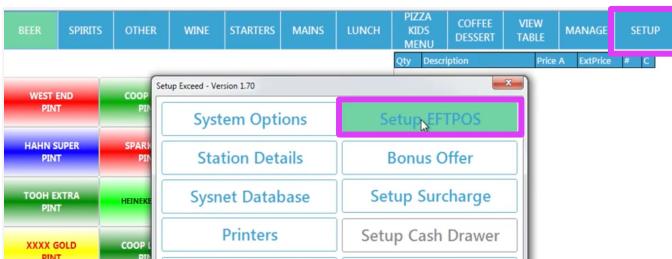
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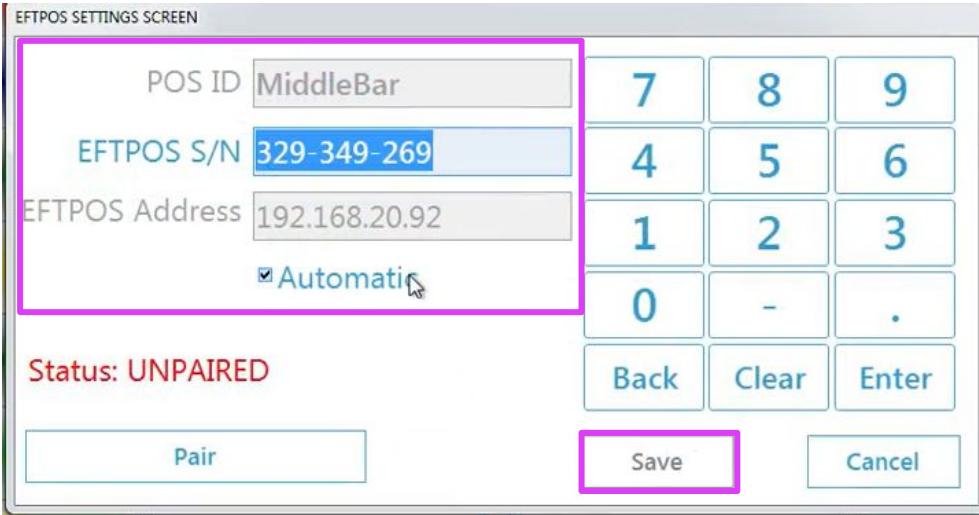
# System Requirements

Systems	Requirements
Connectivity	Both the Point-of-sale (POS) system and EFTPOS Terminal need to be connected to the <b>same Local Area Network</b>
POS Version	<b>8.1.0.0 and above</b>
POS Operating System	<b>Windows 7 and above</b>
Integration Type	<b>SPI</b>

# Pairing the POS to the EFTPOS Terminal - *POS configuration (1 of 3)*

Steps	Example Screens
<ol style="list-style-type: none"><li>1. Launch the <b>H&amp;L POS</b></li><li>2. Enter credentials and select <b>Logon</b> <i>This is merchant specific and the credentials can be obtained through the merchant or POS.</i></li></ol>	 <p>POS screen</p>
<ol style="list-style-type: none"><li>3. Select <b>SETUP</b> in the top right corner</li><li>4. Select <b>Setup EFTPOS</b></li></ol>	 <p>POS screen</p>

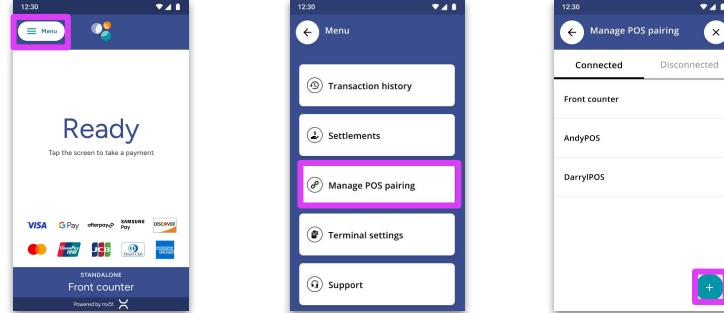
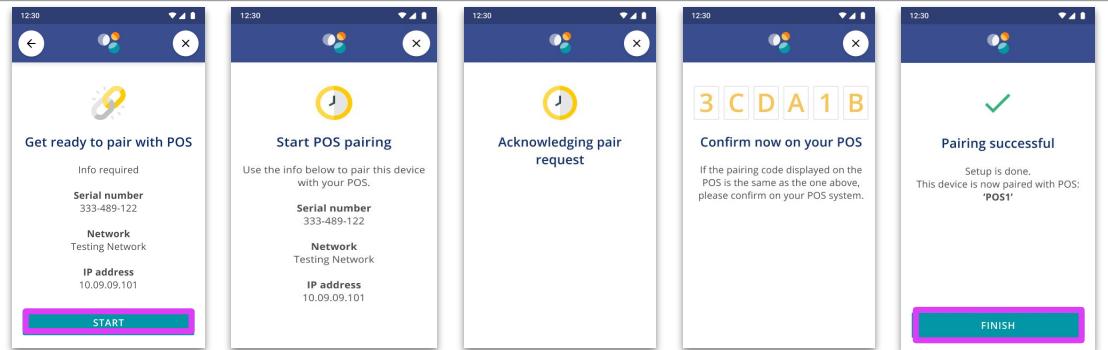
## Pairing the POS to the EFTPOS Terminal - *POS configuration (2 of 3)*

Steps	Example Screens
<ol style="list-style-type: none"><li>5. Enter the terminal serial number and select <b>SAVE</b>.</li><li>6. When Automatic IP Address is flagged, the IP address as displayed on the EFTPOS terminal will be automatically populated into the Device IP Address field after entering the terminal serial number and selecting <b>SAVE</b>.</li></ol>	 <p>EFTPOS SETTINGS SCREEN</p> <p>POS ID <input type="text" value="MiddleBar"/></p> <p>EFTPOS S/N <input type="text" value="329-349-269"/></p> <p>EFTPOS Address <input type="text" value="192.168.20.92"/></p> <p><input checked="" type="checkbox"/> Automatic</p> <p>Status: UNPAIRED</p> <p>Pair <span style="border: 2px solid pink; padding: 2px;">Save</span> Cancel</p> <p>POS screen</p>

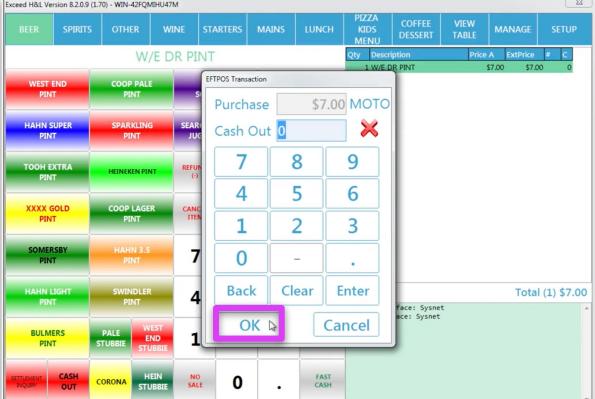
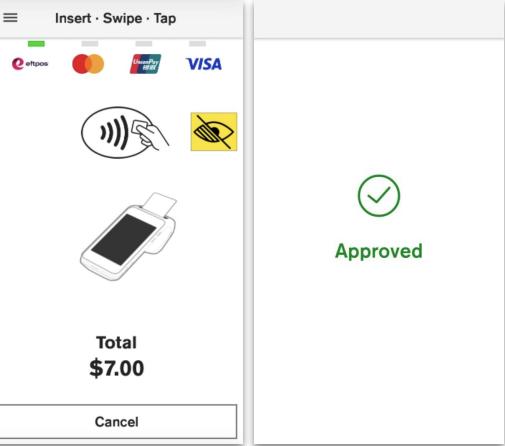
## Pairing the POS to the EFTPOS Terminal - *POS configuration (3 of 3)*

Steps	Example Screens
7. Select <b>Pair</b>	 <p>The screenshot shows the 'EFTPOS SETTINGS SCREEN' with the following fields and status:</p> <ul style="list-style-type: none"><li>POS ID: MiddleBar</li><li>EFTPOS S/N: 329-349-269</li><li>EFTPOS Address: 192.168.20.92</li><li><input checked="" type="checkbox"/> Automatic</li><li>Status: UNPAIRED</li></ul> <p>A numeric keypad is displayed on the right. At the bottom are three buttons: 'Pair' (highlighted with a pink box and a cursor), 'Save', and 'Cancel'.</p> <p>POS screen</p>

# Pairing the POS to the EFTPOS Terminal - *EFTPOS Terminal*

Steps	Example Screens
<ol style="list-style-type: none"><li>1. On the <b>EFTPOS terminal</b>, Select <b>Menu</b>  <i>Note: If there is no existing pairing, the "Manage POS pairing" button will show</i></li><li>2. Select <b>Manage POS pairing</b></li><li>3. Select <b>+</b></li></ol>	 <p>EFTPOS Terminal screens</p>
<ol style="list-style-type: none"><li>4. On the <b>EFTPOS Terminal</b><ul style="list-style-type: none"><li>o Select <b>START</b></li><li>o Ensure the code displayed matches what is displayed on POS and select <b>YES</b></li><li>o Select <b>FINISH</b></li></ul></li></ol>	 <p>EFTPOS Terminal screens</p>

# Perform a Test Purchase Transaction

Steps	Example Screens
<p>To perform a test Purchase Transaction to ensure that the integrated solution is working;</p> <ol style="list-style-type: none"><li>1. Select the Product</li><li>2. Select EFTPOS PAYMENT</li><li>3. Select OK. The transaction will be sent to the eftpos terminal for payment.</li></ol>	 <p>POS screen</p>  <p>EFTPOS Terminal screens</p>

# Perform a Test Refund Transaction - (1 of 2)

Steps	Example Screens																				
<p>To Refund the test purchase transaction:</p> <ol style="list-style-type: none"><li>1. Select Refund</li><li>2. Select the item to be refunded</li><li>3. Select EFTPOS Payment</li></ol>	 <p>POS screen</p> <table border="1" data-bbox="1301 267 1781 843"><tr><td data-bbox="1301 267 1436 335">CANCEL ITEM</td><td data-bbox="1436 267 1570 335">CANCEL SALE</td><td data-bbox="1570 267 1704 335">DELETE</td><td data-bbox="1704 267 1781 335">REPRINT RECEIPT</td></tr><tr><td data-bbox="1301 335 1436 476">7</td><td data-bbox="1436 335 1570 476">8</td><td data-bbox="1570 335 1704 476">9</td><td data-bbox="1704 335 1781 476">EFTPOS RECEIPT</td></tr><tr><td data-bbox="1301 476 1436 616">4</td><td data-bbox="1436 476 1570 616">5</td><td data-bbox="1570 476 1704 616">6</td><td data-bbox="1704 476 1781 616">EFTPOS PAYMENT</td></tr><tr><td data-bbox="1301 616 1436 735">1</td><td data-bbox="1436 616 1570 735">2</td><td data-bbox="1570 616 1704 735">3</td><td data-bbox="1704 616 1781 735">QUICK SALE</td></tr><tr><td data-bbox="1301 735 1436 843">NO SALE</td><td data-bbox="1436 735 1570 843">0</td><td data-bbox="1570 735 1704 843">.</td><td data-bbox="1704 735 1781 843">FAST CASH</td></tr></table>	CANCEL ITEM	CANCEL SALE	DELETE	REPRINT RECEIPT	7	8	9	EFTPOS RECEIPT	4	5	6	EFTPOS PAYMENT	1	2	3	QUICK SALE	NO SALE	0	.	FAST CASH
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NO SALE	0	.	FAST CASH																		

## Perform a Test Refund Transaction - (2 of 2)

### Steps

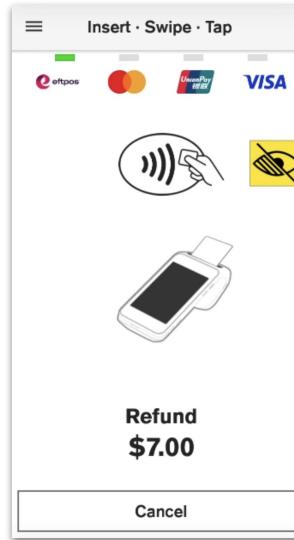
To Refund the test purchase transaction:

4. Select OK

### Example Screens



POS screen



EFTPOS Terminal Screens

