PAYMENT TERMINAL

Quick Start Guide

Global Payments Smart Terminal — DX8000 / EX8000



Get started

Welcome to the **Global Payments Smart Terminal Quick Start Guide**! It's your go-to resource for quickly and easily setting up and using your new payments terminal. This guide covers everything from the initial setup to processing payments, ensuring you have all the essential information at your fingertips. We'll also provide you with helpful links to additional resources to maximize the potential of your new payment solution. **Let's get started!**

NOTE: Bill 72 was recently passed and is **mandatory** for merchants in the province of Quebec, The bill states that merchants accepting tips must apply all tip percentages on the base sale amount BEFORE tax. If you are a merchant in Quebec, please refer to the instructions in the **User Guide** on how to add the GST and QST tax rates. You can find the User Guide by scanning the QR code below and navigating to the Smart Terminals DX/EX 8000 section. If you are outside of Quebec, and wish to support pre-tax tipping, you can turn these settings on directly from your terminal device, or, if further help is needed, you can contact our Help Desk.

Terminal ON/OFF

- Power On: Ensure the terminal battery is installed and press the power button [⏻] for about 1 second until the display turns on.
- Power Off: Hold down the power button [⏻] for more than 2 seconds and tap "**Power off**".

Administrator ID and password

If your terminal has a default administrator ID name of "**1**", please contact Global Payments Customer Care at **1-800-263-2970** to set up a personalized admin password.

Performing a sale transaction

1. Tap the Sale transaction icon on the home screen.
2. Select the Merchant option and enter the merchant password (if enabled).
3. Enter the clerk ID (if enabled) and password, then press [**Confirm**].
4. Enter the invoice number (if enabled), then press [**Confirm**].
5. Key in the transaction amount and press [**Confirm**].
6. The terminal will prompt the customer to choose a tip option: [1]-Tip percentage, [2]-Custom Tip, or [3]-No Tip. Confirm the total amount and press Yes or No. The cardholder can press [1]-Yes to confirm or [2]-No to make changes.
7. The cardholder should proceed to tap, insert, or swipe their card as instructed.
   a. If the card is inserted, the cardholder follows the prompts, including entering their PIN.
   b. If the card is swiped, follow the prompts to enter the last 4 digits of the card number and CVV/CVC (if enabled).
   c. If the credit card is issued outside Canada and the terminal has HomeCurrencyPay (HCP) dynamic currency conversion, follow the HCP prompts to select the payment currency.
8. After the transaction is complete, the merchant copy of the receipt will be printed. Press [**Enter**] to print the customer copy.

Performing a refund transaction

1. Tap the **Refund** transaction icon on the home screen
2. Enter the supervisor or manager ID and password, then press [**Enter**]
3. Enter the total return amount, including tip and cashback, then press [**Confirm**]
4. The cardholder should tap the card on the reader, insert the chip card, or swipe the card
5. The cardholder follows the prompt to complete the refund
6. The merchant copy of the receipt will be printed. Press [**Enter**] to print the customer copy of the receipt

Performing a settlement transaction

1. It is highly recommended to perform a settlement at least once daily.
2. Tap the ☰ icon on the Apex main menu screen and then select the **Settlement** transaction icon.
3. Press "**Done**" to close the batch and deposit funds.
4. The screen will display "**Batch released printing**" and the receipt will be printed.

CAUTION: If the terminal displays "*Out of Balance*" at the end of the settlement procedure, please contact Global Payments Customer Care at **1-800-263-2970.**

NOTE: If you wish to activate the Auto Settle function on your terminal, please contact Global Payments Customer Care at **1-800-263-2970**

Additional resources

Visit the **Global Payments Help Centre** at https://help.globalpay.com/en-ca/products/terminals/smart-terminals or scan the QR code on the side for additional support materials for your device(s).

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