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Paper roll request	<a href="https://www.firstcitizensgroup.com/tt/merchant-support/">https://www.firstcitizensgroup.com/tt/merchant-support/</a>



## FIRST CITIZENS BANK LIMITED

### Electronic Banking Unit



Operational Procedures for Mobile POS Terminal - iOS



# Terminal Operational Procedures Guide

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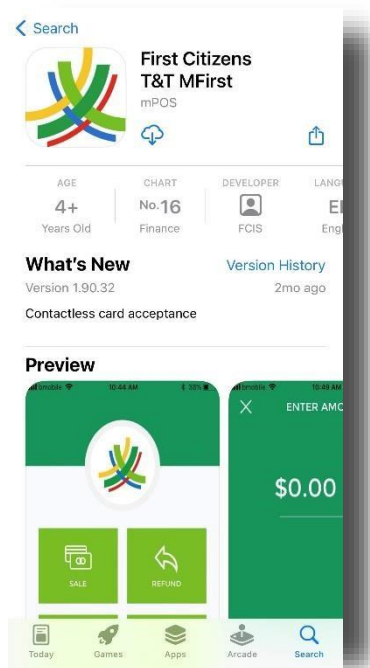
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# 1

## Installing First Citizens Mobile POS Application


*This process installs the application on the cellular device that you intend to pair the WisePad 3S Device.*

- Using the **App Store** search for **First Citizens T&T mFirst** App and install app as per instructions
  - Ensure that the mobile device is connected to a source of Internet i.e. WiFi or Mobile Data




# Set Up of Application

*This function is done after the initial install of the application on the Mobile device.*



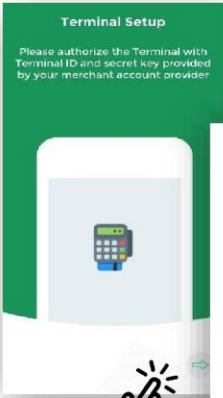
**1 Welcome**

Touch the arrow to proceed to the next page



**2 Permissions**


Enable permissions by selecting **“Allow While Using App”**  
Touch the arrow to proceed to the next page





**3 Terminal Setup**

Touch the arrow to proceed to the next page

Enter your **Terminal ID**  
Re-enter your **Terminal Provided by Bank**  
Confirm your business information





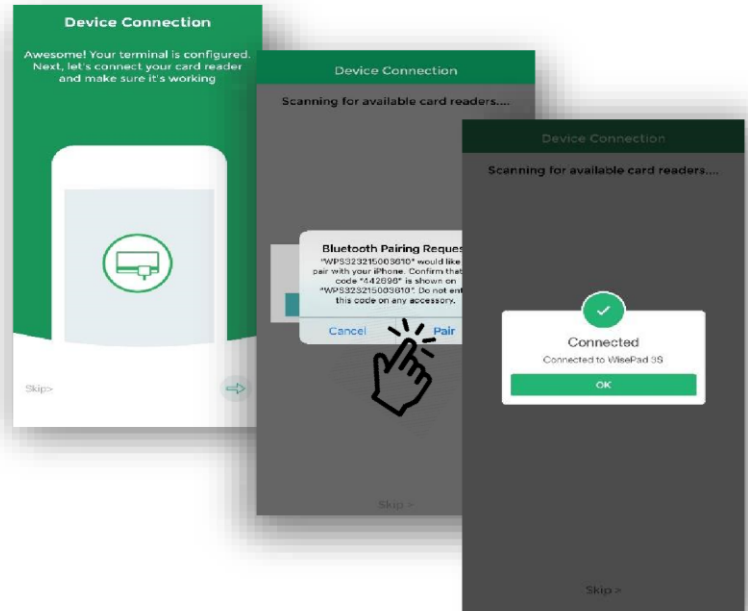


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## 4 Device Connection

After searching for the card reader, proceed to

Touch the arrow to proceed to the next page **Pair**

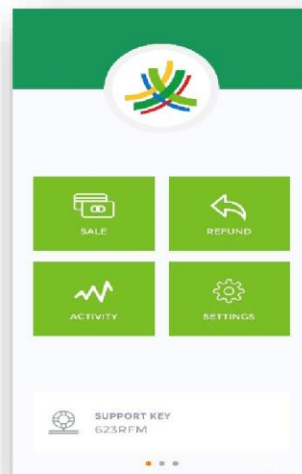


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## 5 Home Screen

Homepage appears on the screen

***Sale/ Refund/ Activity/ Settings***



# 8 Connect Device

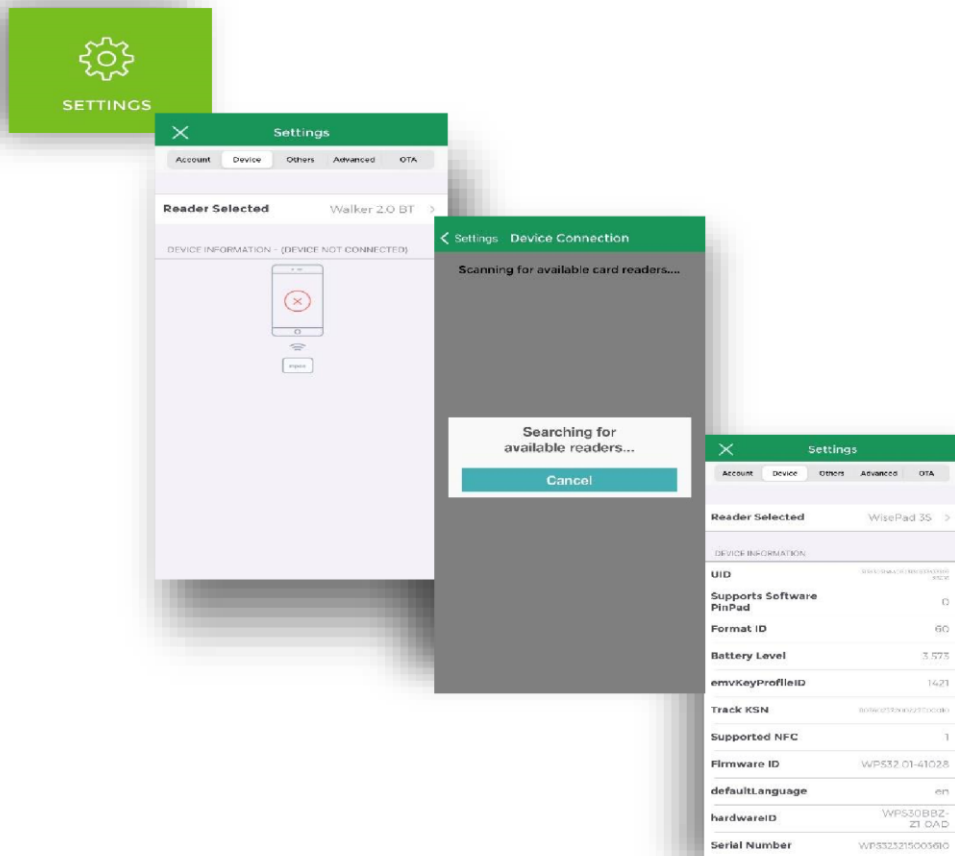
Power **ON** WisePad device

Open App – Go to **Settings**

Select **Device** tab

Select **Arrow** next to the 'Reader Selected'

Device Type will change to **WisePad 3S**



# 3

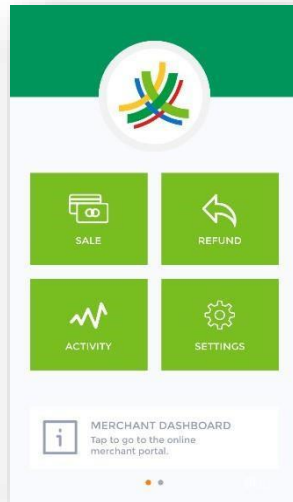
## Processing a Transaction

*This function allows you to process transactions via the Mobile App.*

### PROCESSING A TRANSACTION

#### 1 Home Screen

Open the POS Mobile Application



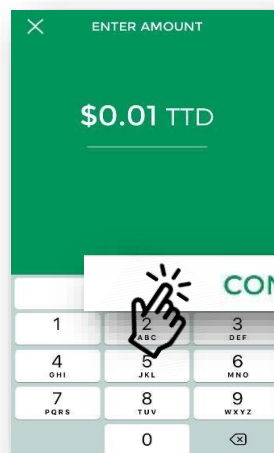
#### 2 Select Sale

Select Sale Icon option on the screen



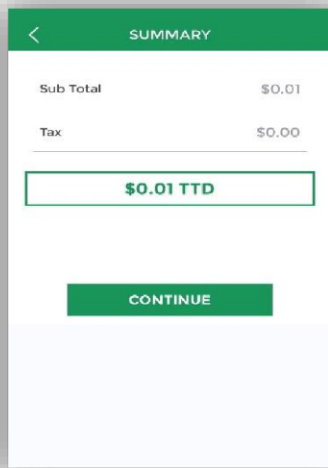
#### 3 Enter Sale Amount

Enter the desired **'Amount'** to be processed on the screen that appears



Using the available keypad  
Select **Continue**



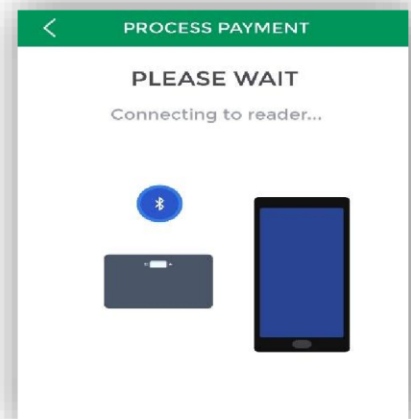


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## 4 Confirm Transaction

View transaction details on **Summary** screen

Click **Continue** again upon confirmation



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## 5 Connect Reader

Screen will appear reading **Connecting to reader**



If not already powered on, **Power on** the *WisePad 3S Device*

*Bluetooth will automatically Turn On the device*

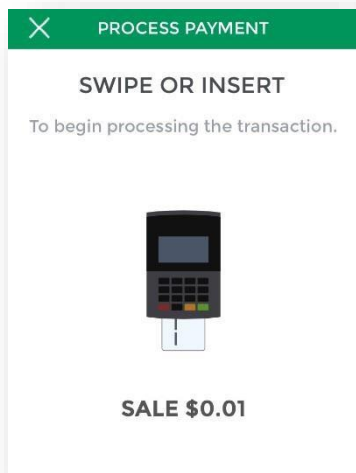
*Ensure that Bluetooth is enabled on the mobile device*

*When connected, the screen will change to read **Swipe or Insert***

## 6 Swipe/Insert Card

Screen will appear reading **Swipe or Insert**

1. At the top of the reader, Swipe Debit Magstripe card with Magstripe facing the back of the device
2. Insert Chip Cards



## 7 Customer Pin Entry

Allow the customer to enter their pin using the **WisePad 3S** Device

Press Green key on device to **Enter**



## 8 Select Savings / Chequing

Upon successful Pin Entry, the device will prompt the Customer to select one of the following

## 1. Chequing 2. Savings

### 9 Transaction is Approved / Send Receipt

Once successfully processed, a screen will appear reading **Transaction Approved** with a **Tick**

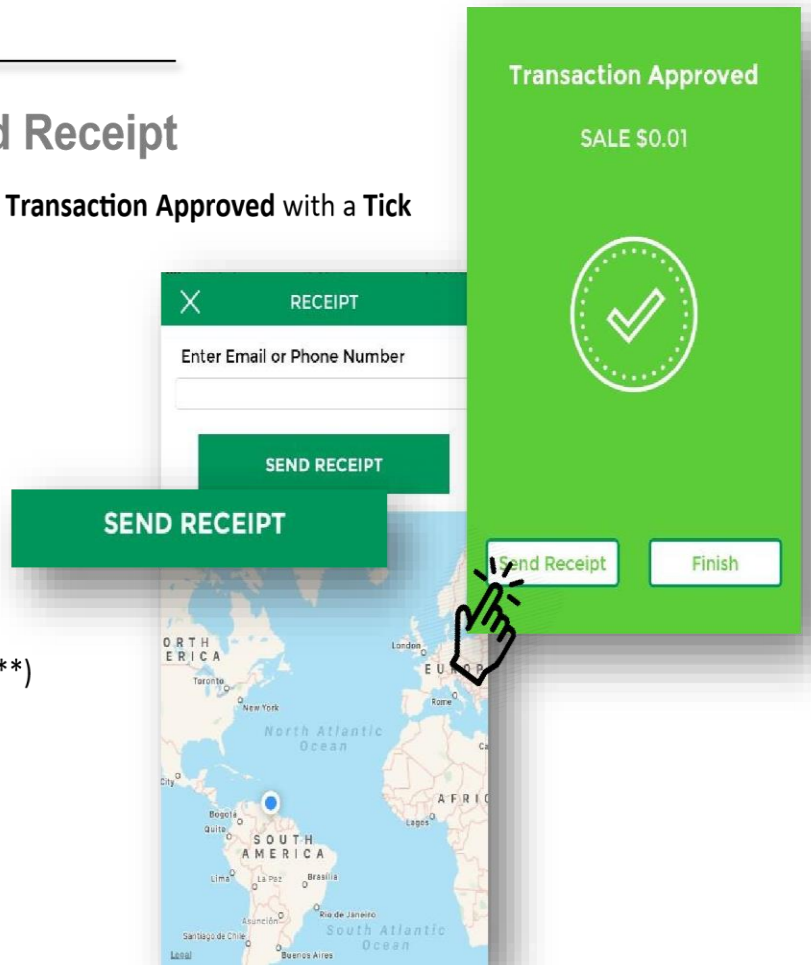
Option will also appear to allow you to send a receipt

Select **Send Receipt** to enter a destination

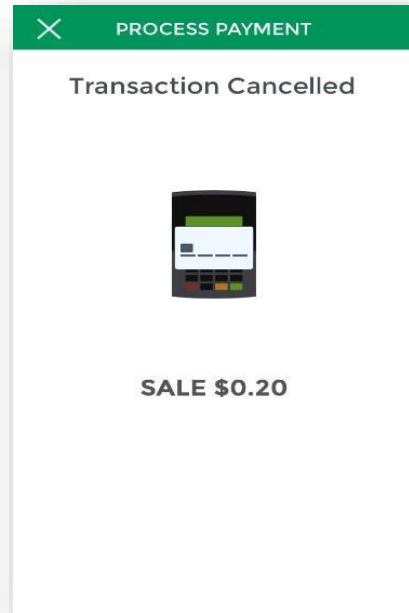
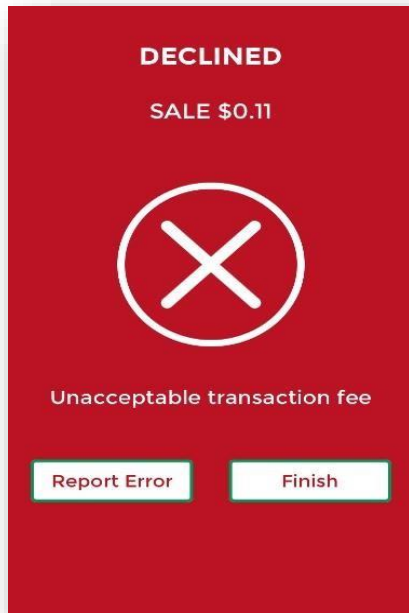
Receipt can be sent either via Email or Text message

Enter the email address or mobile number (1-868-\*\*\*-\*\*\*\*)

Click **Send Receipt** to send



*NB. If the transaction was not approved (an error occurred) or was cancelled; the screen will appear as follows:*

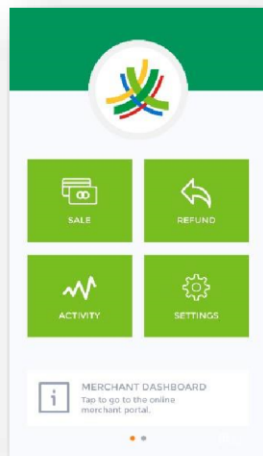


## Reviewing Transactions

*This section outlines the steps to review previously completed / attempted transactions*

### 1 Home Screen

Open the POS Mobile Application



### 2 Select Activity

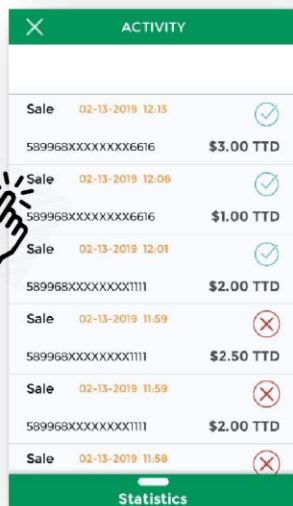
Select Sale Icon option on the screen



### 3 Summary

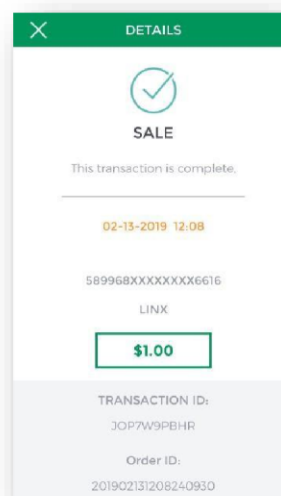
Transaction Summary screen will

Select a transaction



### 4 Transaction Details

Transaction details will appear on the screen



## Void/Reversal Function

*This section outlines the steps in voiding a transaction in an open batch directly from the mobile application*

### 1 Home Screen

Open the POS Mobile Application



### 2 Select Activity

Select Sale Icon option on the screen

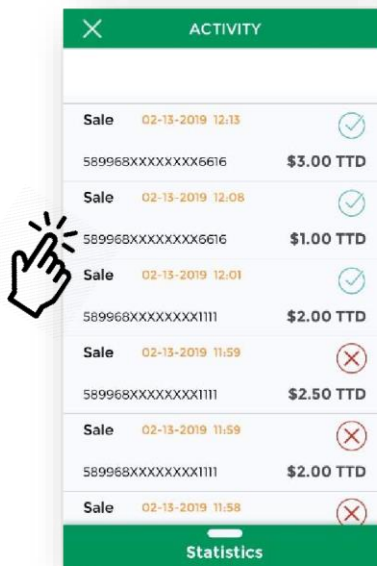


NOT



### 3 Summary

Transaction Summary screen will appear



Do  
NOT  
Select  
REFUND  
Option

## Note

All Merchants have access to **VOID** transactions remotely via the **DASHBOARD**

Only transactions completed before settlement @ 7pm daily can be **'VOIDED'** - **'OPEN BATCH'**

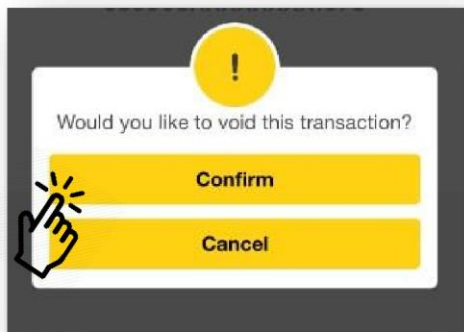
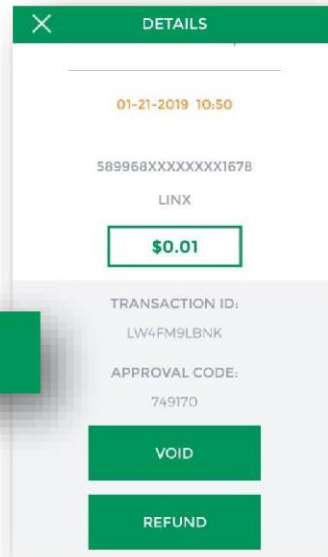
## 4 VOID Transaction

Select a particular transaction you wish to **VOID**

Transaction details will appear

Verify that the details match that of the transaction you wish to void

Select **VOID**



Select **Confirm**

Allow time for authorization

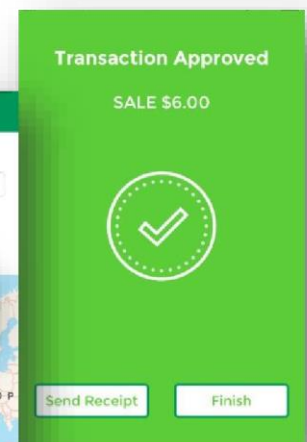
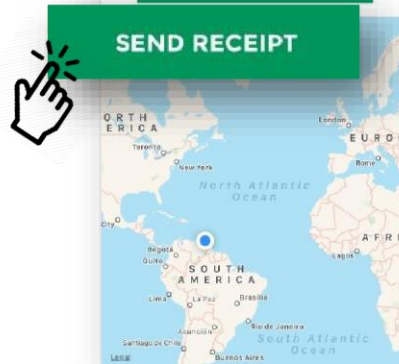
Upon Authorization a **Transaction Approved** screen will appear

Options will also appear to allow you to send a receipt or Finish

Select **Send Receipt** to enter a destination

Receipt can be sent either via Email or Text message

Enter the email address or mobile number (1-868-\*\*\*-\*\*\*\*)

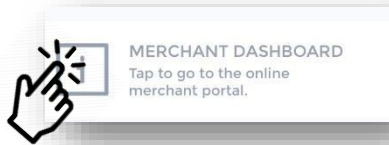


## ACCESSING DASHBOARD / RECONCILIATION

*This sections shows merchants how to utilize the merchant portal to manage transactions and generate reports.*

❖ Using your previous set up **Login credentials**, Log in to the dashboard via

1. The **secure Merchant page** <https://payments.paymobilepos.com/merchant/selfcare>
2. Link on App home screen



❖ The required fields are as

follows:

**Merchant ID:** 1234

**Username:** jsmith

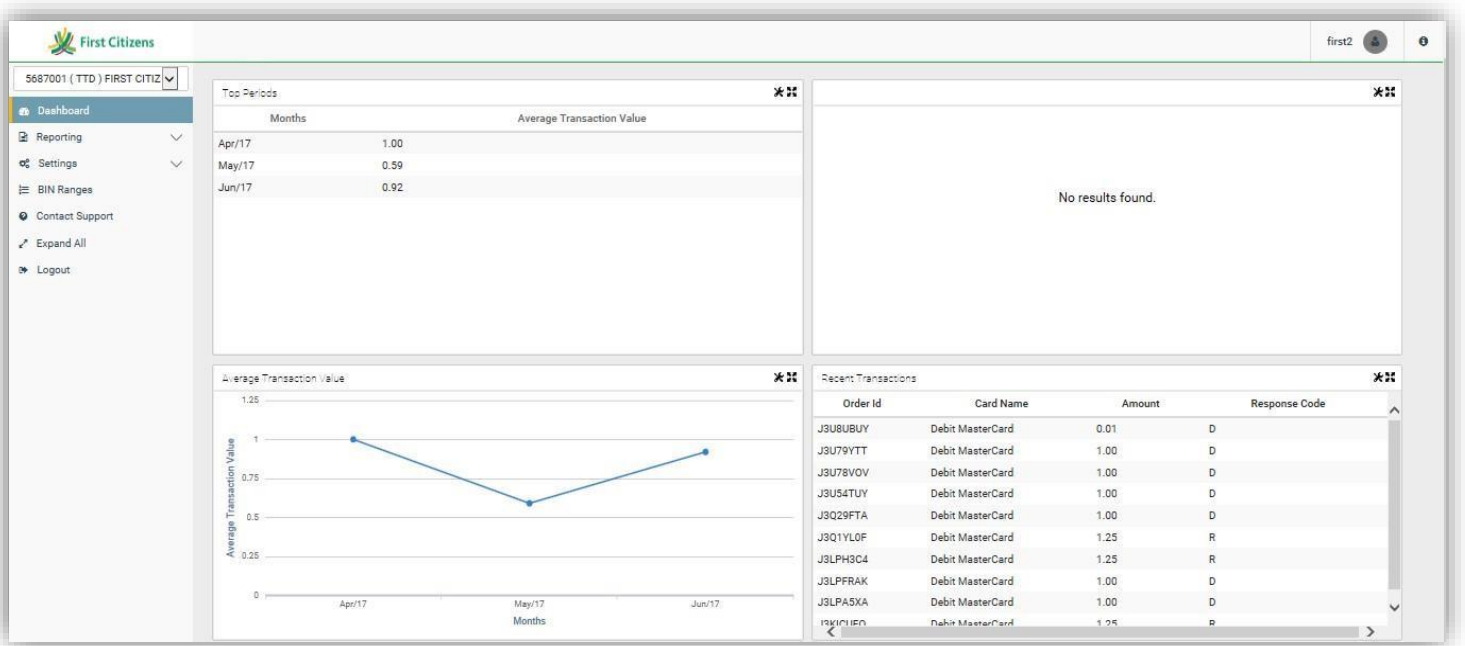
**Password:** \*\*\*\*\*

### Note

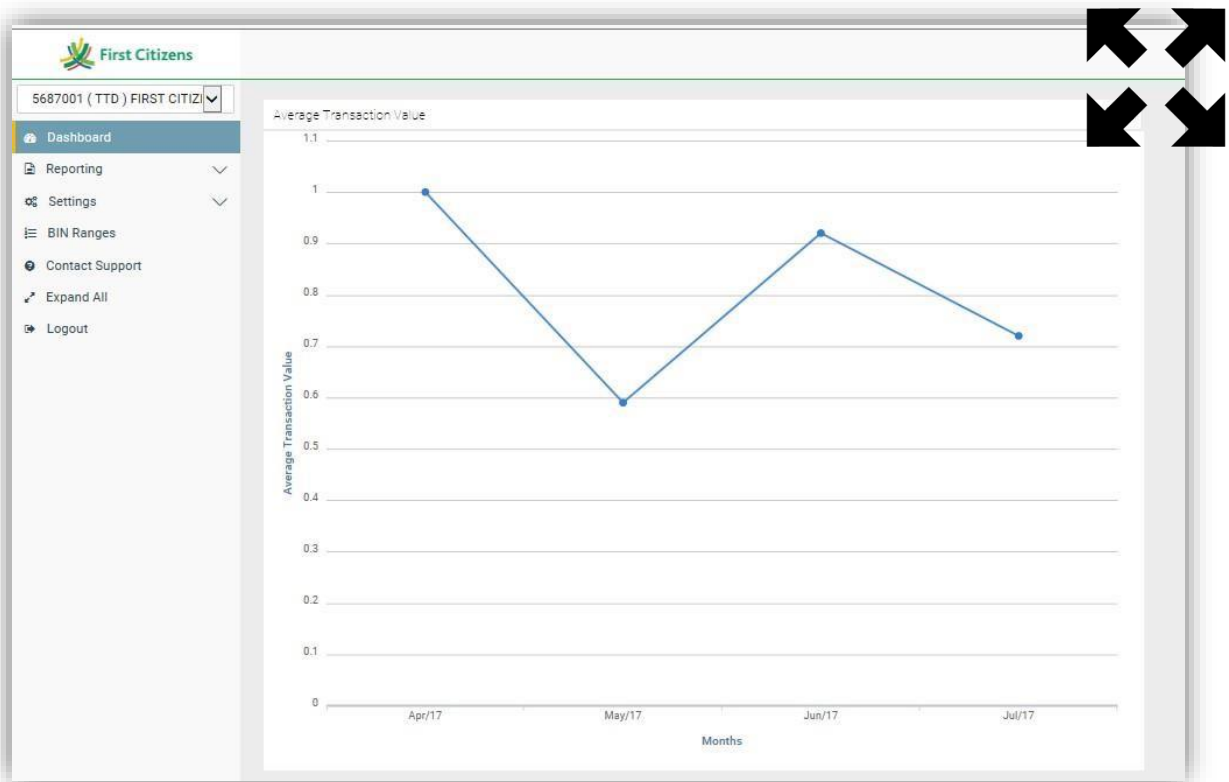
The security of the login credentials is essential to prevent unauthorized access to customer information and transaction history. Merchants also have the access to **VOID** transactions in the open batch by accessing the Dashboard remotely. Avoid sharing your password with others.

❖ The Dashboard will appear as shown below.

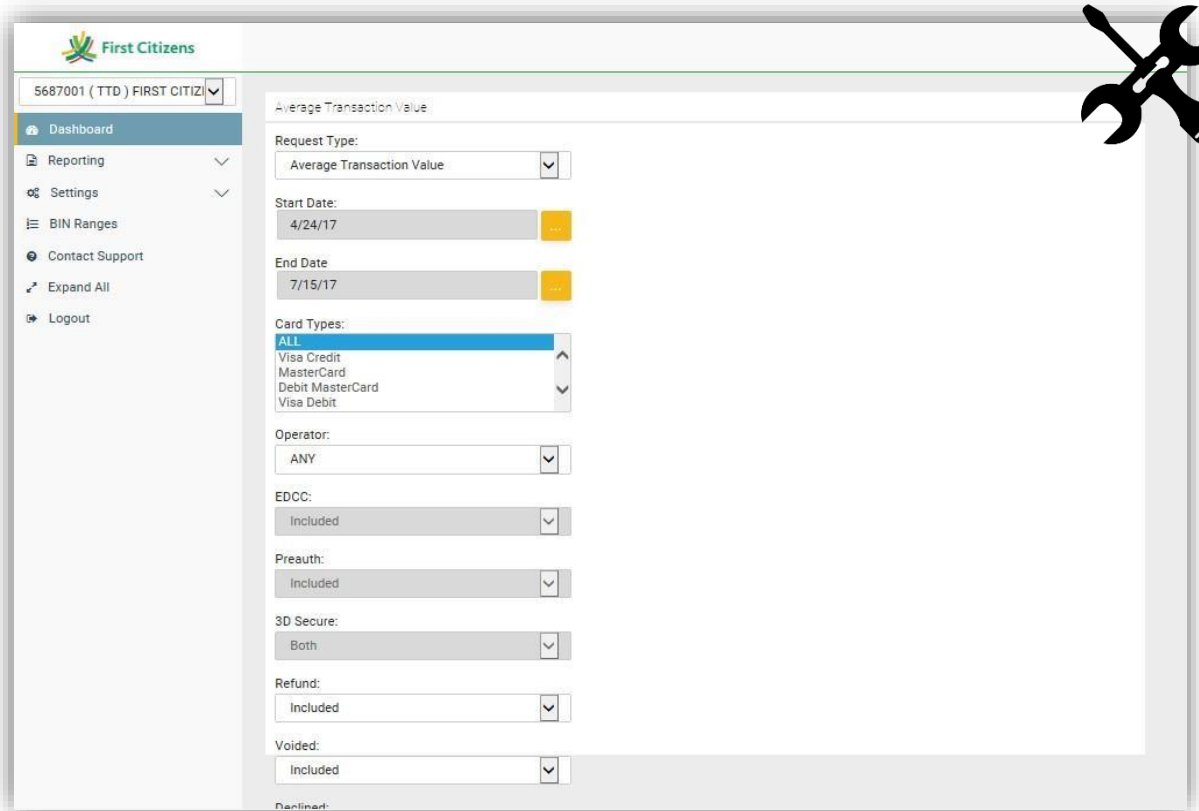




- ❖ By clicking the expansion symbol in the corner of each window, the section will expand showing relevant information clearer on a large scale

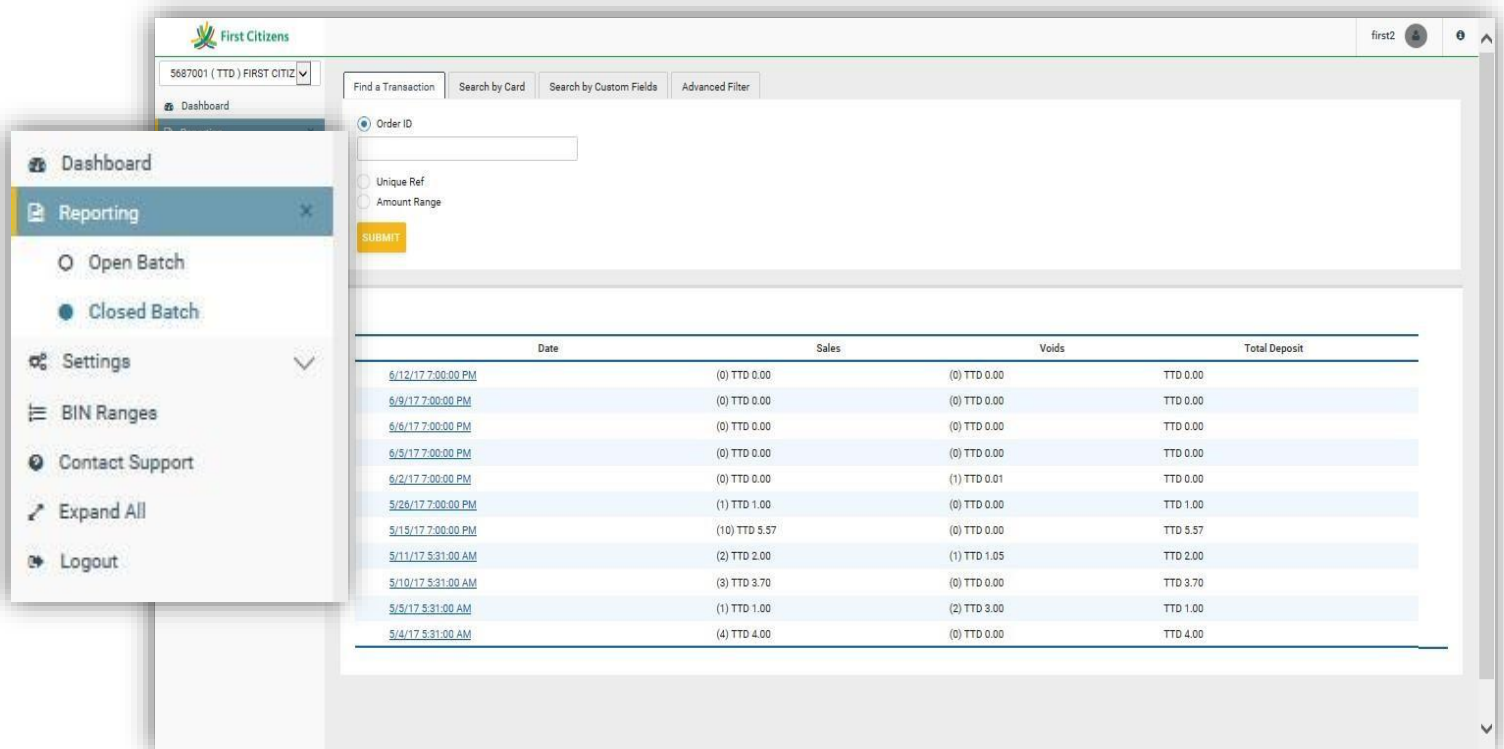


- ❖ By clicking the settings/tools icon merchants have the option to edit the criteria for each section as seen below;



- ❖ In the menu, by clicking the drop down arrow next to **REPORTING**, merchants can access either the 'Open batch' or any of the 'Closed batches'

The following is displayed for selection:



The screenshot displays the First Citizens merchant portal. On the left, a navigation menu includes 'Dashboard', 'Reporting', 'Open Batch', 'Closed Batch', 'Settings', 'BIN Ranges', 'Contact Support', 'Expand All', and 'Logout'. The 'Reporting' section is active, showing a list of batch transactions with columns for 'Date' and 'Net Total (3 / 3)'. The net total is TTD03.70. An 'EXPORT TO CSV' button is visible above the list.

The main area shows 'Transaction Details' for a specific transaction. The details are as follows:

Order ID:	J2HQZFFF
Unique Ref:	LMGP7QRCV9
Date/Time:	May 9, 2017 12:06:11 PM
Commerce Type:	Cardholder Present
Type:	SALE
Status:	COMPLETE
Description:	
Operator:	
Response:	A APPROVAL
Approval Code:	304773
System Trace Audit Number:	40
Retrieval Reference Number:	712900000040
AVS Response:	
CVV Result:	
Card:	589968*****1004 / 0979
Cardholder Name:	
Amount:	TTD1.20

Below the transaction details, there is a 'Resend Cardholder Receipt' section with a text input field for 'Cardholder Email' containing 'customer@firstcitizenatt.com' and a clear button (X).



By selecting the desired date, Merchants can view detailed transaction information

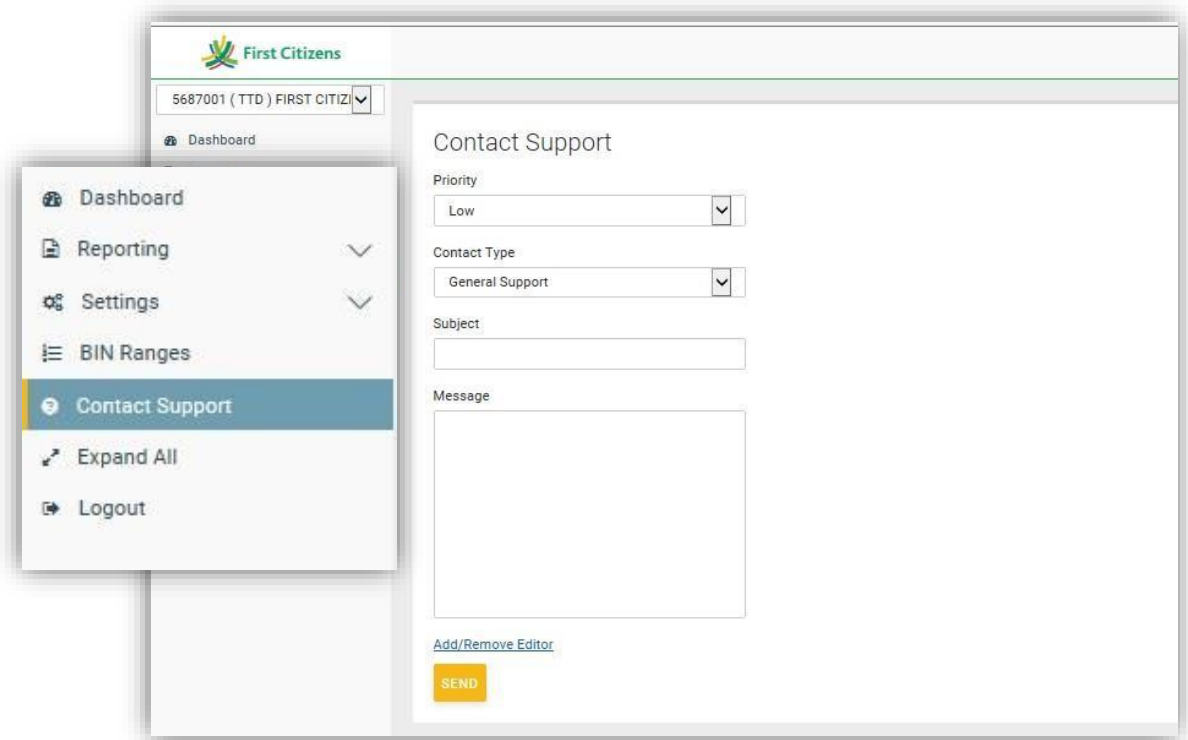
*When viewing a transaction either of the following scenarios may apply*

- a. If the batch has already been **'Closed'**, the merchant can only view the transactions, resend receipts and/or print copies of the receipt
- b. If the batch is **'Open'**, the merchant has the option to **VOID** transactions, view, resend receipts and/or print copies of the receipt

#### Note

The Process of resending/re-printing a transaction's receipt is the same for Debit Transactions, Credit Card (Magstrip/Non-Chip) Transaction and Credit Card (Chip Card) Transactions.

- ❖ In the menu, by clicking **CONTACT SUPPORT**, merchants can contact the website developers directly regarding technical issues with the website itself.



### Note

For Technical assistance for the Nomad Device and other Mobile Point of Sale issues, utilize the contact information given by the bank.

### ❖ How to settle the device with the transactions at the end of the day?

Settlement occurs **automatically daily** at **7:00pm**. All transactions processed after settlement will be settled next day with the subsequent settlement.

### ❖ Will the application or device work without internet or data access?

No, the device processes transactions from commands given through the application. The application utilizes the internet or data to connect with the host in order to process transactions.



# FAQ

❖ **Can the device be charged using a car charger?**

Yes, the device is charged using any USB adaptable outlet.

❖ **Is there a daily number of transactions limit?**

No, merchants can process as many transactions as required daily. However, at inception a limit per transaction will be established.

❖ **Can I resend receipts to customers from transactions processed days or weeks prior?**

Yes, any receipt for a transaction (approved, voided or declined) can be resent via email at any time. The receipt can even be sent to a different email address than initially entered.

Yes, this can be enabled by the bank upon request. Email notifications will be sent each time a transaction is processed.

❖ **If the mobile device's security is compromised can my transactions be tampered with?**

No, the information can only be accessed using your secure log in credentials. Any transactions completed using your Terminal ID and Secret will automatically credit your account. Credentials can be changed via formal request to the bank.



**❖ Where on the mobile device is the transaction information stored?**

Transactions and all customer account information is not stored on the mobile device. This information can only be accessed through secure login on the secure First Citizens Merchant System web portal.

**❖ Can I void transactions complete days or weeks prior?**

No, only transactions processed in the open batch (unsettled batch) can be voided or reversed . In a situation where such a reversal is required, the merchant must send an email First Citizens to officially request a the reversal of the transaction,

**❖ Can I received notifications every time a transaction is completed?**

- Avoid sharing your credentials
- Avoid saving your credentials on your mobile device

**❖ How can I prevent communication issues that can affect the performance of my IOS phone or tablet that connects to the device?**

For WIFI users, to prevent communication issues, you should choose a fast and stable internet service provider that offers adequate bandwidth and coverage for your business location.

For GPRS (Mobile/Cellular Data) users, to prevent communication issues, you should ensure that the device is operating in an exceptional service coverage area.





# Contact Information

Contact	Contact Number
Officer number	627-4POS (627-4767) (Call for paper rolls and technical assistance)
Authorization Department 24/7	623-2460
Call Center – between 6am -10pm, 7 days a week	62 FIRST (623-4778)
E-mail	<a href="mailto:pos@firstcitizenstt.com">pos@firstcitizenstt.com</a> (Email for paper rolls and technical assistance)

