

Quick Reference Guide

Chase Countertop Terminal
DX4000



Getting Started

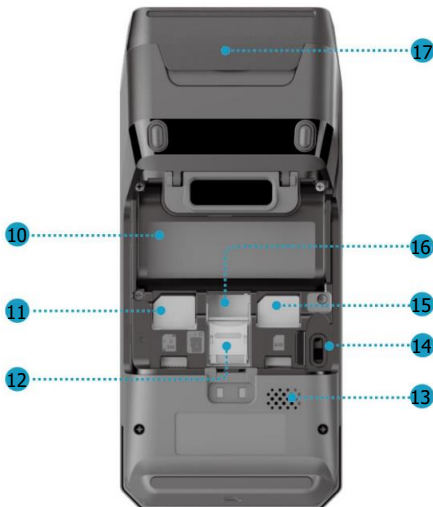
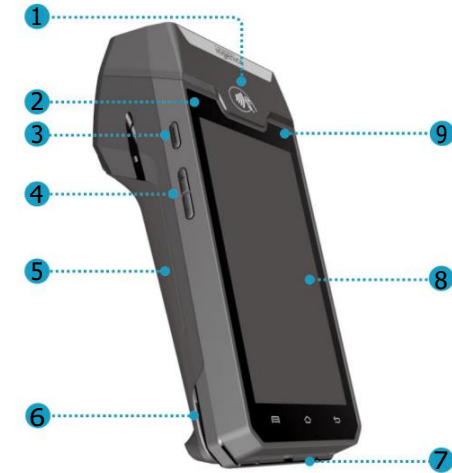
To help you get started, this Quick Reference Guide outlines some of the most common transactions for the DX4000 terminal solutions.

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If at any time you need assistance or have a question, you can use the Chase Assist Application on your device or you can contact your dedicated payment advisor.

Navigating Your DX4000 Terminal



1. Contactless Landing Zone
2. LEDs for Contactless Card
3. Power Key
4. Volume Keys
5. Battery Cover
6. Magnetic Card Reader
7. Smart Card Reader
8. LCD and Touch Screen
9. Front Camera
10. Battery Compartment
11. Double Slots 2 SIMS
12. Micro SD Slot
13. Speaker
14. USB Type-C Connector
15. SAM Card Slot by Default
16. Battery Connector
17. Easy Loading Printer

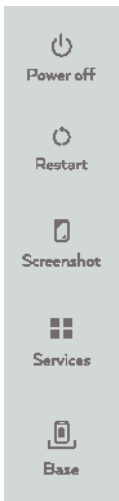
Use of the Terminal

To power on:

Press and hold the <Power> button for about 1 second until the Chase screen appears.

To power off:

Press and hold the <Power> button for more than 2 seconds until the display shows the figure below, then press <Power off>.



Power saver mode:

Press the <Power> button once, the terminal display will be turned on or off.

Unpacking the DX4000 Terminal

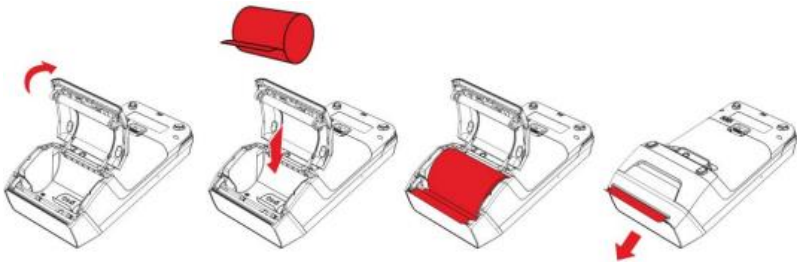


The DX4000 Terminal are shipped with the following items:

- Axium DX4000
- Paper Roll
- Magic Box with attached cables
- 2 Piece power adapter with power cord



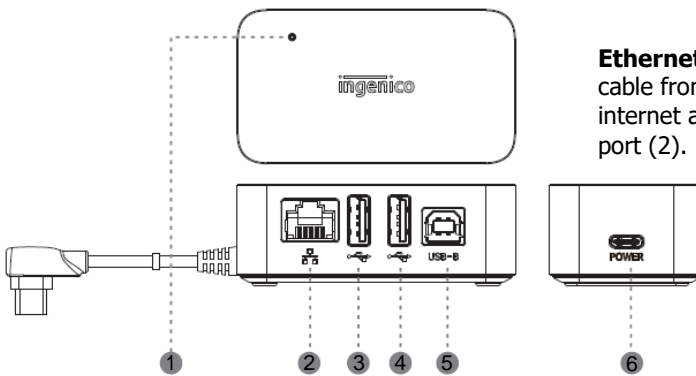
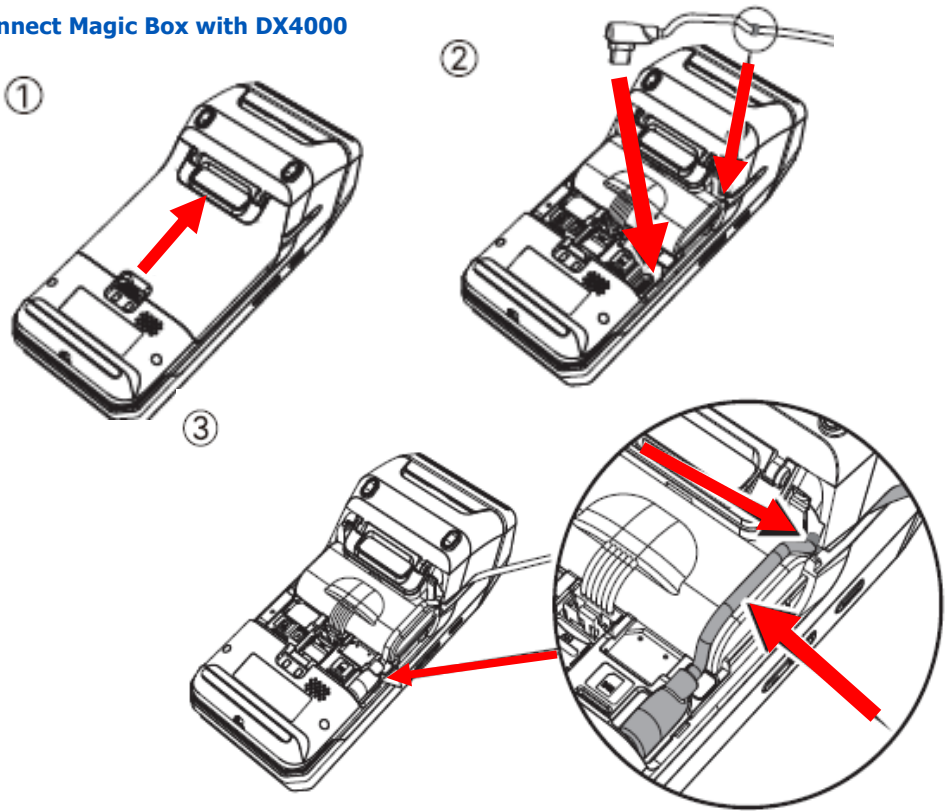
Installing paper roll:



- Turn device over to open the paper cover by lifting the catch located at the top of the DX4000. Pull the cover to the rear of the terminal.
- Enter the paper roll in the compartment following the directions above.
- Pull the paper up to the top of the terminal. While holding the paper and close the cover.
- Make sure to press both upper corners of the paper flap to ensure it snaps into place.
- To tear the receipt, paper should be cut off in an upward motion.

Setting Up Your Equipment

Connect Magic Box with DX4000



Ethernet – Connect the Ethernet cable from the switch or other internet access point to the ETH port (2).

1. Power indicate led	2. RJ45 Network Interface
3. USB-TYPE A	4. USB-TYPE A (optional)
5. USB-TYPE B	6. USB-TYPE C Power Interface

Password Management

In order to perform certain transactions, you will need to setup your terminal passwords. Here is the information to get started creating passwords.

Password privileges

Before you begin, think about the password(s) you will need to provision for your manager and staff:

- Ideally, each member of your staff should have credentials based on their level of responsibility.
- As an added layer of security, only managers can perform the following password protected transactions: Refund and Voids.

To protect your business, use discretion when sharing passwords and consider changing them on a regular basis.

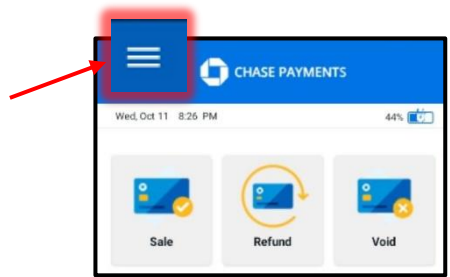
Two levels of passwords

The DX4000 terminal supports the following level of passwords:

1. **Manager** – Unlimited Access
 2. **Clerk** – Limited Access where applicable
- Each ID can support a unique password.
 - We recommend the creation of unique ID/Passcode for each of the 2 password levels.
 - Usernames and passwords are configured manually on the terminal by accessing the **Users Menu**. To access the "User's" menu, please contact your dedicated payment advisor for temporary passcodes required.

Setting Up Your Passwords

From main screen, choose the menu icon in the upper left corner and select [User].



Press/Tap [Admin]. You will be prompted to "Enter dynamic password".

Please use password provided by your dedicated payment advisor.

Press/Tap [Add User] located at the bottom of the screen to create user account.

Add Manager(s)

Press [Add User] located at the bottom of the screen to create user account.

1. Enter a Username
[Ex: Jane Smith]
2. Enter a password.
 - Must be 8-characters
 - 1 Upper
 - 1 Lower
 - 1 Special Character
3. Press Confirm to save changes.
4. Repeat Steps to add additional Managers/Users.

How to Process Basic Transactions

Below are some common transactions to help you start processing right away.

Sale

Perform a credit card sale transaction when the card is present.



From the idle screen select **Sale**.

Optional prompts if enabled may display. Ex: Clerk #, Invoice #, Tax #.

Then key in amount and press **Confirm**.

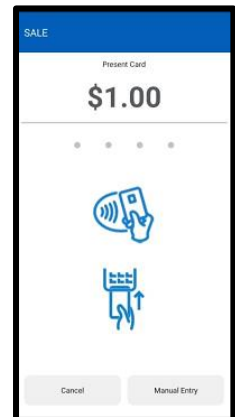


What the customer will see on the display:

Customer is prompted to Tap/Insert/Swipe

1. Customer confirms the sale amount.
2. Approval is displayed and receipt prints.
3. Press Print Receipt to print the customer copy.

For contactless transactions, the customer holds their card over the terminal until the reader flashes and/or beeps.



* Follow prompts until sale is completed.

Return/Refund

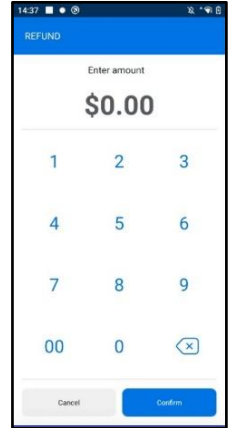
Perform a refund to return money to a cardholder's account from a sale completed in a closed batch (e.g., previous day).



From the idle screen select **Refund**.

Optional prompts if enabled may display. Ex: **Clerk #**, **Invoice #**, **Tax #**.

Then key in amount and press **Confirm**.

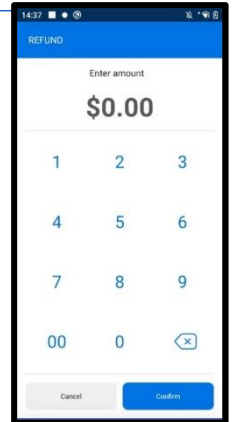


What the customer will see on the display:

Customer is prompted to Tap/Insert/Swipe

1. Customer confirms the refund amount.
2. Approval is displayed and receipt prints.
3. Press Print Receipt to print the customer copy.

For contactless (tab) transactions, the customer holds their card over the terminal until the reader flashes and/or beeps.



* Follow prompts until refund is completed.

Void

Perform a void to reverse a credit or debit sale, force, or return transaction and prevent any funds from transferring from the cardholder's account. Only available for transactions in the current batch (e.g., same day).



From the idle screen select **VOID**.

Select **"Yes"** to void the last transaction.

Select **"No"** to void any other transaction within the batch.

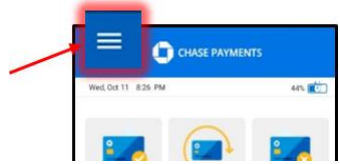


Display Main Screen	DX4000 Select Void
Void the last transaction?	Select "Yes" to Void the last transaction performed. Select "No" to Void other transaction in the batch.
Enter last four digits of the card?	If "No" is selected, "Enter the last four digits" of the cardholder's number located on the receipt and press [Confirm].
Select Transaction VISA XXXXXXXX7871 \$8.00	If more than one card ends with the same last 4-digits, then select the applicable transaction to void. Then press [Confirm] to void transaction.
Are you sure? Visa 401288*****1181 \$10.00	If "Yes", the terminal will connect to the host voiding the transaction. If "No", cancels the transaction completely.

More Information and Support

Below is some helpful information about transactions and functions on your terminal.

From main screen, choose the menu icon in the upper left corner and select applicable options.



Access Reports/ Reprint a Receipt

Scroll through the menu to select desire operation.

Press the screen to start the transaction or function.

Settling the Batch

Your terminal batch contains all the daily transactions to be settled. Settlement is the process of managing your transactions, so they are funded to your banking account.

For the DX4000 terminal, there are three (3) settlement options:

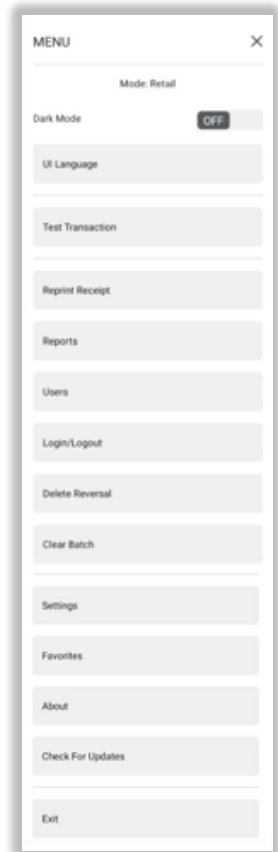
- Manual Settlement
- Host Auto Settlement [default]
- Terminal Auto Settlement

Manual Settlement

If your terminal is set to Manual Close, press to access the [Settlement] button on the main screen of the payment application. (Where you would see your Sale button).

Host or Terminal Auto Settlement

If your terminal is set to either Host or Timed Auto Settle, it will automatically settle transactions in the current batch at a specific, predetermined time, within a 24-hour period.



Note: If the terminal is unplugged or turned off before the set time, the auto settlement will occur when the terminal is turned on again.

Disputed charges/chargebacks

Chargebacks cost you time and money, so understanding how to manage them and protect your business is critical.

Customers may dispute charge because:

- They did not receive a product or service.
- They do not recognize the charge or business name on their credit card statement.
- The Product or service was defective, damaged, or not as it was described.
- They were a victim of fraud – their credit card was stolen or used without consent.

To help prevent chargebacks:

- Use delivery tracking, including signature confirmation.
- Use your company name on card statements.
- Use accurate product descriptions and clearly defined refund policies.
- Use ID verification policies and services – also consider accepting chip-enabled cards.

To learn more visit

<https://www.chase.ca/en/support/managing-your-account/chargebacks>

Common Errors Explained

More details on next steps, fixes, and additional error codes available at Chase Assist.

DECLINED REMOVE CARD	Transaction was declined	<ol style="list-style-type: none"> 1. Remove Card 2. Try a different card. Important: Don't try the same card. A "Forced" transaction could result.
FAILURE ON ALL COMM MODES	The network connection failed.	Verify terminal network connection.
MUST SETTLE BATCH	A previous attempt to settle batch failed. OR An attempted action requires empty batch.	<ol style="list-style-type: none"> 1. Retry settling batch. 2. Check your terminal connection. 3. If problem persists, please contact your dedicated payment advisor.
TRANSACTION FAILED	The network connection failed.	<ol style="list-style-type: none"> 1. Check network connection. 2. Retry transaction.
SYSTEM PROBLEM CALL HELP DESK	There are no pending transactions	<ol style="list-style-type: none"> 1. Indicates your terminal won't work until you contact us for important security or maintenance enhancements. 2. Please contact your dedicated payment advisor.

