



Counter app DX and EX models

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Introduction

The Counter Service app (hereafter: the app) is a software component designed to store transaction statistics. The app reports transaction details and limited statistical data for completed transactions, including: the number of transactions, the total cumulative total of transactions, the cumulative amount of the transactions per transaction type or per card brand.

If the terminal is equipped with a printer, a receipt reporting an overview of the completed transactions can be printed.

Additionally, the app can be configured to report transactions that occur on specific shifts or in specified time periods. Each named shift or time period can be closed and a new shift subsequently opened. Shifts can be configured to open and close automatically or manually.

When a transaction is performed, the details of the transaction are registered to the shift that is currently open. Once the shift has been closed, no new transactions can be added. Only one shift can have 'open' status at a time.

The app has a maximum reporting capacity of seven shifts. Of these shifts, only the most recent shift remains open to allow the registering of transactions. The previous six shifts are then set to closed and only the recently opened shift remains open to allow transactions to be registered.

Note: When the total shift reporting capacity (seven shifts) is reached, opening a new (eighth) shift will cause the oldest shift to be discarded.

Counter app guidelines

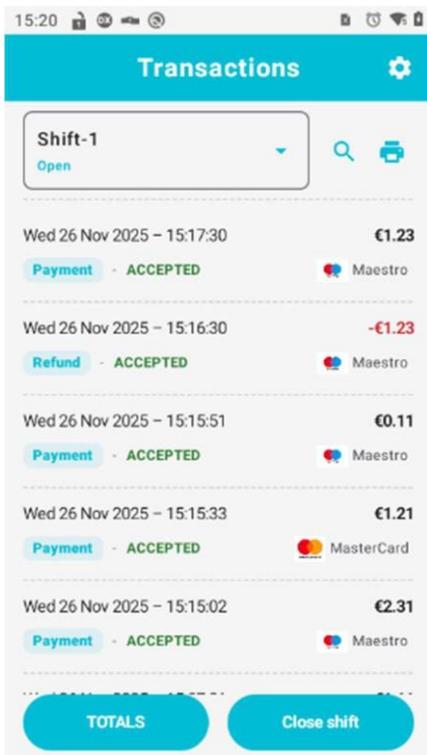
Installation and starting the app

The terminal has its own separate software package. Once the app is installed, an additional icon named 'Transactions' will appear on the desktop screen.

Tap the icon to launch the Counter app.



Once the app is launched, it will display all transactions registered on the terminal up to the current time. The name of the currently open 'shift' or time period will also be displayed in the upper left corner.



The default shift name is 'Shift-n', where 'n' automatically changes from 1 (the first shift is named 'Shift-1') to the next consecutive number, with each new shift. So, 'Shift-1' is followed by Shift-2, Shift-3, etc.

Once the app is installed, the payment app will begin registering transaction details in the Counter Application Service app.

By default, shifts are automatically closed at midnight (00:00).

Note: Changing the name of the current shift will cause the current shift to be closed and a *new shift with the new name will open*.

The main screen

On the following picture, the seven main components of the screen are indicated:

Transaction details



(1) The central part of the screen contains the details of the completed transaction within the currently open shift (or time period). Each transaction displays the following details:

- The amount**
 In transactions in which the cardholder pays the merchant, the amount is displayed in black. For transactions in which the merchant returns (i.e. refunds) or cancels a transaction payment previously paid by the customer, the amount will be displayed in red, along with a minus ('-') symbol.
- The card scheme (or card brand)**
 The logo and brand name of the card used in the transaction is displayed (e.g. Mastercard, Visa, Mastercard Debit, Bancontact, etc.) alongside the relevant transaction.
- The date and time**
 The date and time at which the acquirer authorised the transaction is displayed.
- The transaction type**
 The type of transaction is displayed (e.g. payment, refund, reservation, sale after reservation, refund).
- Transaction result**
 Confirmation of the transaction process outcome is displayed (e.g. accepted, declined, etc.).

Shifts overview



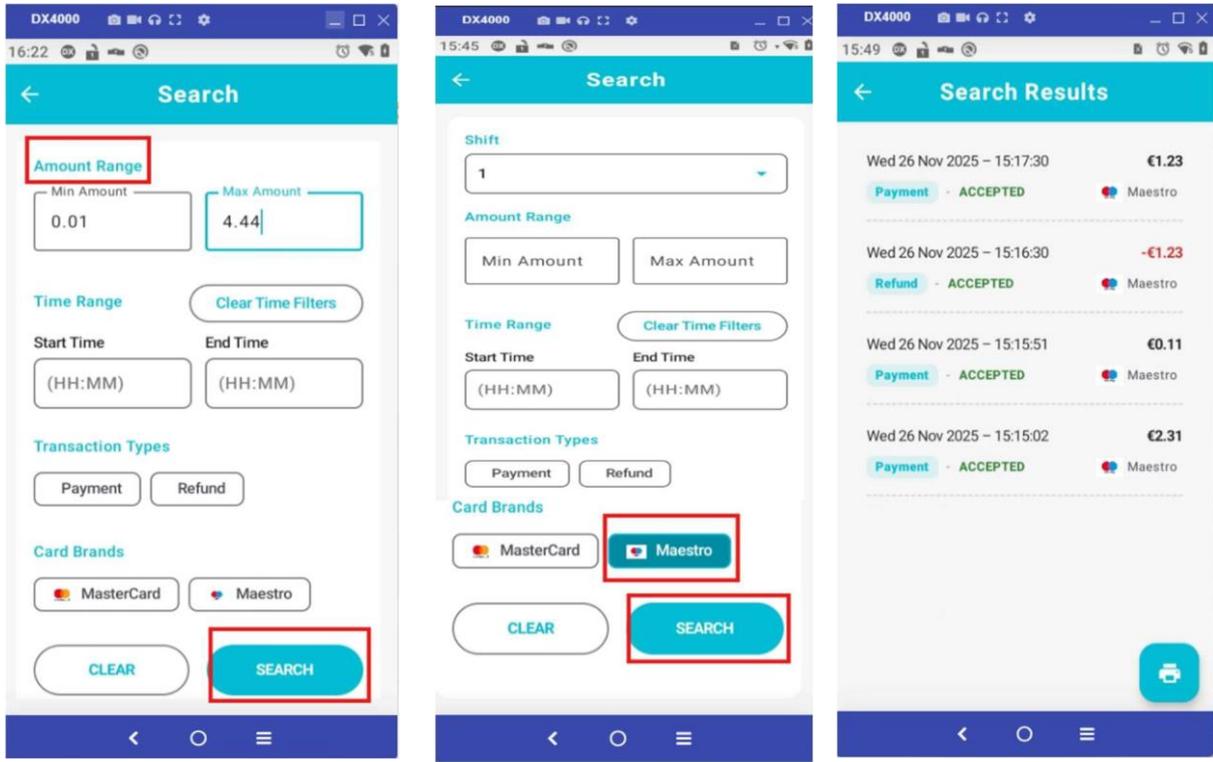
Tap the dropdown menu (2) to display an overview of all the shifts that are saved on the app.

The shift presented at the top of the list is the shift that is currently open.

Once a shift is selected, the main (central) part of the screen (1) displays all the transactions recorded in the time period covered by the shift.

Search function

Once a specific shift is selected, you can initiate a search by hitting the magnifying glass icon (3).



In the search screen, select different criteria or filters to refine your search results. The search results will always **pertain to the shift named at the top of the screen**.

The screens above show the steps for specifying search parameters, based on the amount range or based on the card scheme.

If the terminal is equipped with a printer, the search results can also be printed out.

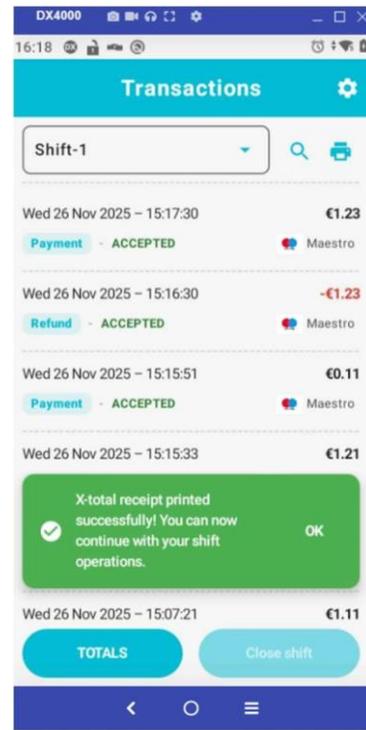
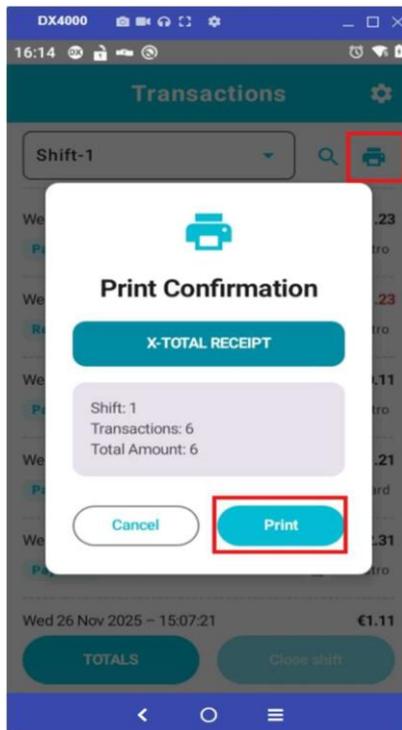
To quit the 'Search' screen, tap the left arrow in the upper lefthand corner to return to the main screen.

Print function

If the terminal is equipped with a printer, the transactions of the selected shift can be printed from the main screen.

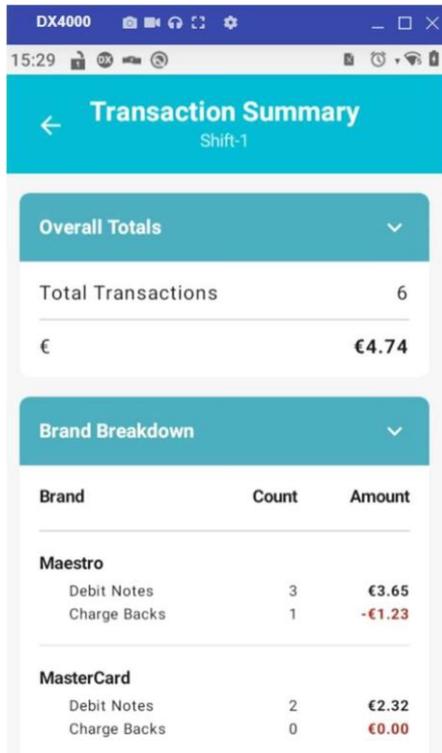
To print transaction details, tap the printer icon (4) to initiate printing.

The receipt that is printed contains all details of all the transactions in the order that they were registered during the shift. These are also referred to as X Totals.



Z-totals summary

Select Totals (5) to view a summary of completed transactions. This transaction summary is also known as the 'Z-totals' summary.



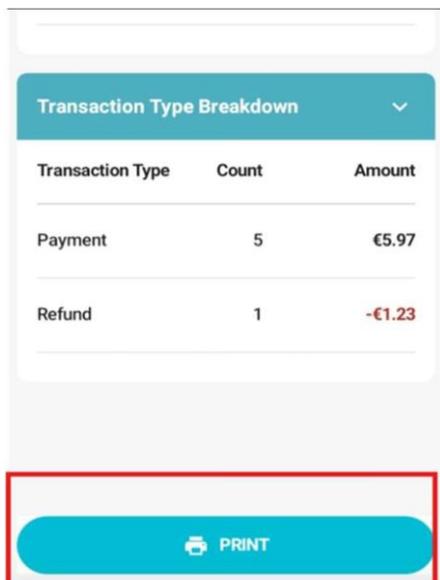
In the 'Transaction Summary' screen, following breakdowns are shown:

- 'Overall Totals' displays the cumulative, overall total of all transactions completed during a shift. The name of the relevant shift is displayed at the top of the screen.
- 'Brand Breakdown' displays a breakdown of all the card brands that are used. The number of transactions are displayed as well as the cumulative total.

Cumulative counts for transactions in which the cardholder paid the merchant are grouped together as 'Debit Notes'. For chargebacks (i.e. refunds or cancellations), the total amount of such transactions is displayed on a separate line in red and preceded by a minus (-) symbol, as 'Charge Backs'

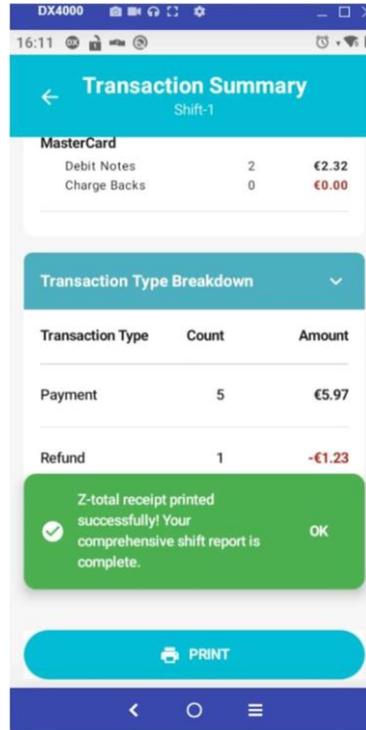
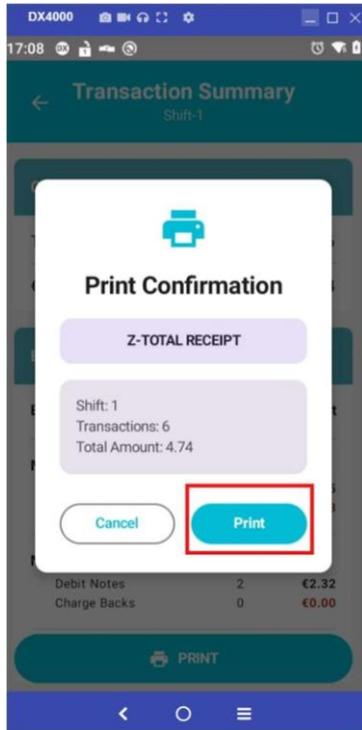
- To view the 'Transaction Type Breakdown', simply scroll down further to view a breakdown of all transaction types.

The number of transactions and the cumulative total of each transaction type is displayed and can be printed if the terminal has a printer.



Z-total printing

Z Totals can also be printed from the 'Transaction Summary' screen. Tap print to print breakdown results on a receipt.



Closing shifts

Shifts can be managed in one of two ways:

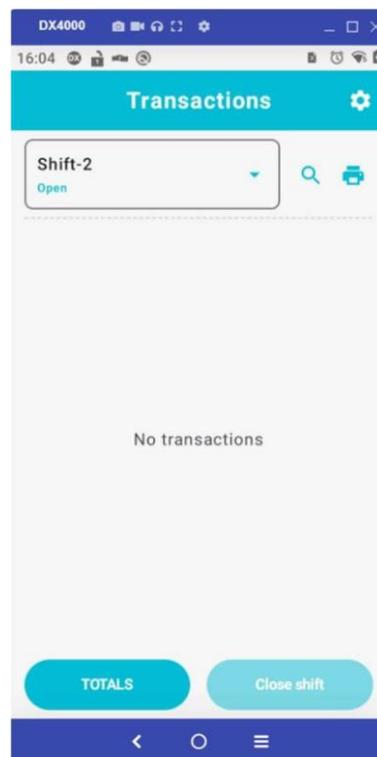
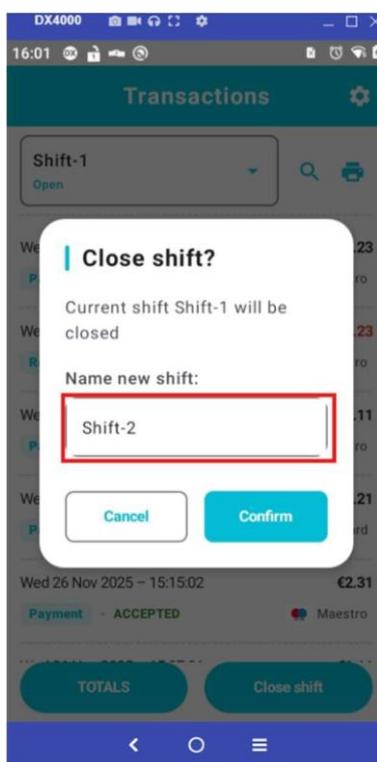
- **Automatically** – In this mode, shifts will be closed at a pre-defined times of the day. The default time is midnight (00:00).
- **Manually** – In this mode, the merchant must close each shift themselves.

Important to know

Regardless of which closure method is configured, the app will automatically close the currently open shift and start a new shift in the following circumstances:

- If the total number of transactions during the shift exceeds 750 transactions.
- If there is more than 24 hours between the shift opening time and the current time, the current, open shift will automatically close. This means that if the terminal is configured for the manual closing mode, shifts cannot remain open beyond 24 hours.

When a shift is closed, the app will prompt the user to enter a name for the new shift. The default name is 'Shift-n' where n value becomes the next, as yet unused numerical value, as outlined under 2.1 above.

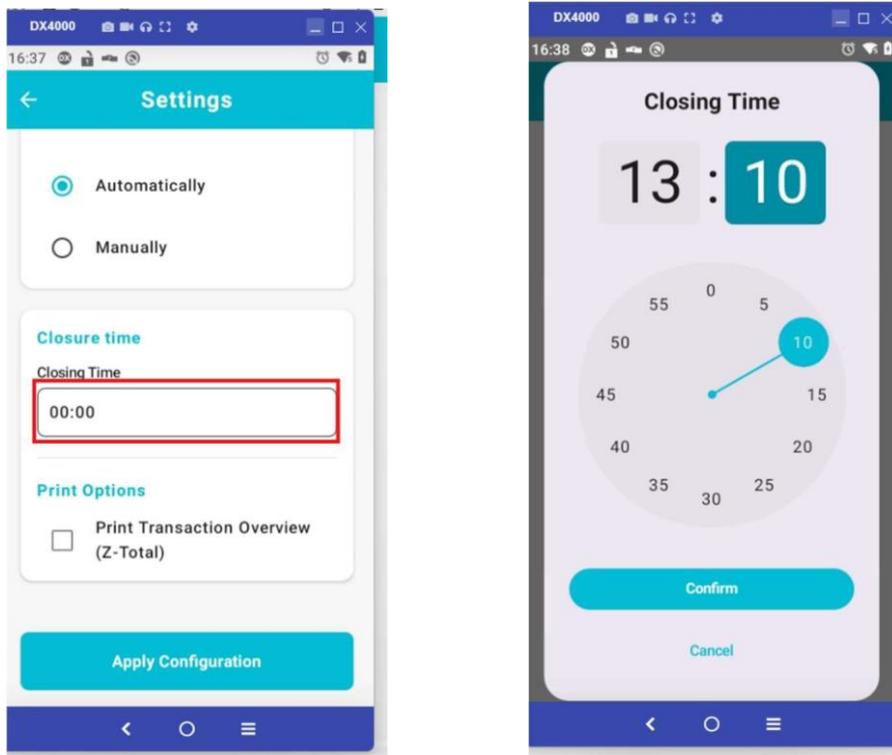


In the main window (i.e. the righthand illustration), the app indicates that no transactions have yet been recorded yet. The previous shift (Shift-1) will be closed.

A maximum of seven shifts can be stored in the app's list of shifts at any one time. Of these, only one may have 'open' status. The rest of the shifts are closed (i.e. one is open and six closed). If seven closed shifts were present before closing, the oldest closed shift will be discarded from memory.

Configuring the app

To configure the app, select the 'cog' symbol (7) in the upper righthand corner of the screen.



As explained above (see section Closing a shift), shift closures are managed automatically or manually.

If 'Manually' is selected, no further options are configurable.

If 'Automatically' is selected, two further options are available:

- Closing time – this indicates the time that the shift is automatically closed. As stated above, the maximum period the app keeps a shift open is 24 hours. If a shift extends beyond this time period, the open shift will be closed and a new shift will be started.
- Print Transaction Overview (Z-totals) – select this option to have the terminal print a receipt with a summary of all transactions completed during the shift that is about to be closed.
- Shift names – in automatic mode, the shift name will default to 'Shift-n' where 'n' is a number number that will increases by one with each new shift.