Commonwealth Bank

Smart Sync app & Smart Dash User Guide

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Introducing Smart Sync

Congratulations on choosing Smart Sync, the latest payment innovation by CommBank. The Smart Sync app is a new payment interface that enhances the capabilities of your Smart Terminal

Smart Sync has a range of versatile features including;

- Home screen customisation
- Unique terminal names
- Built in calculator
- Split bills by amount or table
- Tipping
- Surcharging
- Terminal reporting by shift, running total or sales summary

Smart Sync is designed to pair with the merchant portal, Smart Dash. Receive additional data insights with detailed views of daily, weekly, monthly or yearly sales.

Whether you are looking to use your Smart Terminal in standalone mode, or seamlessly integrate with your existing Point of Sale (POS) system, Smart Sync has you covered. You can choose the set up that best suits your business needs and still enjoy the benefits of our intuitive Smart Dash portal.

Getting Started

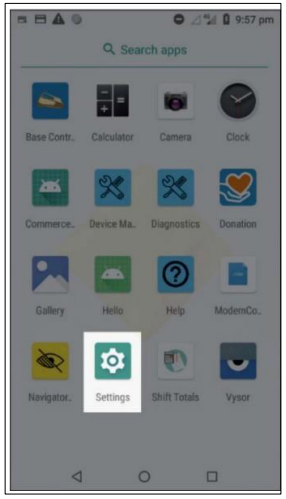
Setting Smart Sync as your default app

Set Smart Sync as the default app on your terminal to maximise the benefits it offers.

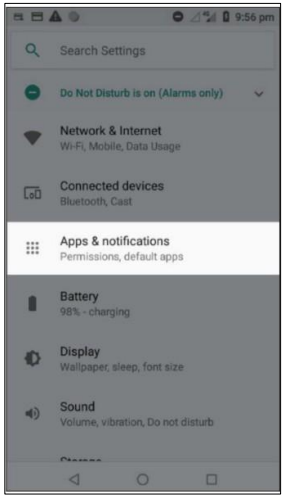
1. Drag your finger from the top of the terminal screen. This will display the Launcher menu dropdown. Select the Tiles icon to access the range of app.
2. Select the **Settings** icon.
3. Click on **Apps & notifications.**
4. Scroll to the **Advanced** menu option and select.
5. Tap on **Default apps.**
6. Click on **Home app.**
7. Select the **Smart Sync** tile .
8. Navigate back to the landing screen using the **Home** button on the bottom of the screen.



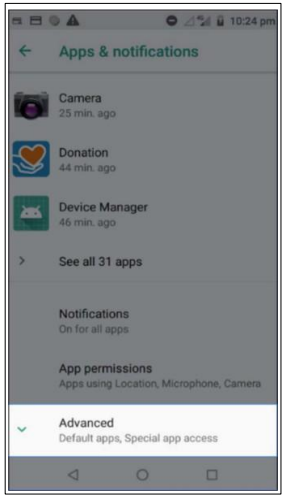
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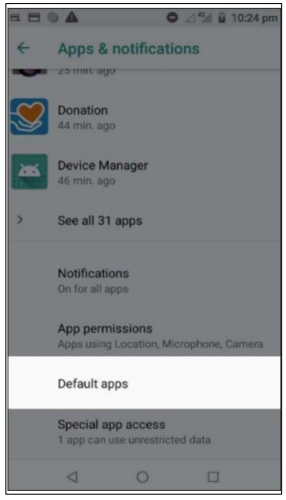
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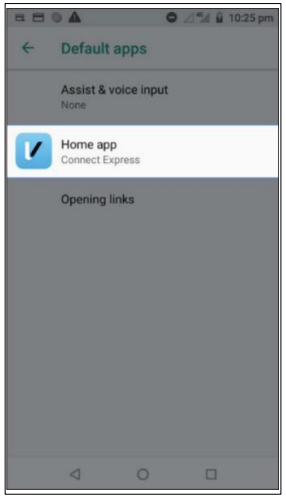
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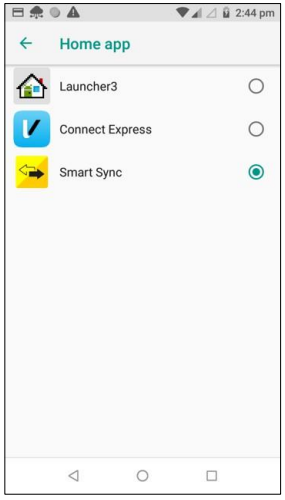
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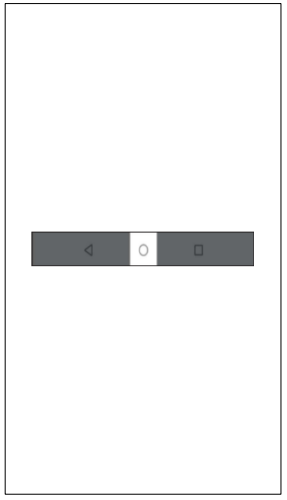
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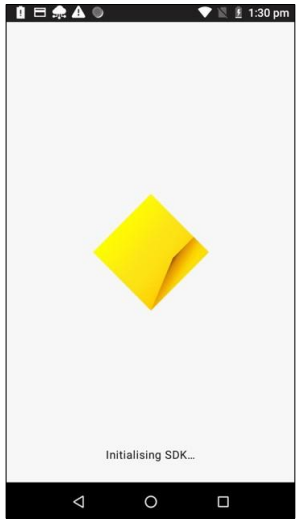
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Activating Smart Sync

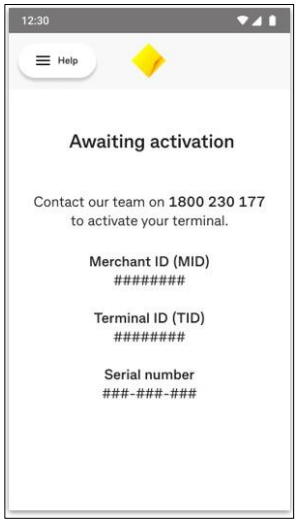
1. Open the **Smart Sync** app.
2. Select **Ready.**
3. Wait for the self-activation to complete.
4. Select **Next.**
5. Select **Review.**
6. Accept the permissions prompt with **ALLOW.**



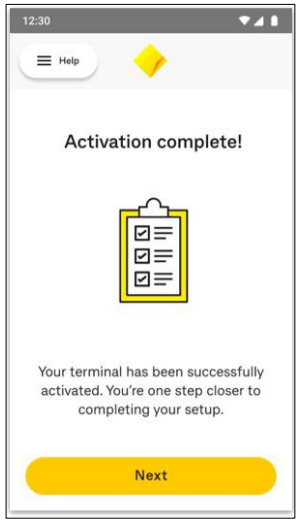
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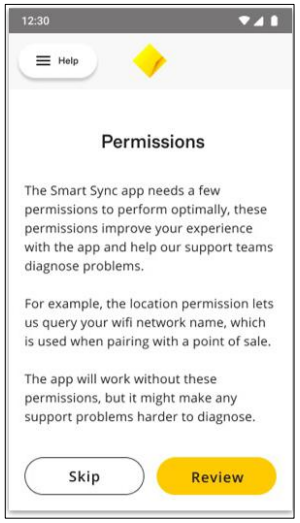
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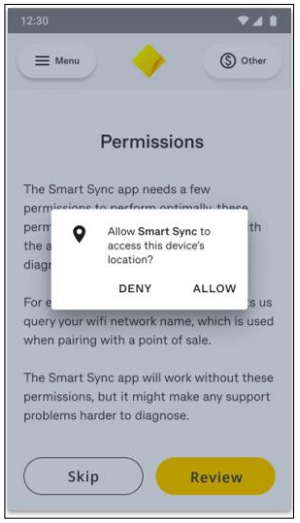
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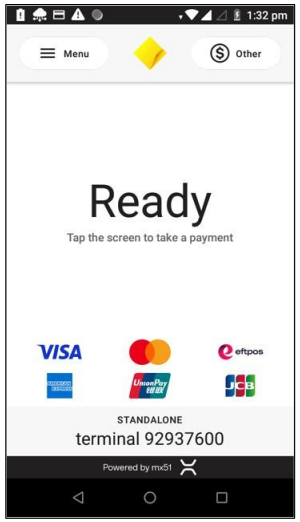
Operating in Integrated or Standalone mode

Smart Sync integrates with your existing Point of Sale (POS) device, or can be used in standalone mode.

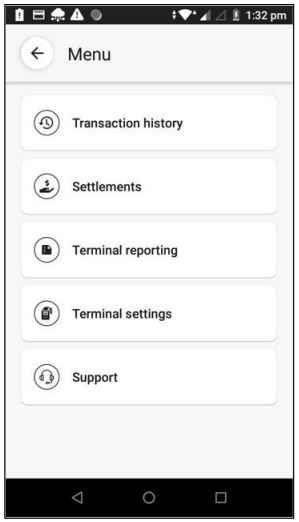
Please note, the transaction data from Smart Sync originating transactions will be available in the Smart Dash portal regardless of whether the app is in Standalone or Integrated with a POS device.

Setting the Smart Sync in Standalone or Integrated mode

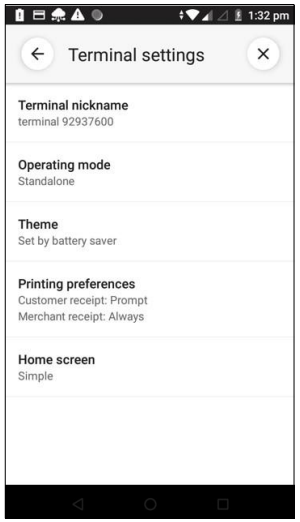
1. Select the **Menu** option on the Smart Sync home screen.
2. Select **Terminal settings.**
3. Select **Operating mode**.
4. A pop up will appear in Operating mode allowing you to select **Integrated** or **Standalone**.
5. Navigate back to the landing screen using the Home button on the bottom of the screen.
6. The Integrated or Standalone status will be reflected on your terminal home screen.



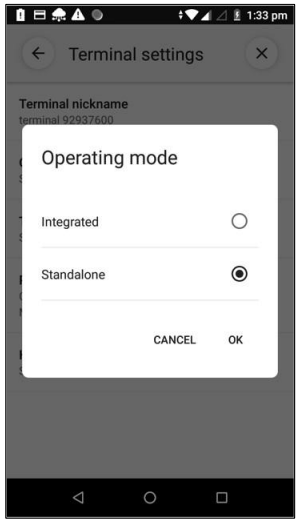
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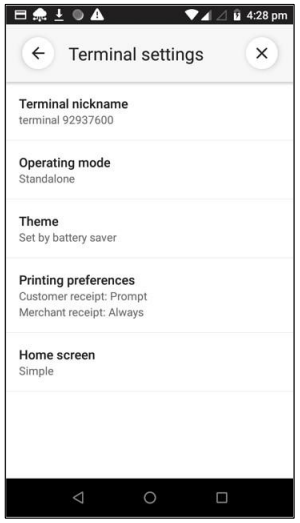
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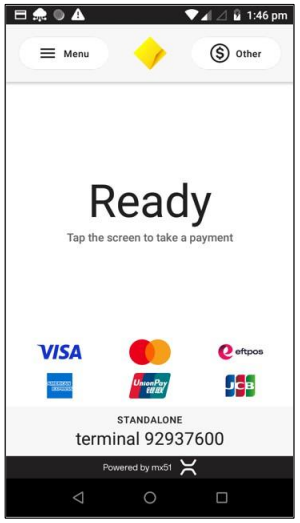
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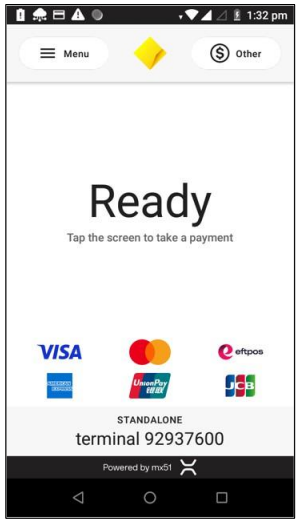
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Standalone

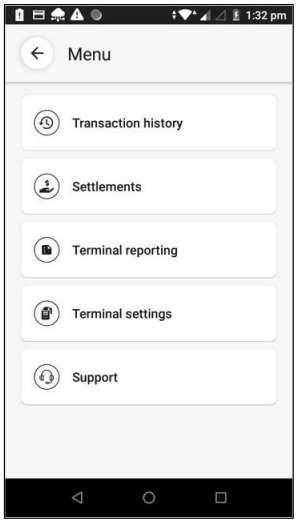
Display Options

When in Standalone mode, the Smart Sync offers three different options for how to display the terminal. To access the different options:

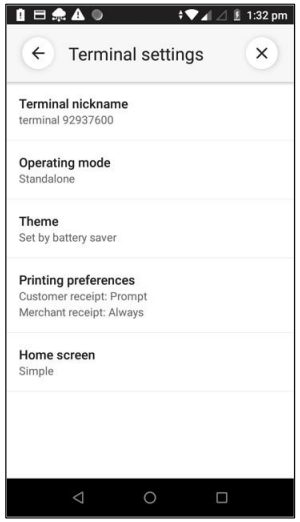
1. Tap on the Menu icon.
2. Select Terminal settings.
3. Select Home Screen.
4. Select the Home Screen option that suits your needs:
   - **Simple**
   - **Keypad**
   - **Tiles**
   - **And select 'OK'**
5. Tap the X button to the return to the home screen. It will have updated to reflect your choice.



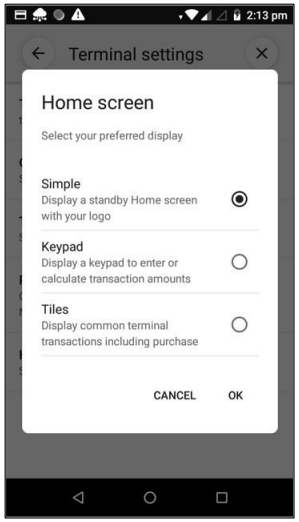
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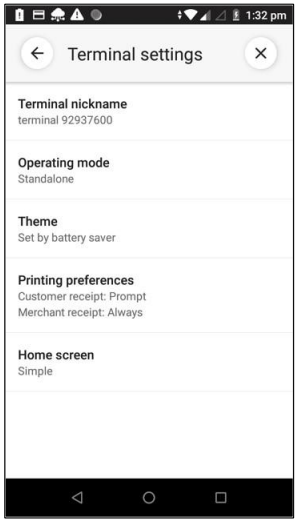
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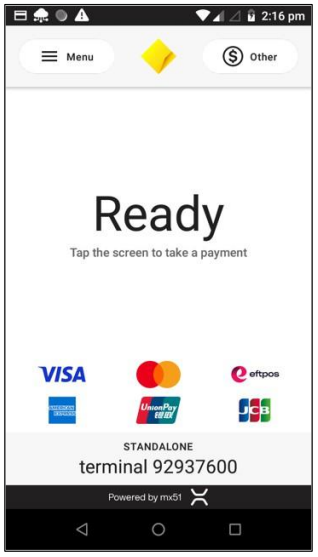


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Accessing the Payment Options based on your selected display

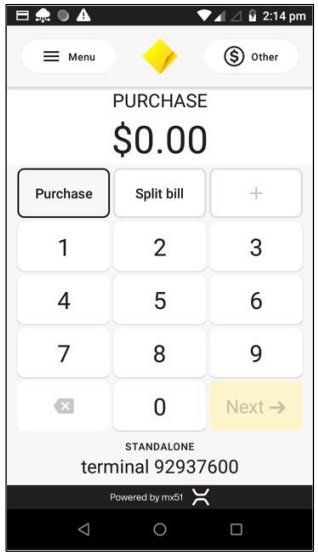


Simple

To access the purchase screen in the Simple display, just tap the centre of the screen.

By tapping the Other Transactions icon, you can access:

- Refund,
- MOTO (if applicable), and
- Split bill

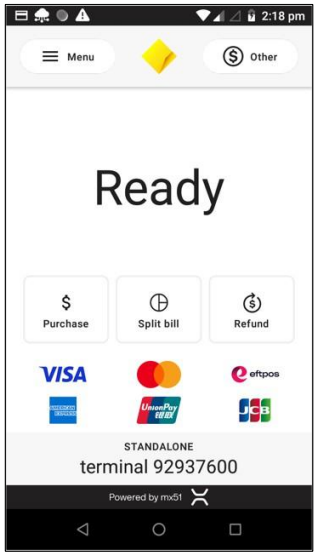


Keypad

If you selected the Keypad screen the Purchase, Split Bill, and Add Charge tiles are above the keypad.

By tapping the Other Transactions icon, you can access:

- Refund, and
- MOTO (if applicable),



Tiles

The Tiles display option provides you with the tiles on the home screen for.

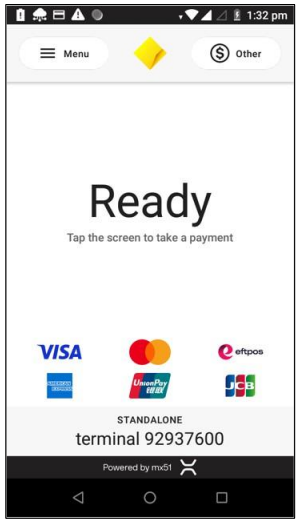
By tapping the Other Transactions icon, you can access MOTO (if applicable).

- Purchase,
- Split Bill, and
- Refund.

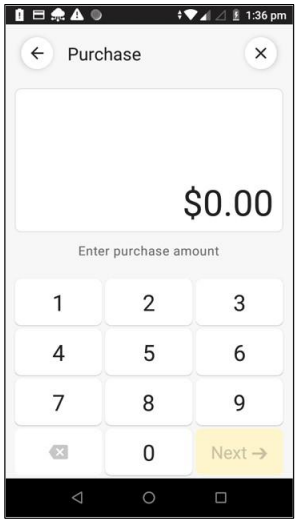
Standalone Purchase

Here are the steps to make a purchase transaction via you Smart Sync app in Standalone mode.

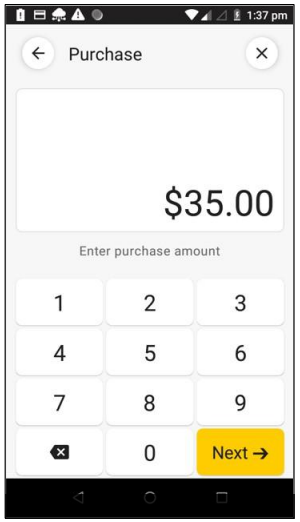
1. Tap screen to access the purchase screen.
2. The payment screen will appear.
3. Enter the purchase amount and then select **Next** to process the transaction.
4. Present the terminal to the cardholder for Tap, Swipe or Insert card payment.
5. Payment success is confirmed on the terminal screen.
6. Select **No** or **Yes** to print the customer receipt.



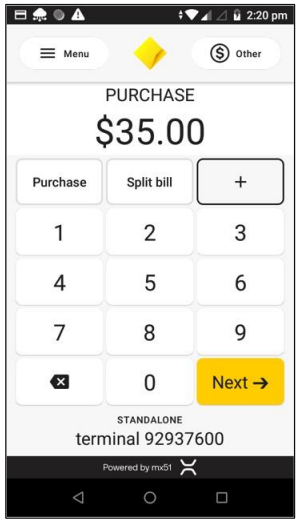
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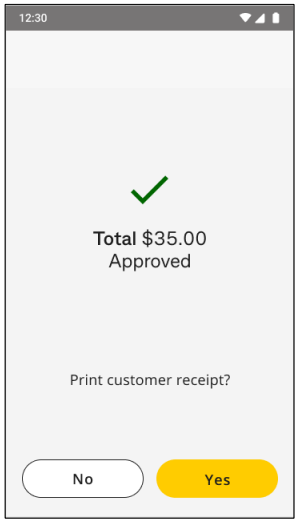
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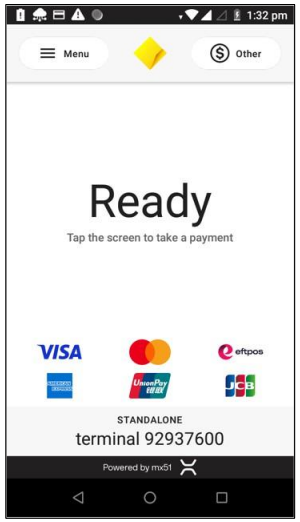
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Standalone Purchase with Surcharge

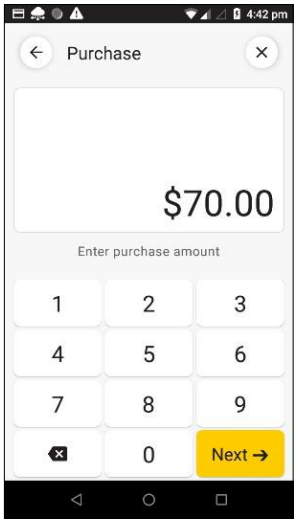
If you have set up surcharges for the card scheme used by the cardholder, they will be automatically applied to the total when calculating the charge.

To have a surcharge set up against a card scheme, please refer to the Smart Terminal User Guide in the CommBank Support Hub.

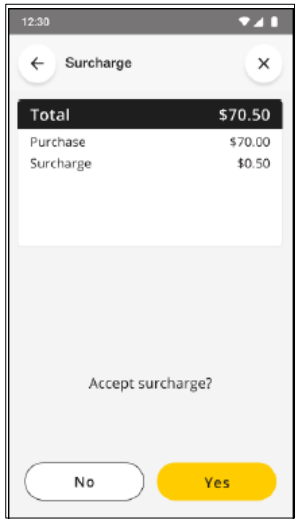
1. Tap screen to access the purchase screen, enter the purchase amount then select **Next**. The surcharge will be applied against the purchase amount entered.
2. Present the terminal and select **No** or **Yes** to accept the surcharge applied.
3. The cardholder can now tap or insert card for the payment.
4. Payment success is confirmed on the terminal screen, select No or Yes to print the customer receipt.



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Standalone Purchase with Tipping

If tipping is enabled on your terminal, the cardholder will be given the option to tip.

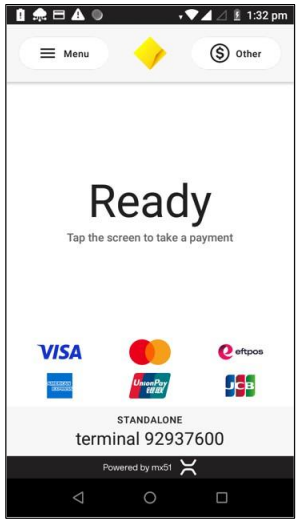
NOTE: To have tipping enabled on your Smart Dash Terminal, please contact the helpdesk **1800 230 177.**

1. Tap screen to access the purchase screen.
2. Enter the purchase amount then select **Next.**
3. The option to tip will appear on the screen, the cardholder can elect to tip, either by

a. preset percentage or by

b. customised amount.

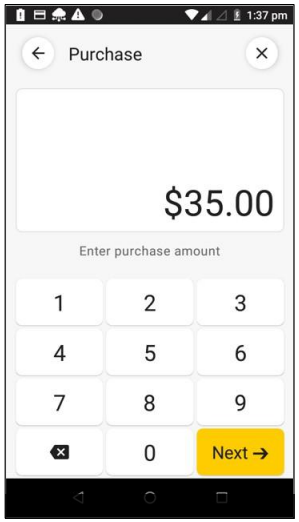
3. The cardholder can now tap, swipe or insert card for the payment. Payment success is confirmed on the terminal screen.
4. Select **No** or **Yes** to print the customer receipt



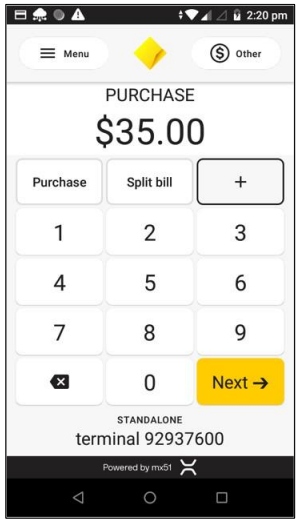
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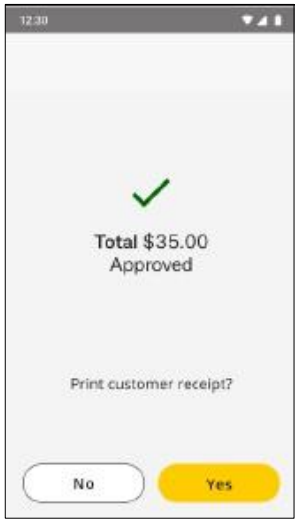
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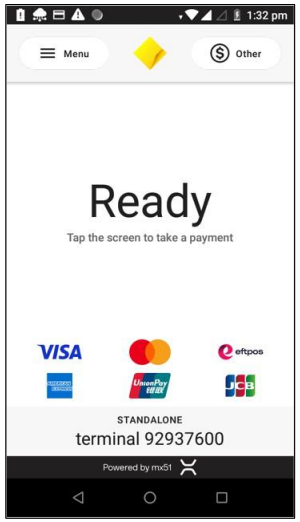


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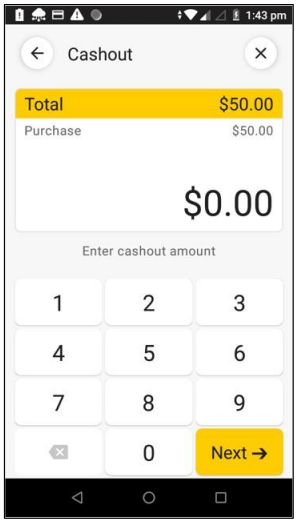
Standalone Purchase with Cashout

If cashout is enabled on your terminal, you can include a cashout when you make a purchase.

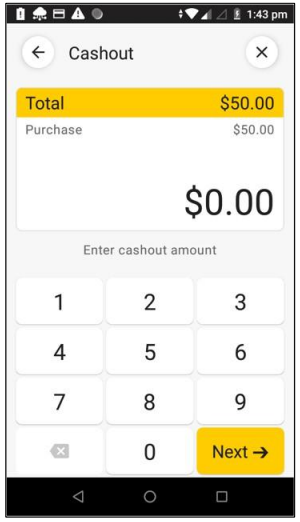
1. Tap screen to access the purchase screen.
2. Enter the purchase amount then select **Next**.
3. Enter the Cashout Amount then select **Next**.
4. The Purchase & Cashout amount are presented on the Terminal. The cardholder can now tap, swipe or insert card for payment. Payment success is confirmed on the terminal screen. Select **No** or **Yes** to print the customer receipt.



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Standalone Purchase with Split Billing – Split evenly

The **Split Bill** option allows for an even split among a selected number of card holders or customised split of different amounts of the total.

1. Tap screen to access the purchase screen.
2. Access the Split Billing function (either via the Split Billing tile if using the Tiles display or via the Other icon if using the simple or keypad display).
3. Enter the full purchase amount then select **Next**.
4. Select **Split Evenly.**
5. Select the number of splits using the + & - keys or enter the number manually, then select **Next**.
6. The terminal will display the amount of the split transaction. Select **Next**.
7. The terminal will display the split amount (and if tipping is enabled, the cardholder will be given the option to tip). Select **Next**.



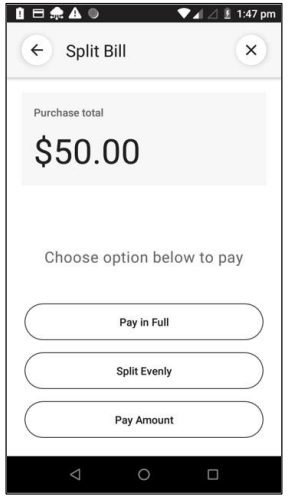
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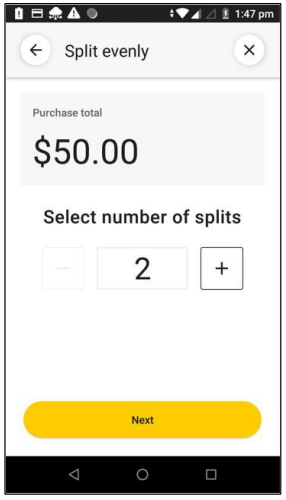
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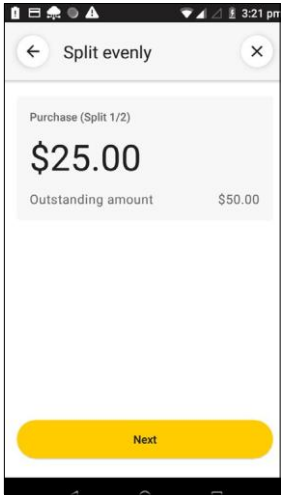
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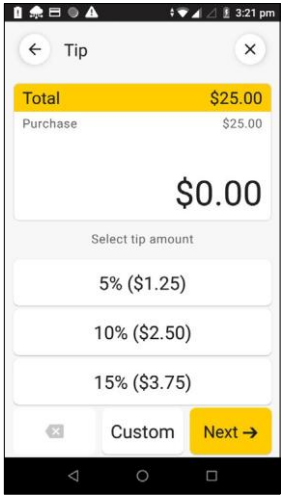
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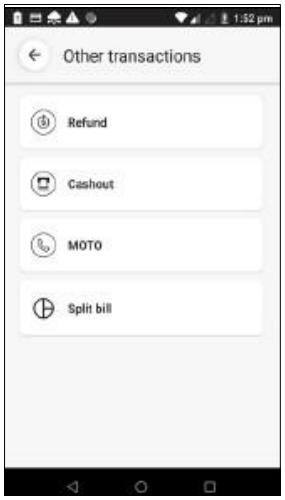
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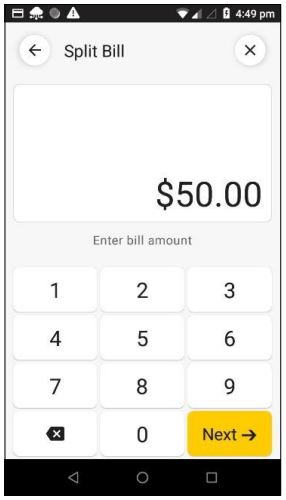
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Standalone Purchase with Split Billing – Customised split

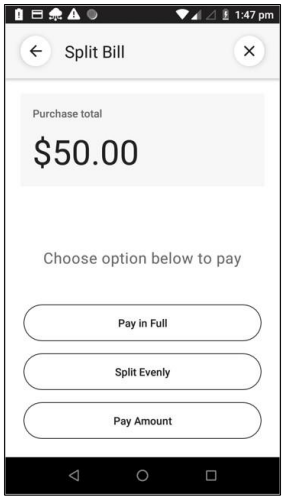
1. Access the Split Billing function (either via the Split Billing tile if using the Tiles display or via the Other icon if using the Simple or Keypad display).
2. Enter the full purchase amount then select **Next**.
3. Select **Pay amount**.
4. Input the amount the cardholder is to pay, then select **Next**.
5. The terminal will display the amount of the split transaction (and if tipping is enabled, the cardholder will be given the option to tip. The cardholder can now tap, swipe or insert card for payment.



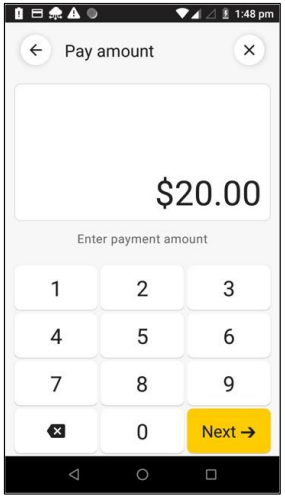
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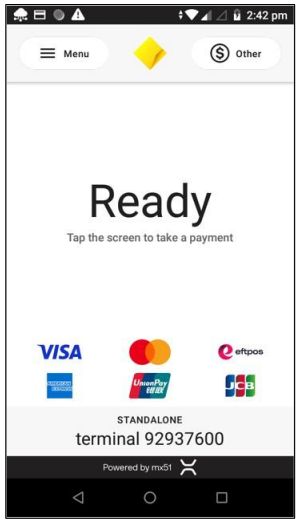
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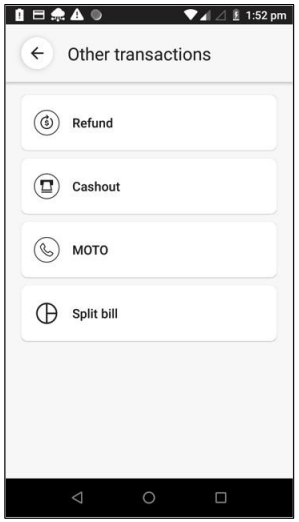
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Standalone Refund

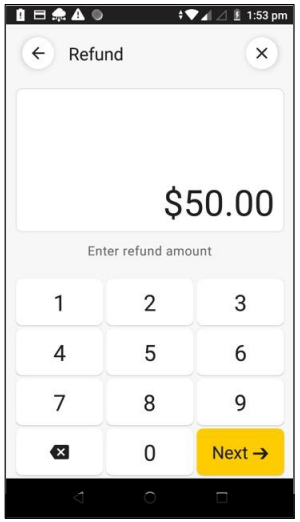
1. Tap screen to access the purchase screen.
2. Access the Refund function (either via the Refund tile if using the Tiles display or via the Other icon if using the Simple or Keypad display).
3. Enter the amount to be refunded then select Next.
4. Enter the cashier's passcode to authorise the refund.
5. Present the terminal to the cardholder for Tap, Swipe or Insert card payment.
6. Payment success is confirmed on the terminal screen.



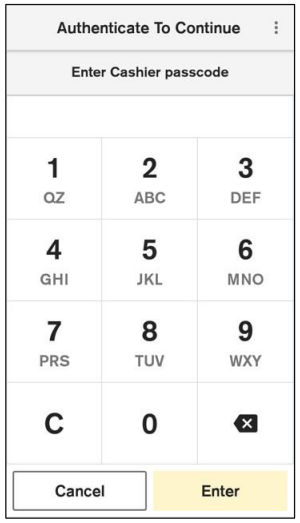
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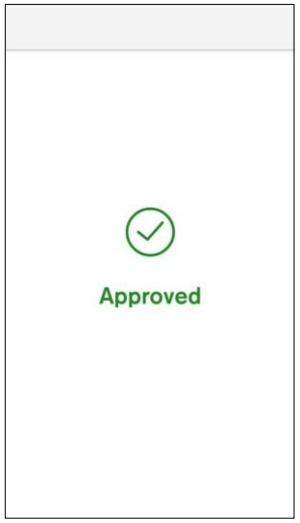
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Integrated

Once the Smart Sync app has been integrated with the POS, you will be able to initiate transactions on the POS then have the cardholder make the payment via the terminal. All transactions that occur when the Smart Sync app is linked to the POS will be sent to the Smart Dash portal.

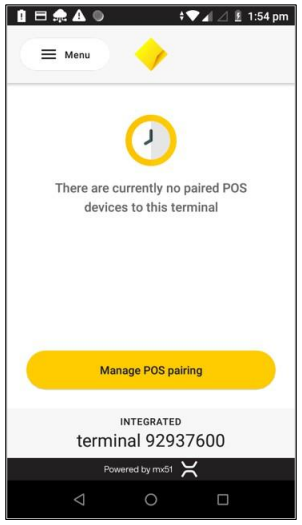
Receipts for transactions that occur on integrated terminals will be printed from the POS, not from the terminal.

If there are any settings that are available on the POS, such as tipping or surcharges, which do not occur on the terminal please contact our merchant helpline on 1800 230 177.

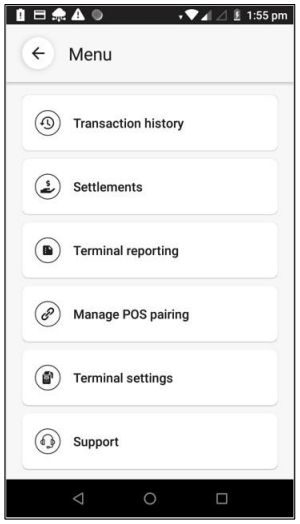
Integration with the Point of Sale

1. In Integrated Mode, select **Menu**, or select **Manage POS pairing** if no POS devices are connected.
2. Select **Manage POS pairing.**
3. Select +.
4. On the POS, enter in the details displayed on the EFTPOS screen. Then select **Start** on the EFTPOS terminal and pair on the POS.
5. Ensure the code displayed matches what is displayed on the POS and select **Yes.**
6. Select **Finish.**

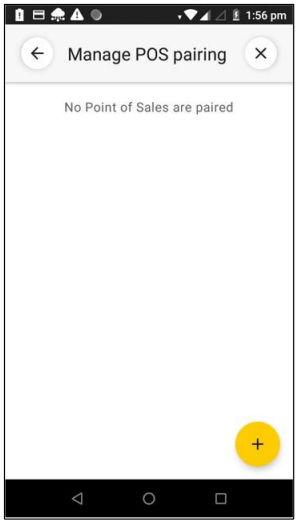
Note: Your POS and Terminal have to be on the same network.



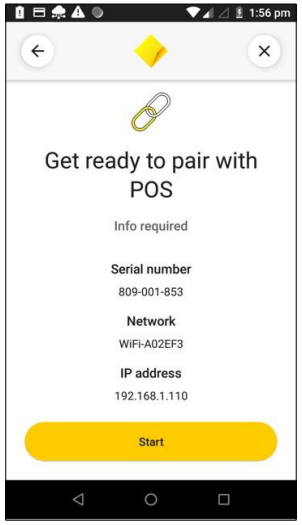
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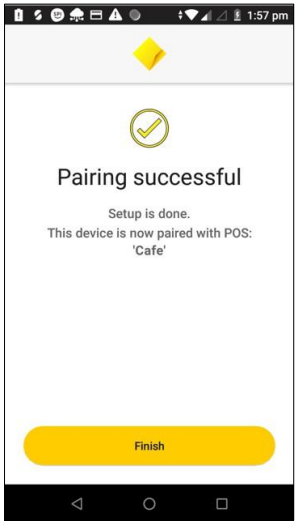
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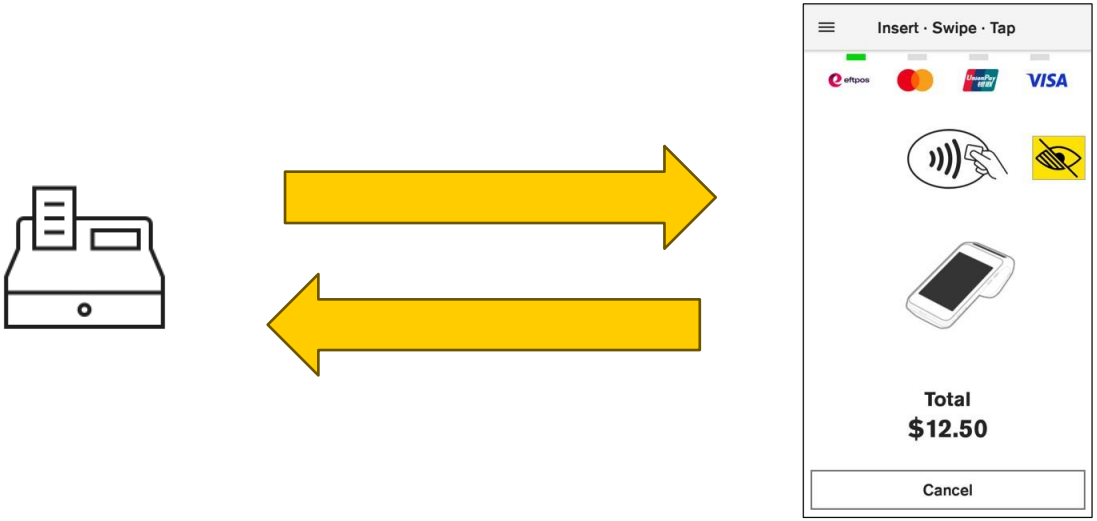
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Integrated Purchase

1. Input the payment into the POS and initiate the transaction.
2. The transaction details will be sent to the terminal.
3. Take payment from the cardholder via the terminal.
4. Payment details will be sent back to the POS and the Smart Dash portal.



a. Follow the standard checkout flow on your POS to initiate the transaction

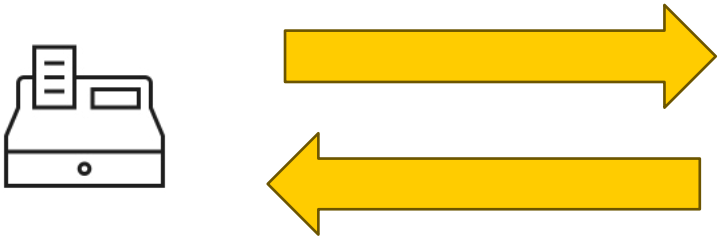
b. Transaction details are sent to the Terminal

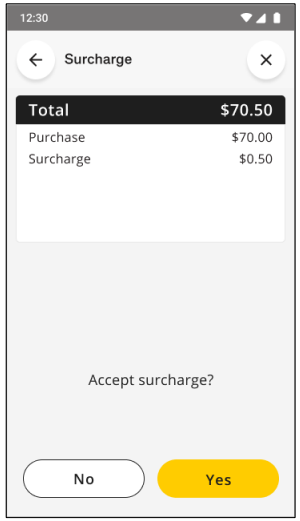
c. Take Payment from the cardholder via the terminal. Details are sent back to the POS and the Smart Dash portal.

Note: The receipt will print via the POS printer

Integrated Purchase with Surcharge

1. Input the purchase into the POS and initiate the transaction.
2. The transaction details will be sent to the terminal.
3. Take payment from the cardholder via the terminal.
4. The Smart Sync app will recognise the card type and apply a surcharge to the Purchase amount. The terminal will ask that the surcharge be approved. Once the surcharge is approved the transaction can proceed.
5. Payment details will be sent back to the POS and the Smart Dash portal.





a. Follow the standard checkout flow on your POS to initiate the transaction

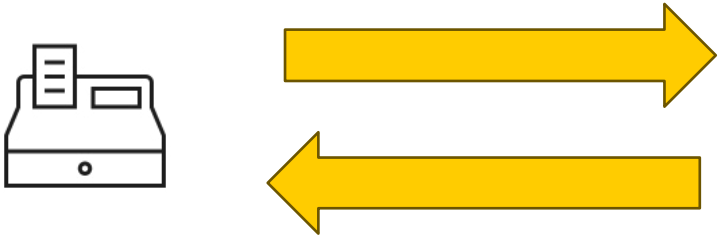
b. Transaction details are sent to the Terminal

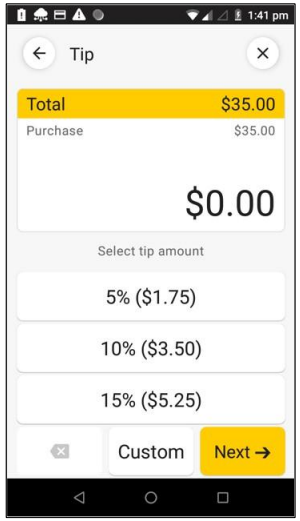
c. The terminal will request approval for the surcharge. Once approved the payment is taken, transaction details are sent back to the POS, and the Smart Sync portal.

Integrated Purchase with Tipping

To put through a purchase with tipping activated, please follow the below steps:

1. Input the purchase into the POS and initiate the transaction.
2. The transaction details will be sent to the terminal.
3. The merchant facility has tipping activated, so when the terminal is offered to the cardholder they have the option of making a Tip, either by selecting one of the preset percentages, or by pressing **Custom** and input a specific tipping amount.
4. The cardholder then makes the payment via the terminal.
5. Payment details will be sent back to the POS and the Smart Dash portal.





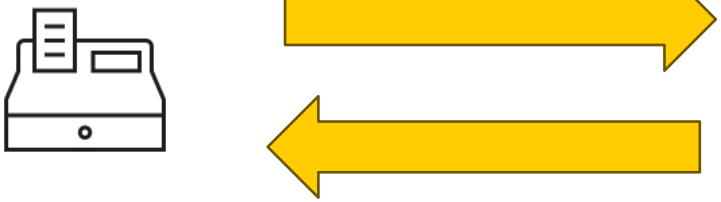
a. Follow the standard checkout flow on your POS to initiate the transaction

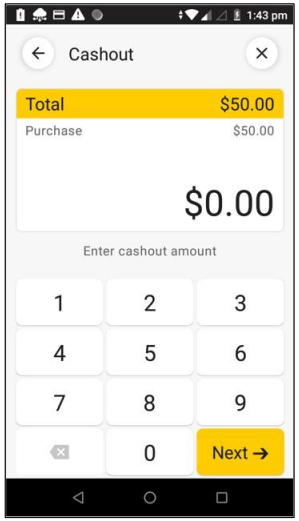
b. Transaction details are sent to the Terminal

c. The terminal will request approval for the surcharge. Once approved the Payment is taken. Transaction details are sent back to the POS, and the Smart Sync portal.

Integrated Purchase with Cashout

1. Input the purchase with cashout into the POS and initiate the transaction.
2. The transaction details will be sent to the terminal.
3. The terminal will allow the cardholder the ability to add the amount of the cashout that they want to add to the total cost of the purchase. Once the cashout amount has input press Next on the terminal.
4. The cardholder then makes the payment via the terminal.
5. Payment details will be sent back to the POS and the Smart Dash portal.





a. Follow the standard checkout flow on your POS to initiate the transaction

b. Transaction details are sent to the Terminal

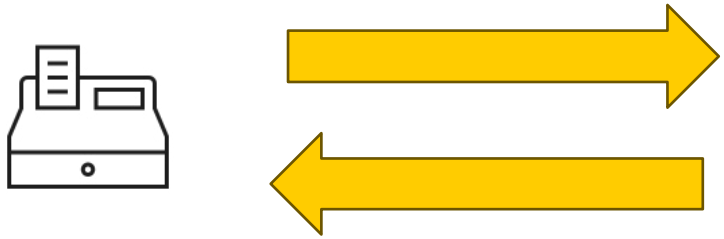
c. The cashout option allows a cardholder to input the amount that of cash that they would like to have added to the purchase. Transaction details are sent back to the POS, and the Smart Sync portal

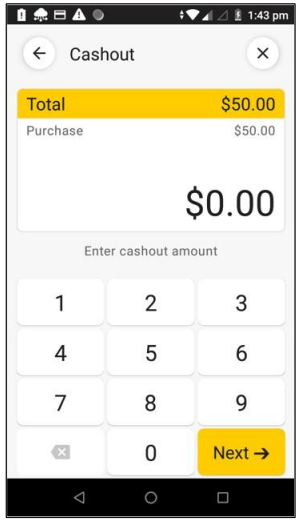
Integrated Purchase with Signature

1. Input the purchase into the POS and initiate the transaction.
2. The transaction details will be sent to the terminal.
3. The cardholder then makes the payment via the terminal.
4. Payment details will be sent back to the POS and the Smart Dash portal.
5. The POS will produce a receipt requiring a signature, the cardholder can sign the receipt and the cashier can approve/ decline the payment after reviewing the signature.

Integrated Purchase with Split Billing – Split evenly

1. Input the purchase into the POS, to split the bill evenly and initiate the transaction.
2. The transaction details will be sent to the terminal.
3. The first cardholder can make a payment for the initial split payment.
4. Payment details will be sent back to the POS and the Smart Dash portal. A receipt can be printed from the POS if required.
5. The second cardholder can now make a payment via the terminal, repeat as required.





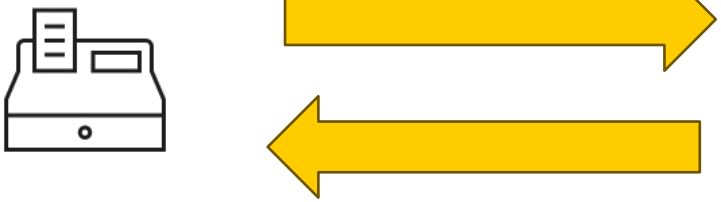
a. Follow the standard Split Bill – Even Split flow on your POS to initiate the transaction

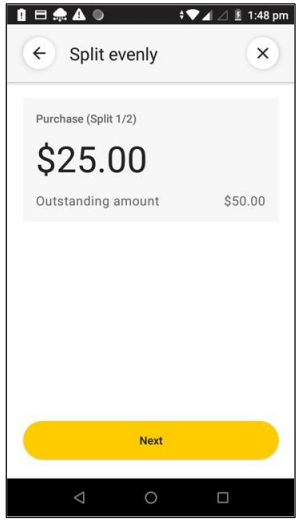
b. Transaction details are sent to the terminal

c. The terminal will then display the amount for the cardholder to pay. Once the first cardholder has successfully paid, the next split will display ready for the next payment.

Integrated Purchase with Split Billing – Customised split

1. Input the purchase into the POS, and customise the split, then initiate the transaction.
2. The transaction details will be sent to the terminal.
3. The first cardholder can make a payment for the initial split payment.
4. Payment details will be sent back to the Point of Sale and the Smart Dash portal. A receipt can be printed from the POS if required.
5. The second cardholder can now make a payment via the terminal, repeat as required.





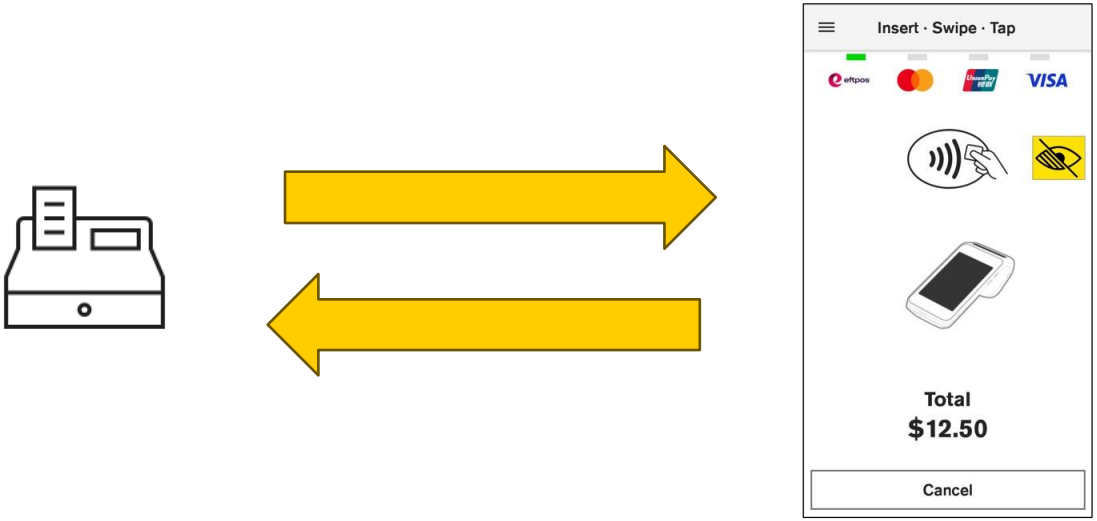
a. Follow the standard Split Bill – Even Split flow on your POS to initiate the transaction

b. Transaction details are sent to the terminal

c. The terminal will then display the amount for the cardholder to pay. Once the first cardholder has successfully paid, the next split will display ready for the next payment.

Integrated Refund

1. Input the Refund into the POS and initiate the transaction.
2. The refund details will be sent to the terminal.
3. Get the cardholder to use the same card they used for the purchase to authorise the transaction.
4. Refund details will be sent back to the POS and the Smart Dash portal.



1. Follow the standard checkout flow on your POS to initiate the Refund
2. Refund details are sent to the Terminal
3. Get the cardholder to authorise the refund with the card that was used for the transaction. Details are sent back to the POS and the Smart Dash portal.

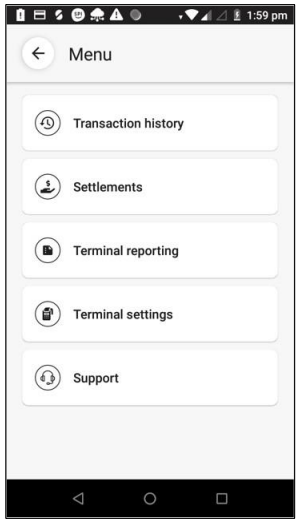
Note: The receipt will print via the POS printer

Smart Sync Menu Options

The Smart Sync home screen has a Menu option with the following options:

- Transaction history.
- Settlements.
- Terminal reporting.
- Terminal settings.
- Support.

Section overviews are provided below.

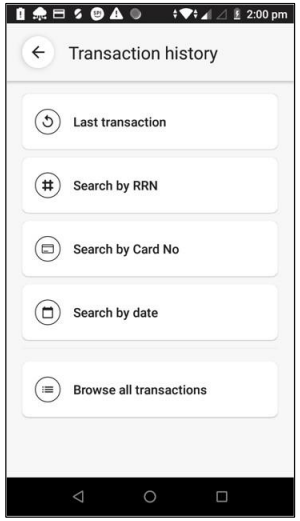


Transaction History

Transaction history allows the user to search for transactions that occurred on the terminal in the last 12 months.

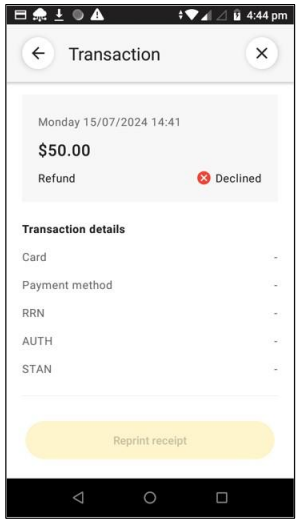
Criteria for a Transaction history search are as follows:

- Last transaction.
- Search by RNN.
- Search by Card No.
- Search by Date.
- Browse all transactions.



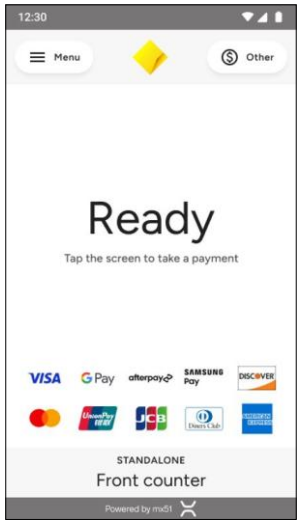
Last Transaction

The last transaction allows for a quick link to the transaction details of the last transaction that was processed on the terminal.

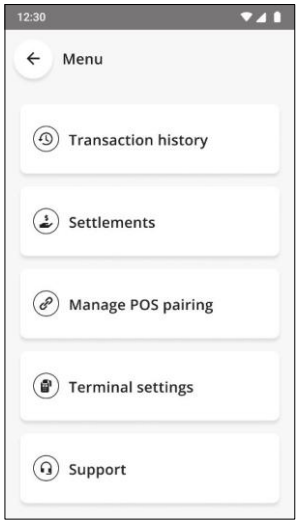


Search By RNN

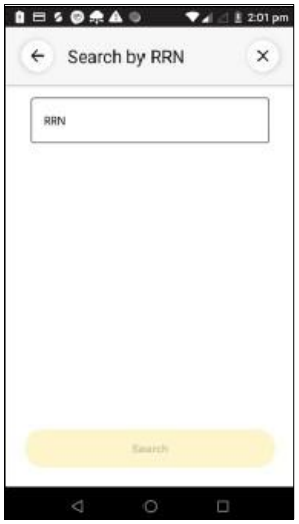
1. Select **Menu**.
2. Select **Transaction history.**
3. Select search by RRN.
4. Input the RRN and press Search.
5. The terminal will return the transaction with the matching RNN.



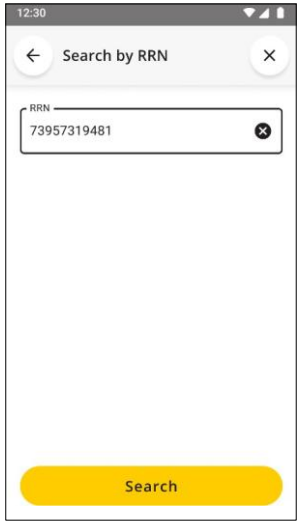
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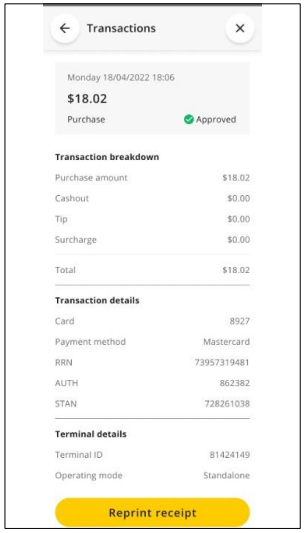
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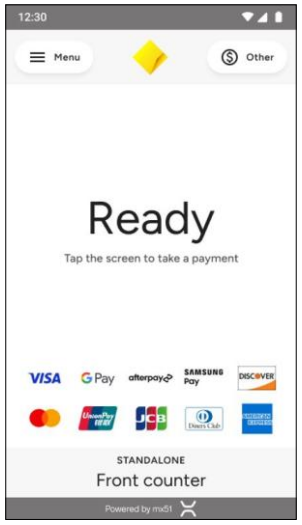
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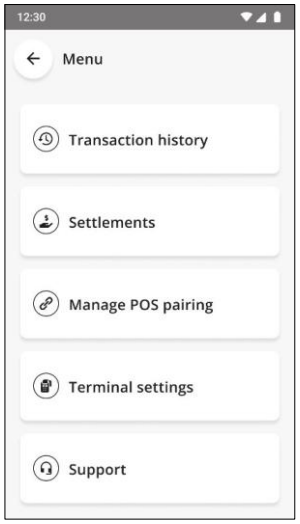
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Search by Card Number

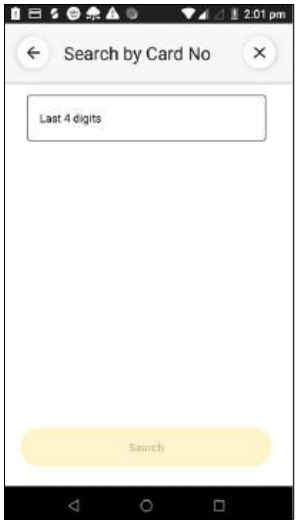
1. Select **Menu**.
2. Select **Transaction history.**
3. Select **Search** by Card No.
4. Enter the last 4 digits of the card and select **Search**.
5. A list of the transactions that match those card details will be returned. Select the transaction that you want to review.
6. Reprint the receipt if required with **Reprint receipt.**



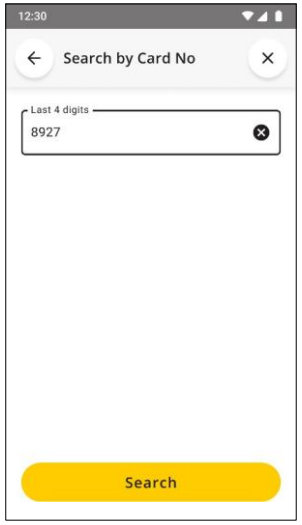
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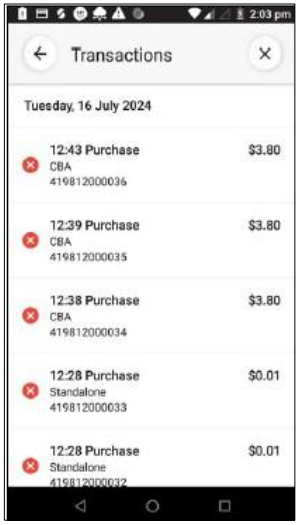
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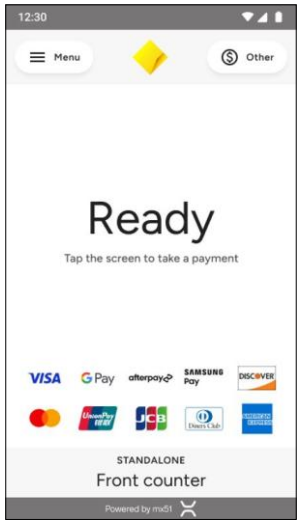


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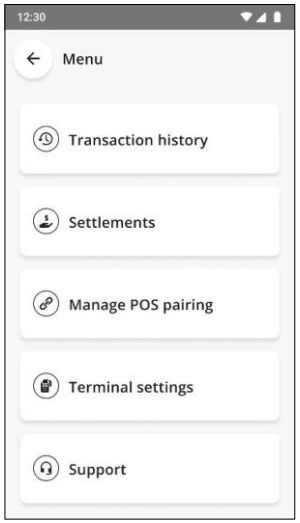
Search by Date

1. Select **Menu**.
2. Select **Transaction history**.
3. Select Search by date.
4. Select the Start date and End date then press **Search**.

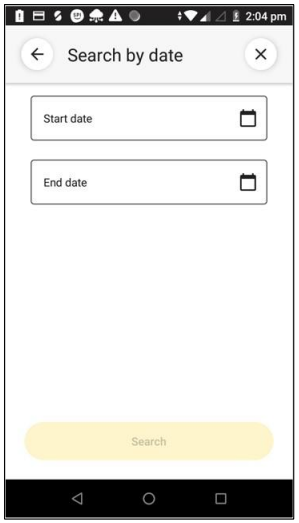
All transactions that occurred within the selected period will be returned.



1



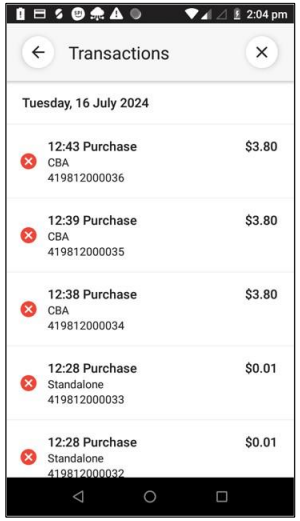
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3

Browse all Transactions

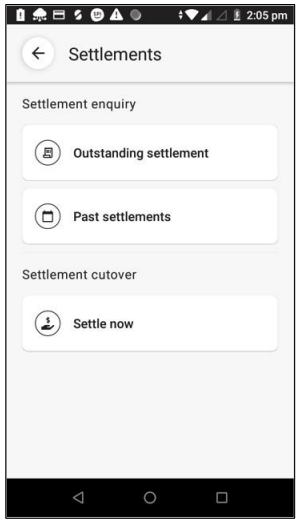
Browsing all transactions will allow the user to access all transactions that occurred on the terminal in the last 12 months.



Settlements

Navigate to this screen to make Settlement enquiries and perform a Settlement cutover.

- Outstanding settlement triggers an enquiry that will confirm how much is currently unsettled.
- Past settlements will confirm the settlement that took place on a particular day or provides a quick link enquiry to the last settlement.
- Settle now will trigger a settlement. Please note, you can only settle once per day.

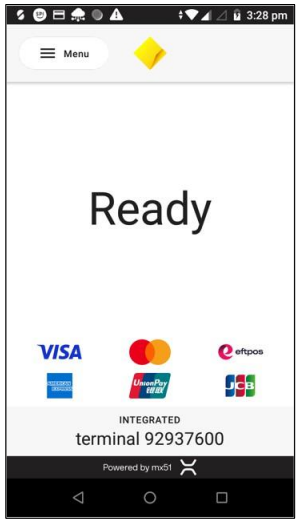


Terminal Reporting

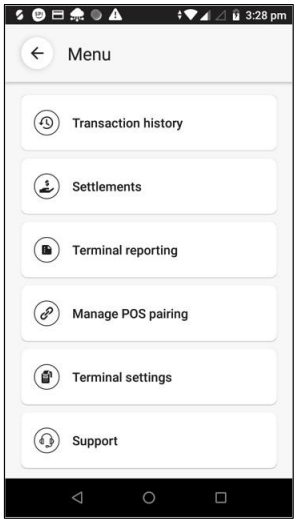
Sales Reporting

Sales reports allow the terminal user to view and print a summary of the sales that have occurred on the terminal during a set period of time. The report comes with preset timeframes such as the current day, the previous day, the last 7days, or the last 30 days. Additionally, the user can create a customised report selecting a start and end date.

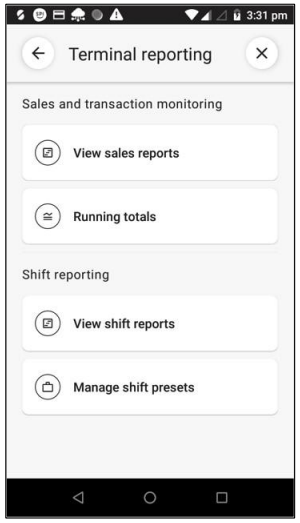
1. Tap the Ready screen. Select **Menu**.
2. Select **Terminal reporting**.
3. Select **View sales reports.**
4. Select the appropriate time frame, you can print the report if required.



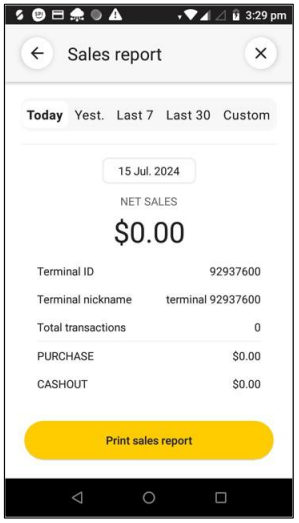
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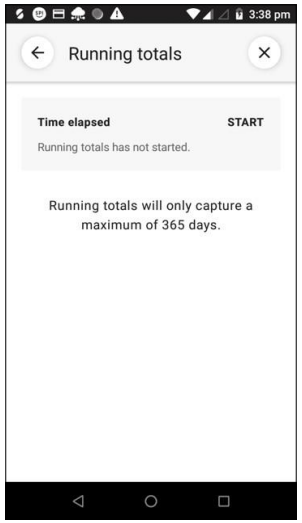


4

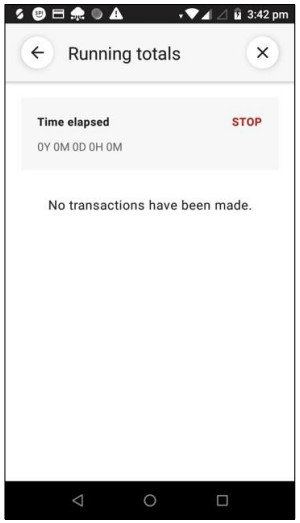
Running totals

The running totals report allows a terminal user to create a time for calculating a running total. The user initiates the report to start, and all transactions that occur on the terminal, until the report is stopped, will be included in the running total.

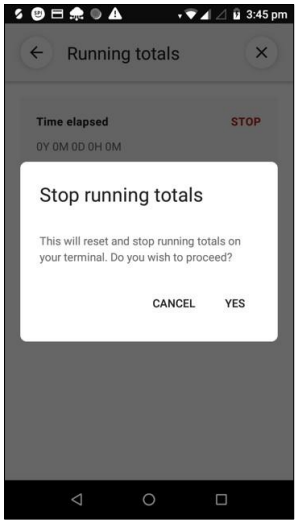
1. Select **Menu, Terminal reporting, Running totals** and select **Start** to begin the count.
2. When entering the running totals (after completing step a), the current total will display.
3. Select stop then **YES** to stop the running total.



1



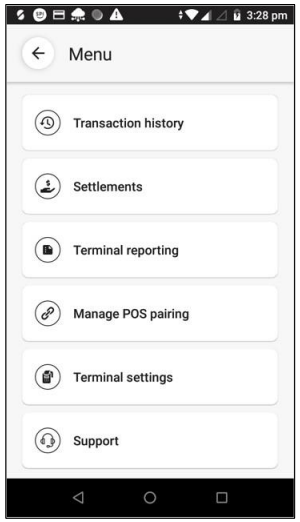
2



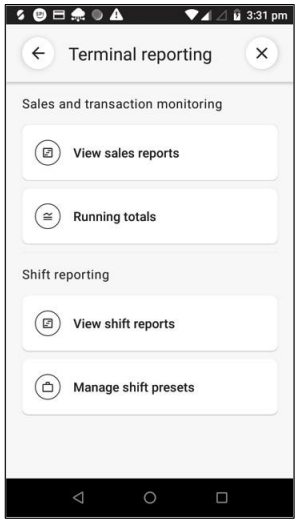
3

Create, view and edit shift reports

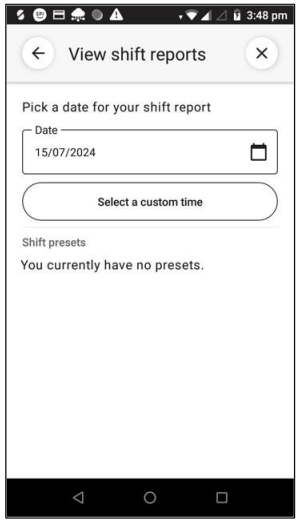
1. Select **Menu**, **Terminal reporting**.
2. Select **View shift reports**.
3. **Select Custom time** and enter your Start Time and End Time, you can name the shift and save as a preset shift. Select **Generate Shift Report** to view totals for this time period. Shift presets will display here once created. Select them to view and print the time period.
4. Select **Manage shift** to edit and remove shift presets.



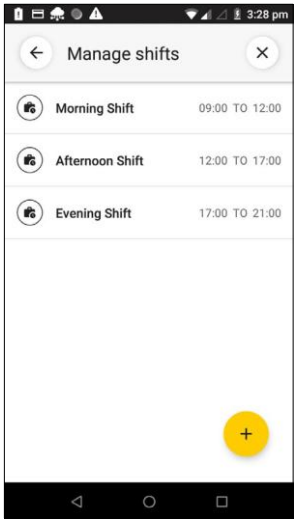
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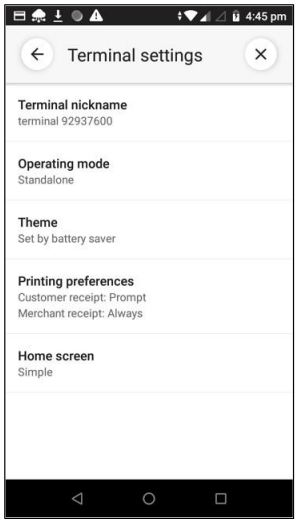


4

Terminal Settings

The terminal settings allows you to perform the following actions:

- Create a terminal nickname.
- Change the operating mode;
  - Standalone
  - Integrated
- Set a theme for the terminal;
  - Light mode
  - Dark mode
  - Set by battery saver mode.
- Home screen display;
  - Simple
  - Keypad
  - Tiles

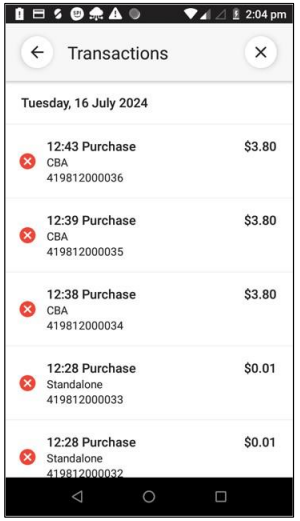


Support

The support option provides you with contact details, terminal information, connectivity tests, passcode updates for security, device restarting, and configuration synchronisation.

The section includes:

- Contact us –The support number, your Merchant ID Terminal ID, Serial number you will need to provide when contacting the helpdesk.
- About this terminal – terminal, connection, battery and software information.
- Network test – test your internet connectivity.
- Change passcode – update the terminal passcode.
- Restart device – shuts down device.
- Sync TMS config – updates the terminal to the latest configuration.



Smart Dash

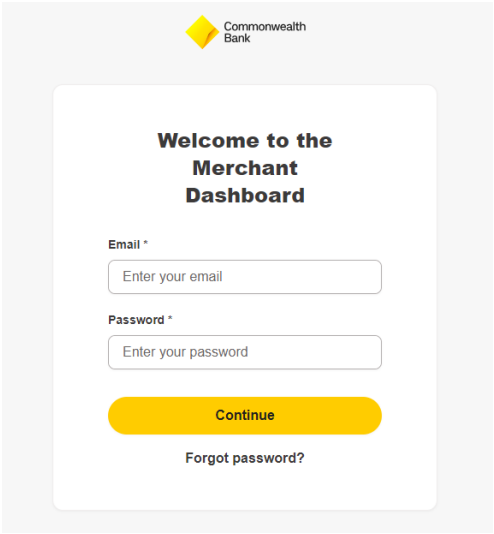
The Smart Dash merchant dashboard allows you to view the latest transaction data from payments initiated via the Smart Sync app. The dashboard will provide real time transactions from Smart Sync whether you are using it in Standalone or Integrated mode.

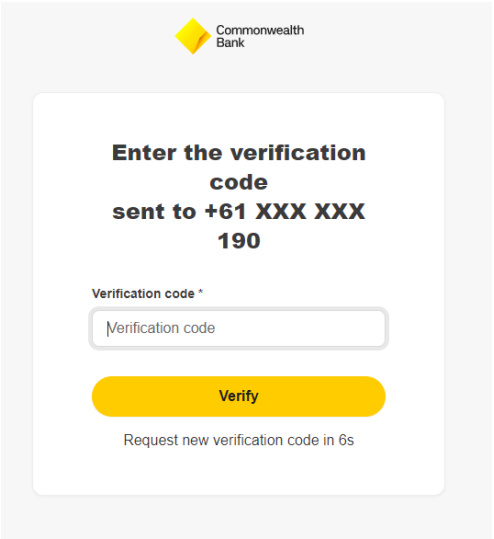
Getting Started

Once you have been onboarded to the Smart Sync app, you will receive an email with a link to the Smart Dash portal: https://smartdash.commbank.com.au

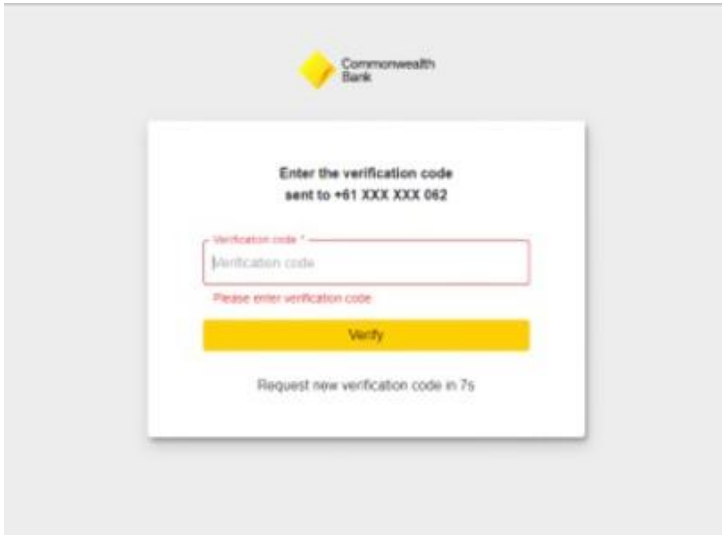
Follow the instructions on the email.

- Enter your email address and the temporary password that was provided in the Smart Dash email.
- Click Continue.
- You will be sent a verification code to the mobile phone number provided.

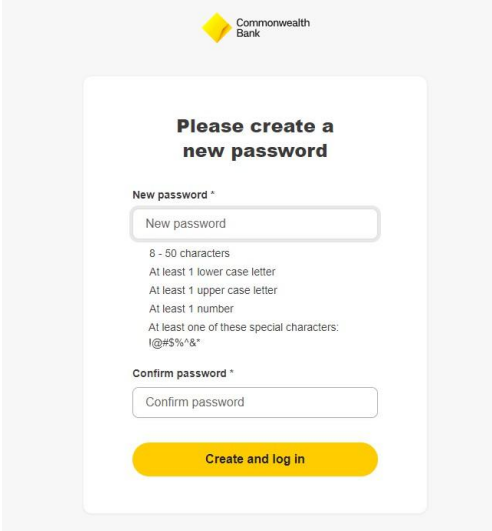




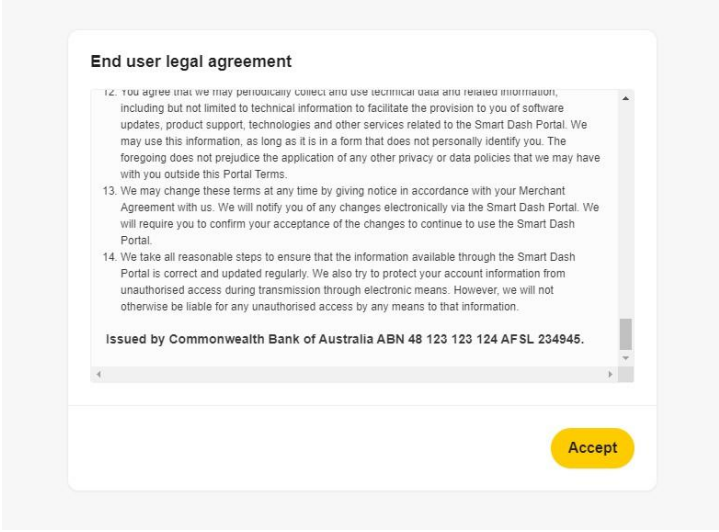
- Input the verification code then click on **Verify.**



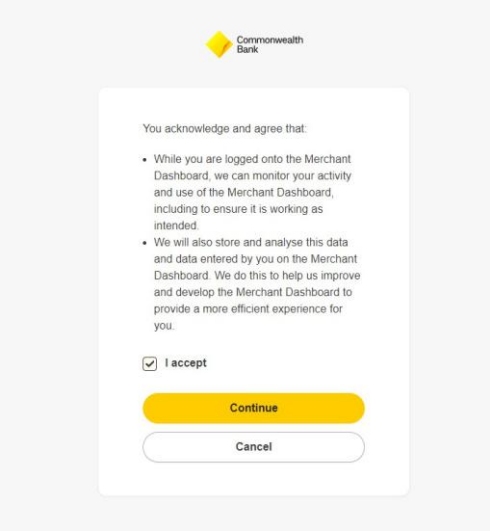
- Create and confirm a new password.



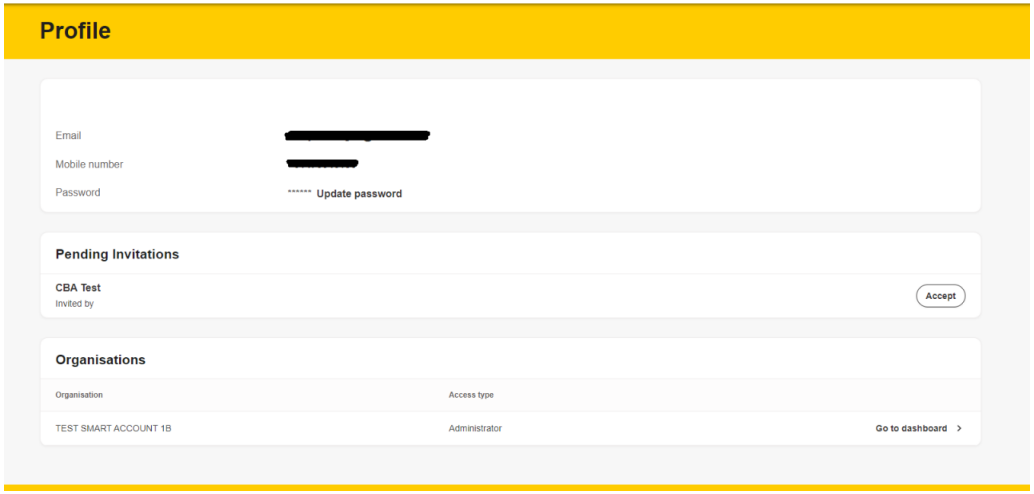
- Please review End User License Agreement, if you agree, please select **Accept.**



- Tick the check box and click Continue to accept the Terms & Conditions.



- Click **Accept** to complete the activation of your account.



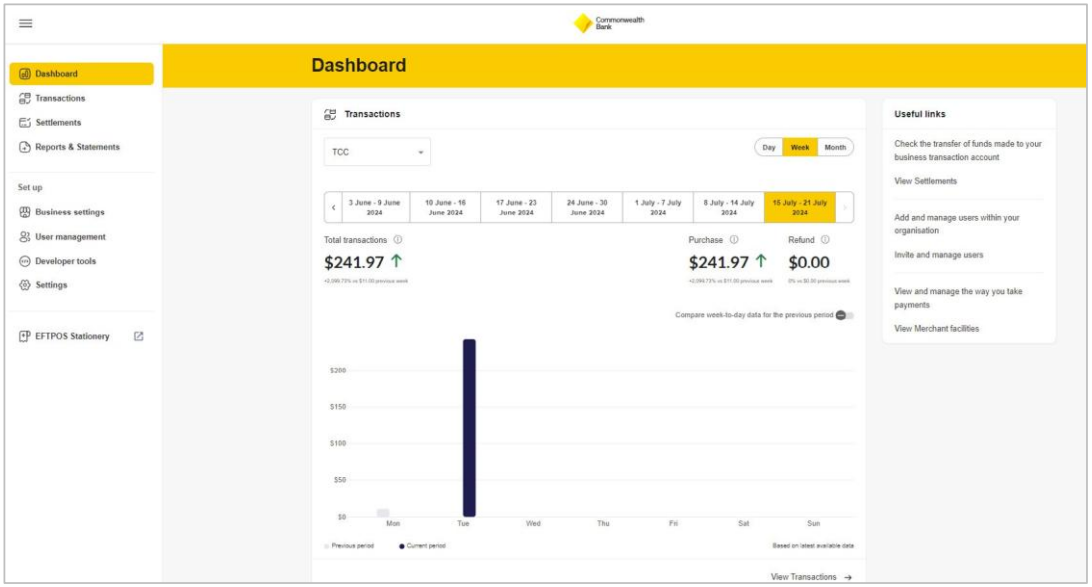
Dashboard

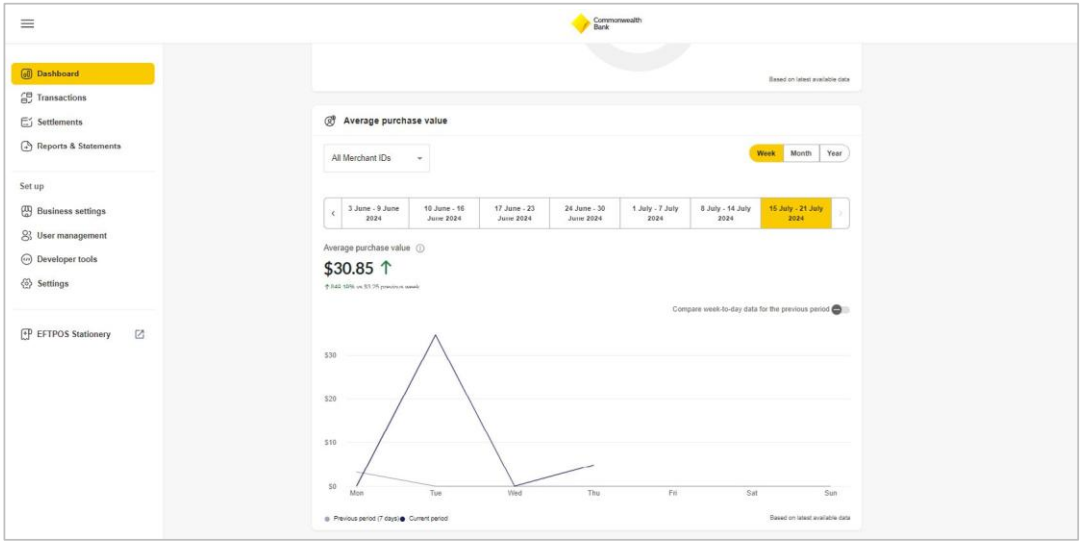
Once you have updated your details you will be taken to the Dashboard Landing Page. It provides a comprehensive overview of the transactions, allowing users to monitor, analyse, and manage the financial transactions that occurred via the Smart Sync app.

Features include:

- Filter dashboard display by Merchant Facility.
- Summarise transactions by day, week and month.
- Drill down to specific days to see transaction totals per hour.
- Filter by card schemes, approved and declined transactions and at a terminal level.

If you scroll down the dashboard you will also see the average purchase value graph, this graph will also allow the user to filter the results on the graph by week, month and year.

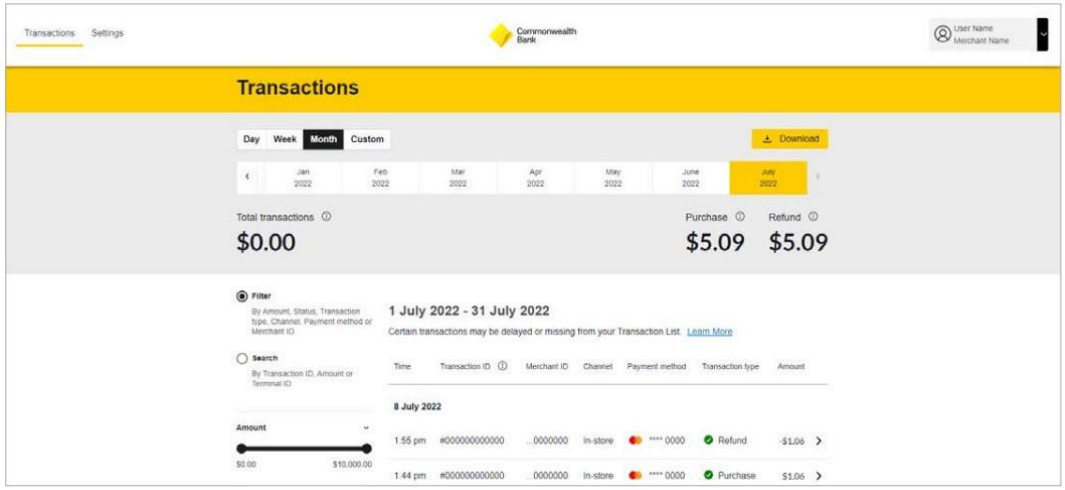




Transactions

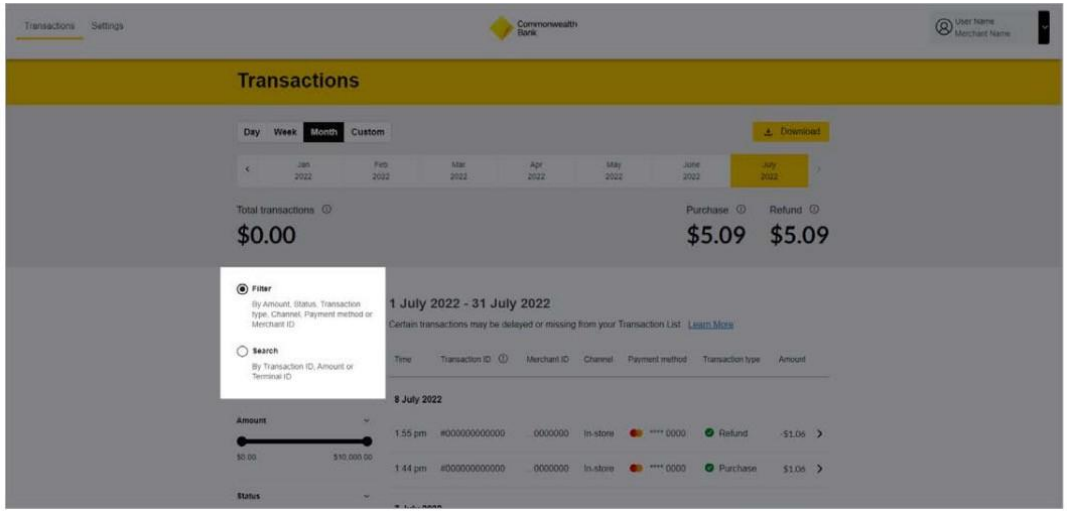
The Transactions tab allows users to review the transactions that have been made via the Smart Sync app:

The dashboard displays the transaction history of the merchant facility, and you can tailor the view to a particular on day, week, month, or a customised period.



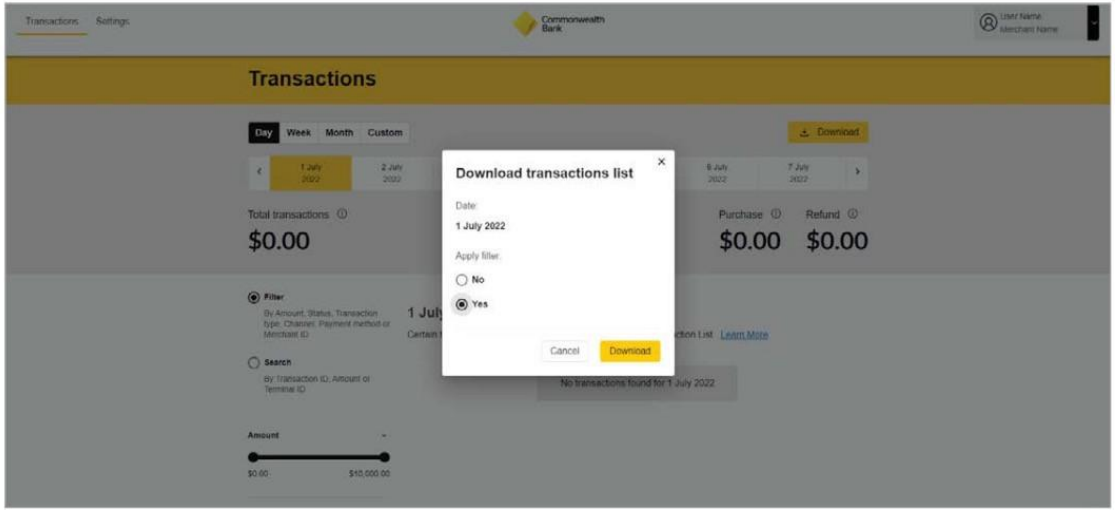
Filtering for a faster search

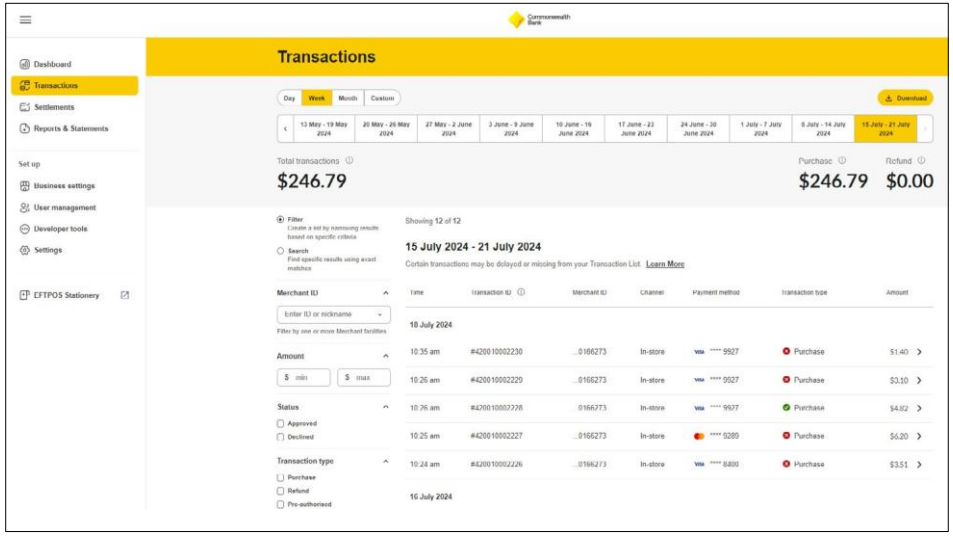
You can filter transaction by amount, transaction status, transaction type, channel, payment method or Merchant ID to facilitate a faster search for the transaction you want to view.

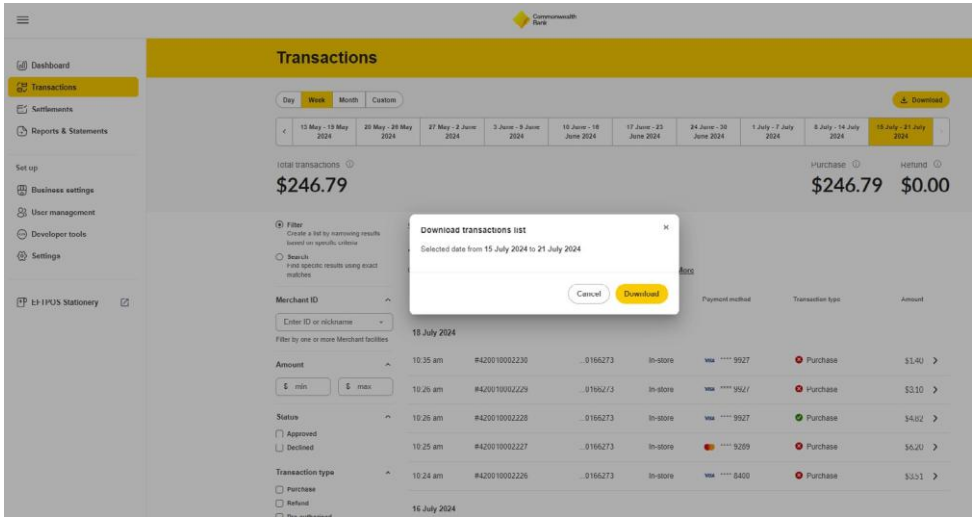


Download the transactions:

You can download the transactions that you are viewing into a csv file.





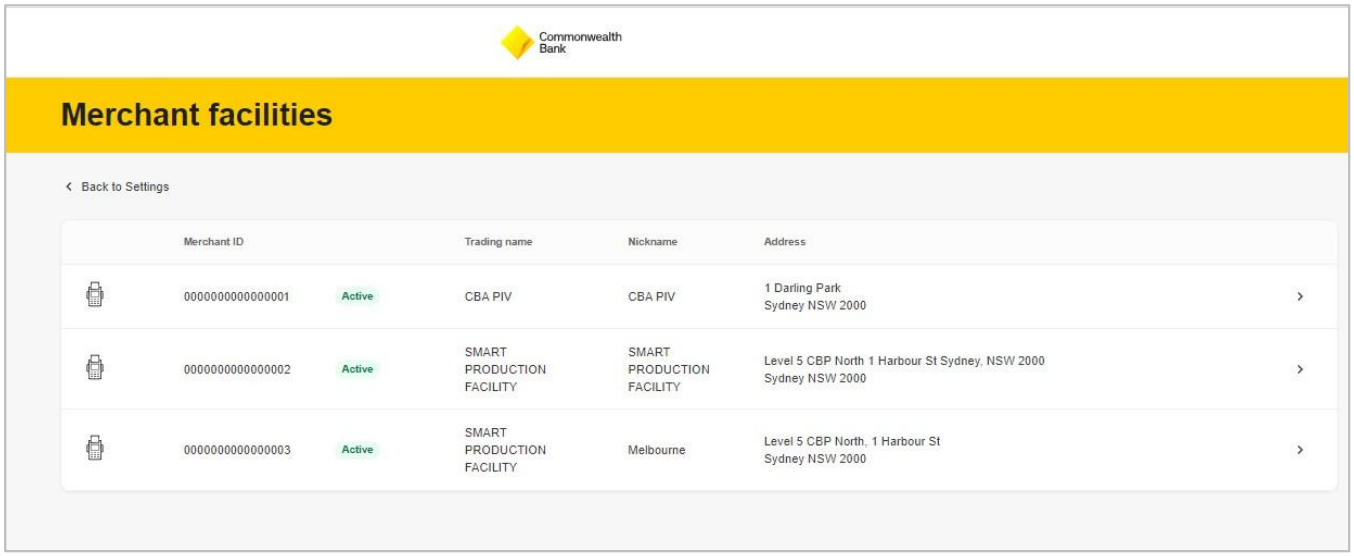


Business Settings

The business settings enable users to review the merchant facilities held under the organisation. When accessing the business settings, the user will be presented with a table that displays the merchant facility information for each outlet, this includes:

- Merchant ID
- Status
- Trading name
- Nickname
- Address

The arrow to the right of the merchant facility allows a user to access the merchant facility details.



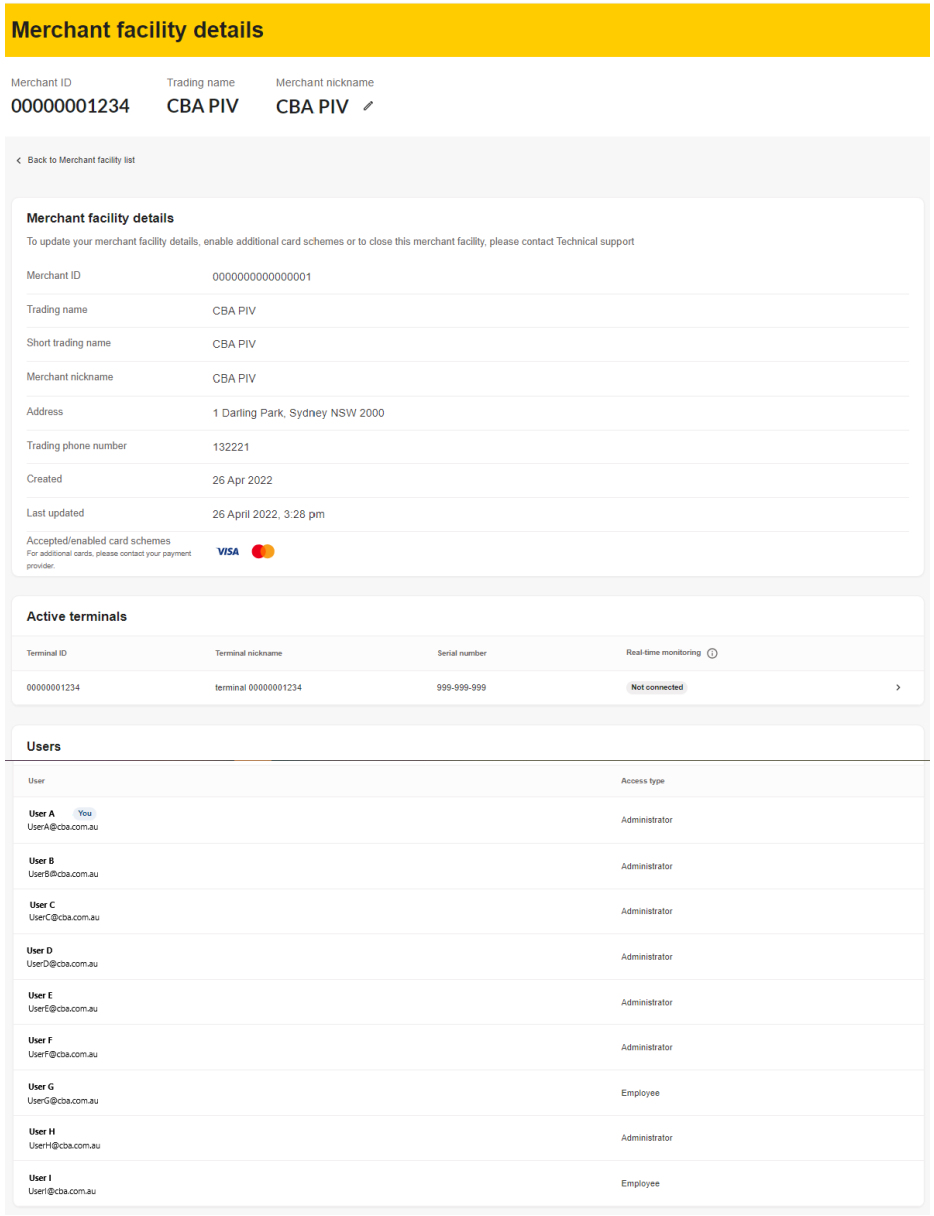
The business settings screen displays all merchant facilities under the organisation.

Merchant Facility Details

When a user accesses the merchant facility details screen they are presented with the details of the merchant facility and the ability to edit the merchant nickname.

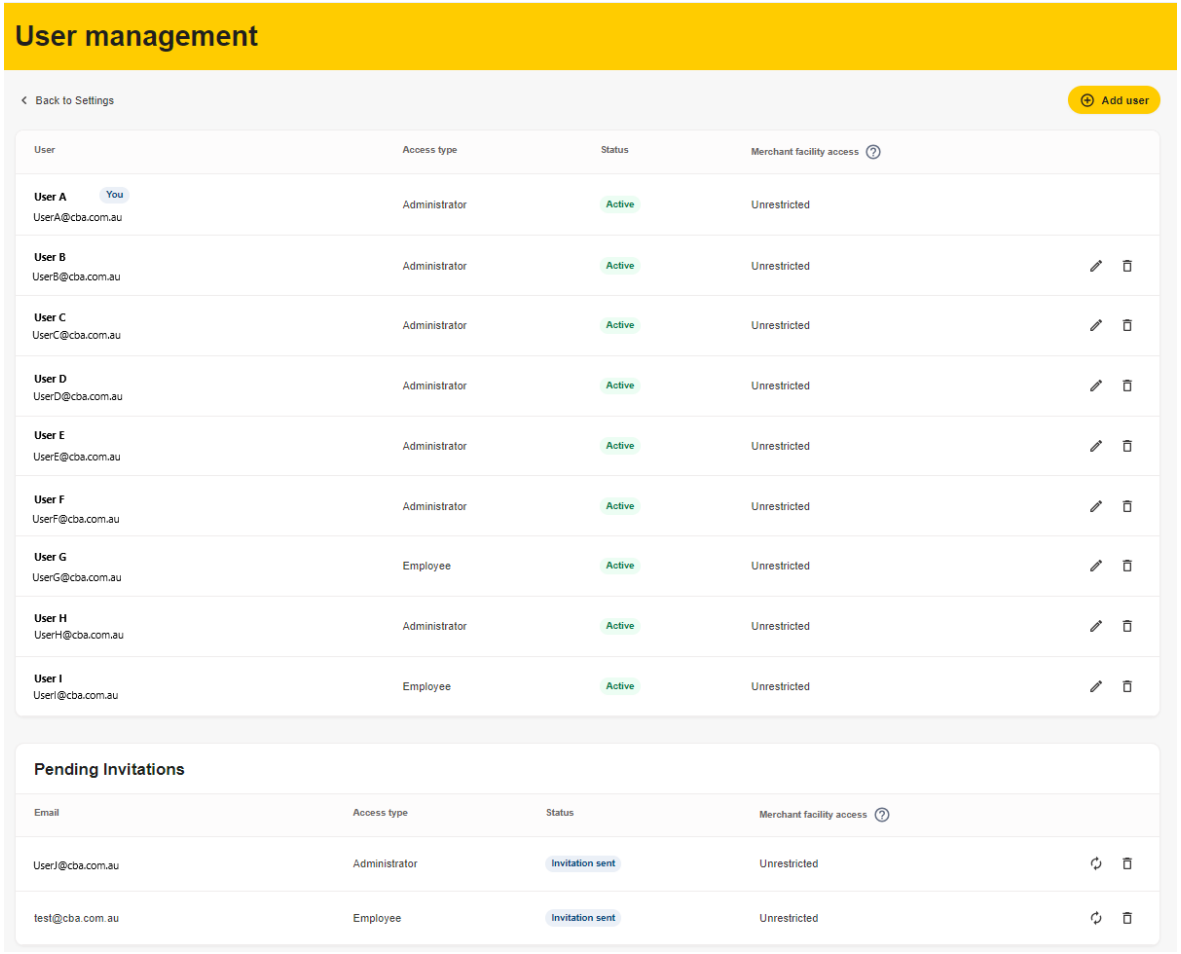
From this screen the user can see:

- Merchant ID
- Trading name
- Address
- Date Created
- Available card schemes
- Active terminals
- Users, and user access permission



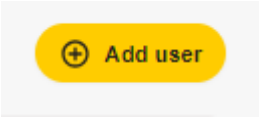
User Management

User management allows an authorised user to review, create, and disable access to the Smart Sync portal. The user management screen will display all users and users with pending invitations i.e. they have not yet logged on.



Adding a User

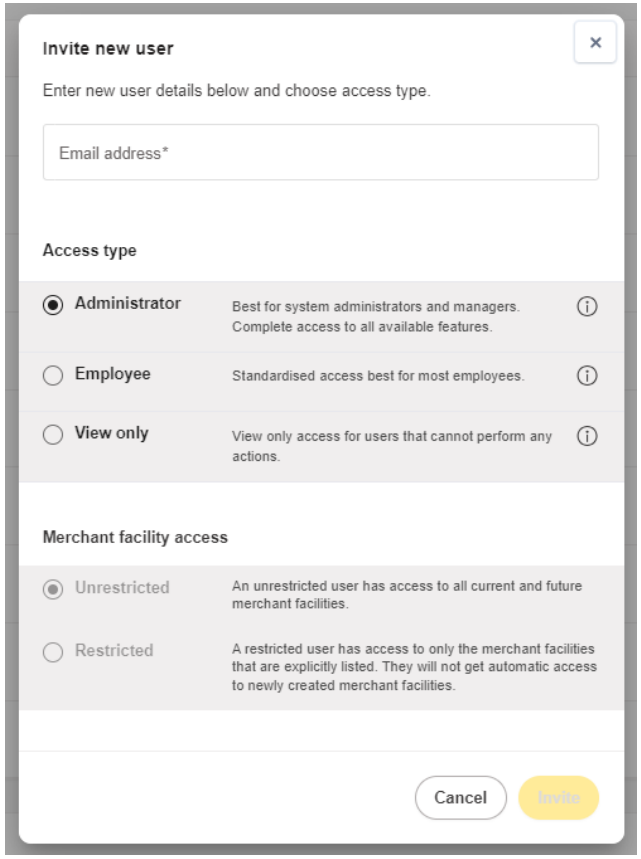
To add a user, click on the add user icon in the top right of the screen, this will cause the add user pop up to appear.



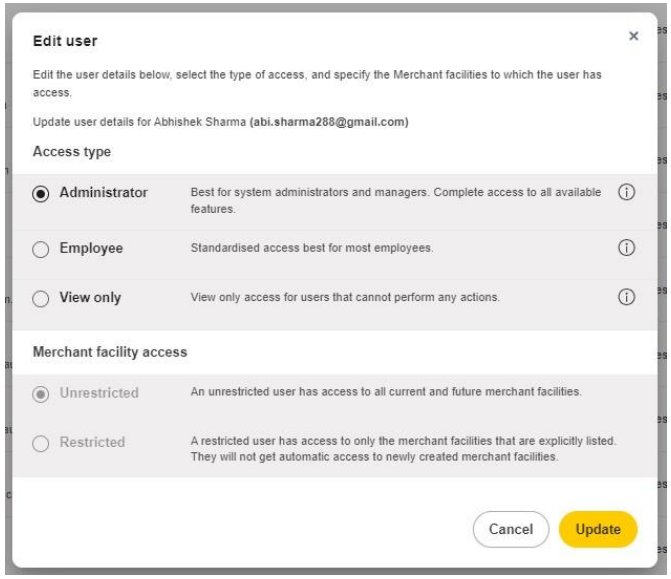
Once the pop up appears, create the new user, by inputting the new users:

- Email address,
- Access type, and
- Merchant facility access.

An email will be sent to the user providing them with instructions on how to access the Smart Dash portal.

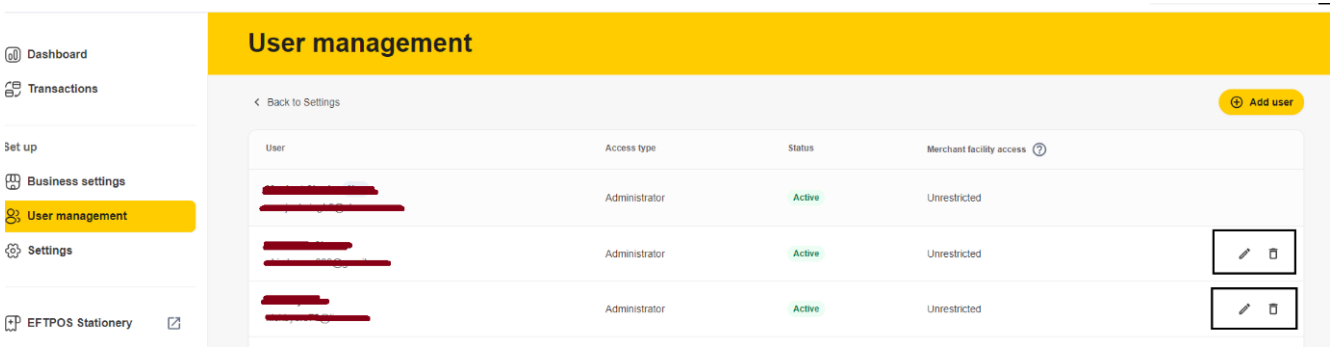


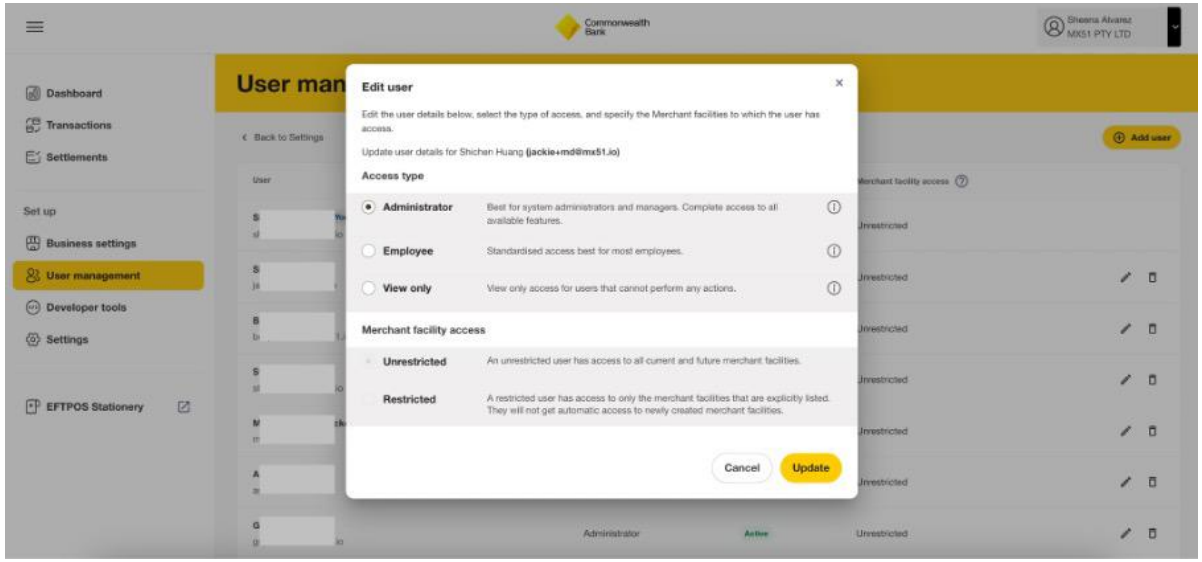
The Invite new user screen



Editing a user's access and removing a user's access

A Smart Sync portal user's details can be edited by clicking on the pen icon. Similarly, a user's access to the Smart Sync terminal can be removed by clicking on the rubbish bin icon.

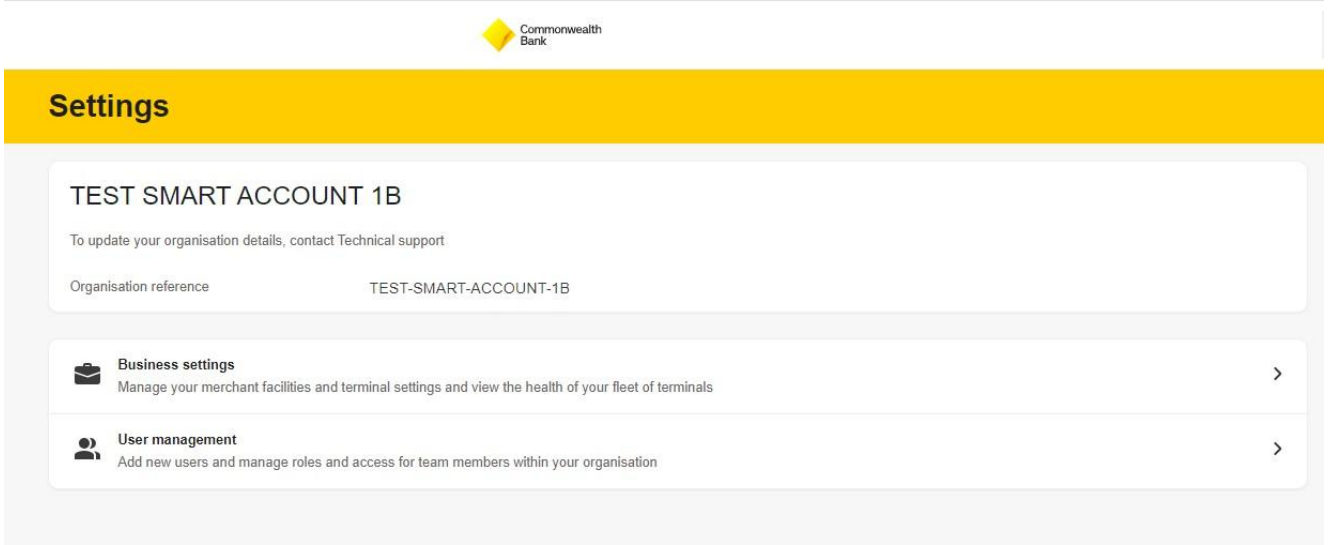




Settings

The settings screen will advise the organisation details and provide access to the business settings and user management screens.

For more information, please refer to the App Marketplace User Guide at commbank.com.au/merchantsupport.



The Settings screen.

Troubleshooting

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