ingenico
GROUP

Terminal user guide

iWL200 series
Bluetooth / GPRS / WiFi

Contents

Please note: some functions may not be supported on your terminal, please speak to your provider for more details.

1. <u>Introduction</u>

This guide will detail how you install and use your iWL2xx Bluetooth/GPRS/WiFi terminal, including Safety Instructions and instructions on transaction processing, printing reports and general maintenance of the terminal.

Base Unit and Handset Placement for Bluetooth Terminals

PLEASE READ THIS VERY IMPORTANT INFORMATION BEFORE PLACING YOUR BASE UNIT AND HANDSET

The Ingenico iWL2xx is a portable product that uses Bluetooth Short Range Radio to communicate between the handset and the base. The handset, when off the base, is powered by a battery, which re-charges when the handset is put back on the base.

This notice will help you optimise the operation of your portable product by describing how to place the base(s) to give maximum coverage, and how to manage the impact of battery drain from normal use.

Handset/Base (Radio) Coverage for Bluetooth Terminals

Various obstructions can reduce the level of the radio signal. These include: walls, screens, lift shafts, steel girders, kitchen fittings, doors, glass mirrors, metal objects and kitchen equipment.

PLEASE BE AWARE OF THE IMPACT YOUR ESTABLISHMENT CAN HAVE ON RADIO COVERAGE.

Coverage Test

Short Range Radio systems (like Bluetooth) are not like GSM mobile phones; they do not operate over extended distances. After completing the installation process and charging the battery, you MUST test the coverage by carrying the handset around your establishment and monitoring the status of the aerial symbol and the signal strength. Try to achieve a maximum signal in all areas (although this is not imperative). Should the signal be lost, you will need to either re-position the base (remember you need power and a phone line) or purchase an additional base and handset for your establishment.

PLEASE NOTE: A single handset cannot be assigned to multiple bases at the same time. It can only be active with one base at any given time.

The 'Radio Link Test' (Bluetooth Only)

The Radio Link Test (Function 36) will produce a print out of the link quality available at a particular location. Please refer to Section 44 for instructions which also include advice on how to test the signal quality. You now have the ability to see the signal strength on the display. To perform this test you will need a Supervisor Card or Supervisor Code.

PLEASE NOTE: When cancelling out of this menu after performing the test, the handset will verify its assignment to the base.

Try to keep the base at least 4 metres away from metal objects such as mirrors, kitchen fittings and equipment and metal doors. DO NOT let such objects come between the base and handset. If you have more than one base ensure there is a minimum of 2 metres between them. Positioning of bases to gain optimum coverage in a multi floor, multi obstruction environment, will take some time and effort to establish.

Battery Operation

The terminal displays the Battery Power status as a number of bars similar to those on a mobile phone display. There are a number of factors that can affect the rate of Battery drainage. For example:

- Length of time off the base
- Number of receipts per transaction
- Time before sleep mode is activated
- Time between transactions.

Depending upon a number of factors, you might experience variation in the number of transactions performed for each bar on the Battery Power display.

Please check the battery status prior to initiating any action on the handset. Should it indicate 'very low' (no bars) or 'no power' then you should return the handset to the base to charge the battery.

2.   <u>Important Safety Instructions</u>

Powering down the IWL2xx base

Disconnect the iWL2xxx power supply block adapter from the electrical mains network.

Lithium cell (Backup battery)

The iWL2xx is fitted with an internal lithium cell which can only be accessed by a qualified technician.

Battery

The iWL2xx is fitted with a battery specially designed for this terminal:

- Only use the appropriate chargers and batteries listed in Ingenico's catalogue
- Do not short circuit the battery
- Do not attempt to remove the battery housing as its components cannot be modified
- Do not disassemble
- Batteries at 'end of life' must be disposed of at the appropriates sites.

The lifespan depends on:

- Features
- Number of charges and discharge cycles
- Use temperature.

Warning: There is a risk of explosion if the battery is incorrectly replaced. Never place the battery next to a heat source or in a fire.

Electrical power outlet

The electrical outlet must meet the following criteria:

- Must be installed near the equipment and easily accessible
- Must meet standards and regulations in the country where used
- The protection of the installation must be set to 20A .

Telephone network

The phone jack must comply with standards and regulations in the country where used.

SAM1/SAM2/SIM readers compartment

The trapdoor for battery, SAM1/SAM2/SIM, readers located underneath the terminal, must be in place during the normal operation of the terminal.

On airplanes

Your handset must be switched off and the battery pack removed whilst on an airplane. Non-compliance of these safety rules may result in legal action and/or a ban on later access to cellular network services.

Explosion areas

Some regulations restrict the use of radio equipment in chemical plants, fuel depots and any site where blasting is carried out. You are urged to comply with these regulations. The terminal shall be protected by a specially fitted and certified cover enabling use in proximity to a fuel pump.

Electronic health appliances

Your handset is a radio transmitter which may interfere with health appliances, such as hearing aids, pacemakers, hospital equipment, etc. Your doctor or the equipment manufacturer will be able to provide you with appropriate advice.

Security of your terminal

Upon receipt of your terminal you should check for signs of tampering of the equipment. It is strongly advised that these checks are performed regularly after receipt. You should check, for example, that the keypad is firmly in place and that there is no evidence of unusual wires that have been connected to any ports on your terminal or associated equipment, the chip card reader, or any other part of your terminal. Such checks would provide warning of any unauthorised modifications to your terminal, and other suspicious behaviour of individuals that have access to your terminal.

Your terminal detects any 'tampered state'. In this state the terminal will repeatedly flash the message 'Alert Irruption!' and further use of the terminal will not be possible. If you observe the 'Alert Irruption!' message, you should contact the terminal helpdesk immediately. You are strongly advised to ensure that privileged access to your terminal is only granted to staff that have been independently verified as being trustworthy.

CAUTION: NEVER ask the customer to divulge their PIN Code. Customers should be advised to ensure that they are not being overlooked when entering their PIN Code. The terminal must never be put in or left at a location where it could be stolen or replaced with another device.

Telephone call (Bluetooth)

You may need to make an urgent call while the IWL2xx is occupying the line. In order to get a dial tone quickly, place the handset in the hang up position pressing the red key (=cancel) or disconnect the base power supply from the mains network or disconnect the iWL2xx telephone connector from the telephone call socket, and place the telephone connector into the telephone wall socket. You should hear a dial tone within 6 seconds.

Specific Absorption Rate (SAR) for Bluetooth and GPRS devices

In order to meet FCC and Industry Canada RF radiation exposure limits for the general population, this device must only be operated when held in the hand or in a desktop position with a minimum separation distance of at least 20cm from the user's body and it must not be collocated or operated in conjunction with any other antenna or transmitter. Use of this device with an accessory in order to be worn and operated on user's body is strictly prohibited and will invalidate the certifications obtained for FCC and Industry Canada.

3. <u>Declaration of Conformity</u>

CE Marking

The CE marking indicates iWL2xx complies with the requirements of European Directive 1999/5/EC of 9 March 1999 on Radio and Telecommunications Terminal Equipment for:

- The protection of the health and the safety of the user and any other person
- The protection requirements with respect to electromagnetic compatibility and complies with
- harmonised standards.

FCC/IC Compliance (WiFi model)

The FCC ID for iWL Wifi Terminal model (Model: IWL220-01T1426A) is: XKB-IWL2XXWBCL and IC number is: 2586D-IWL2WBCL. This device complies with Part 15 of the FCC Rules. Operation is subject to the following two conditions:

(3) This device may not cause harmful interference, and
(4) This device must accept any interference received, including interference that may cause undesired operation.

This device complies with Industry Canada licence-exempt RSS standard(s). Operation is subject to the following two conditions:

(3) This device may not cause harmful interference, and
(4) This device must accept any interference received, including interference that may cause undesired operation.

Depending iWL2xx model involved standards are:

EN 60950 1 :2006	According to 2006/95/EC	(Low Voltage Directive)
EN 55022 :2006	According to 2004/108/EC	(EMC Directive)
EN 55024 A2 :2003	According to 2004/108/EC	(EMC Directive)
EN 62311 (2008) /07 2001	According to 1999/519/EEC	(R&TTE Directive)
EN 301489 1/24 2009	According to 89/336/EEC	(EMC Directive)
EN 300 328 v1.4.2 /12 2000	According to 1999/5/EC	(R&TTE Directive)
EN 301489 3 2011	According to 89/336/EEC	(EMC Directive)
EN 301357 1/2 (2008)	According to 1999/5/EC	(R&TTE Directive)
EN 50357;EN50364 /2001	According to 1999/519/EEC	(R&TTE Directive)

EN 301908-1 2010		
EM 301893 2011		
The whole range complies with the European approval specification on connecting terminals with DTMF dialling to the public switched telephone network (Council Decision 1998/482/EC, Council Decision 1999/303/EC).		
• TS 103021-1/2/3 /09-2003		
• TR 103000-1/2/3/4 /06-2003		
• ES 201187 /03-1999.		

WEEE Directive

The product belongs to the family of electrical and electronic equipment. Therefore it is subject to the WEEE Directive which requires the collection and recycling at the end of the life of the product. Ingenico products present the symbol for the marking of electrical and electronic equipment as required by the WEEE Directive.

The crossed through wheeled bin printed on the product provides information about the requirement not to dispose of WEEE as unsorted municipal waste and to collect such WEEE separately.

To ensure that the product is collected and recycled with respect to the environment, you must contact your supplier (contact the Ingenico local office or the commercial head office in charge of your country at www.ingenico.co.uk via the Contact Us page).

The abandonment or uncontrolled disposal of waste can harm the environment and human health. By recycling your product in a responsible manner you are contributing to the preservation of natural resources and the protection of human health.

Batteries

If your product contains batteries they must be disposed of at the appropriate collection points.

4. <u>Installing the Bluetooth Terminal</u>

•   Ensure the mains supply is connected to the terminal and switched off
•   Ensure you have your Merchant ID to hand. This can be found in your Welcome Letter
•   Place the terminal handset onto the base if you have not already done so.

Now switch on the mains supply.

Dual Comms Mode

The terminal will display the screen shown, press the GREEN button and a number of additional screens will be displayed while the handset assigns to the base.

> PLACE TERMINAL ON A BASE WITH A PHONELINE and press ENTER

Use the arrow keys to highlight the required option and then press ENTER to select that option.

If you selected Telephone <PPP> a number of additional screens will be displayed.

> Connection Method
> **Telephone <PPP>**
> LOCAL NETWORK

If your terminal is connected via a direct line, press the YELLOW button to select NO.
OR, if your phone line is connected to a Switchboard/PBX, press the GREEN button to select YES.

If you selected YES, key in the number used to get an outside line (often 9) and press the GREEN button. If your telephone line uses the 1571 or call waiting function, press the GREEN button.

NOTE: If you select NO here and you do use these functions, the terminal will be unable to dial out for authorisations when a call message is waiting.

1. Key in your merchant number and press the GREEN button. The terminal will start to dial the Host computer and a number of communication messages will be displayed.

2. The terminal will now contact each card acquirer which your terminal is configured to accept.

Further communications messages will be displayed. An installation report will then be printed displaying the card types that your terminal will accept.

3. Finally, the terminal will dial the Host computer to report the successful installation.

4. Installation is now complete and the terminal will display the READY prompt. Your terminal is now ready for use.

Check the date and time on your terminal, if this needs to be corrected refer to Section 41 of this guide for detail on how to do this.

```
Terminal Installation
Key in Merchant No.

and then press Enter
```

```
40243595        09:01
  B             01/09/2009
READY
Merchant Number
12345678
```

5.   Installing the GPRS Terminal

- Ensure the mains supply is connected to the terminal and switched off
- Ensure you have your Merchant ID to hand. This can be found in your Welcome Letter
- Place the terminal handset onto the base if you have not already done so.

Now switch on the mains supply.

1. Key in your merchant number and press the GREEN button. The terminal will start to dial the Host computer and a number of communication messages will be displayed.

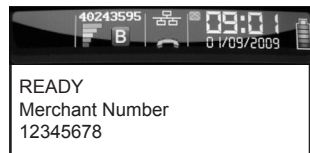2. The terminal will now contact each card acquirer which your terminal is configured to accept.

Further communications messages will be displayed. An installation report will then be printed displaying the card types that your terminal will accept.

3. Finally, the terminal will dial the Host computer to report the successful installation.

4. Installation is now complete and the terminal will display the READY prompt. Your terminal is now ready for use.

```
Terminal Installation
Key in Merchant No.

and then press Enter
```

```
Ingenico       11 10
  GPRS    GPRS  12/12/2011
READY
Merchant Number
12345678
```
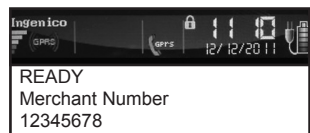
6.   Installing the WiFi Terminal

- Ensure the mains supply is connected to the terminal and switched off
- Ensure you have your Merchant ID to hand. This can be found in your Welcome Letter
- Place the terminal handset onto the base if you have not already done so.

Key in your Merchant ID and press the GREEN ENTER button. Once the Merchant ID has been entered, the terminal will start the WiFi connection set-up.
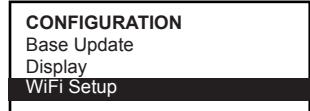
On the CONFIGURATION screen, scroll down using the arrow keys, highlight the WiFi Setup option and press the GREEN ENTER button.

CONFIGURATION
Base Update
Display
WiFi Setup

Select PROFILES on the next screen and press the GREEN ENTER button.

Select NEW PROFILE to create a new profile for the desired network and press the GREEN ENTER button. Highlight the Manual Connection option and press the GREEN ENTER button.

CONNECTION METHOD

Automatic Scan
Manual Connection
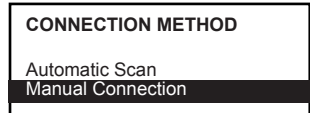
The access point for the network will be either visible or hidden. On the HIDDEN ACCESS POINT screen, select the appropriate option and press the GREEN ENTER button. If it isn't known whether the network is hidden or not, this can be established by scanning the available networks using another mobile device with wireless capabilities such as a smart phone, tablet or laptop. If the desired network is displayed amongst the available networks, this indicates that the network is not hidden and the 'NO' option should be selected. If it isn't displayed despite being active, this suggests that the network might be hidden and the 'YES' option should be selected.

On the ESSID ENTRY screen, key in the name of the network. A virtual keyboard will be activated by pressing the MENU button which will make it possible to facilitate the entry of non-numeric characters using arrow keys. To select capital letters press the right or left arrow key. Once the entry of the network name is completed press the GREEN ENTER button.
Please Note: this field is case sensitive.

On the SECURITY TYPE screen highlight the HOME SECURITY option and press the GREEN ENTER button.

SECURITY TYPE

Home Security
Enterprise Security
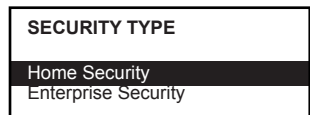
The next screen displays the encryption method options, highlight the 4-WPA / WPA2 option and press the GREEN ENTER button. For PCI-DSS compliance the WiFi network must use the WPA encryption protocol.

CYPHER
None
WEP64
WEP128
WPA / WPA2
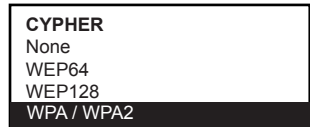
Enter the WiFi password on the WIFI PASSWORD screen and press the GREEN ENTER button. The virtual keyboard can be activated by pressing the MENU button.
Please Note: this field is case sensitive.

Key in '1' for PRIORITY level and press the GREEN ENTER button. The Wi-Fi network is automatically selected according to its visibility and priority value entered on this screen. When more than one profile is configured with priority set as '1', the signal strength will determine which profile is to be used.

The set-up is now complete. Press the RED CANCEL button a few times and allow some time (up to a minute depending on the signal strength) for the terminal to attach to the newly configured WiFi network. The icons at the top of the screen will indicate the connection status of the terminal.
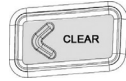
7.   <u>Using the Terminal</u>

Switching the terminal on and off

To SWITCH ON the terminal when it is off the base,
press the GREEN ENTER button:

If on the base the terminal will always be powered.
To SWITCH OFF the terminal when off the base, press
both of the buttons shown at the same time:
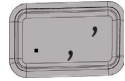
8.   <u>Battery and Display Information</u>

**Your terminal is supplied with a removable, rechargeable battery. This battery recharges
when the terminal is connected to the charger unit.**

Following installation, the battery charge status is indicated by the battery icon found in the top
right hand corner of the terminal display.

When you charge the battery for the first time, it should be charged until full capacity is indicated.
This may take from 4 to 16 hours. New terminals are dispatched with some charge present.

Transactions can be performed provided the terminal is connected to the charger unit so that it
can continue charging.

Battery low

One of these Battery Status Symbols will be displayed
depending on the charge in the battery and whether the
handset is on the base.
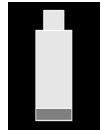
Battery fully
charged (off
base)
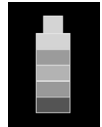
9.   <u>GPRS Connection Indicators</u>

The signal icon represents the strength of the GSM
mobile signal. The fewer bars indicated, the poorer the
network strength.

Your terminal may not be able to communicate with the
acquirer if the signal is very poor. The network name
shown next to the signal icon, indicates which network
the terminal is communicating by. This symbol indicates
that the network and SIM card are Active/Installed.

When 'GPRS' is displayed in green it confirms that the
terminal has a GPRS connection.

10.   <u>Bluetooth Connection Indicators</u>

This section of the display banner shows that the handset is connected to the base and also details the serial number of that base. It further indicates the signal strength.

If this information is not displayed, or the serial number is flashing, then you need to move the handset closer to the base unit.

If the 'B' symbol shown is displayed in BLUE, the handset is in range of the base unit and can be used safely.

If the 'B' symbol shown is displayed in RED then the handset is out of range of all the base units and cannot be used. Please see section 44 for further details.

If the symbol shown on the right is displayed in GREEN this indicates that the terminal is connected to a network. This will only be displayed if your terminal is an ethernet product.
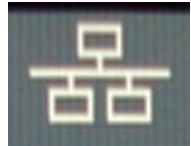
If it is shown in white, it is not connected to the cable.
If it is shown in red, it is not connected to the network

If this symbol is a lowered receiver, the terminal is ready to be used.

If this symbol is a raised receiver, the terminal is trying to connect to the Host computer.

11.   <u>WiFi Connection Indicators</u>

The main screen will look similar to the one shown below once the WiFi connection is established. The following icons on the screen indicate the status of the connection:

Network Name

Connected to the network when green

Signal Strength

Connected to WiFi when in brackets
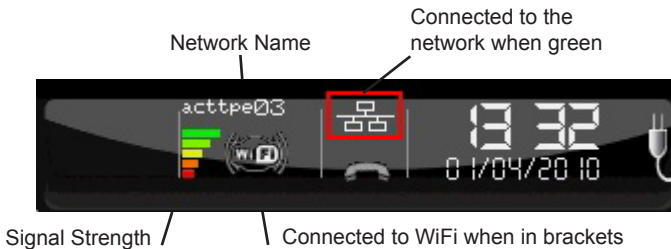
12. <u>Using the Menus</u>

The Transaction Menu enables you to perform a transaction on the terminal. At the READY prompt press the MENU button. The first option on the list will be highlighted. The actual options shown may differ from those shown here.

Please Note: Only three options can be displayed on the terminal screen at any one time. Use the arrow buttons to view all of the available options.

Press the GREEN ENTER button to select a highlighted option. The terminal will return to the READY display if no option is selected within 30 seconds.

The System Menu enables you to perform an administration function on the terminal. Select the System Menu by following the instructions below.

At the READY prompt press the MENU button until the System Menu is displayed. Other menu options may appear before or after, depending on your configuration.

Transaction Menu
Use the arrow keys to view the available options and press the button in between the arrows or press the ENTER button to make your selection when the required option is highlighted.

Throughout the transaction flows in this guide, all your instructions are denoted by this clear display.

All instructions to be carried out by the customer are denoted by a shaded display.

At this time you should hand the terminal to the customer and ask them to follow the instructions displayed.

Entering Letters

You may need to enter letters whilst using your terminal. Most numeric buttons have alphabetical characters allocated to them.

e.g. the number 2 button has a, b and c allocated to it
e.g. the number 5 button has j, k and l allocated to it

To enter a letter, press the relevant number button and then the MENU button to scroll through the letters until you select the character required. To enter the next letter you must again select the relevant number button. To enter a space press the 0 button followed by the MENU key.

If a mistake is made when entering numbers or letters, press the YELLOW button until the incorrect numbers or letters have been removed. Then re-key the correct entry. Once all the numbers or letters have been entered press the GREEN button to accept the entry.

TRANSACTION MENU
Refund
Sale
Purch with Cashback

SYSTEM MENU
Totals
Print Function Codes
Select Function

READY
Merchant Number
12345678

Amount   55.00
PIN ****
Cardholder to key PIN
Enter=OK   Clear=REKEY

13. <u>Using a Payment Card</u>

Inserting a Chip Card

The card should be inserted with the chip facing uppermost.

The terminal can detect if a chip card has been swiped as a magnetic card. If the card has not been inserted previously, it will prompt you to insert the card.

If the card is inserted the wrong way or there is a problem with the chip, the terminal will prompt for the card to be removed and re-inserted.

The terminal will prompt you when the card is to be removed.
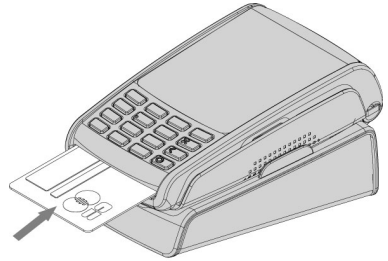
Swiping a Card

The card should be swiped with the black magnetic stripe facing the terminal and running along the bottom of the card.

Make sure that the bottom of the card runs firmly along the bottom of the card swipe and that the card is swiped at even speed.

The speed of the card swipe should not be too slow as this can sometimes cause problems when the terminal is reading the card.

PLEASE NOTE: It is important to swipe cards correctly through the terminal so that they can be read by the card reader.
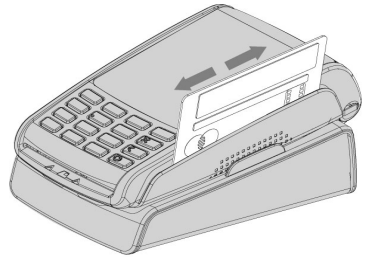
Using a Card with the Contactless Reader

If the terminal is allowed to process Contactless transactions the cardholder should present their card against the Contactless symbol displayed on the terminal.

If the card is removed too quickly a message will appear on the display and the cardholder will be asked to present the card again.
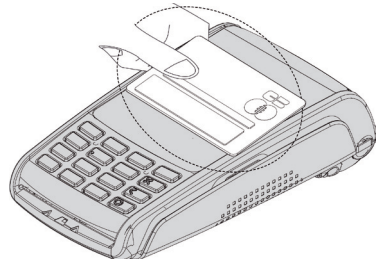
Where a contactless transaction is allowed, the terminal display will show the contactless symbol.

LED's will light at the top of the terminal during different parts of the transaction.

The cardholder should hold their card against the Contactless symbol.

Present, insert or swipe card	£9.50
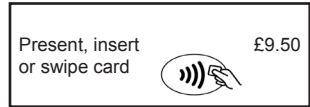
Re-Printing Receipts

Once a re-print has been printed the user will be asked to press ENTER.
Check to ensure receipt is correct, if another re-print is required press MENU to re-print.

PLEASE NOTE: This is not the same as printing a duplicate receipt.

14. <u>Starting a Transaction</u>

IMPORTANT INFORMATION

If your terminal is configured to accept Contactless payments it will always expect you to enter the transaction amount first for whichever type of transaction you are performing (the payment flow may differ slightly depending upon your configuration).

The following sections of this guide detail this type of transaction flow.

If your terminal is NOT configured for Contactless payments you may be asked to insert the customer's card first rather than key in the transaction amount first to initiate the transaction. If you are asked to 'Insert Card' first you will then be asked to key in an amount; continue from the 'Checking Card Prompt' for the transaction type selected.

15. <u>Sale Transactions</u>

From the READY prompt, key in the amount of the Sale and then press the GREEN button. The terminal will display (if the value is less than the contactless limit it will also display a Contactless symbol):

Present, insert or swipe card	£9.50
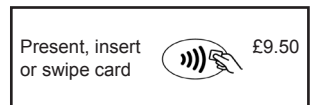
If the card is a Chip card, please see 'Sale (Card Inserted)'. If the customer's card has been swiped, please see 'Sale (Card Swiped)'.

If the customer's card is a Contactless card and is to be used for a Contactless transaction, please see 'Sale (Contactless)'.

Sale (Card Inserted)

The terminal will check the card. If the customer presents a card which supports multiple card schemes you may be required to choose which card scheme to use.

SALE Checking Card Please Wait...
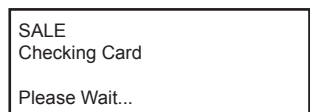
1. Your terminal may be configured to allow Cashback, if so press the GREEN button to select this option.

```
SALE
Cashback?

Enter=YES          Clear=NO
```

2. Now enter the Cashback amount and press the GREEN button. If Cashback is not required, press the YELLOW button and continue from step 4 below. If Cashback is not configured, continue from step 3 below.

```
PWCB
Key in Cash Amount
                    0.00
and then press ENTER
```

3. Hand the terminal to the customer. The customer should enter their PIN, as they do so asterisks will appear on the screen. Now press the GREEN button.

```
Amount             55.00
PIN ****
Cardholder to key PIN
Enter=OK        Clear=REKEY
```

4. If numbers are entered incorrectly during this process use the YELLOW button to delete and then reinsert.

PLEASE NOTE: Removing the card will VOID the transaction.

```
Amount             55.00
PIN: ACCEPTED
RETURN TERMINAL
Do NOT Remove Card
```

5. The terminal will now print a receipt which the CUSTOMER must retain for their records.

```
Printing
CUSTOMER RECEIPT

Please Wait...
```

Tear off the receipt and press the GREEN button to continue. Should you require a reprint of the receipt press the MENU button.

```
Tear OFF
CUSTOMER RECEIPT
Press ENTER if OK
Press MENU to Reprint
```

6. You will now be prompted to remove the customer's card. The terminal will then print a MERCHANT receipt which must be kept for your records.

```
SALE
Please Remove Card
```

```
Printing
MERCHANT RECEIPT

Please Wait...
```

7. Press the GREEN button and the terminal will return to the READY prompt.

PLEASE NOTE: The card number will be masked on the customer's receipt.

```
Tear OFF
MERCHANT RECEIPT
Press ENTER if OK
Press MENU to Reprint
```

Sale (Card Swiped)

1. Swipe the customer's card through the terminal.

```
SALE
Checking Card

Please Wait...
```

2. You may be prompted to confirm the last four digits of the card number. Key in the last four numbers from the customer's card and then press the GREEN button.

3. The terminal will check the card.

```
Key in last 4 digits of Card
Number

and then press ENTER
```

4. Your terminal may be configured to allow Cashback, if so press the GREEN button to select this option. Now enter the Cashback amount and press the GREEN button.

```
SALE
Cashback?

Enter=YES          Clear=NO
```

If Cashback is not required, press the YELLOW button and continue from step 5 below.

If Cashback is not configured, continue from step 5 below.

5. The terminal will now dial for authorisation and a number of messages will appear on the screen.

```
SALE
AUTH CODE: nnnnn
<Acquirer Name>
```

6. The terminal will print a Merchant receipt, tear this off and ask the customer to sign it.

```
Printing
MERCHANT RECEIPT

Please Wait...
```

```
Tear off
MERCHANT RECEIPT
Press ENTER if OK
Press MENU to Reprint
```

7. Check the signature and, if it is OK, press the GREEN button and a CUSTOMER receipt will be printed.

```
SALE
Signature OK?

Enter=YES          Clear=NO
```

If the signature is NOT OK press the YELLOW button and the transaction will be cancelled.

```
Printing
CUSTOMER RECEIPT

Please Wait...
```

```
Tear OFF
CUSTOMER RECEIPT
Press ENTER if OK
Press MENU to Reprint
```

8. The transaction is now complete and the terminal will return to the READY prompt.

Sale (Contactless)

1. From the READY prompt, enter the amount of the transaction and then press the GREEN button.

```
READY
Merchant Number
12345678
```

If you make a mistake, press the YELLOW button and re-enter the correct amount.

```
Key in Amount
                        0.00

and then press ENTER
```

2. The cardholder should present their card against the Contactless symbol on the terminal display.

```
Present, insert          £9.50
or swipe card
            ))) ☞
```

3. The terminal will now print a Merchant receipt.

```
Printing
MERCHANT RECEIPT

Please Wait...
```
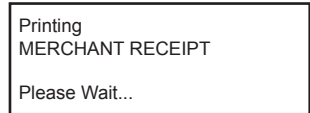
4. If the customer requests a receipt this must be done before the next transaction takes place.
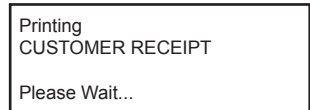
From the READY prompt press the decimal key and a customer receipt will be printed. Press ENTER to return to the READY prompt.

```
Printing
CUSTOMER RECEIPT

Please Wait...
```

16.   <u>Voice Referrals</u>

Sometimes transactions will require you to obtain a voice referral from the Authorisation Centre.

As a security measure your terminal may have been set up to request either the swipe of a Supervisor Card or the input of a Referral Password when this situation arises.

Please follow the process below if your terminal has been set up to ask for a Referral Password.

If a voice referral is required, the following screen will be displayed:

```
<Transaction Type>
<Voice Referral Message>
<Acquirer Name>
Press CLEAR
```
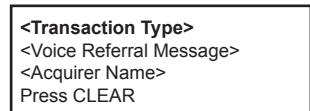
The card should be removed from the terminal and handed to the operator who will be contacting the Authorisation Centre.

```
SALE
Please remove card for voice
referral
Please Wait...
```
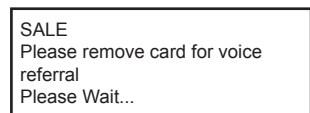
The Authorisation Centre telephone number will be displayed.

```
REFERRAL
MID: 12345678
CALL: nnnn nnnnnnn
and then press enter
```
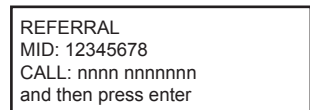
Enter your Referral Password and press the GREEN button to continue.
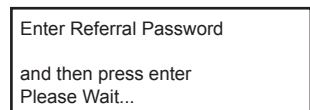
If you have not set up your Referral Password please see the Section 17, Setting the Referral Password.

```
Enter Referral Password

and then press enter
Please Wait...
```

Once you have spoken to the Authorisation Centre press the GREEN button to continue with the transaction or, if authorisation is declined, press the YELLOW button.

```
SALE
Authorisation given?

ENTER=YES        CLEAR=NO
```

If the YELLOW button is selected, the terminal will display 'Not Authorised' and print a 'Not Authorised' receipt. The terminal will then return to the READY prompt.

Enter the authorisation code provided by the Authorisation Centre and press the GREEN button.

```
SALE
Key in Auth. Code
                    <Auth Code>
and then press ENTER
```

The terminal will now print the receipts and then return to the READY prompt.

Incorrect Code/Password

If you enter an incorrect Password this screen will be displayed, press the YELLOW button to retry.

```
INCORRECT REFERRAL
PASSWORD

Press CLEAR to retry.
```

```
Enter Referral Password
LAST TRY

and then press ENTER
```

If an incorrect Password is entered at the second attempt this screen will be displayed, press the GREEN button for a final retry.

Once the number of tries has been exceeded the terminal will cancel the transaction, print 'Cancelled' receipts and return to the READY prompt.

```
NUM TRIES EXCEEDED
Please call Help Desk
on: nnnn nnn  nnnnnnn
Press CLEAR
```

17. <u>Setting the Referral Password</u>

Function 23 will allow you to set and change the Referral Password.

1. At the READY prompt, press the MENU button to display the System Menu. Use the arrow keys to view the available options and press the GREEN ENTER button when the SELECT FUNCTION option is highlighted.

```
SYSTEM MENU
Totals
Print Function Codes
Select Function
```

2. Enter the number 23 and then press the GREEN button. The terminal will ask you to swipe the Supervisor card or key in your Supervisor Code.

3. Now press the GREEN button to select the option to Set the Referral Password.

```
EFT
Set Referral Password?

Enter=YES          Clear=NO
```

Selecting the YELLOW button will return the terminal to the READY prompt.

If this is the first time the Password has been set please enter 0000 and then press the GREEN button.

```
Enter Current
Referral Password?

and then press ENTER
```

Enter a new Referral Password and then press the GREEN button.

```
Enter New
Referral Password?

and then press ENTER
```

Re-key the new Referral Password to confirm and then press the GREEN button.

```
Confirm New
Referral Password?

and then press ENTER
```

4. The terminal will print a receipt to confirm the Password has been changed and will return to the READY prompt.

18.   Refund

1. At the READY prompt, press the MENU button.

2. Using the arrow keys at the top of the handset, select Refund and press the GREEN button.

```
TRANSACTION MENU
Refund
Sale
 Purch. with Cashback
```

3. Either key in the amount of refund transaction and then press the GREEN button or swipe/insert card in the terminal and then key in the refund amount.

```
REFUND
Key in Amount
                        0.00
and then press ENTER
```

If performing a swiped transaction, your terminal may prompt you to enter the last four digits of the card number. If so, key in the last four digits of the customer's card number and press the GREEN button.

```
REFUND
Insert or swipe card
to continue
(or press Cancel key)
```

The terminal will check the card. If a customer presents a card that supports multiple card schemes, you may be required to choose which card scheme to use.

You may be prompted to swipe the Supervisor Card or enter your Supervisor Code through the terminal.

PIN entry is not required on refunds, the transaction will proceed as a signature verified sale.

(Please refer to Section 15 of this guide for instructions on how to Complete a Sale.)

19. Contactless Refunds

To perform a Contactless Refund, 'Amount Entry First' must be enabled; the card scheme must be configured to allow it and the transaction amount must be below the maximum Contactless transaction limit.

PLEASE NOTE: A 'Contactless Refund' may be performed either by using credit/debit cards (if configured) or any other contactless devices such as fobs or mobile telephones.

If the transaction value is below the maximum Contactless Limit a screen similar to the following will be displayed:

```
REFUND
Key in TOTAL Amount:
                                    0.00

and then press ENTER
```

If the value is above the Contactless Limit you will only be asked to swipe or insert the card.

Normal card checks will be performed.

```
REFUND                          £9.00
Present / Insert or Swipe Card to
continue
(or press Cancel key)
```

If refunds are supervisor protected then you will be asked to swipe the supervisor card or key in the supervisor code.

```
                  Swipe
               Supervisor Card
```

20. Purchase with Cashback

This menu option only needs to be used to provide Cashback when normal sale transactions are performed with a gratuity. Selecting this option allows a transaction to be carried out with Cashback instead of with gratuity.

PLEASE NOTE: Only certain types of debit cards allow Purchase with Cashback.

1. At the READY prompt press the MENU button. Use the arrow keys to view the available options and press the GREEN button when the Purchase with Cashback option is highlighted.

```
TRANSACTION MENU
Refund
Sale
Purch. with Cashback
```

2. Key in the amount of the sale and press the GREEN button.

3. Either insert into or swipe the customer's card through the terminal. If performing a swiped transaction, your terminal may prompt you to enter the last four digits of the card number. If so, key in the last four digits of the customer's card number and press the GREEN button.

```
PWCB
Key in Amount
                                    0.00

and then press enter
```

4. Key in the amount of cashback required and then press the GREEN button.

```
PWCB
Key in Cash Amount
                                    0.00

and then press enter
```

The transaction will now continue as a normal sale transaction. Please refer to Section 15 of this guide for instructions on how to complete a Sale Transaction.

PLEASE NOTE: Only certain types of debit cards allow Purchase with Cashback.

21. Cash Advance

This option is only available for certain types of business. Please contact Customer Services for further information.

PLEASE NOTE: Only certain types of debit cards allow Cash Advance.

At the 'Ready Prompt' press the MENU button.

1. Use the arrow keys to view the available options and press the GREEN button when the Cash Advance option is highlighted.

```
TRANSACTION MENU
Refund
Cash Advance
Purch. with Cashback
```

2. Key in the amount of the cash advance and press the GREEN button.

```
CASH ADVANCE
Key in Amount:
                        0.00
and then press ENTER
```

If performing a swiped transaction, your terminal may prompt you to enter the last four digits of the card number. If so, key in the last four digits of the customer's card number and press the GREEN button.

3. Either insert into or swipe the customer's card through the terminal.

```
CASH ADVANCE
Insert or swipe card
to continue
(or press CANCEL key)
```

4. The terminal will check the card.

```
CASH ADVANCE
Checking card

Please wait....
```

The transaction will now continue as a normal sale transaction. Please refer to Section 15 of this guide for how to complete a Sale Transaction.

22. Add Gratuity as a Percentage

If the terminal is configured for gratuity this can be added as a percentage of the total or as an actual value.

Press ENTER if a gratuity is to be added.

```
Amount            £10.00
Customer to
Enter a Gratuity
Press ENTER
```

If gratuity with percentage is enabled the following screen will be displayed:

```
Gratuity Percentage
1-        5 %
2-        10 %
3-        15 %
4-        20 %
5-        Other
```

Select 'Fixed Percentage' from the available options or select 'OTHER' to key in an amount.

```
Total                    £10.50
Customer to
Confirm Total
Press ENTER to assist
```

23.   Purchase with Gratuity (Restaurants)

PLEASE NOTE: This option is only available for certain types of business. Please contact Customer Services for further information.

1. Initiate a transaction as normal.

```
READY
Merchant Number
12345678
```

The terminal will check the card. If performing a swiped transaction, your terminal may prompt you to enter the last four digits of the card number. If so, key in the last four digits of the customer's card number and press the GREEN button.

```
SALE
Checking Card

Please Wait...
```

2. Your terminal may prompt you to enter the Waiter ID. If so, enter the relevant Waiter ID and press the GREEN button. You may also be prompted to enter the table number.

(Please see Section 40 for more information on Waiter ID's.)

3. Pass the terminal to the customer to confirm the amount.

```
Cardholder to Confirm
Amount                    55.00
Press ENTER to Accept
or CLEAR to Reject
```

If the customer rejects the amount, the customer should return the terminal. You will be prompted to swipe the Supervisor Card or enter your Supervisor Code and re-enter the amount.

```
Amount                    55.00
Do you wish to
Add a GRATUITY?
Enter=YES          Clear=NO
```

4. If the customer does not want to add a gratuity, they should press the YELLOW button and the transaction will then proceed from step 8. If the customer wishes to add a gratuity, they should press the GREEN button.

```
Amount                    55.00
Enter GRATUITY
                          5.00
Enter=OK         Clear=REKEY
```

5. The customer will now be prompted to key in the gratuity amount and to press the GREEN button.

6. The customer may then be prompted to confirm the total transaction amount.

```
Cardholder to Confirm
Total                    60.00
Press ENTER to Accept
or CLEAR to Reject
```

7. The customer will be prompted to enter their PIN. Once the PIN has been entered, the customer should press the GREEN button to confirm.

```
Amount                   60.00
PIN:
Cardholder to key PIN
Enter=OK        Clear=REKEY
```

8. The customer should now return the terminal. If the card has been inserted, the card should remain in the terminal.

```
PIN ACCEPTED

RETURN TERMINAL
Do NOT Remove Card
```

PLEASE NOTE: Removing the card will VOID the transaction.

9. The terminal will dial the authorisation centre and display the message CONNECTION MADE.

10. The terminal will now confirm if authorisation has been obtained.

The terminal will display PLEASE WAIT while it prints the customer's receipt. Press the GREEN button and you will be prompted to remove the card.

11. The terminal will then print a MERCHANT receipt which should be retained for your records.

Press the GREEN button and the terminal will return to the READY prompt.

24.   <u>Refund with Gratuity</u>

1. At the READY prompt press the MENU button. Use the arrow keys to view the available options and press the GREEN button when the Refund option is highlighted.

2. Key in the total amount including any gratuity and press the GREEN button.

```
REFUND
Key in TOTAL:
                          0.00
and then press ENTER
```

3. Either insert into or swipe the customer's card through the terminal.

If performing a swiped transaction, your terminal may prompt you to enter the last four digits of the card number. If so, key in the last four digits of the customer's card number and press the GREEN button.

```
REFUND
Insert or Swipe Card
to continue
(or press CANCEL key)
```

The terminal will check the card. If a customer presents a card that supports multiple card schemes, you may be required to choose which card scheme to use. You may be prompted to swipe the Supervisor Card or enter your Supervisor Code through the terminal.

4. If a gratuity has been added, press the GREEN button.
If no gratuity has been added, press the YELLOW button.

```
REFUND
Gratuity Added?

Enter=YES              Clear=NO
```

5. If a gratuity has been added, enter the amount of the gratuity and press the GREEN button.

```
REFUND
Key in GRATUITY
                            0.00
and then press ENTER
```

6. Key in the Waiter ID from the original transaction and press the GREEN button.

```
REFUND
Original Waiter ID:

and then press ENTER
```

The transaction will now proceed as per a normal sale transaction. Please see Section 15 for information on how to complete a Sale Transaction.

25.   **Pre-Authorisation**

PLEASE NOTE: this option is only available for certain types of business. Please contact Customer Services for further information.

Where there is the likelihood of a large value transaction, such as a hotel or car hire bill, a pre-authorisation transaction for the expected value can be made. If, following a pre authorisation transaction, the value of the transaction increases (e.g. as a result of an extended stay at an hotel) a further pre-authorisation may be required.

1. At the READY prompt press the MENU button. Use the arrow keys to view the available options and press the GREEN button when the Pre-Auth option is highlighted.

```
TRANSACTION MENU
Refund
Purch.with Cashback
Pre-Auth
```

2. Key in the estimated amount of the transaction and press the GREEN button.

```
PRE-AUTH
Key in Amount:
                            0.00
and then press ENTER
```

3. Either insert into or swipe the customer's card through the terminal. If performing a swiped transaction, your terminal may prompt you to enter the last four digits of the card number. If so, key in the last four digits of the customer's card number and press the GREEN button.

```
PRE-AUTH
Insert or Swipe Card
to continue
(or press Cancel key)
```

4. When supported on the acquirer host, the use of a 'transaction identifer' can be used during Pre-Auth transactions. An additional prompt for Transaction ID will appear as shown. **NOTE**: The initial 'Pre-Auth Txn' will NOT have a 'Txn ID' to be keyed in as this is returned from the acquirer. It is only then that a 'Txn ID' will be used until completion.

```
PRE-AUTH
Key Last Txn ID:

and then press ENTER
```

The transaction will now continue as a normal sale transaction. Please refer to Section 15 for instructions on how to complete a Sale Transaction.

26. <u>Completion</u>

The following procedure will complete a pre-authorised transaction when the final account is confirmed with the customer.

1. At the READY prompt press the MENU button. Use the arrow buttons to view the available options and press the GREEN button when the Completion option is highlighted.

```
TRANSACTION MENU
Pre-Auth
Completion
Cash Advance
```

2. Key in the amount of the transaction and press the GREEN button.

```
COMPLETION
Key in Final Amount
                                    0.00
and then press ENTER
```

3. Either insert into or swipe the customer's card through the terminal. If performing a swiped transaction, your terminal may prompt you to enter the last four digits of the card number. If so, key in the last four digits of the customers card number and press the GREEN button.

```
COMPLETION
Insert or swipe card
to continue
(or press Cancel key)
```

4. You will then be prompted to enter the last Pre-Authorised code and press the GREEN button. The transaction will now continue as a normal sale transaction.

```
COMPLETION
Key in last Pre-Auth Code:

and then press ENTER
```

5. When supported on the acquirer host, the use of a 'transaction identifier' can also be used during Completion transactions. An additional prompt for Transaction ID will appear as shown.

```
COMPLETION
Key Last Txn ID:

and then press ENTER
```

Please refer to Section 15 for instructions on how to complete a Sale Transaction.

27. <u>Key Entering Card Details and Mail Order Transactions</u>

You may need to key enter a customers card details if their card is faulty or if you are entering a mail order transaction where the customer is not present.

A. **Mail Order Transactions:**
Begin at Step 1 if you are performing a Mail Order Transaction.

B. **Card Read Failure or Key Card Number:**
Begin at Step 2: if you have swiped a customer's card at the READY prompt and the terminal displays CARD READ FAILURE.

OR

If you have selected the Sale option from the Transaction menu and unsuccessfully swiped the card three times, and the terminal displays 'Key in Card Number'.

1. At the READY prompt press the MENU button. Use the arrow keys to view the available options and press the GREEN button when the required option is highlighted. Key in the amount of the transaction and then press the GREEN button

```
TRANSACTION MENU
Refund
Sale
Purch. with Cashback
```

2. Enter the customer's card number when you see this prompt. The card number will be displayed as it is keyed in.

```
<transaction type>
Insert or Swipe Card
to continue
(or press Cancel key)
```

3. The terminal will check the card number. Key in the card expiry date and press the GREEN button.

```
<transaction type>
Key expiry date MMYY

and then press ENTER
```

4. You may be asked to enter the start date or issue number from the card. Enter them as they appear on the card and press the GREEN button.

```
<transaction type>
Key start date MMYY

and then press ENTER
```

```
<transaction type>
Key in issue number

and then press ENTER
```

5. If the customer is present, press the GREEN button. If this is a mail order transaction, press the YELLOW button and proceed from number 9 below.

```
<transaction type>
Is customer present?

ENTER=YES        Clear=NO
```

6. Key in the amount of the transaction and press the GREEN button. The terminal will now dial for authorisation. The authorisation code will be displayed. Press the GREEN button.

```
<transaction type>
Key in Amount:
                    0.00
and then press ENTER
```

7. A receipt will now be printed. Obtain the customer's signature. If the signature is OK, press the GREEN button. If it is not, press the YELLOW button and the transaction will be voided.

```
SALE
Signature OK?

ENTER=YES        Clear=NO
```

8. The signed receipt should be kept for your records. The terminal will now print a receipt for the customer. Pass the receipt to the customer and the transaction is complete.

9. IF YOUR TERMINAL IS CONFIGURED FOR CSC/ AVS (A CARDHOLDER VERIFICATION SERVICE) PROCEED AS FOLLOWS:

If you see this prompt, key in the 3 digit security code, which can be found on the signature strip on the back of the customer's card. Now press the GREEN button.

```
<transaction type>
Key in Security Code:

and then press ENTER
```

PLEASE NOTE: The security code for American Express cards is a four digit code and can be found on the front of the card.

Your terminal will then prompt you to do the following:

• Enter the numeric digits from the customers Post Code, (i.e EH11 9YE would be entered 119) and then press the GREEN button

```
<transaction type>
Key in Numerics from
The Post Code:
and then press ENTER
```

• Enter the customer's house number, (i.e Flat 5, 29 High Street would be entered 529) and then press the GREEN button.

```
<transaction type>
Key in first five digits
of the address:
and then press ENTER
```

10. The terminal will now dial out for authorisation and the authorisation code will be displayed. Press the GREEN button.

```
<transaction type>
AUTH CODE: nnnnn
<Aquirer name>
press ENTER
```

The terminal will display the results of the address check. The result will be printed on the receipts.

The security message will advise the response for any information entered at the Security Code, Address and Post Code prompts.

Message Text	Result
ALL MATCH	All data entered is correct
SEC CODE MATCH ONLY	Only the Security Code is correct
ADDRESS MATCH ONLY	Only the address is correct
NO DATA MATCHES	None of the data entered is correct
DATA NOT CHECKED	The data has not been checked

11. To accept the transaction press the GREEN button and a customer receipt will be printed. Press the GREEN button again and this will print a copy of the receipt for your records.

```
AUTH CODE: nnnnn
<security messages>
Press ENTER to Accept
Press CLEAR to Decline
```

To decline the transaction press the YELLOW button and a void receipt will be printed for the customer. Press the GREEN button again and a void receipt will be printed for your records.

28.   Reversal

You can reverse the last previously authorised Sale or Refund transaction provided the reversal is carried out within 30 seconds of completing the original transaction.

1. At the READY prompt press the MENU button. Use the arrow buttons to view the available options and press the GREEN button when the Reversal option is highlighted.

```
TRANSACTION MENU
Refund
Duplicate Receipt
Reversal
```

2. The terminal will dial the authorisation centre and display the message CONNECTION MADE. The terminal will now confirm the reversal is successful and print a receipt.

```
REVERSAL
Dialling
<Acquirer Name>
```

3. Tear off the receipt and give this to the customer as a copy of the transaction. Press the GREEN button.

The terminal will now print a copy of the receipt for you to retain for your records. Press the GREEN button and the terminal will return to the READY prompt.

29.   Verify Account

Press the MENU button and then use the arrow keys to highlight the transaction type from the transaction menu and then Press ENTER.

```
TRANSACTION MENU
Verify Account
Pre-Auth
Refund
```

1. Insert or Swipe Card.

```
VERIFY ACCOUNT
Insert or Swipe Card
to continue
( or press Cancel key )
```

2. Cardholder PIN entry (* (asterisk) will be displayed as each PIN digit is keyed in).

```
Amount            £0.00
PIN: ****
Cardholder to key PIN
Enter=OK  Clear=REKEY
```

3. The terminal will contact the acquirer to verify the account holder.

Note: If terminal cannot connect to acquirer, terminal will print 'Connection Failed'.

```
Amount            £0.00
PIN ACCEPTED
RETURN TERMINAL
DO NOT Remove Card
```

30.   MCC6012 Support

Merchants classed as Financial Institutions (identified by having a Merchant Category Code of 6012) can now capture additional data when performing certain types of transactions (currently applies to Sale transactions using Visa cards).

When enabled (via Ingenico's GEMS system) the following new prompts will appear when performing transactions where this feature is enabled:

Date of Birth (YYYYMMDD) - Numeric

```
SALE
Key in birth YYYYMMDD

and then press ENTER
```

Surname (First 6 characters) - AlphaNumeric

```
SALE
Key in surname

and then press ENTER
```

Card Number of Account (First 6 and Last 4 digits) -
AlphaNumeric

```
SALE
Key PAN (First 6 Last 4)

and then press ENTER
```

Post Code (up to 10 characters) - AlphaNumeric

```
SALE
Key in post code

and then press ENTER
```

31.   <u>Switching Comms</u>

A new Function Code has been introduced to allow a merchant to switch from PSTN to IP (or vice versa). This avoids having to call the Help Desk to change the configuration on GEMS before doing an 'Ad Hoc' call (Function 81).

Please note: This new functionality does not apply to GPRS enabled devices.

When changing from IP to PSTN, the merchant will be prompted for Dial Parameters (Dial Prefix and Call Waiting). A call to GEMS will be made using the chosen Comms method.

Important Notes:

1) The terminal must already contain details for connecting to GEMS in either PSTN or IP mode.

2) GEMS controls the usage of Function Code 87.

Options are:

•   PSTN Only
•   PSTN / IP Allowed
•   IP Only

You willl only be able to switch comms if the comms is allowed by GEMS.

For example, if set to PSTN, only , you cannot switch to IP.

Switching Comms - F87 Usage

Select Function 87 and proceed as follows:

Swipe supervisor card or enter supervisor code.

Continue with either:

a) 'Switch from PSTN to IP' or
b) 'Switch From IP to PSTN'

Switching from PSTN to IP

Press ENTER

Further messages will be displayed during the terminal re-configuration

After printing a 'CARD TYPES ACCEPTED' report, the terminal will return to the READY screen.

Switching from IP to PSTN

Press ENTER

Press ENTER if required (for use with a Switchboard) or press CLEAR to select NO (for use with a Direct Line).

Key in 'Dial Prefix' and press ENTER
(or press CANCEL to return to previous screen).

Press ENTER if used or press CLEAR if not used
(as appropriate).

Further messages will be displayed during terminal re-configuration.

After printing a 'CARD TYPES ACCEPTED' report, the terminal will return to the READY screen.

SWIPE SUPERVISOR CARD

SYSTEM
Switch Comms ?

Enter=YES   Clear=NO

Connection Method
Local Network

Contacting GEMS
via Local Network

Please Wait…

READY
Merchant Number:
1234567890

Connection Method
Telephone <PPP>

Dial Prefix Required?

Enter=YES   Clear=NO

Key in the Number used
to get an Outside Line

and then press ENTER

Does the Tel. Line have
Call Waiting or 1571 ?

Enter=YES   Clear=NO

Dialling GEMS
Tel.: <GEMS Tel.No>
DPP 100   Prefix NONE
Please Wait…

READY
Merchant Number:
1234567890

32. <u>PIN Entry Failure</u>

If an incorrect PIN has been entered the terminal will display INCORRECT RE-ENTER PIN.

```
INCORRECT RE-ENTER
PIN: ****
Cardholder to key PIN
Enter=OK          Clear=REKEY
```

The cardholder should re-enter their PIN and press the GREEN button.

Once all the re-try attempts have been used the terminal will display the message: 'PIN TRIES EXCEEDED'.

```
PIN TRIES EXCEEDED
Contact Card Issuer
RETURN TERMINAL
Do NOT Remove Card
```

The cardholder should hand the terminal back to you and contact their card issuer.

The transaction will continue and seek authorisation with a signature verification. Press the GREEN button to continue the transaction.

```
PIN TRIES EXCEEDED
Press ENTER to
Continue with
Signature
```

33. <u>Cancelling Transactions</u>

1. CANCELLING BEFORE AUTHORISATION

A transaction can be cancelled at any time before authorisation has been obtained.

Press the RED button. The terminal will display CANCELLED and print a receipt for the customer which will be marked as cancelled.

Then press the GREEN button and the terminal will print a merchant receipt for your records.

Press the GREEN button again and the terminal will then return to the READY prompt.

2. CANCELLING AFTER AUTHORISATION BUT BEFORE COMPLETION

When carrying out a swiped transaction and the transaction requires cancelling after authorisation has been obtained, but before the transaction has been completed, press the YELLOW button at the 'SIGNATURE OK' prompt to select NO and reject the signature. The transaction will be automatically reversed and a void receipt will be printed.

3. CANCELLING AFTER COMPLETION OF A TRANSACTION

If the transaction requires cancelling after the transaction has been completed a REVERSAL or a REFUND will need to be performed. (Please refer to Section 28 for Reversal or Section 18 for Refund)

PLEASE NOTE: Reversal transactions can only be carried out within 30 seconds of the transaction completing and only if no other function has been attempted.

4. CANCELLING THE TRANSACTION BY THE CUSTOMER

If the customer selects to cancel a transaction, they will be asked to confirm if they wish to do so and return the terminal. You should then remove their card and press the GREEN button and the terminal will print out a receipt for the customer and one for your records.

34. Clearing Mistakes

If a mistake is made when entering numbers or letters, press the YELLOW button until the incorrect numbers or letters have been removed or press the RED button to erase all input. Now re-key the correct entry.

35. Printing Duplicate Receipts

1. At the READY prompt press the MENU button. Use the arrow keys to view the available options and press the GREEN button when the Duplicate Receipt option is highlighted.

2. Press the GREEN button to print a duplicate receipt. It is not an exact copy of either a customer or merchant receipt and has Duplicate Receipt printed on it.

```
TRANSACTION MENU
Refund
Reversal
Duplicate Receipts
```

```
EFT
Duplicate Receipt

Enter=YES          Clear=NO
```

36. X and Z Totals

X Totals can be printed at any time throughout the day and give a sub total of all transactions performed. X totals do not reset the totals within the terminal.

Z Totals show the total of all transactions processed through the terminal for each card company since the last Z Totals were performed. Once Z Totals have been completed the totals within the terminal are reset to zero. X Totals will also be reset. Z Totals are not connected to your Banking totals.

1. At the READY prompt, press the MENU button to display the System Menu The TOTALS option will be highlighted. Press the GREEN button and the TOTALS menu will be displayed.

2. Use the arrow keys to view the available options and press the GREEN button when the required option is highlighted.

3. You will then be asked to swipe the Supervisor Card or enter your Supervisor Code through the terminal.

4. Press the GREEN button to proceed or the YELLOW button to cancel.

5. The terminal will print the report. Press the MENU button if you wish to reprint the report. If not, press the GREEN button and the terminal will return to the READY prompt.

```
SYSTEM MENU
Totals
Print Function Codes
Select Function
```

```
TOTALS MENU
End-of-Day Banking
Z-Totals
X-Totals
```

```
EFT
X-Totals? (or Z-Totals?)

Enter=YES          Clear=NO
```

```
Tear Off
TOTALS RECEIPT
Press ENTER if OK
Press Menu to Reprint
```

37. Waiter Totals

1. At the READY prompt, press the MENU button to display the System Menu. The TOTALS option will be highlighted. Press the GREEN button and the TOTALS menu will be displayed.

SYSTEM MENU
Totals
Print Function Codes
Select Function

2. Use the arrow buttons to view the available options and press the GREEN button when the Waiter Totals option is highlighted.

TOTALS MENU
Z-Totals
X-Totals
Waiter Totals

You will then be asked to swipe the Supervisor Card or enter your Supervisor Code through the terminal.

3. Press the GREEN button to print the totals.

EFT
Print Waiter - Totals
Enter=YES   Clear=NO

4. To reset the Waiter Totals press the GREEN button and the totals will be reset.

The terminal will now return to the READY prompt.

WAITER TOTALS
Reset Waiter - Totals?
Enter=OK   Clear=REKEY

38. End of Day Banking

Banking should be carried out at the end of each business day once the last customer has left the premises. This is to make checking credits and reconciliation with your bank statements easier.

PLEASE NOTE: To ensure that your statement totals balance, it is important that you carry out your End of Day Banking **before the cut off time set by your acquirer**. For information regarding these times please contact the relevant Customer Services.

1. At the READY prompt, press the MENU button to display the System Menu. The TOTALS option will be highlighted. Press the GREEN button and the TOTALS menu will be displayed.

SYSTEM MENU
Totals
Print Function Codes
Select Function

2. Use the arrow keys to view the available options and press the GREEN button when the End of Day option is highlighted.

TOTALS MENU
End-of-Day Banking
Z-Totals
X-Totals

You will then be asked to swipe the Supervisor Card or enter your Supervisor Code through the terminal.

3. Press the GREEN button to proceed.

EFT
End-of-Day Banking?
Enter=YES   Clear=NO

4. You will now have the choice of selecting totals for ALL card types or selecting those card types you wish to bank.

5. Press the GREEN button to reconcile ALL card types and the terminal will contact each acquirer in turn before printing the report or press the YELLOW button to continue from 6.

Select card types to be banked
Press ENTER for ALL
Press CLEAR to SELECT

PLEASE NOTE: This screen will only be displayed if your terminal is set up with more than one acquirer.

6. You will now be shown a list of the individual acquirers. Press the GREEN button to reconcile an acquirer or press the YELLOW button if you do not want to reconcile a particular acquirer.

```
End-of-Day Banking
Bank <acquirier>

Enter=YES           Clear=NO
```

7. Once the desired acquirer has been selected, the terminal will dial the selected acquirer. You will be prompted to wait while the terminal prints a banking report.

8. After all acquirers have been banked, tear off the receipt and press the GREEN button. The terminal will return to the READY prompt.

PLEASE NOTE: If Stored or Session Totals Not Agreed is printed on your End of Day receipt, please contact Customer Services.

39.   <u>Entering Function Codes</u>

There may be occasions when you have further requirements of your terminal. These can be met through the use of Function Codes.

1. At the READY prompt, press the MENU button to display the System Menu. Use the arrow keys to highlight and select functions and press the GREEN button.

2. Key enter the function code required and then press the GREEN button.

Once the function code has been entered, follow the prompts displayed by the terminal. You may be prompted to swipe your Supervisor Card or enter your Supervisor Code. The following codes are available for you to use:

CODE	TITLE	DESCRIPTION
16	Print Transaction Log	Refer to section 42
30	Set Date/Time	Refer to section 40
33	Power Up Banner Setup	Refer to section 46
36	Radio Setup	Refer to section 43
38	Sleep Parameters	Refer to section 41
40	Waiter Setup	Refer to section 39
86	Connection Test	Allows you to connect to host
91	GSM Network	Refer to section 47

40.   <u>Waiter IDs (Restaurants)</u>

Default Waiter 0

A default waiter, Waiter 0: SHARED will be created automatically by the terminal. This can be used if you do not want to create individual Waiter IDs.

All sale transactions with gratuity will add tips/gratuities to this waiter without the need for a Waiter ID to be entered during transaction processing.

The total of all Waiter 0 tips/gratuities will be printed as part of the Waiter Totals Report showing the total value of tips/gratuities performed.

Adding an Individual Waiter ID

Your terminal can be configured to recognise individual Waiter IDs. These make it possible to identify which staff member has dealt with the transaction. The Waiter ID will be printed on the receipt.

1. At the READY prompt press the MENU button to display the System Menu.

```
SYSTEM MENU
 Totals
 Print Function Codes
 Select Function
```

2. Using the arrow button select the Select Function option and then press the GREEN button.

3. Enter the number 40 and then press the GREEN button.

```
EFT
Waiter Setup?

Enter=YES          Clear=NO
```

4. Swipe the Supervisor Card or enter your Supervisor Code through the terminal.

5. If you want to proceed to the Waiter Setup menu, press the GREEN button. If not, press the YELLOW button.

6. Using the arrow button select Add and then press the GREEN button.

```
WAITER SETUP
 Add
 Delete
 Print

Change Name
Delete All
Create Defaults
```

7. Your terminal will automatically allocate the next available Waiter ID. Key in the text/name description and press the GREEN button (this field is limited to 10 characters).

(Please refer to Section 12 of this guide for instructions on how to enter letters.)

```
ADD WAITER          Code nn
 Key in Waiter's Name
                    aaaaaaaaa
 and then press ENTER
```

Deleting a Waiter ID

Follow steps one to six above and select DELETE from the WAITER SETUP menu, now proceed as follows:

1. Key in the Waiter ID code that is to be deleted and then press the GREEN button.

```
DELETE Waiter
 Key in Code to Delete
                         nn
 and then press ENTER
```

2. If you want to proceed to delete the Waiter, press the GREEN button.

If not, press the YELLOW button.

```
DELETE Waiter nn
<name>

Enter=YES          Clear=NO
```

Changing a Waiter ID

Follow steps one to six of Section 39 (Adding an Individual Waiter ID) and select Change Name from the WAITER SETUP menu. Now proceed as follows:

1. To change a Waiter Name, key in the Code of the Waiter that requires changing and then press the GREEN button.

```
CHANGE Name
Key in Code to Change
                              nn

and then press ENTER
```

2. Amend the Waiter Name by using the RED and YELLOW buttons to erase letters. Press the GREEN button and the terminal will return to the Waiter Setup Menu.

```
CHANGE Name
Key in Waiter's Name
                   <existing name>
and then press ENTER
```

Creating Default IDs

When using the Create Defaults option, the terminal automatically creates numbered Waiters from 1-99 instead of named Waiters.

Follow steps one to six of Section 40 (Adding an Individual Waiter ID) and select Create Defaults from the WAITER SETUP menu.

```
CREATE Defaults
Are You Sure?

Enter=YES          Clear=NO
```

If Waiters don't exist yet

When asked whether you would like to create defaults on your terminal, press the GREEN button to accept. To decline, press the YELLOW button.

If Waiters exist already

If Default Waiters exist on your terminal and you wish to add a named waiter, this screen will be displayed. You MUST delete a Default Waiter before a named waiter can be added. Press the GREEN button.

```
Waiters Already Exist
Delete ALL if you wish
to remove
```

41. How to Change the Date and Time

The terminal has a built in clock which maintains the current date and time. If necessary you can also change the date and time manually. **PLEASE NOTE:** this will need to be done twice a year when the clocks change.

1. At the READY prompt, press the MENU button to display the System Menu. Use the arrow buttons to view the available options and press the GREEN button when the Select Function option is highlighted.

```
 SYSTEM MENU
 Totals
 Print Function Codes
 Select Function
```

2. Key enter the number 30 and press the GREEN button. You will then be asked to swipe the Supervisor Card or enter your Supervisor Code through the terminal.

```
Key in Function Code


and then press ENTER
```

3. The current date will be displayed. Re-key the correct date and press the GREEN button.

```
SET DATE/TIME
Enter Current Date
                   dd/mm/yy
and then press ENTER
```

4. The current time will be displayed. Re-key the correct time and press the GREEN button.

The terminal will return to the READY prompt.

```
SET DATE/TIME
Enter Current Time
                        dd/mm/yy
and then press ENTER
```

42.   How to Set Sleep Parameters

This function allows you to set the time when the terminal is not in use before it goes into sleep mode. Having the sleep parameters enabled will save on battery life.

1. At the READY prompt, press the MENU button to display the System Menu. Use the arrow buttons to view the available options and press the GREEN button when the Select Function option is highlighted.

```
SYSTEM MENU
Totals
Print Function Codes
Select Function
```

2 Key enter the number 38 and press the GREEN button. You will then be asked to swipe the Supervisor Card or enter Supervisor code.

```
Key in Function Code


and then press ENTER
```

3. Press ENTER to continue setting Sleep Parameters or Clear to cancel.

```
SYSTEM
Sleep Parameters?

Enter=YES          Clear=NO
```

4. Enter the number of minutes before which the terminal goes to sleep and then press the GREEN button.

The terminal will return to the READY prompt.

```
Number of Mins before
going to sleep (1-30)
                        xx
and then press ENTER
```

43.   How to Print a Transaction Log

This function allows you to print a log of your last 100 transactions, should the need arise for example to check any financial discrepancies.

At the READY prompt, press the MENU button to display the System Menu. Use the arrow buttons to view the available options and press the GREEN button when the Select Function option is highlighted.

```
SYSTEM MENU
Totals
Print Function Codes
Select Function
```

2. Key enter the number 16 and press the GREEN button. You will then be asked to swipe the Supervisor Card or enter your Supervisor Code through the terminal.

```
Key in Function Code


and then press ENTER
```

3. To print a transaction log for the selected acquirer, press the GREEN button. If not, press the YELLOW button.

```
Print Transaction Log
<Acquirer Name>?

Enter=YES          Clear=NO
```

4. Press the GREEN button again and the transaction log for that acquirer will be printed. It will show the previous 20 transactions for that acquirer. Step 3 and 4 will repeat for each acquirer.

```
Print Transaction Log
Continue?

Enter=YES          Clear=NO
```

Once all have been printed, press the GREEN button and the terminal will return to the READY prompt.

44.   How to Assign a Terminal to a Base Unit (Bluetooth Only)

Place the terminal handset onto the base unit.

1. At the READY prompt press the MENU button to display the System Menu.

```
SYSTEM MENU
 Totals
 Print Function Codes
 Select Function
```

2. Use the arrow buttons to view the available options and press the GREEN button when the Select Function option is highlighted.

```
Key in Function Code


and then press ENTER
```

3. Key enter the number 36 and press the GREEN button. You will then be asked to swipe the Supervisor Card or enter your Supervisor Code through the terminal.

```
SYSTEM
Radio Setup?

Enter=YES          Clear=NO
```

4. To assign the terminal to a base unit press the GREEN button. To cancel the operation, press the YELLOW button.

```
RADIO SETUP
Assign To Base
Select Base
Remove Base
Print Base Info
Test Radio Link
```

5. Select ASSIGN TO BASE and press the GREEN button.

6. Place the handset onto the base unit if you have not already done so.

The terminal will display different screens to confirm that the base unit assignment is in progress. The terminal will finally confirm that the base unit assignment was successful and will automatically return to the ready prompt after three seconds.

Assigning a Handset to more than one Base

Your handset can be assigned to up to three bases. If you are not in range of your primary base unit, you can select from two others that the handset is assigned to in order to complete your transaction. Follow the prompts below to assign your terminal to more than one base.

1. At the READY prompt press the MENU button to display the System Menu.

```
SYSTEM MENU
 Totals
 Print Function Codes
 Select Function
```

2. Use the arrow buttons to view the available options and press the GREEN button when the Select Function option is highlighted.

```
Key in Function Code


and then press ENTER
```

3. Key enter the number 36 and press the GREEN button. You will then be asked to swipe the Supervisor Card or enter your Supervisor Code through the terminal.

4. To assign the terminal to a base unit press the GREEN button.

To cancel the operation, press the YELLOW button.

```
SYSTEM
Radio Setup?

Enter=YES          Clear=NO
```

5. Choose SELECT BASE and press the GREEN button.

```
RADIO SETUP
Assign To Base
Select Base
Remove Base
Print Base Info
Test Radio Link
```

6. Select the number of the base unit you wish to assign your handset to and press the GREEN button.

You can now proceed to assign your handset to up to two more base units. Your terminal will return to the READY prompt when each assignment is complete.

```
SELECT BASE
40243643
40243582
```

Test Radio Link

To test the quality of the connection, select Test Radio Link from the Radio Setup menu shown. A 60 second timer starts if ENTER is selected. A printout is produced, follow the on screen prompts.

```
SIGNAL QUALITY TEST

Press Enter to start
Press Cancel to quit
```

45. How to Change a Paper Roll

1. Hold the terminal securely in one hand. With the other hand, and by using two fingers, lift the printer cover release as shown. Fully open the printer cover and remove the old roll of paper.
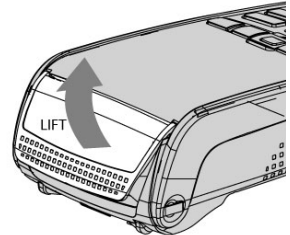
2. Unstick the end of the new roll, leaving the end free, hold the paper roll as shown and carefully place into the printer compartment.
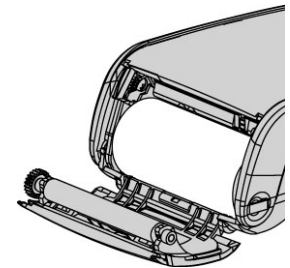
3. Holding the free end of the paper and the terminal, close the printer cover and push firmly until it locks.
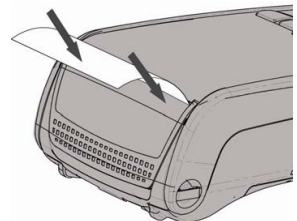
Holding the yellow CLEAR button will feed the paper through.

46. Power Up Banner Setup

Press Enter to disable printing of banner each time terminal is swittched off / on.

```
Do you want to disable Power Up
Banner Print?

ENTER=Yes            Clear=No
```

47. GSM Network (GPRS Only)

Please select option required from the Manual Mode Menu and follow screen prompts.

```
MANUAL MODE
Find Network
Select Network
Test Signal Strength
```

48. Insuring the Terminal

Although you rent your terminal for a monthly charge it is strongly recommended that you insure the terminal against loss or damage to a value as recommended by your acquirer.

49. Security Warning Notice

This terminal is used for the secure transfer of funds using credit and debit cards. As such it is designed as a high security device.

Should you suspect that the terminal might have been removed, stolen or apparently modified or replaced then you should advise your Bank immediately and stop using the terminal until advised by the Bank accordingly. This is to protect both your business and also the persons who have or will continue to use your terminal. **Please be vigilant at all times and check your terminal regularly.**

50. Helpful Hints

Terminal Tips
•   Your terminal unit should be left in your retail premises and plugged into a 24 hour power supply and telephone line at all times.

•   If the terminal display is blank, ensure the terminal is plugged into the power supply.

•   If you have poor quality printing or a blank receipt, change the paper roll and ensure it is the correct way round.

•   Keep your Supervisor card in a secure place. Anyone with access to this card may perform unauthorised refunds. If your terminal is configured for Supervisor code do NOT write this down or give this to anyone.

Financial Tips
•   Always check you have keyed in the correct amount before going ahead with the transaction.

•   If you are referred for an authorisation code, read the amount from the slip to ensure you have the correct amount (It has been known for the amount of 2,000.00 to be keyed instead of 200.00. A code is then obtained for the 200.00 but the cardholder is debited for the keyed amount of 2,000.00)

•   Always check your bank statement on a regular basis to ensure you are receiving your credits and that the amounts are correct.

- Remember to reconcile the terminal each day as this will generate all the funds to your bank account.

- You will not be credited with 'Z Totals' as these are running totals for your records and do not generate funds to your account.

- Keep your copy transaction slips in a safe place. There may be occasions when you are asked to provide copies of these.

- Please ensure that Refund transactions show as REFUND ACCEPTED.

- If the terminal prints the message 'Totals Not Agreed' when you carry out your End of Day Banking, please contact the Helpdesk.

- If 'Stored' is printed on your End Of Day report please contact the Helpdesk.

51. <u>Miscellaneous Prompts</u>

Below are explanations for some of the common prompts displayed by the terminal.

PROMPTS	CAUSE/REASON	REMEDY
Call Auth centre	Assistance required	Call the Authorisation Centre on the number displayed by the terminal. Once you have spoken to the Authorisation Centre press the GREEN ENTER button and follow the prompts displayed by the terminal.
Call Helpdesk	Assistance required	Please contact your Helpdesk.
NOT AUTHORISED	The card issuer has declined to authorise the transaction	Ask the customer to pay by some other means and press the YELLOW button.
Referral	Assistance required	Call the Authorisation Centre on the number displayed by the terminal. When the call is answered quote the referral message and your Merchant Number.
Unable to Authorise	Transaction declined by the card	Ask the customer to pay by some other means and press the YELLOW button.
Unable to Connect	Terminal not connecting to host	Call the Helpdesk for guidance.

security   smartcard   magstripe   contactless   color display   connectivity   GPS