

# 1-2-1 Portable

Quick set-up guide  
and fast facts guide



# welcome

Inside this box you will find everything you need to set up your 1-2-1 Portable terminal.

## Contents

1-2-1 Portable handset and base unit.

- Power supply unit, specially designed for this terminal and should not be used with any other equipment.
- Phone cable and splitter.
- Supervisor and training cards.
- Card reader, thermal printer head/terminal cleaners and paper roll.
- User guide.

Connecting your equipment

**IMPORTANT: Do not switch on the power at the mains until you have followed the simple steps below.**

1. Connect the power supply unit into the base unit.
2. Put the plug into your power source.
3. Plug the pre-connected telephone cable into your telephone wall socket.
4. Place the handset on the base unit.
5. Place the terminal in a clear area where the display can be read and the keypad and card swipe are easily accessible for your customers.

If you experience any problems during the installation process, please contact Customer Services on **0844 811 6666**.\*

Please be near the terminal when you call and have the following ready:

- your Merchant Number as shown on your welcome letter or on the plate of your manual imprinter (if the terminal is installed this is shown on your terminal display). You can keep a record of it here:

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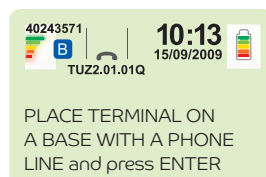
- your Terminal Supervisor card.

# how to install your 1-2-1 Portable terminal

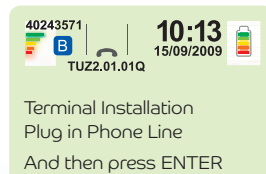
This should take about 5-10 minutes.

Before you start, please make sure you have your **Merchant Number** to hand. You'll find it on your welcome letter or on the plate on your manual imprinter.

1. Place the handset onto the base unit and press the green ENTER button. The terminal handset will now assign to the base unit.



2. Your terminal will now display "Terminal Installation. Plug in Phone Line". Make sure your phone cable is securely plugged into your phone line and press the green ENTER button.

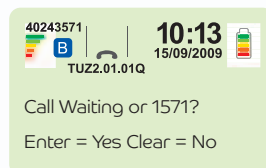
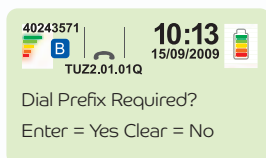


3. Your terminal will prompt "Dial Prefix Required?".

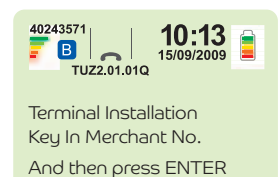
**Option 1:** If your terminal is connected via a direct line, select NO by pressing the yellow CLEAR button.

**Option 2:** If your terminal is connected to a switchboard/PABX, select YES by pressing the green ENTER button. If you selected this option, key in the number used to obtain an outside line (this is usually a 9) followed by the green ENTER button.

4. Your terminal will prompt: "Does the Tel. Line have Call Waiting or 1571?" If your telephone line has either of these services press the green ENTER button. If not, press the yellow CLEAR button.

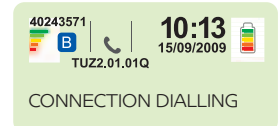


5. Key in your Merchant Number and press the green ENTER button.

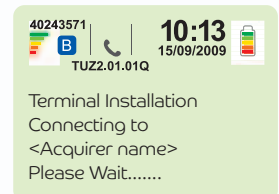


6. Your terminal will now Dial GEMS and display various messages.

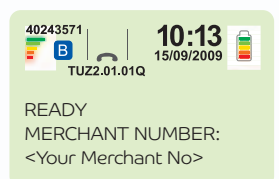
7. Your terminal will print a receipt to show that the configuration is complete.



8. Your terminal will now contact the card companies for each of the card types your terminal will accept and will print another receipt to confirm card acceptance.



9. Your terminal will then contact GEMS again and the following message will be displayed: "Hardware Serial Validation Required press Enter". Press ENTER to continue.



10. Your terminal will now display the READY and also the Barclaycard logo. It is now ready for you to use.



# your quick guide to the different ways of using 1-2-1 Portable

## Sale with gratuity using PIN

At the READY prompt, key in the amount and press the green ENTER button.

Insert the customer's chip card into the card reader. Your terminal may be configured for waiter ID. If you see this prompt, key in the relevant waiter ID and then press the green ENTER button.

Pass the terminal to the customer to confirm the amount; the customer will need to press the green ENTER button to confirm.

Your terminal will now ask the customer whether they wish to leave a gratuity. If the customer does not want to add a gratuity they will be required to press the yellow CLEAR button. If they do want to leave a gratuity they will need to press the green ENTER button and key in the amount of the gratuity.

Your terminal will now display the total amount and will prompt your customer to enter their PIN number into the terminal and confirm by pressing the green ENTER button.

**Follow the terminal prompts to complete the transaction.**

## Mail order/Telephone order

Press MENU.

Select the transaction type and press the green ENTER button.

Key in amount and press the green ENTER button.

Key in the customer's card number and press the green ENTER button.

Key in expiry date and press the green ENTER button.

**Follow the terminal prompts to complete the transaction.**

## Chip & Signature transactions

At the READY prompt, key in the amount and press the green ENTER button.

Insert cardholder's chip card into the card reader.

When prompted, tear off the merchant receipt and obtain cardholder signature.

Remove the customer card from the card reader and check signature.

**Follow the terminal prompts to complete the transaction.**

## Chip & PIN transactions

At the READY prompt, key in the amount and press the green ENTER button.

Insert the customer's chip card into the card reader.

Pass the terminal to the customer to confirm the amount and enter their PIN number into the terminal and confirm by pressing the green ENTER button.

Do NOT remove the card until prompted to do so or the transaction will be void.

**Follow the terminal prompts to complete the transaction.**

## Contactless transactions

**Contactless transactions are currently allowed only for sales up to £15.**

At the READY prompt, key in the amount and press the green ENTER button.

The cardholder should hold their card against the contactless symbol showing on the display (within 4cm).

The terminal will "BLEEP" to acknowledge the transaction and the row of LED lights will flash. 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. The terminal will only print a merchant receipt. Press MENU if a cardholder copy is required.

**Follow the terminal prompts to complete the transaction.**

**To print a cardholder receipt at the READY prompt press the , / key and a customer receipt will be printed. Press ENTER to return to the READY prompt.**

## Banking

**Banking must be carried out at the end of each business day.**

**Just follow these simple steps.**

- At the READY prompt, press MENU button until the system menu is displayed.
- Use the arrow button to select the Totals option and when highlighted, press the green ENTER button to select.
- The End Of Day Banking option will now be highlighted. Press the green ENTER button.
- Swipe the Supervisor card.
- The terminal will display "End Of Day Banking ?" Press the green ENTER button to select.
- The terminal will now give you two options. The first is the option to bank all by pressing the green ENTER button. The second option is to bank by each acquirer separately by pressing the yellow CLEAR button. If you choose to bank by each acquirer you will need to select Yes or No as required. Just press either the green ENTER or the yellow CLEAR button at each prompt.
- Your terminal may now dial out.
- Your terminal will now print an End Of Day Banking report for your records.

## How to print a transaction log

**To help with reconciliation or to confirm the status of a transaction, a log of the last 100 transactions can be produced. Here's how.**

- At the READY prompt, press the MENU button until the system menu is displayed.
- Using the arrow button, highlight the Select Function option and then press the green ENTER button.
- The terminal will prompt you to enter a function code. Key in 16 and then press the green ENTER button.
- Swipe the Supervisor card through the terminal.
- The terminal will now display an acquirer. If you wish to print a transaction log for this acquirer, press the green ENTER button; if not, press the yellow CLEAR button and the next acquirer will be displayed.
- Once you have selected an acquirer, the terminal will print a report detailing the last 20 transactions. If there are more transactions the terminal will display the CONTINUE prompt. If you want to continue, press the green ENTER button again and the terminal will print the next 20 transactions.

(The CONTINUE prompt may be displayed up to 4 times to produce a log of the last 100 transactions.)

- The terminal will now provide you with the option to print a transaction log for another acquirer. Repeat the above steps as required.
- The terminal will automatically return to the READY prompt.

## Handy hints

**Where to put your terminal.**

Your terminal uses Bluetooth short-range radio to communicate between the handset and the base unit. For best coverage we would recommend, where possible, keeping your terminal around 4 metres away from glass, lift shafts, mirrors, steel girders and metal objects. These objects, and other obstructions such as walls, doors and screens, will reduce the level of the radio signal.

**Once you have installed your terminal.**

We suggest you carry out a test to establish the strength of signal from various locations within your premises. To do this you will need to complete a function 90 on your terminal 'test radio link'. The handset will then print a high, medium or low reading and test number.

If it indicates a low reading – i.e. a test number 180 or lower – you may experience 'out of range' signals when attempting transactions at this location. If so, you may wish to relocate your base unit to improve your signal strength and coverage.

**To complete a function 90.**

- Press MENU button until the System Menu is displayed.
- Press the button to 'Select Function' and press the green ENTER button.
- Key in 90 and press the green ENTER button.
- Swipe the Supervisor card.
- To start, press the green ENTER button.

The test will run for 60 seconds and the terminal will print out the result. Move to another location and press the green ENTER button to complete another test. Press CANCEL to quit.

**Battery maintenance.**

Your terminal handset contains a lithium ion battery that requires you to place the handset on the base unit for recharging. There is no need to fully discharge the battery in your terminal, as the battery has been designed to only recharge what is required. Recharging fully can take up to 16 hours.

**Caring for your terminal.**

Please protect your terminal from exposure to liquid. Please use the card reader and thermal printer/terminal wipes to care for your terminal. These can be ordered by contacting our customer service team on **0844 811 6666\***.

**Top tips for multiple terminal sites.**

When installing your new terminals, please switch off any other terminals that are already installed. To switch off your terminal, remove the handset from the base unit and press the red CANCEL button and then press the green ENTER button. A handset can only communicate with an assigned base unit, so if you have multiple handsets and base units, label the handsets to their corresponding base. Always ensure there is at least 2 metres between base units.

**Additional functions.**

**Not every business is the same, so your terminal comes with a range of extra features. This means you can tailor its functionality to suit your individual business needs. These functions are explained in detail in your User guide.**

- Waiter IDs/Totals – lets you break down transactions by waiter. Please refer to your User guide for more information.
- Sleep Mode – to maximise battery performance your terminal will automatically go to sleep if it is left off the base unit – however, you can change these parameters so that the terminal does not go to sleep at all, or adjust the time period before it goes to sleep. This functionality can be amended by completing a function 38; please refer to your terminal user guide for help – "How to set up the sleep parameters".

The following functions can only be activated by contacting our Customer Services team:

- **Gratuities/Tips** – allows a gratuity amount to be added to a transaction
- **Additional Receipt Prints** – if you need more than one copy of every transaction receipt we can configure the terminal to automatically produce these.

**Supplies for your terminal.**

If you require till rolls for your terminal these can be purchased directly from our approved supplier, PDQ Consumables:

Telephone PDQ Consumables on: **0844 822 2044\***,

Fax on: **0844 822 2031** or log on to: **www.pdqconsumables.com**

to order online.

## Problems with the installation of 1-2-1 Portable

TERMINAL DISPLAY PROMPT	POSSIBLE CAUSES	WHAT TO DO
<b>Contacting GEMS Line Disconnected Check</b>  <b>Telephone Line Press Clear to Redial</b>	The telephone cable is not plugged into the socket.	Connect the telephone cable and then press the yellow CLEAR button to continue. If the problems persist, connect your telephone to the socket and check whether it has a dialling tone. If there is no tone then the fault might be with your socket and not the terminal.
<b>Installation Failed Restart Install?</b> <b>Enter = YES Clear = NO</b> <b>Key in Function Code and then press ENTER</b>	There has been a problem with the installation of your terminal.	Press the green ENTER button to select YES and restart the installation process. After three attempts the terminal will prompt you to contact the Helpdesk. Do not select NO as this will ask for a function code – this should only be used under direction of the Helpdesk.

## Common prompts and troubleshooting

TERMINAL DISPLAY PROMPT	POSSIBLE CAUSE/ACTION	WHAT TO DO
<b>CALL AUTH CENTRE</b>	Assistance required.	<b>Call the Authorisation Centre on the number displayed by the terminal.</b> Once you have spoken to the Authorisation Centre, press the green ENTER button and follow the prompts displayed by the terminal.
<b>CALL HELPDESK</b>	Assistance required.	Please contact your Helpdesk on the number displayed by the terminal.
<b>FAULTY CARD</b>	The card is not inserted into the PIN pad or has been swiped incorrectly.	Insert or swipe the card again. If the problem persists, press the green ENTER button and key the card details (please refer to the relevant section of the User guide).
<b>NOT AUTHORISED</b>	The card issuer has declined to authorise the transaction	Ask the customer to pay by some other means and press the yellow CLEAR button.
<b>REFERRAL B</b>	Assistance required.	Call the Authorisation Centre on the number displayed by the terminal. When your call is answered please quote Referral B.
<b>LINE IN USE</b>	The base cannot detect a dial tone.	Another piece of equipment that shares the telephone line may be in use e.g. fax machine. Check that the base unit is plugged into the telephone line. Check there is a dial tone on the telephone line.
<b>ROUTINE CHECK. INSERT OR SWIPE (as seen on the terminal display)</b>	Occasionally the card will require an additional routine security check.	Process the card as a Chip and PIN transaction.
<b>B</b>	The terminal handset may be too far away from its assigned base unit and cannot be used.	Move nearer to the base unit to see if this resolves, if not then please refer to your user guide on How to Assign a Terminal to a Base.

This document is available in large print, Braille and audio by calling **0844 811 6666**.\*

\*Calls may be monitored or recorded to maintain high levels of security and quality of service. For BT business customers, calls to 0844 811 will cost no more than 5p per minute, minimum call charge 5.9p (current at February 2010). The price on non-BT phone lines may be different.

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