

# Full user guide

Barclaycard Countertop Terminal





## Online support

For help installing your card machine, please visit [barclaycard.co.uk/cardmachinehelp](https://barclaycard.co.uk/cardmachinehelp)



## Useful numbers (call charges apply)

Customer services: [0808 175 4326](tel:08081754326)\*

Authorisation: [0800 151 2630](tel:08001512630)\*

Chargebacks: [0800 161 5341](tel:08001615341)\*

American Express: [0800 032 7216](tel:08000327216)\*

Diners: [0845 850 0195](tel:08458500195)\*



## Supplies for your card machine

You can buy supplies, including till rolls and in-car chargers, directly from our approved supplier, PDQ Consumables.

### Contact them by

Telephone: [01698 843866](tel:01698843866)\*

Web: [pdqconsumables.com](https://pdqconsumables.com) (to order online)

\*Call charges apply. Calls to 0845 numbers will cost no more than 7p per minute plus your phone company's access charge (current at July 2022). Calls to 0800 and 0808 numbers are free from UK landlines and personal mobiles, otherwise call charges may apply. Please check with your service provider. Calls may be monitored or recorded in order to maintain high levels of security and quality of service.

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# Essentials

## Keeping your business safe

Taking card payments means that you'll be handling personal data from your customers, so you'll need to make sure that you keep their details secure. You may have heard about the Payment Card Industry Data Security Standard (PCI DSS), which helps to make sure that anyone handling card payments does so securely. We'll write to you again in two to three weeks with more information, but for now there are a few simple things you can do to help look after your business.

### **Keep your receipts locked away**

Your card machine will print a 'merchant copy' receipt with a card number on it, which must be kept secure. You'll need to make sure you lock away all receipts and keep them somewhere safe.

### **Make sure you know who has your card machine at all times**

Fraudsters can sometimes target card machines in order to gather card data and have even posed as service engineers in order to gain access. The easiest way to keep yourself safe is to make sure that you always know who has your card machine and what they're using it for.

If you'd like to know more about data security, please visit [barclaycard.co.uk/pcidss](https://barclaycard.co.uk/pcidss)

## Receiving your money

At the end of each day you should do an 'end-of-day banking process', as described on [page 23](#). This will allow you to confirm that all of the payments you've taken have been submitted to us for settlement. The money will then be paid into your chosen bank account according to the schedule agreed when you signed up.

## Need to know more?

For more information on this and other aspects of taking payments, please make sure you read our procedure guide, which you'll find at [barclaycard.co.uk/business/tips](https://barclaycard.co.uk/business/tips)

## Best practice

### Caring for your card machine

Please keep liquids away from your card machines and use thermal wipes to care for them. These can be ordered by contacting our preferred supplier, PDQ Consumables, on [01698 843866](tel:01698843866)\* or at [pdqconsumables.com](https://pdqconsumables.com)

### It's important to keep your card machine connected at all times (even at night)

That's because we sometimes use these periods to update important security changes. This will help keep your business secure and make sure your terminal stays compliant. It also means your card machines can continue to work and you're able to trade as normal – so it's important you do this.

\*Call charges apply.

# Before you do anything

In the box, you'll have:



- 1) Your terminal card machine.  
Also a Lane 3000 PIN pad  
if required.



- 2) A power lead.



- 3) An IP cable.



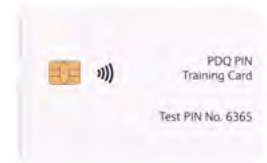
- 4) A junction box.



- 5) A spare till roll.

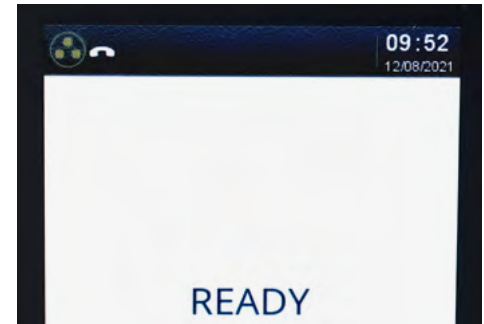


- 6) Your card pack.








- 7) A PIN training card.



# Barclaycard Countertop Terminal at a glance



## The keys you'll need to know


-  Menu – gives you access to additional terminal functions.
-  Cancels any procedure in progress.
-  Clears the last character you typed.
-  Validates input and information – and switches your terminal on.
-  Paper feed – press and hold.


On – press the  button.


Off – with the terminal off the base, press and hold the  and the  buttons at the same time for one second.

## Icons you'll see

You'll see these at the bottom of the terminal display. You can either tap them onscreen or press the corresponding button on the keypad.

 'Ok' – confirms or submits data for verification or selects a highlighted item from a menu.

 'Cancel' – deletes all data or, when prompted, cancels a transaction.

 'Clear' – deletes one character at a time or confirms errors during a transaction.

-  Network connection through your IP cable.



If the symbol is white or orange, this means there are connectivity problems. Check your connections or contact the helpdesk if the problem continues.


If the symbol is green, this means you have full connection.

# Getting started



- 1) Insert the power cable (A) and Ethernet cable (B) into the junction box.





- 2) The terminal will automatically come to life – if it doesn't, press the  button and the screen should light up.



# Installing Barclaycard Countertop Terminal




- 1) When your card machine has powered up, you'll see a welcome screen.
- 2) Choose the region you're in. Don't worry about dealing with customers from other locations – your terminal will work just the same.  
  
If you choose the wrong region, just tap the 'skip', 'no' and 'cancel' prompts until you're back at the 'Select Region' screen.  
  
Tap  at the bottom of the touchscreen or press the  button on the keypad.




- 3) You'll then see a 'Connecting to GEMS' message. This is nothing to worry about – the terminal is just connecting to our internal system.



- 4) You'll be prompted to enter your merchant number. It's on the sticker on the side of your terminal. Tap it in and tap .

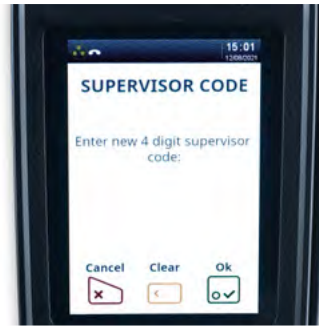
The terminal will now go through some configuration downloads. Once the connection is made, the terminal will say it's disconnecting. You don't need to do anything – it's just disconnecting from our internal systems.





- 5) You'll then need to enter the current date and time using the terminal keypad. Tap it in and tap .




- 6) Now you'll see this screen. **Don't do anything** – your terminal is just setting itself up and rebooting. The screen will then go black.



- 7) Your terminal will ask you to set up your four-digit supervisor code. This is the four-digit code needed to authorise certain actions on your terminal, such as refunds. This should be set by whoever's in charge.

When you've entered the code, tap . You'll be asked to confirm, so type in the code again and tap .



- 8) You'll then see 'Supervisor code successfully set'. Tap .



Your supervisor code can't be any four sequential digits, e.g. 1234, 4567, etc, or four digits that are the same, e.g. 1111, 3333, etc.



9) When connection is made with GEMS, an 'Installation Successful' receipt will print off. If it shows any card types not accepted, then please contact the helpdesk.

10) That's it - you're good to go.


# Taking payments

## Chip and PIN



- 1) At the 'ready' prompt, key in the amount.


Press the  button.

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



- 2) Ask your customer to insert their card into the card reader with the chip facing up.




- 3) Ask your customer to enter their PIN and confirm by pressing the  button.
- 4) Follow the instructions onscreen and your card machine will print two receipts: one for you to give to your customer, labelled 'cardholder copy', and a second for you to keep for your records, labelled 'merchant copy'.

## Contactless



- 1) At the 'ready' prompt, key in the amount.

Press the  button.

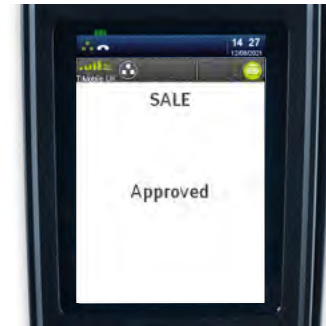
If you make a mistake, press the  button and re-enter the correct amount.



- 2) The cardholder should hold their card or contactless payment device against the contactless symbol at the top of the card machine.


If the transaction is above the contactless payment limit, your cardholder will need to use Chip and PIN instead.

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.



- 3) Your card machine will beep to acknowledge the transaction, and the row of LED lights will flash. If the transaction has gone through, the screen will show 'approved' and your card machine will print a receipt.



- 4) Your card machine will only print a merchant receipt.  
Follow your card machine prompts to complete the transaction.
- 5) If the cardholder requests a receipt, press the  at the 'ready' prompt and a customer receipt will be printed. If any other button has been pressed, then a customer receipt will not print.





### Your terminal can take contactless High Value Payments (HVP)

These are contactless payments made for amounts above the limit set for contactless cards (i.e. £100). They're protected by the cardholder verifying their identity through their smartphone.



## Magnetic stripe



- 1) At the 'ready' prompt, key in the amount.  
Press the  button.  
If you make a mistake, press the  button and re-enter the correct amount.
- 2) Swipe the customer's card, with the magnetic stripe inserted into and facing the card machine.





Chip and PIN should be used whenever possible, as it's the most secure way to take a payment, but some cards don't have a chip. These cards include some foreign-issued cards, notably many of those issued in the US. These need to be put through as magnetic stripe payments.



- 3) When prompted, tear off the merchant receipt and get the cardholder's signature.

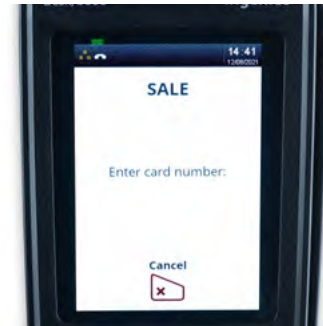








- 4) Check the signature. If the signature doesn't match the one on the back of the card, refuse the card. Press the  button, which will cancel the transaction, and ask for a different form of payment.

If you're happy that the signatures match, press the  button to continue.

Follow your card machine prompts to complete the transaction.

## Mail order and telephone






- 1) Press the 'Menu' button, then scroll down to 'CNP'. Press the  button. Select 'Sale' and press  again.
- 2) Enter the sale amount and press the  button. If you make a mistake, press the  button and re-enter the correct amount.
- 3) Enter the customer's card number and press the  button. Enter the expiry date, security code, numbers from the customer's postcode and numbers from their address, pressing  when prompted to.



Taking payments when the customer isn't with you can increase the chances of a fraudulent transaction. Reduce the risks by reading the advice on [barclaycard.co.uk/business/retrievals](https://barclaycard.co.uk/business/retrievals)



- 4) When the transaction's successful, press the  button.
- 5) Your terminal will now print out the customer receipt – tear this off and give it to your customer. Press the  button.
- The terminal will then print out your merchant receipt. Tear this off and press the  button.



If the payment is authorised, then you know there are sufficient funds on the card. Your card machine will show you an 'auth code' and security message. The security message will let you know how much of the data that you've entered matches what was expected. It's your choice whether to accept the transaction or decline it if you aren't happy with the cardholder's identity.

# Refunds



- 1) To process a Customer Present (CP) refund, press the 'Menu' button, select 'Refund' and press .

To process a Customer Not Present (CNP) refund, press the 'Menu' button, select 'CNP' and press .


Then select 'Refund' and press .

- 2) Key in the amount of refund, and then press the .


- 3) You'll need your customer's card to process a CP refund. You can insert it into your card machine, tap it on the screen or swipe it. Your card machine will then check the card.

- Refunds should only be made onto the card used for the original purchase
- Cash refunds should never be given on a credit card transaction, as fraudsters may use this as a way to get cash from a card
- Refunding only part of the amount (for example, if only one of several items is being returned) is fine
- If the transaction value is below the contactless limit, your card machine will give you the option to do a contactless refund



- 4) If you're processing a CNP transaction, enter the card number, expiry date and security code, pressing  when prompted to.



- 5) Enter your supervisor code and press the  button. You'll have set your supervisor code when you installed your card machine.



- 6) Your card machine will then connect to Barclaycard, process the refund and print a receipt.

Follow the instructions onscreen to complete the transaction, pressing  when prompted to.

\*Calls to 0800 and 0808 are free from UK Landlines and personal mobiles, otherwise call charges may apply.



If you need to reset your supervisor code, please give us a call on [0808 175 4326](tel:08081754326)\* and we'll talk you through it.

# End-of-day banking

End-of-day banking must be carried out after each day of trading to ensure that all the payments you've taken are submitted to us for processing. This is very important and helps us to ensure you receive the payments on time.






- 1) At the 'ready' prompt, press the  button until the application menu is displayed.
- 2) Enter your supervisor code and tap .


Select 'Totals' and tap  then select 'End-of-Day Banking' and tap .

Your terminal can also give you other totals to help with your banking:



- z – totals balance – that day's total transactions with a reset
- x – totals balance – that day's total transactions without a reset
- waiters' totals – a summary of gratuities by waiting staff members

To get these, press the  button until the system menu is displayed. Highlight the 'Totals' option and tap . Choose the 'totals' you need and tap . Follow the onscreen prompt to complete your totals.



- 3) The card machine will display 'End-of-day banking?'  
Tap  to proceed.



- 4) Your card machine will now give you two options.
- Bank all by tapping 
  - Bank by each acquirer separately by tapping . If you choose to bank by each acquirer (e.g. Amex, Barclaycard), you'll need to select 'yes' or 'no' as required, and the terminal will dial out to each acquirer and print each report






- 5) Once all the reports have been printed, the terminal will prompt you to tear off the totals. If gratuity is enabled, the terminal will prompt you to see if you would like to print the waiter totals and/or Pennies if you have this enabled.



# Printing a transaction log



- 1) At the 'ready' prompt, press the  button until the application menu is displayed. Highlight the 'select function' field and tap .
- 2) Enter your supervisor code and tap .



Your card machine can give you information about transactions that you've put through recently. Printing a transaction log will list whether recent transactions have been completed ('SALE'), cancelled by you ('CANCELLED') or declined by the card issuer ('DECLINED').



- 3) Your card machine will display an acquirer (e.g. Barclaycard, Amex).

To print a transaction log for this acquirer, tap .

Otherwise, tap  to display the next acquirer.

Once you've selected an acquirer, your card machine will print a report showing the last 20 transactions.

- 4) If you need to, repeat the steps as required to print a transaction log for other acquirers.

Your card machine will automatically return to the 'ready' prompt.



The 'continue' prompt may be displayed up to four times to produce a log of up to 100 transactions.

# Changing the till roll



**1)** Hold your card machine securely in one hand. With the other hand, use two fingers to lift and release the printer cover. Take out the old plastic till roll tube.



**2)** Peel away the end of the new roll. Leaving the end free, hold the till roll and carefully place it into the printer compartment.



**3)** Holding the free end of the paper and your card machine, close the printer cover carefully and push firmly until it locks.








- 4) While your card machine is displaying the 'ready' screen, press and hold the  button to ensure that the paper feeds correctly.
- 5) Only paper rolls that are 57mm wide and 40mm in diameter can be used in your card machine. Attempting to fit rolls of a different size may damage your card machine.



You can order additional till rolls from our approved supplier, PDQ Consumables, on [01698 843866](tel:01698843866)\* or at [pdqconsumables.com](http://pdqconsumables.com)

# Problems using your card machine?

Card machine display prompt	Possible causes	What to do
CALL AUTH CENTRE <a href="tel:02001512630">020 0151 2630</a> *	Assistance required.	Call the authorisation centre on the number displayed by your card machine. Once you've spoken to the authorisation centre, press the  button and follow the prompts displayed by your card machine.
CALL HELPDESK <a href="tel:08081754326">0808 175 4326</a> *	Assistance required.	Please contact your helpdesk on the number displayed by your card machine.
NOT AUTHORISED	The card issuer has declined to authorise the transaction.	Ask the customer to pay by some other means and press the  button.
REFERRAL B <a href="tel:08001510738">0800 151 0738</a> *	Assistance required.	Call the authorisation centre on the number displayed by your card machine. When your call is answered please quote referral B.
ROUTINE CHECK Insert or swipe	Occasionally the card will require an additional routine security check.	Process the card as a Chip and PIN transaction.
Unable to connect	Possible network issues.	Reboot the terminal by pressing  and  for one second. If the terminal hasn't come to life, press  and the screen should light up.

\*Call charges apply. Calls to 0800 and 0808 numbers are free from UK landlines and personal mobiles, otherwise call charges may apply. Please check with your service provider. Calls may be monitored or recorded in order to maintain high levels of security and quality of service.

# Important safety instructions provided by the manufacturer, Ingenico Ltd.

## Safety Guide



### Warning

The power supply unit provided with your equipment is specially designed for it. To ensure best performance and safety do not use any other power supply. The use of a power supply with apparently similar voltage/current characteristics may damage your terminal.

Switch off the terminal before opening the trapdoor.

Connection is to be made when the terminal is powered off.

Positioning of the terminal on the check stand must be in such a way to make cardholder PIN (Personal Identification Number) spying infeasible. Installing the device on an adjustable stand must be done in such a way that consumers can swivel the terminal sideways and/or tilt it forwards/backwards to a position that makes visual observation of the PIN-entry process difficult. Position in-store security camera so that the PIN-entry keypad is not visible.

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.

### Security of your terminal (tampering attempt detection)

Your device fulfils current applicable PCI PTS security requirements.

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; 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 unauthorized 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.

The terminal must never be put in or left at a location where it could be stolen or replaced by another device.

Before installing SAM or  $\mu$ SD or SIM, switch off the terminal by disconnecting the power supply.

Use only paper approved by Ingenico (diameter 40mm). Use of unsuitable paper is likely to damage the printer of your terminal. Switch off the terminal prior to installing a paper roll.

In order to benefit from the complete guarantee of the product, use **Ingenico approved thermal paper only**.

Do not stick any conductive label on to the contactless active zone located on the paper trapdoor button. It can decrease seriously contactless efficiency.

Before making any operations of maintenance in the terminal, make sure that the power supply is disconnected.

Do not use in any case, **solvents, detergents or abrasive products**. Those materials might damage the plastic or electrical contacts.

## Recommendations / Safety

### Power on/Power down – Emergency stop

To power on or power down the terminal connect or disconnect the power supply from the electric outlet.

### Lithium battery cell

The terminal is fitted with a lithium battery cell which is not accessible to the user. Only a qualified technician is authorized to open the unit and change this component.

### 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 of use
- for type A plug, the protection of the installation must be set to 20 A
- except for Norway do not connect on an IT electrical network

### Telephone network

The phone network must comply with standards and regulations in the country of use.

# Important safety instructions provided by the manufacturer, Ingenico Ltd. (continued)

## Explosion areas

Certain 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

According to the model your terminal could be 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.

## Bottom side compartment trapdoor

Located under the terminal, it must be in place during normal operation of the terminal.

## Standards / Environment (WEEE, Batteries and Packaging)

This product is labelled in accordance with European Directives 2012/19/EU concerning Waste Electrical and Electronic Equipment (WEEE) and RoHS directive 2011/65/EU + 2015/ 863 and 2006/66/EC concerning Batteries and Accumulators. Those provisions are requiring producers and manufacturers to become liable for take-back, treatment and recycling upon end of life of equipment and batteries.



The associated symbol means that WEEE and waste batteries must not be thrown away but collected separately and recycled.

Ingenico ensures that efficient collection and recycling schemes are set-up for WEEE and batteries according to the local regulation of your country. Please contact your retailer for more detailed information about the compliance solution in place for disposing of your old product and used batteries. Packaging waste must also be collected separately to assure a proper disposal and recycling.

Please note that proper recycling of the electrical and electronic equipment and waste batteries will ensure safety of human health and the environment.



## Markings



The CE marking indicates Desk complies with the relevant Union harmonization legislation : RE Directive 2014/53/ EU 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.



AC current input



DC current output



International Efficiency Marking Protocol  
(Energy Star Level 5 and 6)



Double insulation symbol



Indoor use only



DC power jack polarity

**LPS**

This marking indicates power supply meets limited power source safety requirements.



This marking is apposed on to the connector for telephone line connection.



This marking is apposed on to the connector for power supply output cable connection.

**This information is available in large print, Braille and audio,  
by calling 0800 161 5350 (Barclaycard Payment Solutions)  
or 1800 812700 (Barclaycard International Payments).\***

\*Calls to 0800 and 0808 numbers are free from UK landlines and personal mobiles, otherwise call charges may apply. International calls will be charged at a higher rate. Please check with your service provider. Calls to 1800 numbers are free from ROI landlines and personal mobiles otherwise call charges may apply. Calls may be monitored or recorded in order to maintain high levels of security and quality of service.

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Calls may be recorded for security and other purposes.

CT - MG 07/22