

TD Desk 5000

Merchant Guide



For the TD Desk 5000

- Standalone and Semi-Integrated terminals
- With or without PINpads



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MERCHANT INFORMATION

Merchant Name _____

Merchant Number _____

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Welcome to TD Merchant Solutions

The following materials will provide helpful information about the equipment, its features and TD Merchant Solutions. Please ensure you read this guide so that you become familiar with the capabilities of the TD Desk 5000 and how it can support your business needs.

By now your terminal is installed and now it's time for you to learn more about its features and capabilities.

Who should use this guide?

You would use this guide if you use a TD Desk 5000 during the course of your daily business.

The TD Desk 5000

The terminal is solely for you, the Merchant. You will use the terminal to initiate transactions for customer's using credit or debit cards (Visa®, MasterCard®, Discover®, American Express®, Interac® Direct Payment, UnionPay®, etc.) and mobile wallets. Depending on your settings, some card types may not be accepted by your terminal.

To learn how to use other cards, please go to our online documentation at www.TDMerchantSolutions.com/ResourceCentre.

Your TD Desk 5000 will be one of two versions: a standalone terminal (with or without PINpad) or a semi-integrated terminal (with or without PINpad).

Standalone Terminal	Semi-Integrated Terminal
---------------------	--------------------------

The **standalone** requires that you enter the transaction information into the terminal and then the customer enters their payment information on the terminal or PINpad. The standalone terminal has only one mode so you will not see an icon in the top-right corner.

For more information on the standalone terminal, see page 2.

The **semi-integrated** terminal has the transaction information fed to it (usually from an electronic cash register) and the customer enters their payment information on the terminal or the PINpad depending on your setup. The semi-integrated terminal has two modes. You can tell which mode is active by the terminal's *Home* screen and an icon with the arrow in the top-right corner of the *Home* screen.

For more information on the semi-integrated terminal, see page 6
For more information on changing modes, see page 48.

Standalone Mode Home Screen



Semi-Integrated Mode Home Screen



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Standalone Terminal

1. **Command keys**
 - Application key
 - Cancel
 - Correction
 - OK (or Enter)
2. **Touchscreen**
3. **Paper chamber panel**
4. **Paper advance key**
5. **Card readers**
 - a) Insert chipped cards
 - b) Swipe cards
 - c) Contactless cards

Navigation

All terminal navigation is performed through the touchscreen. With your finger, swipe the touchscreen left/right to view the available screens.



Home screen and icons

The default screen is called the *Home* screen. It displays important information, icons and different ways to access your terminal's functionality. They are:

1. **Communication icon**

This icon indicates whether the terminal is connected to the Ethernet network. It will be one of two colours:

 - Green (connected) or
 - White (disconnected)
2. **Admin**

This icon will open the *Admin Menu*.
3. **Language**

This icon will open the *Language Menu*.

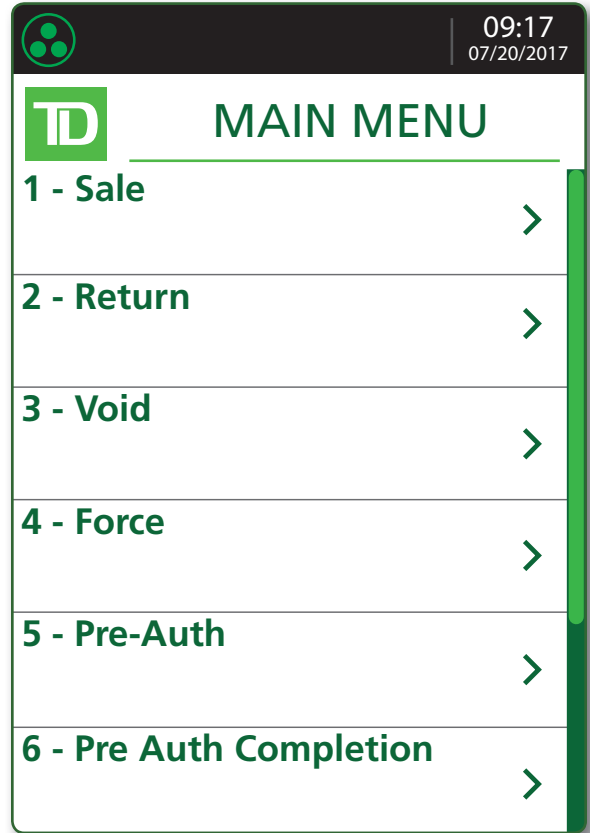
This screen will have six icons or four icons if you have the clock function enabled. You can request to have the following icons enabled for the *Home* screen: **Sale, Settlement, Report, Reprint, Logon and Logoff. Return, Void, Pre_Auth, and P-A Comp** can be added if they are enabled on your terminal.



Main menu screen

From the *Home* screen, press the **OK** key and the *Main Menu* screen appears. The *Main Menu* screen displays the following transactions:

- Sale
- Return
- Void
- Force
- Pre-Auth (if enabled)
- Pre-Auth Completion (if enabled)
- Settlement
- Reprint Menu
- Reports Menu / Log In

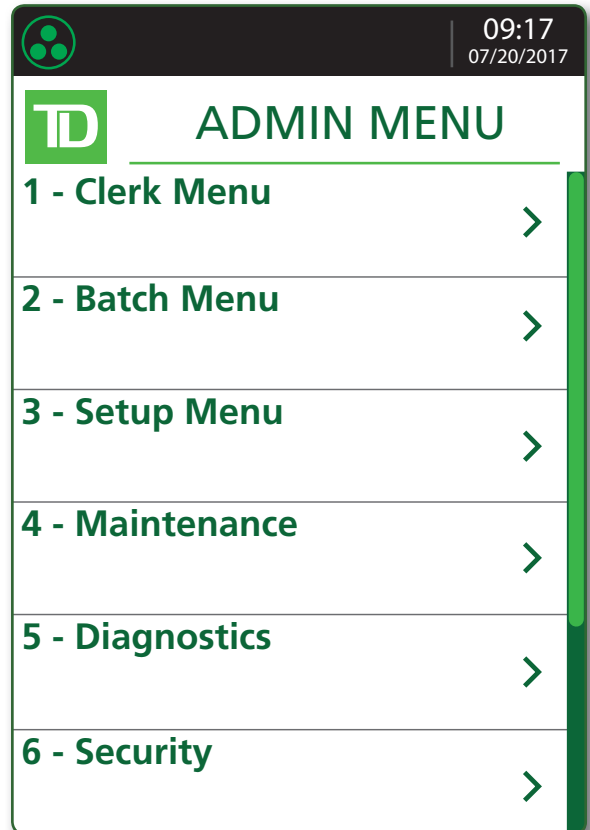


Admin menu screen

From the *Home* screen, tap the **Admin** icon and the *Admin Menu* screen appears. It displays the following options:

- Clerk Menu
- Batch Menu
- Setup Menu
- Maintenance
- Diagnostics
- Security
- Terminal Info
- Host Management

For a list of all the administrator functions available on the terminal, refer to the *Administration and Configuration* section of this document.



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Semi-Integrated Terminal

Home screen and icons

The default screen is called the *Home* screen. It displays important information, icons and different ways to access your terminal's functionality. They are:

- 1. Communication icon**
This icon indicates whether the terminal is connected to the network. It will be one of two colours:
 - Green (connected) or
 - White (disconnected)
- 2. Mode**
This icon will switch the mode that the semi-integrated terminal is in (standalone or semi-integrated).
- 3. Admin**
This icon opens the *Admin Menu*.
- 4. Language**
This icon opens the *Language Menu*.



The Communications Adapter

The communication adapter is the bridge between your terminal and its power and data in one connection.

Ports

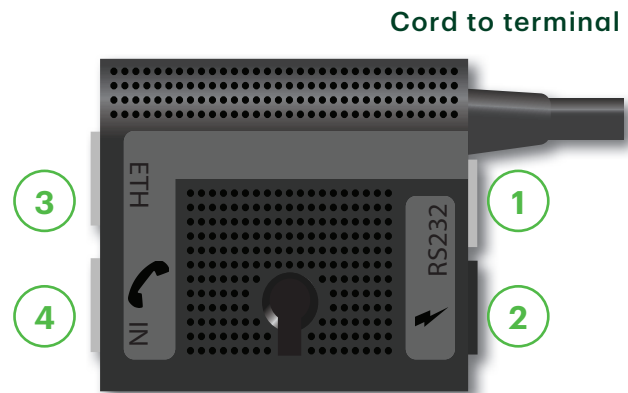
The adapter has four ports and they are:

- 1.** RS232 In
- 2.** Power In
- 3.** Internet In
- 4.** Phone In

Standalone terminals support an Ethernet connection with a dial backup connection.

Semi-integrated terminals support the following connection options:

- RS232 to RS232
- RS232 to USB
- USB to USB



The PINpad

This is an optional piece of hardware. When connected to your terminal it is used by the customer to enter information and select options regarding the transaction. If you don't have a PINpad, the customer will use the terminal to enter information.

1. Function keys

The **F1** and **F4** keys can be used to select onscreen options.

2. Navigation keys

Use the **F2** and **F3** arrow keys to navigate the screens and menus.

3. Command keys

- **Cancel**
- **Correction**
- **OK (or Enter)**

4. Card readers

- Insert chipped cards
- Swipe cards
- Contactless cards

If you use a PINpad, you must process card transactions on it except manual which is processed on the terminal.



Changing the paper roll

1. Gently pull up on the paper chamber panel along the top of terminal and remove the old paper roll.
2. Unwrap a new paper roll and place it in the paper chamber so that the loose end of the paper feeds up from under the paper roll towards you.
3. Press down on the panel until it clicks shut and ensure there is a enough paper sticking out from the chamber that it touches the top of the terminal screen.

The Stylus

A stylus is provided with each terminal. It is located on the back of the terminal. It can help you select screen elements more accurately and keep your touchscreen clean by limiting finger contact. To find the stylus:

1. Turn over the terminal so that the back is facing you.
2. Along the left edge there is a groove that contains a dark grey stylus.
3. Pull the stylus out of the groove and use it instead of your finger to touch the screen.

If you are concerned about losing the stylus, it has a small hole on its head so that you can anchor it to an object.

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Accessibility features

The TD Desk 5000 has numerous accessibility features which reflect TD's commitment to our customers. It has such features as:

- Backlit keypad and adjustable screen brightness to create visual contrast
- Adjustable font size
- Adjustable key stroke sound when a key is pressed
- A stylus is supplied with each terminal to aid on screen navigation
- A raised identifier on the:
 - **5** key,
 - **Main Menu** key,
 - **Cancel** key,
 - **Correction** key, and
 - **OK** key

Cardholder Privacy and Security

Terminal security

It is the Merchant's responsibility to secure the terminal, any user IDs or passwords and to prevent unauthorized use. In any event the Merchant will be liable for any unauthorized use of the terminal or any user IDs or passwords. To help you protect your terminal, there are four available user settings:

- **Administrator** - No access restriction to terminal functionality; assign this level of access with extreme caution.
- **Manager** - Access is restricted to certain features by a manager ID and password.
- **Supervisor** - Access is restricted to certain features by a supervisor ID and password.
- **Clerk** - Access is restricted to certain features by a clerk ID.

The following functions can be individually protected:

- Force post transactions
- Settlement / Day Close
- Reprinting receipts
- Reports
- Manual transactions
- Standalone mode
- Available menus on the terminal

Fraud prevention

Please refer to the *How to Help Prevent Fraud* pamphlet in your Merchant Welcome Kit. The following information will help you protect yourself from fraudulent transactions.

Manually entered credit card transactions

There is an inherent risk associated with these transactions as they have an increased rate of fraud. If you do manually enter a credit card transaction which is deemed fraudulent, you will be held responsible for any chargebacks associated with it. Manually entered credit card transactions include mail order and telephone order transactions.

If you are uncomfortable manually entering a credit card it's within your rights as a business owner to request another form of payment (debit, cash, etc.).

Force post transactions are disabled by default

The Force Post function allows prior authorization numbers to be manually keyed in. For your protection, this capability is disabled by default on your terminal. If you need to process a Force Post, please call the TD Merchant Solutions Help Desk at **1-800-363-1163** to enable the capability after being authenticated. It is strongly recommended that you protect the Force Post function with a password. For information on how to do this, please see page 35.

Call for authorization

Sometimes, due to a communication or security issue, a transaction cannot or should not be completed. See the list of messages and events below that will cause you to call for authorization.

Note: You must call for authorization for *every* force post transaction performed on your terminal.

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Whenever	Action
...the card number on the screen does not match the number embossed on the card.	<ol style="list-style-type: none">1. Press the Cancel key and call for a voice authorization immediately.2. Request a CODE 10 authorization. In this situation, you may be dealing with a fraudulent card and CODE 10 will alert the financial institution to this possibility.
...the cardholder signature on the receipt does not match the signature on the reverse of the card.	<ol style="list-style-type: none">1. Call for a voice authorization.2. Request a CODE 10 authorization. The financial institution will be able to advise whether or not the correct individual is using the card. They will also tell you how to proceed.
...you have any doubts about the validity of a card or a transaction.	<ol style="list-style-type: none">1. Call for a voice authorization.2. Request a CODE 10 authorization. The financial institution will be able to advise whether or not the correct individual is using the card. They will also tell you how to proceed.

Imprinters

Whenever	Action
...you're unable to use the cards chip or swipe the card through the terminal due to a problem with the card's magstripe or a problem with the terminal's reader.	<ol style="list-style-type: none">1. Key in the transaction manually.2. Take an imprinted draft as per the instructions on the terminal.3. Indicate the transaction details in the imprinted copy and staple the printer receipt to the signed copy.
...your printer is not working.	<ol style="list-style-type: none">1. Take an imprinted draft as per the instructions on the terminal.2. Indicate the transaction details on the imprinted copy.
...the system is down, the terminal does not ask for an authorization number and you receive a telephone authorization.	<ol style="list-style-type: none">1. Take an imprinted draft.2. Note all transaction details on the draft.3. Call for authorization.4. When the system becomes available, enter all manually imprinted transaction by going to: Main Menu → Force Post, then staple all printed transactions to the imprinted sales draft(s).

Transaction records

The terminal stores the current and previous days transactions for printing. You can view the last 30 batches (detailed and summary) on the terminal as well.

Storing cardholder receipts

Merchants are responsible for retaining all receipts to respond to cardholder inquiries. The following are guidelines you should use when storing them. Store receipts:

- ...in a dark, secure area with limited access for at least two years

- ...in envelopes arranged by date in a secured filing cabinet works well. If you have several terminals use a separate envelope(s) for each terminal.
- ...as long as you retain cash register tapes for direct payment transactions

Your receipts could become unreadable if you store receipts in plastic coated containers or expose them to direct heat or cold sources.

- If TD needs a receipt copy, please send it within eight days and retain a copy for your records.
- The required storage and response times are for TD Merchant Solutions only and may vary by financial institution.

Applications on the TD Desk 5000

The TD Desk 5000 is designed to accept a wide range of third-party applications to meet your business needs. These applications are very similar in idea to the applications on your smart phone.

For example, if you want to accept gift cards after your initial terminal setup, you would have to:

1. Sign up for the appropriate program with the application provider.
2. Contact TD Merchant Solutions to enable it and have the application downloaded to your terminal.
3. To learn more about which applications are accepted, review the application creator's documentation.

Note: If you accept gift cards it will appear as a payment option during a Sale.

Once downloaded to your terminal, these applications are accessed outside the standard TD Desk 5000 menus. To access an application:

1. Press the silver **Application** key (above the red **Cancel** key).
2. Select the desired third-party application.
3. Follow the instructions provided by the application creator.

To use these third-party applications, you must follow their documentation and instructions.



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Financial Transactions

The TD Desk 5000 can perform the following transactions:

- Sale
- Sale Phone/Mail Order
- Return
- Void Sale
- Void Return
- Force Post
- Force Post pre-authorization
- Pre-authorization
- Pre-authorization completion
- Void Pre-authorization

Financial Transactions (Semi-Integrated)

The financial transaction steps do not differ between the two modes with the exception of how they are initiated.

Standalone	Semi-integrated
<ol style="list-style-type: none"> 1. Tap the Sale icon. 2. Enter the dollar amount and press Enter. 	<ol style="list-style-type: none"> 1. Initiate the sale on the electronic cash register. 2. Enter the dollar amount and press OK.

Accepted card types

Your terminal(s) will accept whatever cards you indicated when you signed your contract with TD Merchant Solutions. If you wish to adjust your accepted card list, please contact the TD Merchant Solutions Help Desk to discuss.

Special transactions

Cashback

This option only works for debit cards. You can set this up yourself, but any changes done by you on terminal will be overwritten whenever a settlement / day close is performed. Please call TD Merchant Solutions Help Desk to ensure that these changes are saved.

Tip

You can set this up yourself, but any changes done by you on terminal will be overwritten whenever a day close is performed. Please call TD Merchant Solutions Help Desk to ensure that these changes are saved.

UnionPay card selection

For some transactions, the customer must indicate whether the card they are using is a co-branded UnionPay card or not. They will indicate this by selecting either **<Other Card Name>** or **UnionPay**. The Other Card Name option will display Visa, MasterCard, or American Express.

UnionPay customer authentication

UnionPay sometimes requires customers to verify their identity differently. The most common customer verification methods are:

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PIN entry

The terminal may request the customer to enter their PIN for any transaction. For credit cards, the customer can bypass this PIN request, but if they do and the PIN is requested again, they must enter their PIN. Debit cards always require a PIN.

Customer signature

The customer may be required to sign the merchant receipt. This can occur for any transaction, even one where the customer has already entered their PIN. If you see a signature line on the Merchant receipt, the customer must sign the receipt.

Restrictions

The following functionality is **not available** for UnionPay cards:

- Account selection (chequing or savings) on debit card transactions - a default setting will always be used
- Offline authorizations
- Transactions in foreign currencies
- Voice authorization / force post transactions
- Cashback

Sale (credit card)

Use these instructions to process a credit card purchase on the terminal for card present and card not present transactions (mail order and phone orders). UnionPay cards cannot be manually entered.

- All sales must be completed with one card; there are no split payment options (except for gift card).
- To perform a mail order or telephone order (MOTO) transaction, indicate that the card was not present. There are risks performing transactions when the credit card is not present. Ensure that you perform **all** of the available security checks for a mail / phone sale. See page ## for more information regarding manually entered credit card transactions.

1. Tap the **Sale** icon.
2. Enter the **total dollar amount** for the sale and press **Enter**.
3. The customer confirms the dollar amount (**Yes** or **No**).

Tips (optional)

4. The customer selects a **tip option** and presses **OK**.
 - a) The customer confirms the total amount (**Accept** or **Change**).

Payment method

5. Perform one of the following payment methods: **Insert, Swipe, Tap** or **Key (Manual Entry)**.

Insert card

- a) The customer inserts their credit card.
- b) The customer enters their **PIN** and presses **OK**.
- c) The screen shows that authorization number, the transaction total and the receipts print. Go to step 6.

Swipe card

- a) Swipe the credit card.

- b) The customer indicates if the card is **<Other Card>** or **UnionPay** press **OK**.

If you don't accept UnionPay cards, you will not see step b. Go to step c.

If **<Other Card>** is selected go to step C.

If **UnionPay** is selected, enter the **PIN** and press **OK**. The customer may bypass the PIN but if it is requested again, they **must** enter it.

- c) Perform a fraud check on the card and signature.
 d) Verify the card info with what is on the terminal screen and press **OK**. Go to step 6.

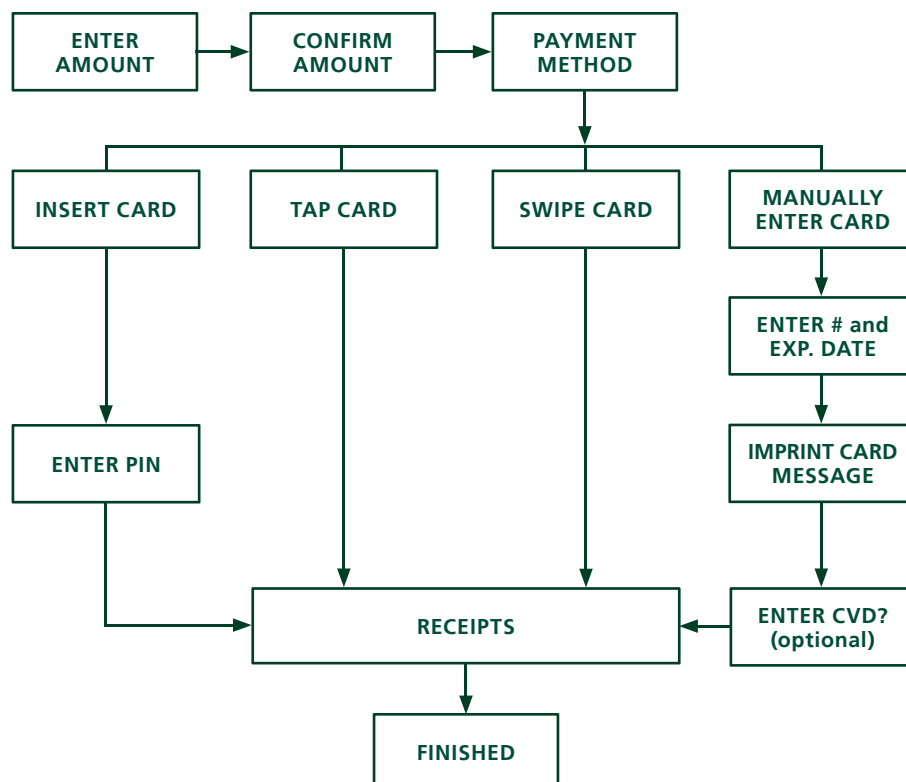
Tap

- a) The customer **taps** their contactless-enabled credit card on the contactless card reader. The customer may be required to insert or swipe their card in some cases. Go to step 6.

Manually enter card

There is an inherent fraud risk for manually entered transactions. Please see page 7 for more information. **Note:** UnionPay cards cannot be manually entered.

- a) Enter the **account number** and press **OK**.
 b) Enter the **expiry date** and press **OK**.
 c) Enter the **CVD number** and press **OK**. This number is generally located on the back of the credit card. This can be an optional step depending on your settings.
 d) If prompted, indicate if the card was present for the transaction (**Yes** or **No**). Go to step 6.
6. The screen shows that authorization number, the transaction total and the receipts print.
- If the card was swiped or manually entered, the customer **must** sign the signature field on the merchant copy.
 - If it is a UnionPay transaction, the customer may be required to sign the receipt. Review the receipt to see if a signature is requested.



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Sale (debit card)

Use these instructions to process a debit card purchase on the terminal.

1. Tap the **Sale** icon.
2. Enter the **total dollar amount** for the sale and press **Enter**.
3. The customer confirms the dollar amount (**Yes** or **No**).

Tips (optional)

4. The customer selects a **tip option** and presses **OK**.
5. The customer confirms the total amount (**Accept** or **Change**).

Payment method

6. 6. Perform one of the following payment methods: **Insert**, **Swipe** or **Tap**. The swipe option will be displayed, but it is not allowed for a debit sale.

Insert card

- a) The customer inserts their debit card. Go to step 7.

Tap

- b) The customer **taps** their contactless-enabled debit card on the contactless card reader. The customer may be required to insert or swipe their card in some cases. Go to step 10.

Cashback (optional)

7. The customer indicates whether they want cashback (**Yes** or **No**).
8. The customer enters or selects the cashback amount and presses **OK**.
9. The customer accepts the new total (**Accept** or **Change**).

If you don't use cashback, you will not see step 6, 7, or 8.

Debit surcharge (optional)

10. The customer agrees to the debit surcharge (**Yes** or **No**).

If you don't use debit surcharge, you will not see step 9.

Account selection

11. The customer selects which account they want to use (**Chq** or **Sav**).

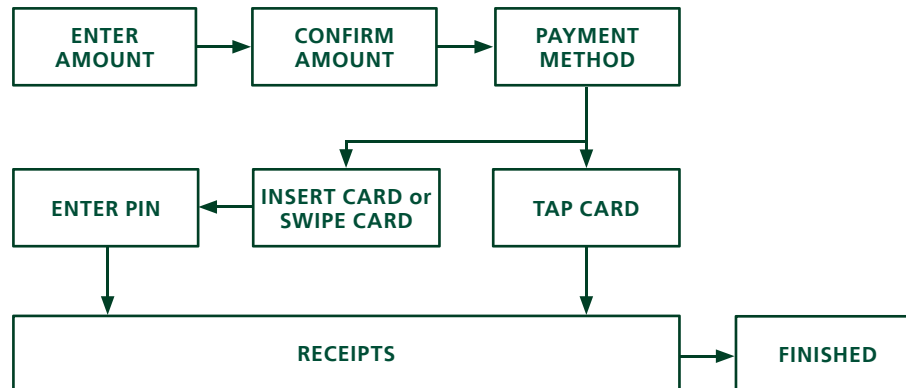
If this is a UnionPay transaction, you will not see step 10.

12. The customer enters their **PIN** and presses **OK**.

If this is a UnionPay transaction, the customer may not be required to enter a PIN and can bypass this step. If the customer bypasses the step, and the terminal requests a PIN again, then the customer must enter their PIN.

13. The screen shows that authorization number, the transaction total and the receipts print.
 - a) If cashback was requested and authorized, ensure that the correct amount is provided to the customer.

- b) If this is a UnionPay transaction, the customer may be required to sign the receipt. Review the receipt to see if a signature is requested.



Force post (sale or phone / mail)

Use these instructions to process a force post credit card transaction on the terminal for card present, card not present transactions (mail order and phone orders) and pre-authorizations.

You must call the TD Merchant Solutions Help Desk at 1-800-363-1163 and receive an authorization number before you perform this transaction.

1. Press **OK** → Force Post → **Force Sale** or **Force Ph/Mail**.
2. Enter the **dollar amount** and press **OK**.
3. Perform one of the following payment methods for the credit card in question: **Swipe** or **Manual entry**.

Swipe card

- a) Verify the card info with what is on the screen and press **OK**. Go to step 4.

Manually enter card

- a) Enter the **account number** and press **OK**.
 - b) Enter the **expiry date** and press **OK**.
 - c) A manual imprint of the credit card is required. Make the imprint and press **OK**.
 - d) Enter the **CVD number** and press **OK**. Go to step 4.
4. Then enter the authorization number and press **OK**.
 5. The screen shows the entered authorization number, the transaction total and the receipts print. The customer **must** sign the signature field on the merchant copy.

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Void / Transaction Recall

Use this option to pull up any transaction that is in an open batch on a terminal and review it with the option of voiding it. If the transaction is in a closed batch you must perform a return. See page 16 and page 17 for more information on returns.

A batch is a group of transactions that you must submit to us to send to the issuer in order for you to be paid. Once you close your, we send the transactions to appropriate the issuer. The issuer then sends us the funds for our settlement to your account.

1. **Void:** Tap the **Void** icon or press **3** on the keypad. Go to step 2.
2. **Transaction Recall:** Press **6** on the keypad. Go to step 3.
3. Verify if you are voiding a pre-authorization (**Yes** or **No**). This will filter the transaction records to make it easier to search. (Only if pre-authorizations are enabled on this terminal.)
4. Select how you wish to look up the transaction (**All**, **Reference #**, **Clerk #**, **Invoice #**, **Account #**, **RRN** or **Approval Code**).
 - a) **All** displays every transaction on the terminal.
 - b) **Reference #** displays a transaction by its reference number. You can find this information on the receipt.
 - c) **Clerk #** displays every transaction performed by a specific clerk number in the open batch on this terminal.
 - d) **Invoice #** displays a transaction by its invoice number. You can find this information on the receipt.
 - e) **Account #** displays every transaction by the last four numbers on the card that was used. You can find this information on the receipt or this can be provided by the customer.
 - f) **RRN** displays a transaction by its RRN number. You can find this information on the receipt.
 - g) **Approval Code** displays a transaction by its approval code. You can find this information on the receipt.
5. Enter the information you wish to use to search for a transaction and press **OK**.
6. If multiple transactions are displayed, use the arrow keys on the screen to scroll to the desired one and press **OK**.
7. The transaction is displayed with all the information. Press **OK** to void this transaction.
8. Confirm this selection (**Yes** or **No**). The transaction is voided.

Return (credit)

Use this option to fully or partially return any sale transaction that is in a settled batch. If this is a correction, you must perform a void for the full amount of the transaction (see Void).

1. Tap the **Return** icon or press **2** on the keypad.
2. Enter the **total return** amount.
3. Customer selects the method to read the card that the initial sale was done on (**Tap**, **Insert**, **Swipe**, or **Key**).

Tap

- a) The customer **taps** their contactless-enabled credit card on the contactless card reader. Go to step 4.

Insert card

- a) Verify the card info with what is on the screen and press **OK**.
- b) The customer may be required to enter their PIN. Go to step 4.

Swipe card

- a) Verify the card info with what is on the screen and press **OK**. Go to step 4.

Manually enter card

- a) Enter the **account number** and press **OK**.
 - b) Enter the **expiry date** and press **OK**. This is four digits in length. Go to step 4.
4. The transaction is approved and the receipts are printed.

Return (debit)

Use this option to fully or partially return any sale transaction that is in a settled batch. If the transaction is in an open batch you must perform a Void (see page 16).

Debit returns are disabled by default. If you wish to activate debit returns on your terminal please call the TD Merchant Solutions Help Desk at 1-800-363-1163. If you concerned about enabling debit returns, you can password protect all returns on your terminal.

1. Tap the **Return** icon or press **2** on the keypad.
2. Enter the **total return** amount.
3. Customer selects the method to read the card that the initial sale was done on (Insert or Swipe).

Insert / swipe card

- a) Customer confirms amount (**Yes** or **No**).
 - b) Customer selects account (**Chq** or **Sav**).
 - c) Customer enters **PIN** and taps **Enter**.
4. The transaction is approved and the receipts are printed.

Pre-authorization

Use this option to confirm that the pre-authorized amount is available on the credit card and then place a hold on it.

1. Tap the **Pre-Auth** icon or press **5** on the keypad.
2. Enter the **amount** and press **OK**.
3. Confirm the incremental amount (**Cancel** or **Enter**).

If you want to change the amount, tap the amount and change it via the touchscreen then press **OK**.

Tap

- a) The customer **taps** their contactless-enabled credit card on the contactless card reader. Go to step 4.

Insert card

- a) Enter the **PIN** and press **OK**. Go to step 4.

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Swipe card

- a) Indicate if the card is **<Other Card>** or **UnionPay** press **OK**.
If you selected UnionPay, enter the **PIN** and press **OK**. Go to step 4.

Manually enter card

- a) Enter the **card number** and press **OK**.
 - b) Enter the **PIN** and press **OK**.
 - c) Enter the expiry day (**MMYY**) and press **OK**.
 - d) Enter the **CVD** number and press **OK**. Go to step 4.
4. The transaction is approved and no receipt is printed at this time.

Pre-authorization Completion

Use this option to release the pre-authorized amount on the credit card to so that the customer can now use that amount to pay you.

1. Tap the **P-A Comp.** icon or press **6** on the keypad to use the **Search Menu**.
2. Select the desired search method to locate the pre-authorization.
3. Enter the information you wish to use to search for a transaction and press **OK**. The transaction is displayed will all the information. Press **OK** to complete this transaction.
4. If multiple transactions are displayed, use the arrow keys on the screen to scroll to the desired one and press **OK**.
5. Confirm this selection (**Yes** or **No**).
6. Confirm the sale amount (**Accept** or **Change**).
If you select change, enter the new amount and press **OK**. This amount cannot be higher than the pre-authorization amount.
7. The transaction is approved and the receipts print.

If you have signature line enabled and:

- a chip card is used with PIN entry, a signature line to acknowledge the tip amount is printed.
- a credit MSR card is used, a signature line to acknowledge the tip amount is printed. This signature line will have the cardholder's name printed underneath it.
- See page ## for more information on signature line.

Receipts

Each transaction has a different receipt and most of the information is purely for record keeping. There is **important information** that you need to be aware of to ensure that your transactions have completed correctly.

Receipt example

The information that you will use the most is explained below.

Merchant Name	
Address	
City, Province	
Merchant Number	
Terminal ID	
SALE	
Manager: 1234567890	
Server #: 01 B Smith	
Table 3: 1234	# Customers: 1234
Batch#: 003	RRN: 1234567890
MM/DD/YY	HH:MM:SS
AVS: N	CVC: X
Invoice #: 1234567890	REF#: 12345678
APPR CODE 12345678	TCD XXXX
*****7892 M	Manual Entry CP
VISA	**/**
AID: AAAAAAAAAA	
TVR: XX XX XX XX XX	
TSI: XX XX	
TC: 007B6441F0A45DEE	
AMOUNT	
TIP	
CASH BACK	\$XX.XX
	\$XX.XX
TOTAL	\$XX.XX
	\$XX.XX
XXX APPROVED	
(PIN VERIFIED)	
X _____	
I AGREE TO PAY THE ABOVE TOTAL AMOUNT ACCORDING TO THE CARD ISSUER AGREEMENT	
RETAIN THIS COPY FOR YOUR RECORDS	
RECEIPT FOOTER LINE 1	
RECEIPT FOOTER LINE 2	
RECEIPT FOOTER LINE 3	
RECEIPT FOOTER LINE 4	
RECEIPT FOOTER LINE 5	
RECEIPT FOOTERLINE 6	
RECEIPT FOOTERLINE 7	
MERCHANT COPY	

Transaction type	
C	Chip card transaction
CM	Chip card transaction that was forced to become a manually entered transaction
CNP	Manually entered transaction and the card was not present. This is a mail or telephone transaction
CP	Manually entered transaction and the card was present.
CS	Chip card transaction that was forced to become a swipe transaction
M	Manually entered transaction and the card was present
P	Contactless transaction
S	Swiped transaction

Important information	
Manager	Manager ID
Clerk	Clerk ID
Batch#	Batch number the transaction is located in
Invoice #	Invoice number
APPR CODE	The approval code for this transaction
RRN	The retrieval reference number
REF#	The reference number
Signature	The card issuer determines when a signatures is required for a transaction
Host Response	Always ensure that the transaction was APPROVED as it could be DECLINED or NOT COMPLETED

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Printing receipts

1. Press **9** on the keypad.
2. Select which receipt you want to reprint (**Last Receipt** or **Search**). If you select **Last Receipt**, go to step e.

Search

- a) If pre-authorizations are enabled on your terminal you will be asked if the receipt is from a pre-authorization (**Yes** or **No**). This will help the terminal filter through the transactions and reduce the number of receipts returned.
- b) Swipe the card used in the transaction or select the criteria that you want to search by (**All**, **Reference #**, **Clerk #**, **Invoice #**, **Account #**, **Customer #** or **RRN**).

All displays every transaction on the terminal.

Reference # displays a transaction by its reference number. You can find this information on the receipt.

Clerk # displays every transaction performed by a specific clerk number in the open batch on this terminal.

Invoice # displays a transaction by its invoice number. You can find this information on the receipt.

Account # displays every transaction by the last four numbers on the card that was used. You can find this information on the receipt or this can be provided by the customer.

RRN displays a transaction by its RRN number. You can find this information on the receipt.

- c) Scroll through the **available receipts**, select the desired one and press **OK**.
- d) Select which receipt you want to reprint (**Merchant Copy**, **Customer Copy** or **Both**).
- e) The receipt reprints and is noted as a duplicate.

Receipts options (semi-integrated only)

You use this option to select which device or devices print the receipts. This function is protected by the Administrator ID and password.

1. Tap the **Admin** icon, select **Misc. Options**, select **Semi-Integrated** and then **Receipt Options**.
2. Select how you want to print receipts (**ECR**, **Terminal** or **Both**) and press **Enter**.

ECR means receipts are only printed on the electronic cash register.

Terminal means receipts are only printed on the terminal.

Business Day Functions

Performing a settlement request / day close

A settlement request / day close must be performed on **each terminal** in order to maintain accurate records and balance your accounts. This is important as it:

- Closes all open batches
- Prints selected reports
- Checks for and downloads available updates
- Starts a new business day on the terminal by opening a new batch

There are two options to request a settlement / day close:

- Automatic daily settlement request (the system settles each night at 11:59 ET) if you have this set up through TD Merchant Solutions.
- Manual settlement request is managed by yourself and is best performed daily.

You have a deadline to perform a manual settlement request. This is called your balancing window and it is set on the system. If your manual settlement request is completed before your balancing window ends, you'll generally receive same or next business day deposit for credit and debit card totals, less refunds and other deductions. Otherwise, they will be forwarded to the next business day.

To perform a manual settlement request / day close:

1. Tap the **Settlement** icon.
2. Confirm that you want to close the business day (**Yes** or **No**).
3. Confirm that you want to print the settlement reports (**Yes** or **No**).
4. The terminal reboots.

- Performing a day close will not close any third party applications on your terminal. You must go into the application and perform a day close separately for it.
- This process may take a while if a lot of transactions have been conducted during the day.
- Do not process any transactions, press any buttons, or disconnect your Internet service, until the settlement process is complete.

Settlement report

Use this option to enable the printing of the settlement report and control how much information is included.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Settlement → SettleRpt.
2. Select how much detail you wish to include on the settlement report (**Off**, **Summary** or **Detail**) and press **OK**.
 - **Off** disables the settlement report.
 - **Summary** enables the settlement report and displays overall transaction totals.
 - **Detail** enables the settlement report and displays transaction details as well as totals.

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Reporting

The following reporting options are split into two different groups, business day, and batch. You have access to all of the business day and batch reports, and these will be covered in this Guide.

Business day reports

1. Press the **OK** key, then Reports and then select one of the following:

Report	Instructions	Provides...
Detail	<ul style="list-style-type: none"> • PRINT or DISPLAY your report. • Sort transactions by Reference #, Invoice # or Card Type. 	... all transactions for the current business day. This report will not show Pre-Auth transactions.
Summary	<ul style="list-style-type: none"> • PRINT or DISPLAY your report. 	...all transactions by card type showing the grand total transaction amount and the number of transactions of that card type.
Clerk	<ul style="list-style-type: none"> • Select whether the report is a Summary Report or a Tip Report. • Select whether is it for All Clerks or Single Clerk. If it is a single clerk enter the ID. • PRINT or DISPLAY your report. 	...all transactions by card type showing the grand total transaction amount and the number of transactions of that card type by Clerk ID. OR ...tip total for all or single clerk.
Open-Pre-Auth	<ul style="list-style-type: none"> • PRINT or DISPLAY your report. • Sort the information by Date/Time, Invoice # or Card Type. 	...transactions by card type, operator ID for the current business day sorted by date/time, invoice # or card type.
Recent Error	<ul style="list-style-type: none"> • Select whether the report is a System Error Messages, Application Error Messages or Host Response Messages. • PRINT your report. 	...any system, application, and host errors that have occurred on this terminal over the last 10 days.

Batch reports

These reports are for all transactions performed within a particular batch. It then prints a report showing transactions performed on the terminal since the last Settlement / Day Close.

1. Tap the **Admin** icon → Batch menu → View History.
2. Select one of the following options (**Batch Totals**, **View History** or **Host Batch Inquiry**).

Batch Totals

This option allows you to view the current batch on the terminal.

3. The batch totals are shown reflecting sale and return amounts separately.

View history

This option allows you to view the previous 30 closed batches on the terminal.

3. Indicate what information you wish to see (**Batch #**, **All** and **Last Batch**).
 - Batch #** - Enter the **Batch #** and press **OK** and the batch total is displayed.
 - All** - The last 30 batches will be displayed.
 - Last Batch** - Select how you want much detail you want (**Detail** or **Summary**).

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Detail

- a) Indicate how you want the information sorted and displayed (**Reference #**, **Invoice #** or **Card Type**).
- b) Scroll through the information with the arrow icons.
- c) Tap the **Print** icon to print a copy of this information.

Summary

- a) The information is automatically printed.

Host batch inquiry

This option allows you to view the current batch at the host.

3. Select preferred viewing option (**Print** or **Summary**).

Administration and Configuration

The TD Desk 5000 offers you a variety of options to personalize the terminal while helping you to administer your business. Some standard administration features are:

- User Management (creating, editing, deleting and unlocking locked user IDs)
- Parameter Updates (updating your settings on the terminal to reflect new information such as new accepted payment types)
- Communications (changes to your terminal's communication method)
- Training Mode (enable/disable this setting to train new employees on how to use the terminal)
- Receipts (changes to how and when they are printed)

Any changes that you make on the terminal will be overwritten the next time that you perform a Host 1 or Host download after a settlement request. Please contact the TD Merchant Solutions Help Desk to make any permanent changes to your terminal.

Administering the terminal

By utilizing the user types, you can help secure your terminal by setting what terminal functionality that each of your employees can access. Listed below are the user types and their functionality.

Note: There is a user hierarchy that determines who can access certain functionality:

- Administrator (highest),
- Manager,
- Supervisor, and
- Clerk (lowest).

TD Merchant Solutions strongly suggests that you create and use a manager ID for your day-to-day business needs and only use the administrator ID when absolutely necessary. Some functions that require an administrator ID are.

- Adding, editing, deleting or unlocking manager IDs
- Any functionality that you have protected with an administrator login

TD Merchant Solutions strongly suggests that when you create your administrator and manager IDs that you record and store them in a safe place for future reference.

User Type	Capabilities	Special Notes
Administrator	<ul style="list-style-type: none"> • Can access all features and functions, including transaction processing, reports and menus • Can set up manager, supervisor and clerk IDs • Only administrators have access to the Activity Log 	<ul style="list-style-type: none"> • A maximum of 9 administrators IDs are allowed per terminal • IDs are 1 to 10 digits in length (#) • Passwords are case sensitive, 7 to 12 characters in length using at least one number AND one letter (#####A)
Manager	<ul style="list-style-type: none"> • Can access features and functions, including transaction processing, all reports and all menus • Can set up supervisor and clerk IDs 	<ul style="list-style-type: none"> • A maximum of 10 manager IDs are allowed per terminal • Be aware of who you grant Manager access to • IDs are 1 to 7 digits in length (#) • Passwords are case sensitive, 4 to 7 characters (alpha-numeric) in length (####)

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User Type	Capabilities	Special Notes
Supervisor	<ul style="list-style-type: none">• Can perform normal transactions• Can set up clerk IDs	<ul style="list-style-type: none">• A maximum of 10 supervisor IDs are allowed per terminal• IDs are 1 to 7 digits in length (#)• Passwords are case sensitive, 4 to 7 characters (alpha or numeric) in length (####)
Clerk	<ul style="list-style-type: none">• Can perform normal everyday financial transactions	<ul style="list-style-type: none">• A maximum of 200 clerk IDs are allowed per terminal• Clerks (default) can be renamed to Server or Cashier by a manager• IDs are 1 to 6 digits in length (#)• Passwords are 4 to 7 digits in length (####)• An optional name can be added (up to 20 alpha or numeric characters in length)

User management

Administrators

Create a new administrator ID

Use this option to add a new administrator ID to the terminal. You log in as an administrator to initiate this process.

1. Tap the **Admin** icon → Security → Admin Setup → Add Admin.
2. Enter the **new Admin ID**.

IDs are 1 to 10 digits in length (#).

3. Enter the **new password**.

Passwords are 7 to 12 chracters in length using at least one number AND one letter (#####A).

4. Re-enter the **new password** and press **OK**.
5. The administrator has been added and you are prompted if you want to add another on (**Yes** or **No**). If you select **Yes**, go to step 2.

Set administrator password expiry

Use this option to set the number of days before administrator passwords expire on the terminal. You must log in as an administrator to initiate this process.

1. Tap the **Admin** icon → Security → Admin Setup → PWExpire.
2. Enter the **number of days** before administrator passwords expire and press **OK**. The maximum setting 999 days.

Set administrator password lock

Use this option to set the number of minutes that an user is locked out for after incorrectly entering their password three times (four times for administrators). You must log in as an administrator to initiate this process.

1. Tap the **Admin** icon → Security → Admin Setup → PWLock.
2. Enter the **number of minutes** that a user is locked out and press **OK**. The minimum setting is 30 and the maximum is 999.

Edit an administrator ID

Use this option to edit an existing administrator ID from the terminal. You log in as an administrator to initiate this process.

1. Tap the **Admin** icon → Security → Admin Setup → Delete Admin.
2. Select the **Admin ID** you want to edit.
3. Edit the **Admin ID**. (optional)
4. Edit the **password**. (optional)
5. Confirm the edited password and press **OK**.

Delete an administrator ID

Use this option to delete one or all existing clerk IDs from a terminal. Repeat these steps on each terminal where the administrator ID resides. You must log in as an administrator to initiate this process.

1. Tap the **Admin** icon → Security → Admin Setup → Delete Admin.
2. Confirm how many administrator IDs you wish to delete (**All** or **One**).

All

- a) Confirm this action (**Yes** or **No**). Select **Yes** if you wish to delete all clerks from this terminal. All administrator IDs are now deleted from the terminal except the original administrator ID that came with the terminal. This can never be deleted by you.

One

- a) Enter the **Admin ID** to be deleted.
- b) Confirm your decision (**Yes** or **No**).
- c) You will be offered the option to delete another ID if one exists.

Managers/supervisors

Login requirements

Login as...to	Add user	Delete user	Unlock user	Change password	Pull user list
Admin	M, S	M, S	M, S	N/A	M, S
Manager (M)	S	S	S	M	M, S
Supervisor (S)	N/A	N/A	N/A	S	S

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Add supervisor or manager ID

Use this option to add a new supervisor ID to the terminal. Depending which ID is used to log in will determine which functionality you will have access to. For example, you must log in as a manager to add a supervisor, or as an administrator to add a manager.

1. Tap the **Admin** icon → Security → Supervisor/Manager → Add User.
2. Log in as an **administrator** or **manager**.
3. Select which type of user you wish to create (**Supervisor** or **Manager**).
4. Enter the new **Supervisor** or **Manager ID**.

IDs are 1 to 7 alpha-numeric characters in length (#).

5. Enter the new **Supervisor** or **Manager name**.
6. Enter the **password**. Passwords are 4 to 7 digits in length (####).

Passwords are 4 to 7 chracters in length (####).

7. Re-enter the **password** and press **OK**.
8. You will be given the option to add another ID of the same type (**Yes** or **No**). If you select **Yes**, go to step 2.

Delete supervisor or manager ID

Use this option to delete an existing ID from the terminal. You must log in with an ID that is one level higher than the one you wish to delete. For example, you must log in as a manager to delete a supervisor, or as an administrator to delete a manager.

1. Tap the **Admin** icon → Security → Supervisor/Manager.
2. Tap **Delete User**.
3. Select the **ID** you want to delete.
4. Confirm your selection (**Yes** or **No**).
5. If there are any remaining IDs you will be given the option to delete another.

Change a supervisor or manager password

Use this option to change an existing supervisor or manager ID's password on the terminal. You must log in with an ID that is equal to or one level higher than the one you wish to change the password for. For example, you must log in as a manager to change a supervisor or manager password.

1. Tap the **Admin** icon → Security → Supervisor/Manager.
2. Log in with **ID** that you want to change the password for.
3. Tap **Change Password**.
4. Enter the **existing password**.
5. Enter the **new password**.
6. Re-enter the **new password** and press **OK**.

Unlock an ID

Use this option to unlock an ID on the terminal. You must log in with an ID that is one level higher than the one you wish to unlock. For example, you must log in as an administrator or manager to unlock a supervisor ID, or as an administrator to unlock a manager ID. IDs are locked when an incorrect password is entered too many times. The number of times is controlled by the application.

1. Tap the **Admin** icon → Security → Supervisor/Manager.

2. Log in with **ID** that you want to unlock.
3. Tap **Unlock User**.
4. Tap the **locked ID**.
5. Confirm that you want to unlock it (**Yes** or **No**).
6. You will be given the option to delete another.

Display existing IDs

Use this option to display a list of existing IDs on the terminal. You must log in with an ID that is equal to or greater than the level of the user list you wish to view. Log in as a manager to see all manager and supervisor IDs on the terminal.

1. Tap the **Admin** icon → Security → Supervisor/Manager.
2. Log in with a **manager** or **supervisor ID**.
3. Tap **User List** and the list will display.
4. Tap **Print** if you want to print a copy.

Clerks

User management is your first line of defense in helping you protect your terminal from unauthorized use. The most common users on your terminal will be the clerk. You can:

- Create and manage clerks users
- Require clerks use an ID and passwords to limit access the terminal

The following are some scenarios to help you administer clerk users on your terminal(s) to suit your business needs.

Scenarios

I want clerks IDs to be automatically created when they use the terminal for the first time...

This will automatically create a clerk ID on the terminal for a new user or if a manager/supervisor enters their ID for a clerk ID. This will not help protect your terminal as it is only helps you monitor terminal activity.

If you want to protect your terminal, please go to the next scenario *I want my clerks to log on to the terminal for their shift....*

1. Ensure *ClkPrompt* is set to **ID Only** (page 30)
2. Ensure *ClkLogOnOff* is **off** (page 30)
3. Ensure *AutoAddClk* is **on** (page 31)
4. Once the ID has been created, we suggest that you add a name to it as well. This is very useful when you have to administer multiple clerks.

I want my clerks to log on to the terminal for their shift...

This will help protect your terminal and its functionality as it requires clerks to sign in for standalone mode only.

1. Ensure *Enable clerk login* is **on** (page 30)
2. Ensure *Select clerk login requirements* is set to **ID Only** or **ID & Password** (page 30)
3. Ensure *Enable auto clerk IDs* is **off** (page 31)
4. When creating the clerk ID ensure you add a name to it as well. This is very useful when you have to administer multiple clerks.

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Enable clerk log in

Use this option to enable clerk login and logoff functionality on the terminal. Once logged in, the terminal will not require another log in until the current clerk logs out. This option in conjunction with clerk login requirements will enhance the terminal's security.

1. Tap the **Admin** icon → Clerk Menu → ClkLogOnOff.
2. Enable or disable this feature (**On** or **Off**). By enabling this option clerks must log on to the terminal before they can perform any financial transactions.

- The default login/logoff key is **9** on the keypad when this is enabled.
- All terminal transactions and activities will reflect the currently logged in clerk so they must log out when they are finished using it.
- ClkLogOnOff negates AutoAddClk as you will need an existing clerk ID to log onto the terminal from the home page. You will be unable to automatically make clerk IDs until ClkLogOnOff is disabled.

Select clerk login requirements

Use this option to set what information, if any, is required for a clerk user on the terminal. This must be set to **ID Only** if you want to enable the **Auto Add Clerk** feature (page 31).

1. Tap the **Admin** icon → Clerk Menu → ClkPrompt.
2. Select which of the following options you would like to assign to all Clerks on this terminal (**Off, ID Only** or **ID & Password**):

- If you switch from ID Only to ID & Password the clerk file on this terminal will be deleted.
- If you switch from ID & Password to ID Only the clerk file will not be deleted on this terminal, but the passwords will be removed.
- If you then switch back to ID & Password, the clerk file will be cleared as the passwords are not saved and you will have to manually recreate your all clerk IDs and create new passwords.

a) Off

Clerk users cannot be created and existing clerks will be deleted on this terminal. Once deleted these clerks cannot be recovered and will have to be manually recreated if they were deleted in error.

b) ID Only

Clerks can be created but they will not have a password attached to them.

c) ID & Password

Clerks can be created with passwords for added security.

3. Press **OK**.

Depending upon your current settings and which option you select, you may be prompted to clear the existing clerk file (**Yes** or **No**).

- a) If you select **Yes**, the clerk file will be deleted.
- b) If you select **No**, you will be returned to the **Clerk Prompt** selection screen.

Enable auto clerk IDs

Use this option to auto create a new clerk when performing a transaction on the terminal. This does not enhance security to your terminal.

1. Tap the **Admin** icon → Clerk Menu → AutoAddClk.
2. Select whether you wish to offer the user to automatically create clerk users when certain transactions are activated (**On** or **Off**):

This is only used when Clerk Prompt is set to ID Only. This cannot be used when Clerk Prompt is set to ID & Password (see page 30).

Add a clerk

Use this option to create a unique user ID for them with the appropriate level of access to terminal features. You will be required to log in as an administrator to create a clerk user.

1. Tap the **Admin** icon → Clerk Menu → Add ID.
2. Enter **Clerk ID**.
3. Enter **Clerk Name (optional)**. This is useful to track IDs and their owners.
4. Enter the **Password (optional)**. This will only appear if the clerk prompt is set to ID & Password.
5. Reenter **Password (optional)**.
6. Press **OK**.
7. An option to create another clerk appears. Select **Yes** or **No**. If you select **Yes**, go to step 2.

- If you have multiple terminals, you must add the clerk ID to each one separately.
- The clerk ID is one to six digits in length.
- The clerk name is always optional and has a 20 alpha-numeric character limit.
- The password may be optional and must be a minimum of four to seven digits in length.

Edit a clerk name

Use this option to add or change an existing clerk name. It requires a higher level user to change it. For example, it would take a manager or supervisor to affect a clerk's name. You must enable **ClkPrompt** to use this feature (page 30).

1. Tap the **Admin** icon → Clerk Menu → ClkWording.
2. Select which name you wish to apply to your general user group (**Clerk**, **Server**, or **Cashier**) and press **OK**.

Delete a clerk ID

Use this option to delete one or all existing clerk IDs from a terminal. Repeat these steps on each terminal where the clerk ID resides. This option cannot delete one or more clerks if the terminal has an open batch.

1. Tap the **Admin** icon → Clerk Menu → Delete ID.
2. Confirm how many clerks you wish to delete (**All** or **One**).

All

- a) Confirm this action (**Yes** or **No**).

Select **Yes** if you wish to delete all clerks from this terminal. All clerk IDs are now deleted from the terminal.

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One

- a) Enter the **Clerk ID** to be deleted.
- b) Press **OK**. The individual clerk ID is now deleted from the terminal.

Create a clerk ID report

Use this option to print a report that contains the user ID details.

1. Tap the **Admin** icon → Clerk Menu → Print ID List.
2. The report prints showing all clerk IDs and associated clerk names (if entered) for the terminal that this was performed on. Passwords are not shown on this report.

Create a clerk parameter report

Use this option to display all clerk parameter settings on the terminal. This feature is useful to review the settings on terminal or to compare settings between terminals.

1. Press **Admin** icon → Clerk Menu → Display Params.
2. Tap **Server Menu**. The following parameters and their settings will be displayed: **AutoAddClk**, **ClkLogOnOff**, **ClkPrompt** and **ClkWording**.
3. Tap **PRINT** if you wish to print a copy of what is shown on screen.

General customization

Training mode

This option allows a Manager or Supervisor to sign in and train a new user on the functions of the terminal without impacting any live transactions or totals. While in Training Mode the user can perform all transactions except for any configuration changes or chip card transactions. You cannot enter demo mode if the terminal has an open batch, but you can exit training mode.

1. Tap the **Admin** icon → Setup Menu → Demo.
2. Enable or disable demo mode (**On** or **Off**) and press **OK**.

- All screen names will have a (D) at the end to indicate that you are in demo/training mode – Sale (D), Main Menu (D), etc.
- You can create, edit and delete users that will be active after you exit training mode.

Limit transaction amounts in training mode

This option allows you to limit the transaction amount when in training mode.

1. Tap the **Admin** icon → Setup Menu → Demo → Demo Amt Max.
2. Enter the **maximum amount** that you want to be entered when in training mode and press **OK**.

Keystroke sounds

Use this option to adjust the keystroke sound settings on this terminal.

1. Tap the **Admin** icon → Setup Menu → Term Settings → Term HW → Keybeep.
2. Select the desired option (**All Off**, **All On** or **Invalid Only**).
 - **All Off** – The terminal will beep on every key press. This is the default.
 - **All On** – The terminal won't beep when keys are pressed.

- **Invalid Only** – The terminal will only beep when an invalid action is performed.

If KeyBeep is set to **All Off**, this does not include sounds related to:

- activity log is full
- PIN entry
- postal code error entry

Terminal backlight

Use this option to adjust the brightness setting on this terminal.

1. Tap the **Admin** icon → Setup Menu → Term Settings → Term HW → Brightness Setting.
2. Use the **scroll bar** to set the touchscreen brightness (0% - 100%) and press **OK**. The default setting is 100%.

Keypad lighting

Use this option to adjust the keypad backlight settings on this terminal which illuminates the numbers on the keypad.

1. Tap the **Admin** icon → Setup Menu → Term Settings → Term HW → Backlight.
2. Set the backlight levels for the keypad (**Always Off**, **Always On** or **On/Key Press**) and press **OK**.
 - **Always Off** disables keypad backlighting.
 - **Always On** enables keypad backlighting. This is the default setting.
 - **On/Key Press** enables keypad backlighting only when a key is pressed.

Set the clock

Use this option to adjust the time and date on this terminal. You cannot change this if there is an open batch or there are open pre-authorizations.

1. Tap the **Admin** icon → Setup Menu → Term Settings → Set Date And Time.
2. Enter the current date (**MMDDYY**).
3. Enter the current time (**HHMM**) and press **OK**. This can be set to a 24 hour time format.

Home screen message

Use this option to adjust the message settings on this terminal.

1. Tap the **Admin** icon → Setup Menu → Term Settings → IdleMsg.
2. Enter the idle message and press **OK**. This message will display at the top of the touchscreen when it is in idle mode.

- You, the Merchant, are solely responsible for any content entered into this field by you or your employees.
- The idle message has a maximum limit of 16 alpha-numeric characters.

Terminal font size

Use this option to adjust the font size on this terminal.

1. Tap the **Admin** icon → Setup Menu → Term Settings → Font Size.
2. Determine the font size you wish to use for the touchscreen (**Normal** or **Large**) and press **OK**. The default setting is **Large**.

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Enable clock

Use this option to adjust the clock settings on this terminal.

1. Tap the **Admin** icon → Setup Menu → Term Settings → Clock Display.
2. Determine when you want the clock to be displayed on the terminal (**All Pages**, **First Page Only** or **Hide**) and press **OK**. The default setting is **All Pages**.

- Enabling this clock display reduces the number of screen icons from six to four.
- The small clock in the upper-right corner of the screen is not affected by this setting.

Set daily terminal reboot

Use this option to set a time that this terminal will automatically reboot. This functionality is required to erase the working memory of the terminal. This will not erase data files on the terminal such as completed transactions.

1. Tap the **Admin** icon → Setup Menu → Term Settings → 24HR RESET.
2. Enter the **Set Begin Time**. The default setting is 0330, or 3:30AM.
3. Enter the **Set End Time** and press **OK**. The default setting is 0500, or 5:00AM.

- The time between Begin Time and End Time must be a minimum of 30 minutes.
- A user will be given the option to reboot the device immediately or reboot later if they are about to use the device.

Reset terminal

This option resets your terminal to factory settings. Do not use this option unless instructed to by the TD Merchant Solutions Help Desk as it resets the terminal to the factory default settings.

1. Tap the **Admin** icon → Setup Menu → Term Settings → Reset New.
2. Enter your **admin password** and press **OK**.
3. Confirm that you wish to continue (**Yes** or **No**).

- This function can be executed if there are open batches in the device.
- All password files and transactions are erased.
- This is not reversible.

Enable screen saver image

Use this option to adjust the screen saver settings on this terminal.

1. Tap the **Admin** icon → Setup Menu → Term Settings → Screen Saver.
2. Set the **Screen Saver Move**. This is the speed at which the image moves on the screen and the default is 10.
3. Set the **Screen Saver Timer** and press **OK**. This is the time in which the terminal must be idle before the screen saver turns on and the default is 001.

Press any key to disable the screen saver. If the pressed key is associated with any function, terminal will exit screen saver mode and perform the corresponding function.

Set your PINpad idle time

This option displays the time on the PINpad when it is idle.

1. Tap the **Admin** icon → Setup Menu → Term Settings → PINpadIdle.
2. Enter up to 16 alpha-numerical characters and press **OK**.

Security settings

Menu security

The TD Desk 5000 has different ways to help protect your terminal by password including using passwords and the user level functionality (clerk, supervisor, manager or administrator). These settings are useful to block specific transactions from general users such as force post, day end settlement and administrative functions on the terminal. You must call the TD Merchant Solutions Help Desk to enable these settings.

Main menu passwords

Use this to password protect one, some or all of the financial transactions on the terminal.

1. Tap the **Admin** icon → Security → Main Menu PWs and select one of the following:
 - PWSale – Sale transactions
 - PWReturn – Return transactions
 - PWVoid – Void transactions
 - PWForce – Force post transactions
 - PWPreAuth – Pre-authorization transactions
 - PWCompletion – Pre-authorization completion transactions
 - PWSettle – Settlement / day close
 - PWReprint – Reprint receipts
 - PWReports – Print reports
 - PWManual – Manually key transactions
 - PWStandalone – Change mode to standalone
2. Indicate the minimum user type that must enter their password to access the protected menu (**Supervisor, Manager** or **Admin**) and press **OK**.

Admin menu passwords

Use this to password protect one, some or all of the administrator functionality on the terminal.

1. Tap the **Admin** icon → Security → Admin Menu PWs and select one of the following:
 - PWClerkMenu – Clerk Menu
 - PWBatch – Batch Menu
 - PWSetup – Setup Menu
 - PWMaintenance – Maintenance Menu
 - PWDiagnostics – Diagnostics Menu
 - PWSecurity – Security Menu
 - PWTermInfo – TermInfo Menu
 - PWHostMgmt – Host Mgmt Menu
 - PWMisc – Misc. Options Menu
 - PWDetail – Detail Report Menu
 - PWSummary – Summary Report Menu
2. Indicate the minimum user type that must enter their password to access the protected menu (**Supervisor, Manager** or **Admin**) and press **OK**.

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Activity log

The activity log provides the ability to display, print or delete a report log showing all restricted access activity on the terminal.

1. Tap the **Admin** icon → Security → Activity Log.
2. Select your report option (**Display**, **Print**, or **Delete**).
3. Select **Display** if there aren't many transactions to go through. Otherwise the **Print** option is better for reviewing a large number of entries.

- If you delete the log it cannot be retrieved.
- If a user ID is used, the activity log captures the user ID against the restricted function that was performed.
- If a software download is performed the activity log will be deleted.

Transaction security

Merchants have the option to protect specific transactions by password (see page 35) as well as setting a dollar limit on sale / return transactions, flag duplicate transactions and mask card information.

Whenever you perform a Host 2 Download, you will overwrite these options with what is on the server. To ensure that these settings aren't overwritten you must call TD Merchant Solutions Help Desk to permanently change them.

Enable maximum sale passwords

Use this option to designate the minimum level of authorization required to proceed with a sale that exceeds the transaction limit on this terminal.

1. Tap the **Admin** icon → Setup Menu → Trans Options → High Amt Tran → PWHighAmt.
2. Select the required user level to authorize sale transactions that exceed your established limit (**Off**, **Supervisor**, **Manager** or **Admin**) and press **OK**. The default setting is **Off**.
3. Go to *Enable a maximum sale amount* and set it to **Password**.

Enable maximum sale amount

Use this option if you would like to limit sale amounts on your terminal. This option is useful for Merchants who want an upper limit on transaction amounts for their business. This option can help reduce fraudulent high value transactions.

1. Tap the **Admin** icon → Setup Menu → Trans Options → High Amt Tran → HighAmtTran.
2. Select how you want to protect high transaction amounts (**Off**, **Limit** or **Password**) and press **OK**.
 - **Off** means there are no limitations on transaction amounts and is the default setting.
 - **Limit** means there is a hard maximum limit to transaction amounts. This cannot be bypassed.
 - **Password** means that a password must be entered by a supervisor or manager if a transaction amount is higher than the HighAmtLmt setting.
3. Go to *Set a maximum sale amount* to complete this option.

Set a maximum sale amount

Use this option to set a sales transaction limit on this terminal. You must enable HighAmtTran on this terminal to use this function at *Enable a maximum sale amount*.

1. Tap the **Admin** icon → Setup Menu → Trans Options → High Amt Tran → HighAmtLmt.
2. Enter the **transaction limit** amount and press **OK**. Once set, any transaction above this amount will be verified against whatever setting was chosen in *Enable a maximum sale amount*.

The amount entered is always assumed to have cents. This means that for \$78.50, you must enter 7850 or for \$80.00, you must enter 8000.

Enable maximum return passwords

Use this option to designate the minimum level of authorization to proceed with a return that exceeds the transaction limit on this terminal.

1. Tap the **Admin** icon → Setup Menu → Trans Options → High Amt Tran → PWHighAmtRet.
2. Select the required user level to authorize return transactions that exceed your established limit (**Off**, **Supervisor**, **Manager** or **Admin**) and press **OK**. The default setting is **Off**.
3. Go to *Enable a maximum return amount* and set it to **Password**.

Enable maximum return amount

Use this option if you would like to limit return amounts on your terminal. This option is useful for merchants who want an upper limit on transaction amounts for their business. This option can help reduce fraudulent high value transactions.

1. Tap the **Admin** icon → Setup Menu → Trans Options → High Amt Tran → HighAmtTranRet.
2. Select how you want to protect high transaction amounts (**Off**, **Limit** or **Password**) and press **OK**.
 - **Off** means there are no limitations on transaction amounts and is the default setting.
 - **Limit** means there is a hard maximum limit to transaction amounts. This cannot be bypassed.
 - **Password** means that a password must be entered by a supervisor or manager if a transaction amount is higher than the HighAmtLmt setting.
3. Go to *Set a maximum return amount* to complete this option.

Set a maximum return amount

Use this option to set a return transaction limit on this terminal. You must enable HighAmtTran on this terminal to use this function at *Enable a maximum return amount*.

1. Tap the **Admin** icon → Setup Menu → Trans Options → High Amt Tran → HighAmtLmtRet.
2. Enter the **transaction limit** amount and press **OK**. Once set, any transaction above this amount will be verified against whatever setting was chosen in *Enable a maximum return amount*.

The amount entered is always assumed to have cents. This means that for \$78.50, you must enter 7850 or for \$80.00, you must enter 8000.

Duplicate transaction warnings

Use this option to enable duplicate transaction warning messages on this terminal for credit (DupTran) or debit (DbDupTran). This option will only work with Automatic Invoice Number enabled.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Prompts → DupTran or DbDupTran.
2. Select your duplicate transaction option (**Off**, **All Transactions** or **Last Transaction**) and press **OK**.
 - **Off** does not check for duplicate transactions. This is the default setting.
 - **All Transactions** flags for any duplicate transactions performed on the terminal. The terminal will compare against all transactions contained within the current open batch.
 - **Last Transaction** will only check if your transaction is a duplicate of the prior transactions performed on the terminal.

Card information masking

Use this option to determine how much card information is included on the settlement report on this terminal.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Settlement → ReportTrunc.

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2. Select how much card detail you wish to include (**Last 4** or **Partial Mask**) and press **OK**.
 - **Last 4** displays the last four digits of the card on reports.
 - **Partial Mask** hides all but first 6 digits and last 4 digits.

Enable manual invoicing

Use this option to enable the option to see an invoice number or purchase order numbers on the receipts from this terminal.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Prompts → Invoice.
2. Select your entry option (**Off**, **Invoice** or **Purchase Order**) and press **OK**.
 - **Off** disables invoice.
 - **Purchase Order** will prompt you to manually enter or automatically create a purchase order number for any transaction that you perform on this terminal. This will be displayed as **ORDER#** on the receipt.
 - **Invoice number** will automatically create an invoice number for any transaction that you perform on this terminal. This will be displayed as **Invoice #** on the receipt. This is the default setting.

Enable manual imprint prompt

Use this option to enable imprint card prompts when a card is entered manually on this terminal.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Prompts → Imprint Card.
2. Select whether you be prompted to imprint the credit card on a manually entered transaction (**On** or **Off**). The default setting is **Off**.

Report security

The TD Desk 5000 allows you to limit who accesses report functionality on your terminal by password and the user level (supervisor, manager or administrator).

Whenever you perform a Host 2 Download, you will overwrite these options with what is on the server. To ensure that these settings aren't overwritten, you must call TD Merchant Solutions Help Desk to change them.

Report passwords

1. Tap the **Admin** icon → Security → Report Menu PWs and select one of the following:
 - PWDetail – Detail Reports
 - PWSummary – Summary Reports
 - PWClerkRpt – Clerk Reports
 - PWRecentError – Recent Error Reports
 - PWPreAuthRpt – Pre-Authorization Reports
 - PWEMVRpt – EMV Reports
2. Indicate the minimum user type that must enter their password to access the protected report (**Supervisor**, **Manager** or **Admin**) and press **OK**.

Password settings

If you want to review which function or report is password protected, you can pull a list from the terminal. This can help you to identify any differences between terminals.

1. Tap the **Admin** icon → Security → Display Params.
2. A list of all the possible password protected functions and reports will appear with their setting (**Supervisor**, **Manager** or **Admin**).

3. Tap **PRINT** if you would like a printed copy of these settings.

Cashback settings

Use these options to configure preset cashback format and amounts.

Whenever you perform a Host 2 Download, you will overwrite the cashback options with what is on the server. To ensure that your cashback settings aren't overwritten, you must call in to TDMS Help Desk to permanently change them.

Enable cashback

You cannot enable cashback if the terminal has an open batch.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Debit → CashBack.
2. Select your cashback option (**Off** or **Debit**). If you select **Debit**, every customer will be offered the cashback option during a debit transaction. The default setting is **Off**.

- You must set this to Debit if you wish to enter CashBack settings.
- If you have CashBack settings set and turn this to Off, your CashBack Setup settings will be saved for when you re-enable this setting.

Cashback settings

Use this option to adjust the cashback amount settings on this terminal.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Debit → CashBack Setup.
2. Enter your CashBack settings for this terminal:

CashBackLmt	(This sets the maximum allowed cashback amount and the default is 0)
CashBackAmt1	(This is a preset amount displayed to the customer and the default is 0) Any preset amounts of zero after the first entry are not displayed.
CashBackAmt2	(This is a preset amount displayed to the customer and the default is 0)
CashBackAmt3	(This is a preset amount displayed to the customer and the default is 0)
CashBackVbge	(Default is CASHBACK)
CashBackVbgeFR	(Default is REMISE)

- You cannot modify these settings unless you set CashBack to Debit.
- CashBackLmt is the maximum amount allowed for this terminal.
- CashBackAmt 1, 2 or 3 cannot exceed the CashBackLmt amount. Any preset amounts of zero after the first entry are not displayed.
- We suggest that you do not modify the CashBackVbge or CashBackVbgeFR setting.

3. When finished press **OK**.

Debit surcharge

You can now add a surcharge to debit transactions. To add surcharge to your terminal you must call the TD Merchant Solutions Help Desk.

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Tip settings

The TD Desk 5000 has a robust array of tip options. Below are some common scenarios to help you set up tips on your terminal to suit your business needs.

Scenarios

I want to allow customers to enter their tip...

This will allow customers to enter their tip as dollar amount/percentage.

1. Ensure *Enable tips* is set to **Std Tip Only**.

I want to allow customers to select a preset tip amount or enter their tip...

This will allow customers to select from predetermined tip amounts or enter their tip as dollar amount/percentage.

1. Ensure *Enable tips* is set to **Std Tip Only**.
2. Ensure that *Tip mode* is set to **Amount Only, Percentage Only** or **Amount or Percentage**.
3. Ensure *Tip guide* is set to **Display** (optional).
4. Ensure the *Tip guide values* are set (optional).

I want to protect the customer by limiting the tip amount that they can enter...

This will help prevent customers from entering an overly large tip in error which could potentially incur a chargeback at a later date.

1. Ensure *Enable tips* is set to **Std Tip Only**.
2. Ensure *Tip limit* percentage is set.

I want one standard preset tip amount to be automatically added to every transaction...

This feature is useful for a business that has a standard tip amount for all transactions. For example, restaurant workers normally expect a tip amount between 15% to 20%.

1. Ensure *Enable tips* is set to **Auto Tip Only**.
2. Ensure *Automatic tip amount* is set to the percentage that you want it to be.

I want one standard preset tip amount or allow the customer to manually select their tip ...

This feature is useful for a business that has a standard tip amount, but also want to give the customer flexibility in the amount that they tip.

1. Ensure *Enable tips* is set to **Std/Auto Tip**.
2. Ensure *Automatic tip amount* is set to the percentage that you want it to be.
3. Ensure that *Tip Mode* is set to **Amount Only, Percentage Only** or **Amount or Percentage**.
4. You can set *Tip Guide, Tip guide values* and *Tip excess* if you wish (optional).

Customization

Enable tips

Use this option to enable tips on your terminal. If this option is not enabled, tips will not be available on your terminal. You cannot modify this setting if the terminal has an open batch.

Whenever you perform a Host 2 Download, you will overwrite the tip options with what is on the server. To ensure that your tip settings aren't overwritten, you must call TD Merchant Solutions Help Desk to change them.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Tip Options → Tip.
2. Enable the desired tip option (**Off**, **Std Tip Only**, **Std/Auto Tip** or **Auto Tip Only**) and press **OK**.
 - **Off** disables tips on this terminal. This is the default setting.
 - **Std Tip Only** allows customer to do tip by percentage, dollar amount or no tip.
 - **Std/ Auto Tip** allows customer to do tip by percentage, dollar amount or no tip.
 - **Auto Tip Only** automatically adds the preset tip percentage based on the overall sale amount.
3. Once you select a tip option you can now customize it. Please follow the corresponding steps for your selection. See below for standard tip settings, the next page for standard / automatic tip settings and automatic tip settings on page 43.

Standard tip settings

Enable standard tips on your terminal with these settings.

- Tip Mode
- Tip Guide (optional)
- Tip Guide Values (optional)
- Tip Limit (optional)

Tip mode

Use this option to set the tip format on this terminal.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Tip Options → Tip Mode.
2. Select how you want to display your tip options (**Amount Only**, **Percentage Only** or **Amount or Percentage**) and press **OK**.
 - **Amount Only** sets the tip format to dollar amount only.
 - **Percentage Only** sets the tip format to percentage only.
 - **Amount or Percentage** allows the customer to choose which format they want to calculate their tip.
3. Once this is enabled, set your *Tip guide* and *Tip guide values*.

Tip guide (optional)

Use this option to display an amount value for preset percentages on the screen for the customer.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Tip Options → Tip Guide → Tip Guide.
2. Enable the tip guide (**Off** and **Display**) and press **OK**.
3. Once this is enabled, set your *Tip guide values*.

Tip guide values (optional)

Use this option to enable/disable preset tip options for the customer.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Tip Options → Tip Guide → Tip Guide Values.
2. Enter your **Tip Guide Values** for this terminal:
 - TipGuide1 (Default is 0)
 - TipGuide2 (Default is 0)
 - TipGuide3 (Default is 0)
3. Press **OK**. Now set your *Tip limit*.

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Tip limit (optional)

Use this option to set the maximum percentage of the bill that the tip can be on this terminal. If the customer exceeds this amount when they tip, they will be informed that they cannot leave this amount.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Tip Options → TipExcess.
2. Enter the maximum percentage of the bill that is allowable for tip and press **OK**. The default setting is 50% and the maximum is 99%.

Standard / automatic tip settings

Enable standard and automatic tips on your terminal with these settings.

- Tip Mode
- Automatic Tip Amount
- Tip Guide (optional)
- Tip Guide Values (optional)
- Tip Excess (optional)

Tip mode

Use this option to set the tip format on this terminal.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Tip Options → Tip Mode.
2. Select how you want to display your tip options (**Amount Only**, **Percentage Only** or **Amount or Percentage**) and press **OK**.
 - **Amount Only** sets the tip format to dollar amount only.
 - **Percentage Only** sets the tip format to percentage only.
 - **Amount or Percentage** allows the customer to choose which format they want to calculate their tip.
3. Once this is enabled, set your *Automatic tip amount*.

Automatic tip amount

Use this option to enable and set the auto tip function on this terminal. This set percentage is applied to every sale transaction on this terminal. The customer will have the option to decline and/or change the amount if they wish.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Tip Options → TipAuto.
2. Enter your **automatic tip value** for this terminal and press **Enter**.
3. Once this is enabled, set your *Tip guide* and *Tip guide values*.

Tip guide (optional)

Use this option to enable/disable preset tip options for the customer.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Tip Options → Tip Guide → Tip Guide.
2. Enable the tip guide (**Off** and **Display**) and press **OK**.

Tip guide values (optional)

Use this option to enable/disable preset tip options for the customer.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Tip Options → Tip Guide → Tip Guide Values.

2. Enter your **Tip Guide Values** for this terminal:
 - TipGuide1 (Default is 0)
 - TipGuide2 (Default is 0)
 - TipGuide3 (Default is 0)
3. Press **OK**.
4. Once enabled set your *Tip Limit*.

Tip limit

Use this option to set the maximum percentage of the bill that the tip can be on this terminal. If the customer exceeds this amount when they tip, they will be informed that they cannot leave this amount.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Tip Options → TipExcess.
2. Enter the maximum percentage of the bill that is allowable for tip and press **OK**.

Automatic tip settings

Enable automatic tips on your terminal with this setting.

- Automatic Tip Amount

Automatic tip amount

Use this option to enable and set the auto tip function on this terminal. This percentage is applied to every sale transaction on this terminal. The customer will have the option to decline and/or change the amount if they wish.

1. Tap the **Admin** icon → Setup Menu → Trans Options → Tip Options → TipAuto
2. Enter your **automatic tip value** for this terminal and press **Enter**.

Receipt settings

All of the following settings must be done for each terminal individually or you can call TD Merchant Solutions Help Desk to have this done for all terminals. Otherwise, every time you do a Host 2 download, you will lose any information that you have changed.

Receipt delay

Use this option to insert a delay between printing the Merchant and Customer receipts on this terminal.

1. Tap the **Admin** icon → Setup Menu → Receipts → RcptDelay.
2. Determine the delay between printing the Merchant and Customer receipts in seconds. The default is 3.

Receipt sequence

Use this option to determine the receipt print order for this terminal.

1. Tap the **Admin** icon → Setup Menu → Receipts → RcptSeq.
2. Determine if you want the customer receipt printed first (**On** or **Off**). The default setting is **Off**. Select **On** if you want the customer receipt to print first.

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Print error receipts

Use this option to print receipts for any transaction errors that occur on this terminal.

1. Tap the **Admin** icon → Setup Menu → Receipts → PrintErrRpt.
2. Enable or disable this option (**On** or **Off**).

- The receipt will show NOT COMPLETED near the bottom of the receipt.
- This can be useful to provide a customer peace of mind that an error occurred when you ask for their card again to reprocess a transaction.

Receipts header and footer settings

Use this option to print additional lines on the receipt header and/or footers. You, the Merchant, are solely responsible for any content entered into these fields by you or your employees.

1. Tap the **Admin** icon → Setup Menu → Receipts → Headers or Footers.
2. Enter your **Header4 / Header5** or **Footer 1 - 7** and press **OK**. Headers are generally used for business information such as addresses while footers are used for thanking the customer, and advertising events. There is a 24 alpha-numeric character limit for each.

Receipt print delay

Use this option to adjust the print delay between the merchant receipt and the customer receipt on the terminal.

1. Tap the **Admin** icon → Setup Menu → Receipts → Receipt Options → Receipt Delay.
2. Enter the **Receipt Delay** and press **Enter**. The default is three seconds.

Print a pre-authorization receipt

Use this option to print a pre-authorization receipt when it is initially entered for this terminal.

1. Tap the **Admin** icon → Setup Menu → Receipts → Receipt Options → PreAuthRcpt.
2. Enable or disable this option (**On** or **Off**). The default setting is **Off**.

Communication settings

Use these options to review and edit communication settings on your terminal.

You must enter a valid admin ID and password to access these options.

Test communications

Use this option to review the communications ability to connect with the host URL or IP on this terminal via Ethernet. This function is usually requested by the TD Merchant Solutions Help Desk to test terminal communication errors or issues.

1. Tap the **Admin** icon → Diagnostics → Ping.
2. Enter the **URL or IP** that you wish to ping and press **OK**.
3. The ping result and speed will be displayed.

IP Address type

Use this option to adjust the Ethernet communication settings on the terminal.

1. Tap the **Admin** icon → Setup Menu → Communications → Ethernet → Ethernet Setup.
2. Select the desired option (**Dynamic IP** or **Static IP**).

If you selected **Dynamic IP** go to step 3.

If you selected **Static IP**:

- a) Enter the following information: Gateway IP, IPSubMask, PriDNSIP and SecDNSIP) and press **OK**.
- b) When you select any of the above options, enter the **IP address** and press **OK**. For a static IP address you must complete all of the above information.

All of the addresses are 12 digits long and supplied by your Internet service provider (ISP). Leading zeros are not usually provided or required to be entered. It is four groups of 1 to 3 numbers separated by decimal points.

3. The IP address is now saved.

- Do not make any changes to these settings unless instructed to do so by the TD Merchant Solutions Help Desk. If incorrect information is entered your terminal may lose connectivity and you will be unable to perform transactions.
- All of the addresses are 12 digits long and supplied by your Internet service provider (ISP). Leading zeros are not usually provided or required to be entered. It is four groups of 1 to 3 numbers separated by decimal points.
- Please ensure that you enter the decimal points in the IP addresses as they do not auto-populate.

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Dial up settings

Set a dial-up access code

Use this option to add a code to for dialing out of a PABX telephone system.

1. Tap the **Admin** icon → Communications → Dial → Accesscode.
2. Enter up to three numbers (0 to 9)for the access code. The default is empty.
You can use an asterisk (*) before two numbers to disable phone line features such as call waiting.
You can use a comma (,) to pause for two seconds before dialing any digits following the comma.

Set the dial-up speed (baud)

Use this option to set the baud rate for your dial modem.

1. Tap the **Admin** icon → Communications → Dial → Baud.
2. Select the desired option (**1200** or **2400**). The default is 1200.

Set the dial-up retry attempts

Use this option to set the number of redial attmepts for your dial modem.

1. Tap the **Admin** icon → Communications → Dial → DialRetry.
2. Enter the number of dial attempts for all phone numbers to connect to the server before the connection attempt is aborted. The default is 1.

Check for a dial tone before dialing

Use this option to enable a dial tone check before dialing out.

1. Tap the **Admin** icon → Communications → Dial → DialTone.
2. Select the desired option (**On** or **Off**). The default is **On**.

Select your dialing method

Use this option to select the dial method.

1. Tap the **Admin** icon → Communications → Dial → DialType.
2. Select the desired option (**Tone** or **Pulse**). The default is **Tone**.

Predial during a transaction

Use this option to predial during a transaction so as to save time.

1. Tap the **Admin** icon → Communications → Dial → PreDial.
2. Select the desired option (**On** or **Off**). The default is **On**.

Download settings

Perform a Host 1 or Host 2 download

Use this option to initiate a Host 1 or Host 2 download on this terminal.

1. Tap the **Admin** icon → Host Management → Host 1 Param.DL or Host 2 Param.DL.
2. Press **OK** to begin the download.

- You must close any open pre-authorizations before performing a download.
- You must close the batch before performing a download.
- If you perform a settlement it will also initiate a download once the batch is closed.

Perform a parameter download

Use this option to initiate a download on the terminal.

1. Tap the **Admin** icon → Maintenance → Download → Start Download.
2. The download starts.

- You must close any open pre-authorizations before performing a download.
- You must close the batch before performing a download.
- If you perform a settlement it will also initiate a download once the batch is closed.

Set automatic download frequency

Use this option to set the number of days between an automatic download on the terminal.

1. Tap the **Admin** icon → Maintenance → Download → Schedule Download.
2. Enter the **number of days** between downloads and press **OK**. The default setting is **three (3) days**. Set the number of days between **1** and **999**.

Download server settings

Use this option to adjust download settings on the terminal. Do not change these settings unless instructed to do so by a TD Merchant Solutions Help Desk agent. If you change these settings you may affect the performance of the terminal.

1. Tap the **Admin** icon → Maintenance → Download → Setup.
2. Enter the **Host URL/IP**.
3. Enter the **Host Port** and press **OK**.

Display last download time stamp

Use this option to review the last download on the terminal.

1. Tap the **Admin** icon → Maintenance → Last Download.
2. The **date and time** of the last download on this terminal is displayed.
3. Press **OK** to return to the previous screen.

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Display current parameters

Use this option to review all parameters on this terminal. If you wish to only see certain parameters, you can go to the menu in question and access the parameters for that menu only.

1. Tap the **Admin** icon → Terminal Info → Display Params → Display All.
2. Tap one of the **displayed options** and the parameters are displayed on the screen.
3. Tap **PRINT** if you wish to print a copy all the parameters. This will create a long report. If you only need a few parameters, go to the menu in question and print from those specific parameters.

Semi-integrated settings

If you have a terminal with a semi-integrated mode available, the following settings will be available to you.

Disable / enable semi-integrated functionality

Use this option to turn off semi-integrated functionality on the terminal in question. Do not do this unless instructed by the TD Merchant Solutions Help Desk.

1. Tap the **Admin** icon → Misc. Options → Semi-Integrated → Enable SemiInteg.
2. Enable semi-integrated on this terminal (**On** or **Off**).

Receipt options

Use this option to determine how receipts are printed.

1. Tap the **Admin** icon → Misc. Options → Semi-Integrated → Receipt Options.
2. Select how you want to print your receipts (**ECR**, **Terminal**, or **Both**) and press **OK**.
ECR - The terminal sends receipt data to the Electronic Cash Register, it formats the receipt and prints it.
Terminal - Transaction receipts are printed at the terminal. This is how standalone mode works as well.
Both - Receipts are printed at the terminal and the ECR.

Troubleshooting

With any equipment, sometimes problems occur. With the TD Desk 5000, error messages are displayed on screen with a short description. Below is a list of error messages that you could see on the terminal screen and the actions required.

Error codes

"A" Error codes	Explanation	Action required
ACCEPTABLE LETTERS ARE: 0-9, A-Z, a-z	This is displayed if the solution is set to support alpha-numeric characters and the user entered a special character such as ! or @.	<ul style="list-style-type: none"> Do not enter special characters.
AMOUNT EXCEEDS CARD BALANCE	If a pre-paid card is used for a pre-authorization and the amount on it is insufficient to cover the entire amount.	<ul style="list-style-type: none"> Customer must use a different payment method.
AMOUNT EXCEEDS LIMIT	The sale amount exceeds the <i>HighAmtLmt</i> parameter amount on the terminal. OR The amount entered on the cashback prompt is greater than the cashback ceiling limit.	<ul style="list-style-type: none"> Reduce the sale amount. Reduce the cashback amount.
APPLICATION BLOCKED PRESS ENTER	EMV transactions are blocked on this card.	<ul style="list-style-type: none"> Press OK and use the magnetic stripe to process the transaction.
APPLICATION BLOCKED REMOVE CARD	EMV and magnetic stripe transactions are blocked on this card.	<ul style="list-style-type: none"> Remove the card and use a different form of payment.
APPLICATION NOT SUPPORTED SWIPE ALLOWED REMOVE CARD	EMV transactions are blocked on this card.	<ul style="list-style-type: none"> Use the magnetic stripe to process the transaction.
APPLICATION NOT SUPPORTED SWIPE NOT ALLOWED REMOVE CARD	EMV transactions on this card are blocked.	<ul style="list-style-type: none"> Remove the card and use a different form of payment.
"B" Error codes	Explanation	Action required
BATCH EMPTY	The user tries to perform a settlement and there are currently no transactions on this terminal.	<ul style="list-style-type: none"> Repeat settlement once transactions have been stored in the batch.
BATCH FULL SETTLE BATCH	The user tries to perform a transaction but the batch is full.	<ul style="list-style-type: none"> Perform a settlement.
BATCH IS OPEN PARAMETER NOT UPDATED UNTIL BATCH IS CLOSED	The terminal is trying to do a parameter download, but the batch has not been closed.	<ul style="list-style-type: none"> Settle the batch.

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"B" Error codes	Explanation	Action required
BATCH LIMIT REACHED SETTLE BATCH	The user has tried to perform a transaction but the batch has reached the dollar value limit.	<ul style="list-style-type: none"> Settle the batch.
BATCH NEAR MAX SETTLE BATCH	The batch has almost reached the maximum number of transactions allowed.	<ul style="list-style-type: none"> The batch should be settled as soon a possible.

"C" Error codes	Explanation	Action required
CANCELLED REMOVE CARD	EMV transaction has been cancelled.	<ul style="list-style-type: none"> Remove the card.
CAN'T READ CHIP REMOVE CARD	The terminal can't communicate with the card's chip after the transaction has been approved.	<ul style="list-style-type: none"> Remove the card and verify that the transaction has been approved on the receipt.
CAN'T READ CHIP SWIPE ALLOWED REMOVE CARD	The terminal can't communicate with the card's chip.	<ul style="list-style-type: none"> Remove the card and swipe the card.
CAN'T READ CHIP SWIPE NOT ALLOWED REMOVE CARD	The terminal can't read the card's chip.	<ul style="list-style-type: none"> Remove the card and select another payment method.
CAN'T READ CHIP SWIPE NOT ALLOWED Press Enter	The terminal can't read the card's chip. Fallback to the magnetic card swipe is not permitted.	<ul style="list-style-type: none"> Remove the card.
CARD BLOCKED REMOVE CARD	The card is blocked and most likely due to too many failed PIN attempts.	<ul style="list-style-type: none"> Remove the card and select another payment method.
CARD NOT ALLOWED	The card is either not an accepted card type or not permitted for the transaction in question.	<ul style="list-style-type: none"> Remove the card and select another payment method.
CARD NOT SUPPORTED	The user used a debit card when only a credit card will be accepted.	<ul style="list-style-type: none"> Remove the card and select another payment method.
CARD NOT SUPPORTED REMOVE CARD	The terminal is not able to read the data on the card.	<ul style="list-style-type: none"> Remove the card and select another payment method.
CARD REMOVED PRESS CANCEL	The card was removed before it was updated. The transaction is cancelled.	<ul style="list-style-type: none"> Re-initiate the transaction.
CARD READ ERROR	The card information cannot be read.	<ul style="list-style-type: none"> Swipe the card again. Use a different card. Enter the credit card manually.
CHECK LINE AND PRESS ENTER	The terminal did not detect a dial tone when it attempted to dial out.	<ul style="list-style-type: none"> Press Enter or Cancel.

“C” Error codes	Explanation	Action required
CHECK PINPAD	<p>This is displayed if the application is configured to use an external PINpad but it has not been detected.</p> <p>OR</p> <p>This is displayed if the terminal is not receiving a signal from the PINpad.</p>	<ul style="list-style-type: none"> • Check the PINpad cable connection. • Validate that the PINpad is receiving power. • Verify that the PINpad is correctly connected to the terminal.
CLERK ID NOT ADDED	<p>The user elected not to add a new ID during the transaction when Auto Add Clerk is enabled.</p>	<ul style="list-style-type: none"> • Enter an ID that is already set up on the terminal. • Enter a new ID.
COMMUNICATIONS ERROR	<p>This is displayed if Cancel is pressed after download has commenced.</p>	<ul style="list-style-type: none"> • Restart download.
CONFIGURE ERROR	<p>The remote download was unable to detect the server.</p>	<ul style="list-style-type: none"> • Ensure an Ethernet cable is plugged to the communications adapter.
CONTACTLESS TRANS LIMIT EXCEEDED INSERT/SWIPE CARD	<p>The transaction exceeded the contactless transaction limit.</p>	<ul style="list-style-type: none"> • Insert or swipe the card.
“D” Error codes	Explanation	Action required
DEBIT NOT SUPPORTED	<p>The terminal is set not to accept a debit payment method.</p> <p>OR</p> <p>A debit return transaction was attempted but <i>DebitReturn</i> is disabled on the terminal.</p>	<ul style="list-style-type: none"> • Enable debit. • Change the <i>DebitReturn</i> parameter to enabled. • Accept another form of payment.
DEBIT NOT SUPPORTED REMOVE CARD	<p>The terminal is set not to accept a debit payment method.</p> <p>OR</p> <p>A debit return transaction was attempted but <i>DebitReturn</i> is disabled on the terminal.</p>	<ul style="list-style-type: none"> • Enable debit. • Enable the <i>DebitReturn</i> parameter. • Accept another form of payment.
DECLINED REMOVE CARD	<p>The transaction has been rejected by either the terminal or the card.</p>	<ul style="list-style-type: none"> • Remove the card and select another payment method.
DEVICE NOT RECOGNIZED	<p>An unrecognized peripheral device has been plugged into the terminal.</p>	<ul style="list-style-type: none"> • Only plug in certified devices that are certified to be used with the terminal.
DOES NOT MATCH REENTER PASSWORD	<p>The re-entered password does not match the previously entered password.</p>	<ul style="list-style-type: none"> • Re-enter the password carefully so it is correctly entered both times.
DUPLICATE NAME	<p>The administrator name / ID is already in the system.</p>	<ul style="list-style-type: none"> • Enter a new administrator name / ID.
DUPLICATE CLERK ID	<p>The clerk ID is already in the system.</p>	<ul style="list-style-type: none"> • Enter a new clerk ID.

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"D" Error codes	Explanation	Action required
DUPLICATE INVOICE	The entered invoice number matches an invoice number in the current batch.	<ul style="list-style-type: none"> Enter a new invoice number.
DUPLICATE TRANSACTION ACCEPT OR CANCEL	A transaction with the same card number and amount are already in the open batch.	<ul style="list-style-type: none"> Select Accept to continue with the transaction or select Cancel to stop the transaction.

"E" Error codes	Explanation	Action required
EMV KEY UPDATE COMM ERROR PRESS OK	The terminal has not received a response within six seconds while performing an EMV key download.	<ul style="list-style-type: none"> Retry the download.
END OF RECORDS	This is displayed if all records or transactions have been viewed while looking at reports.	<ul style="list-style-type: none"> Displays until Cancel is pressed or Idle Timer times out.
End of Records Search Again? 1- YES 2- NO	This is displayed if all records or transactions have been viewed while performing a search.	<ul style="list-style-type: none"> Select NO to end the search and return to Home Screen. OR Select YES to return to the Search menu where the user can repeat the search using a different search criterion.

ERROR BATCH #	The user tried to access a nonexistent batch total. OR The user entered an invalid batch number. Batch numbers must be within 1 and 999.	<ul style="list-style-type: none"> Enter a valid batch number from the last 30 batches.
EXCEEDS AMOUNT AUTHORIZED	Displays if Pre-Authorization Completion amount exceeds the original pre-authorized amount.	<ul style="list-style-type: none"> Enter an amount that is equal to or less than the original pre-authorized amount.
EXPIRED. ENTER NEW ADMIN PASSWORD	The administrator password has expired.	<ul style="list-style-type: none"> Enter a new password.
EXPIRED CARD	The card used has expired.	<ul style="list-style-type: none"> Select another payment method.

"F" Error codes	Explanation	Action required
FAILURE ON ALL COMM MODES	The terminal is unable to connect to the host.	<ul style="list-style-type: none"> Check the phone and Ethernet cables and check communication settings.
FEATURE DISABLED	The user attempted to select a feature that is disabled on the terminal.	<ul style="list-style-type: none"> Enable the feature in question. Use a different feature.

"I" Error codes	Explanation	Action required
INCORRECT PIN	The customer entered an incorrect PIN.	<ul style="list-style-type: none"> The customer must enter the correct PIN. If the PIN has been entered incorrectly multiple times, have the customer select a new payment method.
INSERT CARD IN CHIP READER	An EMV card has been swiped first when a chip is available on the card.	<ul style="list-style-type: none"> Insert the card chip into the terminal.
INSERT CARD INTO PINPAD READER	An EMV card has been swiped when it should have been inserted first.	<ul style="list-style-type: none"> Insert the card.
INVALID CARD ###	The last four digits of the card number entered do not match the card being used.	<ul style="list-style-type: none"> Re-enter the last four digits of the card number.
INVALID CLERK ID	The clerk ID entered has not been set up on the terminal as of yet and <i>Auto Add Clerk</i> is disabled.	<ul style="list-style-type: none"> Enter an existing clerk ID. Add the clerk ID through the <i>Clerk Menu</i>.
INVALID DATE	The date entered was an invalid format.	<ul style="list-style-type: none"> Re-enter the date as DDMMYY.
INVALID PASSWORD	The password entered does not match the password of the ID selected.	<ul style="list-style-type: none"> Re-enter the correct password.
INVALID PASSWORD PRESS ENTER	The password entered does not meet the requirements.	<ul style="list-style-type: none"> Re-enter the password and ensure that all the format requirements are met such as alpha-numeric and special characters.
INVALID TIME	The entered time is invalid.	<ul style="list-style-type: none"> Re-enter the time as HHMM..
INVALID USER	The incorrect administrator ID was entered. This is a case sensitive ID.	<ul style="list-style-type: none"> Enter the correct administrator ID.
INVALID VALUE	An incorrect parameter value was entered.	<ul style="list-style-type: none"> Enter a value within the permitted parameter range.

"K" Error codes	Explanation	Action required
KEY EXCHANGE REQUIRED	The terminal does not detect EMV keys in the terminal.	<ul style="list-style-type: none"> Contact the <i>TD Merchant Solutions Help Desk</i>.

"M" Error codes	Explanation	Action required
MANUALLY KEYED CARD	A card has been swiped 3 times and the terminal is unable to read the card.	<ul style="list-style-type: none"> Manually key in the credit card.
MAX NUMBER OF ADMINS EXCEEDED	The user tried to create more than nine administrator users.	<ul style="list-style-type: none"> Delete an unused administrator ID to make room for the new one.
MAX NUMBER OF CLERKS EXCEEDED	The user tried to create more than 200 clerk users.	<ul style="list-style-type: none"> Delete an unused clerk ID to make room for the new one.

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"M" Error codes	Explanation	Action required
MAX RETRIES EXCEEDED	The maximum number of tap attempts has been exceeded.	<ul style="list-style-type: none"> Re-initiate the transaction.
MUST SETTLE BATCH	<p>A function has been attempted that requires an empty batch, changing a parameter or deleting a clerk that has a transaction in the open batch.</p> <p>OR</p> <p>The attempt to settle the existing batch has failed and further transactions are not allowed.</p>	<ul style="list-style-type: none"> Close the batch and retry the function. Try to settle the batch again. If there's a error code on the printed report, please contact <i>the TD Merchant Solutions Help Desk</i>.
"N" Error codes	Explanation	Action required
NETWORK ERROR	An attempt was made to connect to the host via TCP/IP. The connection works but the terminal is unable to send or receive data.	<ul style="list-style-type: none"> Contact the <i>TD Merchant Solutions Help Desk</i>.
NETWORK ERROR TRYING SECONDARY COM MODE	An attempt was made to connect to the host via TCP/IP, but the initial connection and retries failed.	<ul style="list-style-type: none"> Contact the <i>TD Merchant Solutions Help Desk</i>.
NO ANSWER	The terminal is receiving no response from the host.	<ul style="list-style-type: none"> Automatically switching over to secondary Com Mode.
NO MATCH ORIG. TRANSACTION	During a credit or debit void transaction that requires card reentry, the swiped card does not match any stored transaction.	<ul style="list-style-type: none"> Swipe the correct card for the transaction to be voided.
NO RECORDS FOUND	The user attempted to print or display a report that would contain no transaction data such as no transactions for a Detail Report.	<ul style="list-style-type: none"> Verify that the correct report is being selected. There is not transaction in the open batch that would be displayed in this report.
NOT PROCESSED SWIPE ALLOWED REMOVE CARD	The card chip has failed and the terminal is requesting that it be swiped.	<ul style="list-style-type: none"> Remove the card and swipe the card.
NOT PROCESSED SWIPE NOT ALLOW REMOVE CARD	The card chip has failed and the terminal is requesting that it be swiped.	<ul style="list-style-type: none"> Remove the card and select another payment method.
"O" Error codes	Explanation	Action required
OUT OF BALANCE CHECK DETAIL REPORT	The user has entered an amount for settlement that does not match the total currently in batch on the terminal.	<ul style="list-style-type: none"> Display or print the detail report to compare totals against each other.

"O" Error codes	Explanation	Action required
OUT OF PAPER	The terminal is out of paper. OR The terminal printer cover is open when reports or receipts are trying to print.	<ul style="list-style-type: none"> Reload the terminal paper. Close the printer cover and press any key.
"P" Error codes	Explanation	Action required
PARAMETER DATA UPDATE FAILED	Parameter download has failed.	<ul style="list-style-type: none"> Retry the download.
PARAMETER DATA UPDATE SUCCEEDED	Parameter download has succeeded.	--
PASSWORD CHANGED	The manager or supervisor password has been changed successfully.	--
PASSWORD LOCKED OUT PRESS ENTER	Too many failed logins have been attempted (four for administrators and three for manager / supervisors).	<ul style="list-style-type: none"> The user is locked out for a number of minutes set by the PWLock parameter. Another administrator can reset the password of the locked out user.
PASSWORD MUST BE MIN 7 CHARS INCLUDING 1 ALPHA AND 1 NUMBER	Displayed if the Admin Password entered is less than 7 characters or an invalid password (i.e. not alpha-numeric).	<ul style="list-style-type: none"> Rekey password. When establishing a new user, password must have minimum of 4 characters with at least 1 alpha and 1 numeric in the password. Supervisor/Manager Password must have between 4 and 7 alphanumeric characters.
PAYMENT TYPE NOT ACCEPTED	A contactless payment type has been rejected by the terminal.	<ul style="list-style-type: none"> The customer must select another payment method.
PIN LAST CHANCE	The customer has entered an incorrect PIN a number of times and now only has one more chance to enter it correctly.	<ul style="list-style-type: none"> Enter the correct PIN. The customer must select another payment method
PIN TOO SHORT	The PIN entered was under four characters.	<ul style="list-style-type: none"> Enter the correct PIN.
PIN TRIES EXCEEDED	The customer has entered an incorrect PIN too many times now.	<ul style="list-style-type: none"> The terminal and card will determine if a signature could be used instead of the PIN. Otherwise, you may be asked to remove the card and the customer will have to provide another payment method.

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"P" Error codes	Explanation	Action required
PLEASE START FROM MENU REMOVE CARD	This is displayed following the <i>SELECTION IN PROGRESS</i> message that briefly displays on the external PINpad, if card is inserted at <i>Home Screen</i> on the external PINpad. Also, it is displayed if card is inserted at <i>Home Screen</i> on the terminal. The PINpad or terminal will beep to tell the customer to remove the chip card.	<ul style="list-style-type: none"> Remove the card and select the transaction from Main Menu on terminal before re-inserting the card.
PRE-AUTH LIMIT REACHED. POST OR VOID PRE-AUTHS TO OPEN MORE	You have reached the maximum of 100 open pre-authorizations.	<ul style="list-style-type: none"> Complete or void an existing pre-authorization to make room.
PRE-AUTH EXISTING	A function has been attempted that requires pre-authorizations must be closed such as entering demo mode or changing a parameter.	<ul style="list-style-type: none"> Delete the open pre-authorization or perform a Pre-auth Completion.
PRINTER NOT ENABLED	The terminal attempted to print a report or receipt when the printer is disabled.	<ul style="list-style-type: none"> Enable the <i>Printer</i> parameter.
"S" Error codes	Explanation	Action required
SEE PHONE FOR INSTRUCTION	If a mobile device is tapped and a CVM passcode is required, the terminal displays this message and allows the customer to enter the passcode and re-tap the mobile device.	<ul style="list-style-type: none"> Customer re-taps their mobile device.
SETTLEMENT UNSUCCESSFUL	The terminal tried to close the batch but was unsuccessful.	<ul style="list-style-type: none"> Review any errors on the terminal and receipt.
SYSTEM PROBLEM CALL HELP DESK	The terminal has experienced an unexpected system problem.	<ul style="list-style-type: none"> Contact the <i>TD Merchant Solutions Help Desk</i>.
"T" Error codes	Explanation	Action required
TAP FAILED PLEASE INSERT OR SWIPE CARD	An EMV contactless card has been tapped and that it must be inserted or swiped, or another payment method must be selected.	<ul style="list-style-type: none"> Insert or swipe the card or receive a new form of payment.
TAP FAILED PLEASE RETRY	A contactless card was tapped too quickly for the terminal to register it.	<ul style="list-style-type: none"> The customer re-taps the card.
TAP FAILED USE ANOTHER CARD	A card was tapped in error.	<ul style="list-style-type: none"> The customer re-taps a different card.

“T” Error codes	Explanation	Action required
TERMINAL WILL REBOOT	A communications error has been reported after selecting the Start Download option.	<ul style="list-style-type: none"> Restart the download.
TIMEOUT REMOVE CARD	The transaction has timed out.	<ul style="list-style-type: none"> Restart the transaction.
TRANSACTION FAILED	If the connection to host failed, the line was busy, or no host response was received, this message will display.	<ul style="list-style-type: none"> Confirm that the phone line is available and try transaction again.
“U” Error codes	Explanation	Action required
UNABLE TO DISPLAY GRAPHIC	An imported image cannot be displayed when it is too large or corrupted.	<ul style="list-style-type: none"> Delete the existing image from the terminal and add a new one.
UNSUPPORTED APP PLEASE RE-SELECT	This message is displayed for 3 seconds during an EMV inserted transaction if cardholder selected an application but later the transaction cannot be performed and there are other supported applications.	<ul style="list-style-type: none"> Re-select payment method
USER ABORTED	The user has cancelled an operation by pressing the Cancel key.	<ul style="list-style-type: none"> Retry the transaction.
“Z” Error codes	Explanation	Action required
ZERO AMOUNT NOT ALLOWED PLEASE RE-ENTER	The user has tried to enter an a transaction amount of \$0.00.	<ul style="list-style-type: none"> Enter an amount greater than \$0.00.

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Hardware troubleshooting

Problem	Action required
Bad Communication	<ol style="list-style-type: none">1. There was a communication failure after the transaction was initiated.2. Verify your connections.3. Press Cancel and try again.
Chip cards cannot be processed	<ol style="list-style-type: none">1. Try inserting a different card. If this card can be read, the problem is with the first card.2. Use a cleaning card to clean the problem card reader.
Connection icon is grey	<ol style="list-style-type: none">1. Is your Internet connection working properly? Verify this with another device.2. Is your modem / router working correctly? Unplug and plug it back in and wait for three to four minutes.3. Ensure the terminal is securely plugged into the communication adapter.4. Ensure the communication adapter is securely plugged into the modem / router.
Display screen is blank	<ol style="list-style-type: none">1. Ensure that the power cable is firmly connected to the power port and the electrical outlet.
Magnetic stripe card reader won't read cards	<ol style="list-style-type: none">1. Try swiping the card more quickly or more slowly or from the top of the reader towards you.2. Request another form of payment. If this card can be read, the problem is with the first card.3. Use a cleaning card to clean the problem card reader.
Printer does not print	<ol style="list-style-type: none">1. Is there paper in the device? If there is, ensure that the paper is loaded correctly.
Printer jam	<ol style="list-style-type: none">1. Ensure that the paper feed is clear and that the roll is seated correctly.2. Ensure the printer lid is completely closed.
Terminal isn't powering on	<ol style="list-style-type: none">1. Ensure that the terminal's power cord is properly inserted into the communication adapter.2. Ensure that the communication adapter power cord is properly inserted into an electrical outlet.
Transaction is not going through	<ol style="list-style-type: none">1. Ensure that the data cables are connected to the terminal.2. Check your Internet connection to ensure that it is working.

Appendices

Lost or stolen equipment

If your device has been lost or stolen, please:

1. Contact the TD Merchant Solutions Help Desk immediately to report the incident. (Stolen or lost)
2. Contact the police to file a report. (Stolen only)

What should I do when the police arrive regarding the stolen device?

If a police officer arrives on site please record the following:

- Officer's name
- Officer's contact information
- Officer's jurisdiction
- Stolen device's serial number

The officer should provide you with a **report number**. After obtaining the above from the officer, please contact the TD Merchant Solutions Help Desk and provide this information so that you can receive a replacement device.

Please see the template below to ensure that you record all the required information.

Police Information	
Name	_____
Jurisdiction	_____
Contact Information	PH# _____ EXT # _____
	FAX# _____
	Email _____
Report Number	_____
Device Information	
Serial Number of the Stolen Device	_____

Maintaining your terminal

- Don't place it on a magnetized pad — this will cause it to malfunction.
- Routinely clean it with a damp cloth so that spills don't get into the inner workings.
- Use TD-approved cleaning cards for the chip and magnetic card readers.

Storing your terminal

- It must be stored in temperatures between 0° and 50° Celsius.
- Do not leave it outdoors overnight, especially in the winter.

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Call Centre Information

Please call the TD Merchant Solutions Help Desk at 1-800-363-1163. We would be happy to answer any questions you may have.

Authorization:

24 hours a day, seven days a week

Terminal Inquiries:

24 hours a day, seven days a week

General Merchant Inquiries:

Monday – Friday, 8 a.m. – 8 p.m. ET

Printer / Stationery Supplies:

Monday – Friday, 8 a.m. – 5 p.m. ET

Documentation Portal

This guide covers the most commonly used information in order to get you started. Your terminal has more features and functionality to explore on our documentation portal which you can find at www.TDMerchantSolutions.com/ResourceCentre.

