TD Move 5000 and TD Desk 5000

Configuration and Troubleshooting Guide

For the TD Desk 5000

- Standalone and Semi-Integrated terminals
- With or without PINpad (iPP315 or Desk 1500)

For the TD Move 5000

- Standalone and Semi-Integrated terminals
- iPay@Table solution

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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 TD Move 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 the TD Desk 5000 or the TD Move 5000 at your business.

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	• **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	• **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	• 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	• **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	• 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**).

   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**).

Configuration

The TD Desk 5000 and TD Move 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 Maintenance download after a settlement request. Please contact the TD Merchant Solutions Contact Centre 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	• 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	• A maximum of 9 administrators IDs are allowed per terminal • IDs are 1 to 10 alpha-numeric characters in length (#) • Passwords are case sensitive, 7 to 12 alpha-numeric characters in length using at least one number AND one letter (######A)

User Type	Capabilities	Special Notes
Manager	• Can access features and functions, including transaction processing, all reports, and all menus • Can set up supervisor, and clerk IDs	• A maximum of 10 manager IDs are allowed per terminal • Be aware of who you grant Manager access to • IDs are 1 to 7 alpha-numeric characters in length (#) • Passwords are case sensitive, 4 to 7 alpha-numeric characters in length (####)
Supervisor	• Can perform normal transactions • Can set up clerk IDs	• A maximum of 10 supervisor IDs are allowed per terminal • IDs are 1 to 7 alpha-numeric characters in length (#) • Passwords are case sensitive, 4 to 7 alpha-numeric characters in length (####)
Clerk	• Can perform normal everyday financial transactions	• 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 alpha-numeric characters in length (#) • Passwords are 4 to 7 alpha-numeric characters in length (####) • An optional name can be added (up to 20 alpha-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 characters 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 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 i**con → 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

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 (####).
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 a 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 i**con → 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 to the terminal

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

Scenario: 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 protect your terminal as it is only helps you monitor terminal activity.

1. Ensure ***ClkPrompt*** is set to **ID Only** (page 8)
2. Ensure ***ClkLogOnOff*** is **off** (page 7)
3. Ensure ***AutoAddClk*** is **on** (page 8)
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.

Scenario: 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 7)
2. Ensure ***Select clerk login requirements*** is set to **ID Only** or **ID & Password** (page 8)
3. Ensure ***Enable auto clerk IDs*** is **off** (page 8)
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.

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 8).

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 8).

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 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 tor supervisor to affect a clerk's name. You must enable **ClkPrompt** to use this feature (page 8).

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.

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**.

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%.

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 the activity log is full, PIN entry and postal code entry error.

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 back lighting.
    - **Always On** enables keypad back lighting. This is the default setting.
    - **On/Key Press** enables keypad back lighting 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.

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**.

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.

You must call the TD Merchant Solutions Contact Centre to have this time changed.

Reset terminal

This option resets your terminal to factory settings. Do not use this option unless instructed to by the TD Merchant Solutions Contact Centre 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.

Terminal wake up (TD Move 5000 only)

You can set your terminal to wake up on touch and/or tilt versus pressing the OK button. Please contact the TD Merchant Solutions Contact Centre at **1-800-363-1163** to enable this.

Security

Menu security

The TD Move 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.

Note: You must call the TD Merchant Solutions Contact Centre 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
   - PWComm - Communication method settings
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**.

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 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 as well as setting a dollar limit on sale / return transactions, flag duplicate transactions and mask card information.

Whenever you perform a Host 1 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 Contact Centre 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.
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.

Report security

The TD Move 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 Maintenance 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 Contact Centre 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

To make any permanent changes to your cashback settings on your terminal(s), you must call the TD Merchant Solutions Contact Centre.

Surcharge

The Payment Card Networks (PCNs) allow Merchants in Canada the ability to apply a surcharge on Credit Card and Debit Card transactions. There are a few restrictions as to how surcharge is enabled for your business:

Credit surcharge

- The surcharge feature cannot be applied to Merchants located in the Province of Quebec.
- Surcharging is applicable to Credit Only (No Visa Debit or Mastercard Debit and No Prepaid transactions).
- A Merchant may apply a surcharge on in-store (card present), and MOTO (card not present) transactions.
- The maximum surcharge amount is the lower of 2.4% **or** the effective Merchant Discount Rate to zero percent. Merchants must not profit from surcharge i.e. surcharging should only offset the cost of acceptance.
- The same surcharge amount will be charged across all credit cards to which the Merchant is subscribed.
- Merchants must contact the respective PCNs to determine what is required to opt in for credit surcharge.
- To enable credit surcharge on your terminal, please call the TD Merchant Solutions Contact Centre at **1-800-363-1163**.

Debit surcharge

- The surcharge feature cannot be applied to Merchants located in the Province of Quebec.
- A Merchant may apply a surcharge on in-store (card present) transactions only.
- To enable debit surcharge on your terminal, please call the TD Merchant Solutions Contact Centre at **1-800-363-1163**.

Transactions

Sales with surcharge

You will only use these steps if surcharge (credit or debit) is enabled on your terminal(s).

1. The customer will see a message informing them that a credit surcharge will be applied.
2. The customer accepts or declines the surcharge.

   If they accept, the transaction proceeds normally.

   If they decline, you can suggest that they use a different payment method (cash or a different card type that doesn't require a surcharge) and reinitiate the sale on the terminal.

It is the Merchant's responsibility to inform the customer that a surcharge will be applied.

To enable surcharge on your terminal, please call the TD Merchant Solutions Contact Centre at **1-800-363-1163**.

Refunds with surcharge

If your business uses credit surcharge, the surcharge portion of the return will be proportionally auto calculated by the terminal.

Tip settings

To make any permanent changes to your tip settings on your terminal(s), you must call the TD Merchant Solutions Contact Centre.

Receipt settings

All of the following settings must be done for each terminal individually or you can call TD Merchant Solutions Contact Centre to have this done for all terminals. Otherwise, every time you do a Maintenance 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.

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 (TD Desk 5000)

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.

Communications Priority

Use this option to set your terminal's communication priority list if you have more than one communication option on your terminal. This list determines the order in which the terminal connects to the payment card network. To permanently set this, please call the TD Merchant Solutions Contact Centre.

1. Tap the **Coms** icon → Priority.
2. Select the primary communication priority for this terminal (**Ethernet** or **Dial**).
3. Select the secondary communication priority for this terminal (**Ethernet/Dial** or **None**).
4. Confirm your selections (**OK** or **Cancel**).

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 Contact Centre 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 **Coms** icon → 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: **TerminalIP**, **GatewayIP**, **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 Contact Centre. If incorrect information is entered your terminal may lose connectivity and you will be unable to perform transactions.
- Please ensure that you enter the decimal points in the IP addresses as they do not auto-populate.

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 **Coms** icon → 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 **Coms** icon → 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 attempts for your dial modem.

1. Tap the **Coms** icon → 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 dialling

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

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

Communication settings (TD Move 5000)

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.

Communications Priority

Use this option to set your terminal's communication priority list if you have more than one communication option on your terminal. This list determines the order in which the terminal connects to the payment card network. To permanently set this, please call the TD Merchant Solutions Contact Centre.

1. Tap the **Coms** icon → Priority.
2. Select the primary communication priority for this terminal (**Ethernet** or **Mobile Data**).
3. Select the secondary communication priority for this terminal (**Ethernet/Mobile Data** or **None**).
4. Confirm your selections (**OK** or Cancel).

Test communications

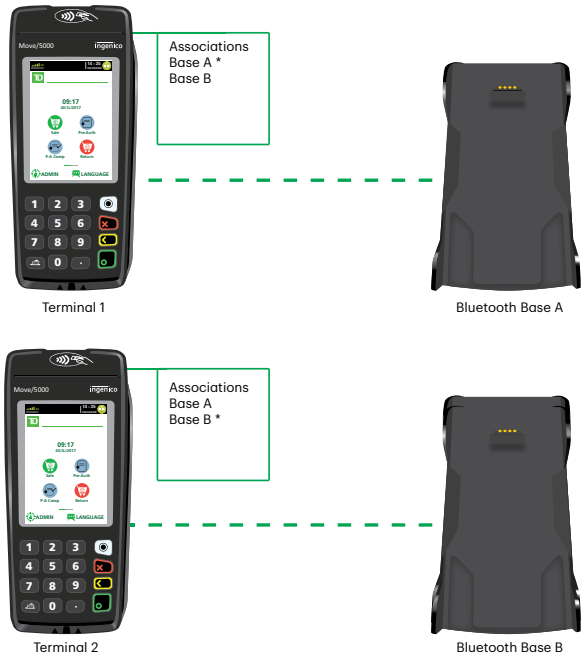
Use this option to review the communications ability to connect with the host URL or IP on this terminal via Ethernet. This function is usually requested by the TD Merchant Solutions Contact Centre to test terminal communication errors or issues.

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.

Bluetooth

Your terminal can be associated with multiple Bluetooth bases at once, but it can only have an active connection with just one of them.

In the example to the right, a business has two Bluetooth terminals and two bases. Both terminals (1 and 2) have been associated with both bases (A and B). Terminal 1 is connected to Bluetooth Base A and Terminal 2 is connected to Bluetooth base B.



You can have five terminals associated with a base. To add a base to a terminal follow the steps under ***Adding Bluetooth bases***.

However, each terminal can only connect to one associated base at any given time. To connect a terminal to another associated base, you must follow the steps under ***Select a Bluetooth base***.

Add a Bluetooth base

Use this option to add a new Bluetooth base to your terminal. You can have more than one Bluetooth base associated with a terminal.

1. Tap the **Coms** icon → Bluetooth → New Base.
2. Dock the terminal on the base. After a few seconds you will see the message ***BASE ASSOCIATION OK***. Your terminal is now linked to the Bluetooth base.

Select a Bluetooth base

Use this option to select a specific Bluetooth base to use for your terminal.

1. Tap the **Coms** icon → Bluetooth → Select Base.
2. Select a specific base from the list of available bases, Your terminal is now linked to this Bluetooth base.

Remove one Bluetooth base

Use this option to remove one or more Bluetooth bases from your terminal.

1. Tap the **Coms** icon → Bluetooth → Remove Base.
2. If you have only one Bluetooth base connected to the terminal:
   a) You will receive the message ***Bases removed***.
3. If you have only one Bluetooth base connected to the terminal:
   a) A list of connected bases appears. Select the base you want to remove and tap **OK**.
   b) You will receive the message ***Bases removed***.

Remove all Bluetooth bases

Use this option to remove one or more Bluetooth bases from your terminal.

1. Tap the **Coms** icon → Bluetooth → Remove All Bases.
2. You will receive the message ***Bases removed***.

WiFi

Connect to a WiFi network

Use this option to connect your terminal to a WiFi router.

1. Tap the **Coms** icon → WiFi → WiFi Easy Conn.
2. A list of available WiFi signals appear. Select the **WiFi network** that you want to connect your terminal to.

   - The WiFi Network profile is identified by service set identifier (SSID).
   - Only WiFi signals that use WPA/WPA2 Security Protocol will be displayed.
   - You cannot connect the terminal to an unsecured network.

3. Enter the WiFi password and tap **Enter**. It will be a minimum of 8 and maximum of 63 characters. Your terminal is now connected to the WiFi network.

IP Address type

Use this option to edit the Static WiFi settings on the terminal.

1. Tap the **Coms** icon → WiFi → Advanced Settings → IP Settings
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: **TerminalIP**, **GatewayIP**, **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. The WiFi settings have been updated.

- Do not make any changes to these settings unless instructed to do so by the TD Merchant Solutions Contact Centre. 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.

4G

You should not change any mobile / 4G settings terminal settings. If you have any questions, please contact the TD Merchant Solutions Contact Centre.

Download settings

Perform a Host 1 download

Use this option to initiate a Host 1 on this terminal.

1. Tap the **Admin** icon → Host Management → Host 1 Param.DL.
2. Press **OK** to begin the 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 for updated parameters, applications and software on the terminal.

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

- 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 Contact Centre 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.

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 Contact Centre.

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 Move 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 @.	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.	Customer must use a different payment method.
Amount exceeds limit	The sale amount exceeds the ***HighAmtLmt*** parameter amount on the terminal. **OR** The amount entered on the cashback prompt is greater than the cashback ceiling limit.	Reduce the sale amount. Reduce the cashback amount.
Application blocked Press Enter	EMV transactions are blocked on this card.	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.	Remove the card and use a different form of payment.
Application not supported Swipe allowed Remove card	EMV transactions are blocked on this card.	Use the magnetic stripe to process the transaction.
Application not supported Swipe not allowed remove card	EMV transactions on this card are blocked.	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.	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.	Perform a settlement.

"B" Error codes	Explanation	Action required
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.	Settle the batch.
Batch limit reached Settle batch	The user has tried to perform a transaction but the batch has reached the dollar value limit.	Settle the batch.
Batch near max Settle batch	The batch has almost reached the maximum number of transactions allowed.	The batch should be settled as soon a possible.

"C" Error codes	Explanation	Action required
Cancelled Remove card	EMV transaction has been cancelled.	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.	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.	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.	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.	Remove the card.
Card blocked Remove card	The card is blocked and most likely due to too many failed PIN attempts.	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.	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.	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.	Remove the card and select another payment method.
Card removed Press Cancel	The card was removed before it was updated. The transaction is cancelled.	Re-initiate the transaction.

"C" Error codes	Explanation	Action required
Card read error	The card information cannot be read.	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.	Press **Enter** or **Cancel**.
Check PINpad	This is displayed if the application is configured to use an external PINpad but it has not been detected. **OR** This is displayed if the terminal is not receiving a signal from the PINpad.	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	The user elected not to add a new ID during the transaction when Auto Add Clerk is enabled.	Enter an ID that is already set up on the terminal. Enter a new ID.
Communications error	This is displayed if **Cancel** is pressed after download has commenced.	Restart download.
Configure error	The remote download was unable to detect the server.	Ensure that the terminal is connected to the network.
Contactless trans Limit exceeded Insert/swipe card	The transaction exceeded the contactless transaction limit.	Insert or swipe the card.

"D" Error codes	Explanation	Action required
Debit not supported	The terminal is set not to accept a debit payment method. **OR** A debit return transaction was attempted but ***DebitReturn*** is disabled on the terminal.	Enable debit. Change the ***DebitReturn*** parameter to enabled. Accept another form of payment.
Debit not supported Remove card	The terminal is set not to accept a debit payment method. **OR** A debit return transaction was attempted but ***DebitReturn*** is disabled on the terminal.	Enable debit. Enable the ***DebitReturn*** parameter. Accept another form of payment.

"D" Error codes	Explanation	Action required
Declined Remove card	The transaction has been rejected by either the terminal or the card.	Remove the card and select another payment method.
Device not recognized	An unrecognized peripheral device has been plugged into the terminal.	Only plug in certified devices that are certified to be used with the terminal.
Does not match Reenter password	The re-entered password does not match the previously entered password.	Re-enter the password carefully so it is correctly entered both times.
Duplicate name	The administrator name / ID is already in the system.	Enter a new administrator name / ID.
Duplicate clerk ID	The clerk ID is already in the system.	Enter a new clerk ID.
Duplicate invoice	The entered invoice number matches an invoice number in the current batch.	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.	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.	Retry the download.
End of records	This is displayed if all records or transactions have been viewed while looking at reports.	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.	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.	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.	Enter an amount that is equal to or less than the original pre-authorized amount.

"E" Error codes	Explanation	Action required
Expired. Enter new Admin password	The administrator password has expired.	Enter a new password.
Expired card	The card used has expired.	Select another payment method.

"F" Error codes	Explanation	Action required
Failure on all comm modes	The terminal is unable to connect to the host.	Check the Bluetooth base, router cables, and check communication settings. Verify that your terminal has a connection to the 4G network. Verify that your router has a connection to the Internet.
Feature disabled	The user attempted to select a feature that is disabled on the terminal.	Enable the feature in question. Use a different feature.

"I" Error codes	Explanation	Action required
Incorrect PIN	The customer entered an incorrect PIN.	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.	Insert the card chip into the terminal.
Invalid card ####	The last four digits of the card number entered do not match the card being used.	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 ***Auto Add Clerk*** is disabled.	Enter an existing clerk ID. Add the clerk ID through the ***Clerk Menu***.
Invalid date	The date entered was an invalid format.	Re-enter the date as DDMMYY.
Invalid password	The password entered does not match the password of the ID selected.	Re-enter the correct password.
Invalid password Press enter	The password entered does not meet the requirements.	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.	Re-enter the time as HHMM.

"I" Error codes	Explanation	Action required
Invalid user	The incorrect administrator ID was entered. This is a case sensitive ID.	Enter the correct administrator ID.
Invalid value	An incorrect parameter value was entered.	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.	Contact the ***TD Merchant Solutions Contact Centre***.

"M" Error codes	Explanation	Action required
Manually key card	A card has been swiped 3 times and the terminal is unable to read the card.	Manually key in the credit card.
Max number of Admins exceeded	The user tried to create more than nine administrator users.	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.	Delete an unused clerk ID to make room for the new one.
Max number of Merchants exceeded	The user tried to create more than 200 merchant users.	Delete an unused merchant ID to make room for the new one.
Max retries exceeded	The maximum number of tap attempts has been exceeded.	Re-initiate the transaction.
Mobile setup incomplete	The terminal is missing communications information and communications priorities have not been set.	Complete the communications setup for each of your communications methods.
Must settle batch	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. **OR** The attempt to settle the existing batch has failed and further transactions are not allowed.	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 ***the TD Merchant Solutions Conta***ct ***Centre***.

"N" Error codes	Explanation	Action required
Network already exists	An attempt was made to create a network profile but it already exists. This message does not mean that the device is connected to this network.	Connect to the terminal to the network if necessary.

"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.	Contact the ***TD Merchant Solutions Contact Centre***.
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.	Contact the ***TD Merchant Solutions Contact Centre***.
No answer	The terminal is receiving no response from the host.	It will automatically switch over to secondary Com Mode if one is available.
No known bases	An attempt was made to connect a terminal to a base that is not detectable.	Place the terminal on an existing base and select Add Base.
No match orig. transaction	During a credit or debit void transaction that requires card reentry, the swiped card does not match any stored transaction.	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.	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.	Remove the card and swipe the card.

"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.	Display or print the detail report to compare totals against each other.
Out of paper	The terminal is out of paper. **OR** The terminal printer cover is open when reports or receipts are trying to print.	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.	Retry the download.
Parameter data update succeeded	Parameter download has succeeded.	--

"P" Error codes	Explanation	Action required
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).	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).	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.	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.	Enter the correct PIN. The customer must select another payment method
PIN too short	The PIN entered was under four characters.	Enter the correct PIN.
PIN tries exceeded	The customer has entered an incorrect PIN too many times now.	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.
Please start from menu Remove card	This is displayed following the ***SELECTION IN PROGRESS*** message that briefly displays on the external PINpad, if card is inserted at ***Home Screen*** on the external PINpad. Also, it is displayed if card is inserted at ***Home Screen*** on the terminal. The PINpad or terminal will beep to tell the customer to remove the chip card.	Remove the card and select the transaction from Main Menu on terminal before re-inserting the card.
Please tap card for update	This is displayed if a Discover card is tapped, and amount on the credit sale is equal to or greater than the Contactless Transaction Limit (Clss-TrnLmt).	Tap the card again to proceed to the next step in the transaction.

"P" Error codes	Explanation	Action required
Pre-auth limit reached. Post or Void pre-auths to open more	You have reached the maximum of 100 open pre-authorizations.	Complete or void and 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.	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.	Enable the ***Printer*** 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.	Customer re-taps their mobiles device.
Settlement unsuccessful	The terminal tried to close the batch but was unsuccessful.	Review any errors on the terminal and receipt.
System problem Call Contact Centre	The terminal has experienced and unexpected system problem.	Contact the ***TD Merchant Solutions Contact Centre***.

"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.	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.	The customer re-taps the card.
Tap failed Use another card	A card was tapped in error.	The customer re-taps a different card.
Terminal will Reboot	A communications error has been reported after selecting the Start Download option.	Restart the download.
Timeout Remove card	The transaction has timed out.	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.	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.	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.	Re-select payment method.
User aborted	The user has cancelled an operation by pressing the **Cancel** key.	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.	Enter an amount greater than $0.00.

Hardware troubleshooting

Problem	Action required
Bad Communication OR Transaction is not going through	There was a communication failure after the transaction was initiated. **1.** Verify your connections. **2.** Press **Cancel** and try again.
Chip cards cannot be processed	**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.
Display screen is blank OR Terminal isn't powering on	**1.** If you are using a Bluetooth or charging base, seat the terminal onto it. **2.** If this doesn't work, or you don't use these bases, plug the charging cord to the terminal and an electrical outlet and wait for one minute. **3.** Press the **power** key. If the terminal does not power on contact the TD Merchant Solutions Contact Centre.
Magnetic stripe card reader won't read cards	**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.

Problem	Action required
Printer does not print	1. Is there paper in the device? If there is, ensure that the paper is loaded correctly.
Printer jam	1. Ensure that the paper feed is clear and that the roll is seated correctly. 2. Ensure the printer lid is completely closed.

Why isn't my terminal connecting to the network?

Bluetooth

If you don't see the green network icon , you can quickly check the following:

1. Is your Bluetooth base powered? Ensure that the electrical outlet has power.
2. Is your Internet connection working properly? Verify this with another device.
3. Is your Bluetooth base working correctly? Unplug and plug the Ethernet cable back into the base and wait for one minute.

WiFi

If you don't see the green WiFi icon , you can quickly check the following:

1. Is your router / modem powered? Ensure that the electrical outlet has power.
2. Is your Internet connection working properly? Verify this with another device.
3. Is your modem / router working correctly? Unplug and plug back in your modem / router and wait for three to four minutes.

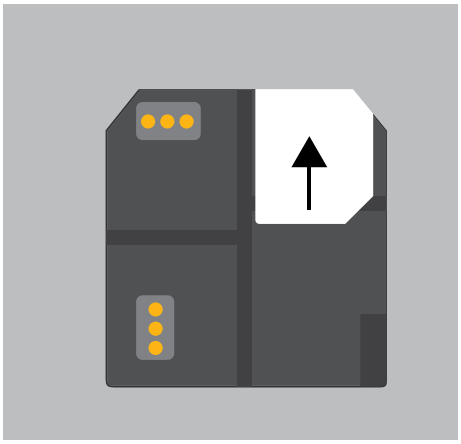
4G

If you don't see this icon 4G, you can quickly check the following:

1. Have you made physical changes to your location? New walls or electronic devices near the terminal may prevent a connection.

   Has something changed to the environment outside your place of business? A new building may block or reduce the signal strength.

   Try walking around your place of business to see if you are able to receive a signal.
2. Is there an issue with the wireless phone network? Your terminal uses the Bell network.
3. Is your terminal's SIM card seated properly? To check this:
   a) Turn over your terminal so that you can see the black, back panel
   b) There is a latch along the bottom-edge of the panel. Push it upwards so that it unlocks the back panel.
   c) Lift up the panel's lower edge. You will now see the SIM card for your terminal. It should look like the image to the right.
4. If the SIM card has become dislodged, you will have to reinsert it. When you do this, ensure that:
   a) the gold design-side is facing downward,



b) the clipped corner is positioned as it is in the diagram (bottom-right), and

c) you slide it upward, following the direction of the black arrow.

Signal Strength

The signal strength is represented differently for each communication method.

Bluetooth

Connected	No Connection

WiFi

100% - 66%	65% - 33%	32% - 1% Low	Zero / None

Bluetooth and WiFi Interference

The biggest issue is that the frequency range (2.4GHz) used by Bluetooth and WiFi is shared by other equipment and can be blocked by certain materials. There are steps that you can take that will minimize Bluetooth connectivity issues. They are:

1. **Distance between the terminal and the base / wireless router**

   Ensure that you keep your terminal and base in the same room if possible. Obstacles such as walls or furniture may weaken or block the signal.

2. **Signal interference**

   Bluetooth and WiFi uses the 2.4GHz frequency range which is shared by other devices such as:

   - Microwaves
   - WiFi devices (routers, VoIP phones, wireless cameras)
   - Fluorescent office lighting
   - Some cordless phones and baby monitors
   - Human bodies in between the Bluetooth base / wireless router and the terminal

   To avoid connectivity and data issues, avoid going near these devices when using the TD Move 5000 solution. Of course, you can't always avoid sources of interference. To accommodate this, Bluetooth and WiFi is able to adapt to some interference from multiple sources depending on its strength. But, if you encounter too many sources of interference at once, your devices may not be able to adapt and they could lose connectivity.

4G

100%	80%	60%	40%	20% / Low	Zero / None

4G Interference

The 4G (cell towers) signal is blocked by certain materials. Buildings (new or existing) have a large amount of concrete or brick and may cause signal strength issues. As well, new physical barriers added to your workplace (walls with metal frameworks and electrical wires) may also cause interference for your terminal. Be aware when modifying your workplace that you may be introducing signal interference.

What do I do if there's a power outage?

The terminal will not be able to process transactions without power. If a transaction was interrupted due to battery/power failure, please perform the transaction again when power is restored.

Dialup or Ethernet

Once the power has been restored, you do not need to take any steps to restart your terminal. It will automatically come online and create a connection.

Bluetooth

Once the power has been restored, you do not need to take any steps to restart your Bluetooth base. It will automatically come online and create a connection with your terminal if it is within range.

WiFi

You may need to reboot your modem / router to reconnect.

4G

A terminal with battery power will still work and be able to perform transactions unless the local cell tower has lost power.

Reference

Admin Menu Structure

Access all of the following menus by tapping the **Admin** icon on the ***Home screen***.

Clerk Menu	
Add ID	Setting
Edit ID	Setting
Delete ID	Setting
Print ID List	Setting
AutoAddClk	On/Off
ClkPrompt	Setting
ClkWording	Setting
ClkLogOnOff	On/Off
Display Params	Setting

Batch Menu	
Batch Totals	Info
View History	Info
Host Batch Inquiry	Print Display

Setup Menu				
Communications	ComsPriority	Disabled		
	Dial	Accesscode	Setting	
		Baud	Setting	
		DialRetry	Setting	
		Dial Tone	On/Off	
		DialType	Setting	
		Predial	On/Off	
	Ethernet	Current Setup	Info	
		Ethernet Setup	Setting	Setting
		Timer Setup	Setting	
	Display Params	Info		
Receipts	Headers	Setting		
	Footers	Setting		
	Receipt Options	RecptDelay	Setting	
		DescriptLines	On/Off	
		PrintMID	Setting	
		PreAuthRcpt	Setting	
		RcptCopies	Setting	
		DebitSigLine	On/Off	
		PrintTID	Setting	
		RcptSeq	On/Off	
		PrinterErrRcpt	On/Off	
	Display Params	Info		

Setup Menu			
Trans Options	Debit	Cashback	Setting
		Cashback Setup	Setting
	Prompts	DupTran	On/Off
		DbDupTran	On/Off
		Invoice	Setting
		Partial Auth	Setting
		Imprint Card	Setting
		Table	On/Off
	Settlement	SettleRpt	Setting
		ReportTrunc	Tip Guide
		PrtStlResult	Tip Guide Values
	Tip Options	Tip	Setting
		Tip Guide	Setting
			Setting
		TipAuto	Setting
		TipExcess	Setting
		TipMode	Setting
	High Amt Tran	HighAmtTran	Setting
		HighAmtLmt	Setting
		HighAmtTranRet	Setting
		HighAmtLmtRet	
		PWHighAmt	
		PWHighAmtRet	
	Display Params	Info	
Term Settings	Idle Timer	Setting	
	Printer	On/Off	
	Term HW	KeyBeep	Setting
		Backlight	Setting
		Brightness Settings	Setting
	IdleMsg	Setting	
	PINPadIdle	Setting	
	Clock Display	Setting	
	Font Size	Normal / Large	
	Screen Saver	Setting	
	Set Date and Time	Setting	
	24HR Reset	Setting	
	Reset new	Setting	
	Display Params	Setting	

Setup Menu		
Demo	Demo	On/Off
	DemoAmt	Setting
Display Params	Info	

Maintenance		
Download	Setup	Setting
	Start Download	
Schedule Download	Setting	
Last Download	Info	
Display Params	Info	

Diagnostics	
Ping	Setting

Security		
Admin Setup	Add Admin	Setting
	Delete Admin	Setting
	Edit Admin	Setting
	PWExpire	Setting
	PW Lock	Setting
Supervisor Manager	Add user	Setting
	Delete User	Options
	Unlock User	
	User List	Info
Main Menu PWs	PWSale	Setting
	PWReturn	Setting
	PWVoid	Setting
	PWForce	Setting
	PWPreAuth	Setting
	PWCompletion	Setting
	PWSettle	Setting
	PWReprint	Setting
	PWReports	Setting
	PWManual	Setting
	PWStandalone	Setting

Security		
Admin Menu PWs	PWClerkMenu	Setting
	PWBatch	Setting
	PWSetup	Setting
	PWMaintenance	Setting
	PWDiagnostics	Setting
	PWSecurity	Setting
	PWTermInfo	Setting
	PWHostMgmt	Setting
	PWMisc	Setting
Reports Menu PWs	PWDetail	Setting
	PWSummary	Setting
	PWClerkRpt	Setting
	PWRecent Error	Setting
	PWPreAuthRpt	Setting
	PWEMVRpt	Setting
Activity Log	Display	Info
	Print	
	Save	
Display Params	Info	

Terminal Info		
Terminal Info	Info	
Display Params	Clerk Params	Info
	Comms Params	Info
	Receipts Params	Info
	Trans Option Params	Info
	Term Setting Params	Info
	Demo Params	Info
	Security Params	Info
	Setup Params	Info
	Download Only	Info
	Other	Disabled
	TD Parameters	Info
	Display All	Info

Host Management	
Host 1 Param.DL	Download
EMV Public Key DL	Download
BIN Ranges Report	Print

Misc. Options (Semi-integrated terminals only)				
Semi-Integrated	Communication Type	RS232 USB Ethernet	COM0	Setting
	Receipt Options	ECR Terminal Both		

Lost or stolen equipment

If your device has been lost or stolen, please:

1. Contact the TD Merchant Solutions Contact Centre 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 jurisdiction
- Officer's contact information
- 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 Contact Centre and provide this information so that you can receive a replacement device. See below for an easy to use information card to record the required information.

Police information

Name: _____

Jurisdiction: _____

PH #: _____ ***EXT #:*** _____

FAX #: _____

Email: _____

Stolen device serial #: _____

Contact Information

Please call the TD Merchant Solutions Contact Centre 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/posresources.