Taking card payments safely (PCI)

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Reader group: All agents
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Card security codes must never be stored after a payment is authorized, and that includes call recordings. These steps keep every payment we take compliant with PCI DSS.

1. Tell the customer: "I'm going to pause our call recording while we take your payment."
2. Select **Pause recording** in the phone toolbar. Check that the red dot turns gray.
3. Enter card details straight into the client's payment screen. Never type them anywhere else.
4. Select **Resume recording** as soon as the payment is approved.

Never write card numbers on paper, in notes, in chat or in email, and never read a full card number back to the customer. If a customer starts reading their card number before you've paused, stop them politely and pause first.

If recording didn't pause, tell your supervisor right away so the recording can be securely deleted.