



Basic Loyalty Program
Using Your Terminal
Guide

For Moneris® e-Select plus®
Merchant Resource Center



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Need help?
Call 1-866-319-7450

Record your Moneris merchant number here:

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How your Loyalty program works:

- Every time a cardholder makes a purchase, you swipe the cardholder's card or enter their Loyalty card number so that he or she can earn points toward rewards.
- When a cardholder reaches a specified number of points, a coupon is automatically printed on the receipt.

Please refer to the *Basic Loyalty Program Operating Manual* to learn how to enrol cardholders, replace lost or damaged cards, promote your program and more.

Loyalty card entry options

There are three ways to perform transactions with a Loyalty card using the e-Select plus Merchant Resource Center:

Manual Entry:

1. Key the **card number** into the "Card Number" field.
2. Click the **Next** button.

Magnetic Swipe Reader:

1. Click the **Swipe Card** button on your computer screen.
2. When the "swipe card" prompt displays on your computer screen, **swipe the card** on the attached magnetic stripe reader.

7800 PINpad:

1. Click the **Swipe Card** button on your computer screen.
2. When the "SWIPE CARD" prompt displays on the attached 7800 PINpad, **swipe the card** on the PINpad's magnetic stripe reader.

Keying a Dollar Amount into a field

For fields that require you to key in a dollar amount, key in the amount as **#.##**.

- For example, to input twelve dollars and fifty cents, you would key in **12.50**.

Order IDs and Customer IDs

Every financial transaction (excluding Card Inquiry, which is not a financial transaction) is identified by a unique Order ID and an optional Customer ID.

You will have the option to assign your own IDs to financial transactions as follows:

- "Order ID:" This is a unique value identifying each transaction. If you submit a transaction without keying in your own Order ID, e-Select plus will automatically generate an Order ID and append it to the transaction.

Administrative transactions

If you are entering your own Order ID, ensure that it is unique. It may be up to 50 characters, contain letters, numbers, and the following special characters: - : . @

- “Customer ID:” This is an additional piece of data that can be submitted with the transaction.

The Customer ID may be up to 30 characters long, contain letters, numbers, and the following special characters: - : @ \$ = /

Initializing the Merchant Resource Center

Once the Loyalty program has been set up, Merchant Resource Center automatically initializes in the background. Therefore, you do not need to manually initialize your store.

Activating a card

Loyalty cards are activated before they are shipped to you, so no activation process is required.

***Note:** We recommend that you store your Loyalty cards in a secure location and that you provide a card to a customer only after he or she has provided written consent to participate in the program and basic contact information.*

Looking up a card balance (Card Inquiry)

Follow the instructions below to display the current balance of a Loyalty card.

1. Click on **LOYALTY** in the main menu bar.
2. Click on **balance inquiry** in the sub-menu bar.
3. Select a **card entry method** from the “Card Input” drop-down list.
4. Enter the **Loyalty card**:
 - If “Keyed Entry” is selected:
 - Key the **card number** into the “Card Number” field.
 - Click the **Next** button.
 - If “Mag Swipe Reader” is selected:
 - Click the **Swipe Card** button on your computer screen.
 - When the “Please swipe card now” prompt displays on your computer screen, **swipe the card** on the attached magnetic stripe reader.
 - If “Pinpad” is selected:
 - Click the **Swipe Card** button on your computer screen.
 - When the “SWIPE CARD” prompt displays on the attached 7800 PINpad, **swipe the card** on the PINpad’s magnetic stripe reader.

Transactions

5. The following information about the Loyalty card is displayed:

- Current Points Balance
- Lifetime Points Balance
- Card Status

Deactivating a card

Follow the steps below to deactivate a Loyalty card and generate a receipt showing any remaining balance.

Important: Once a Loyalty card has been deactivated, it can never be used again even if it has a remaining points balance.

1. Click on **LOYALTY** in the main menu bar.
2. Click on **deactivate** in the sub-menu bar.
If desired:
 - Key an **Order ID** into the “Order ID” field.
 - Key a **Customer ID** into the “Customer ID” field.
3. Select a **card entry method** from the “Card Input” drop-down list.
4. Enter the **Loyalty card**:
If “Keyed Entry” is selected:
 - Key the **card number** into the “Card Number” field.
 - Click the **Next** button.
If “Mag Swipe Reader” is selected:
 - Click the **Swipe Card** button on your computer screen.
 - When the “Please swipe card now” prompt displays on your computer screen, **swipe the card** on the attached magnetic stripe reader.
If “Pinpad” is selected:
 - Click the **Swipe Card** button on your computer screen.
 - When the “SWIPE CARD” prompt displays on the attached 7800 PINpad, **swipe the card** on the PINpad’s magnetic stripe reader.
5. Click the **Process** button to submit the transaction.
6. Print or e-mail the **transaction receipts**, which contain important transaction reference numbers and cardholder messages. (See “Printing or e-mailing a receipt” on p. 12.)

Awarding points for a Purchase

Follow the steps below to award points to a Loyalty card when the cardholder makes a purchase by credit card, debit card, or cash.

1. Submit a **debit, credit, or cash transaction** for processing.
2. When the Host response page opens:
Click the **Loyalty** button (debit/credit only).
OR
Click the **Add Loyalty** button (cash only).
If desired:
 - Key an **Order ID** into the “Order ID” field.
 - Key a **Customer ID** into the “Customer ID” field.
3. Select a **card entry method** from the “Card Input” drop-down list.
4. Enter the **Loyalty card**:
If “Keyed Entry” is selected:
 - Key the **card number** into the “Card Number” field.
 - Click the **Next** button.
If “Mag Swipe Reader” is selected:
 - Click the **Swipe Card** button on your computer screen.
 - When the “Please swipe loyalty card now” prompt displays on your computer screen, **swipe the card** on the attached magnetic stripe reader.
If “Pinpad” is selected:
 - Click the **Swipe Card** button on your computer screen.
 - When the “SWIPE CARD” prompt displays on the attached 7800 PINpad, **swipe the card** on the PINpad’s magnetic stripe reader.
5. Key in the **total transaction dollar amount** (including any tax and gratuity) into the “Amount” field.
6. Click the **Process** button to submit the transaction.
7. Print or e-mail the **transaction receipts**, which contain important transaction reference numbers and cardholder messages. (See “Printing or e-mailing a receipt” on p. 12.)

Allocating points for a Pre-Authorization

After you process a credit/debit card Pre-Authorization for a cardholder, follow the steps below to allocate points to a Loyalty card.

Important: Points are not awarded until the Loyalty Pre-Auth is completed (see “Awarding Points Following a Capture” on p. 9). If a Pre-Authorization is deleted before it is completed, the points allocation is voided.

1. Submit a **credit/debit Pre-Authorization** for processing.
2. When the Host response page opens, click the **Loyalty** button on the page.
3. Select a **card entry method** from the “Card Input” drop-down list.
4. Enter the **Loyalty card**:
 - If “Keyed Entry” is selected:
 - Key the **card number** into the “Card Number” field.
 - Click the **Next** button.
 - If “Mag Swipe Reader” is selected:
 - Click the **Swipe Card** button on your computer screen.
 - When the “Please swipe loyalty card now” prompt displays on your computer screen, **swipe the card** on the attached magnetic stripe reader.
 - If “Pinpad” is selected:
 - Click the **Swipe Card** button on your computer screen.
 - When the “SWIPE CARD” prompt displays on the attached 7800 PINpad, **swipe the card** on the PINpad’s magnetic stripe reader.
5. Key in the **total transaction dollar amount** (including any tax and gratuity) into the “Amount” field.
6. Click the **Process** button to submit the transaction.
7. Print or e-mail the **transaction receipts**, which contain important transaction reference numbers and cardholder messages. (See “Printing or e-mailing a receipt” on p. 12.)

Awarding points following a Capture/ Pre-Authorization Completion

After you process a debit/credit card Capture for a cardholder, follow the steps below to award the points that were allocated to the Loyalty card during the Loyalty Pre-Authorization.

Important: You must complete a Pre-Authorization in order to award points allocated during the Pre-Authorization.

1. Generate a **debit/credit Stored Transactions Report**.
2. Identify the **debit/credit Capture transaction** that is associated with the Loyalty transaction to be captured/completed.
3. Click the **Order ID hyperlink** of the debit/credit Capture to open its **Order History** page.
4. When the Order History page opens, click the **Associated Transactions** button.
5. Identify the **Loyalty transaction** to be captured, and click its **Order ID hyperlink**.
6. When the Order History page of the Loyalty transaction opens, click the **Capture** button.
7. Key the **debit/credit Capture amount** (including any tax and gratuity) into the “Total Amount” field.
8. Key in the **total transaction dollar amount** (including any tax and gratuity) into the “Amount” field.
9. Click the **Process** button to submit the transaction.
10. Print or e-mail the **transaction receipts**, which contain important transaction reference numbers and cardholder messages. (See “Printing or e-mailing a receipt” on p. 12.)

Redeeming points automatically

If your Loyalty program has been set up for Automatic Redemption, points are automatically redeemed when a cardholder reaches the configured Reward Threshold Level, and a Reward Coupon is generated by e-Select plus.

Note: *If a cardholder’s points balance surpasses the Reward Threshold Level multiple times in one transaction (e.g. the Reward Threshold Level is 200 and the cardholder makes a \$400 purchase with a Points Earning Rate of \$1 = 1 point, meaning they have earned 400 points), e-Select plus will redeem points for only one Reward and print only one Reward Coupon. In the above example, the remaining coupons will be generated in increments of the Reward Threshold Level during subsequent transactions with the same card.*

Processing a Refund

Once you have processed a debit/credit or cash Refund on a Purchase for which Loyalty points were awarded, follow the steps below to remove those points from the Loyalty card.

1. Click on **LOYALTY** in the main menu bar.
2. Click on **independent refund** in the sub-menu bar.
If desired:
 - Key an **Order ID** into the “Order ID” field.
 - Key a **Customer ID** into the “Customer ID” field.
3. Select a **card entry method** from the “Card Input” drop-down list.
4. Enter the **Loyalty card**:
If “Keyed Entry” is selected:
 - Key the **card number** into the “Card Number” field.
 - Click the **Next** button.
If “Mag Swipe Reader” is selected:
 - Click the **Swipe Card** button on your computer screen.
 - When the “Please swipe card now” prompt displays on your computer screen, **swipe the card** on the attached magnetic stripe reader.
If “Pinpad” is selected:
 - Click the **Swipe Card** button on your computer screen.
 - When the “SWIPE CARD” prompt displays on the attached 7800 PINpad, **swipe the card** on the PINpad’s magnetic stripe reader.
5. Key in the **total dollar amount to be refunded** into the “Refund Amount” field. (This amount can be a partial amount of the original Purchase.)
 - If the “Reference Number” field appears, key in the **Loyalty reference number** appearing on the Loyalty Purchase receipt (See Loyalty card Purchase receipt).
6. Click the **Process** button to submit the transaction.
7. Print or e-mail the **transaction receipts**, which contain important transaction reference numbers and cardholder messages. (See “Printing or e-mailing a receipt” on p. 12.)

Voiding a Loyalty transaction

Follow the steps below to void a Loyalty card transaction in the open batch.

Important: A Void must be performed in the same batch and for the same amount as the original transaction. To reverse a Loyalty card Purchase transaction in a closed batch or for a partial amount, you must process a Refund.

1. If the Loyalty transaction is associated with a **cash transaction**:
 - Click on **LOYALTY** in the main menu bar.
 - Click on **void** in the sub-menu bar.
 - Identify the **Order ID** appearing on the receipt of the original Loyalty transaction, and key the **ID** into the “Order ID” field.
 - Click the **Locate Transaction** button.
 - Click the **Void** button beside the listed transaction to be voided.
 - Go to step 2.
If the Loyalty transaction is associated with a **debit/credit transaction**:
 - Generate a **debit/credit Stored Transactions Report**.
 - Identify the **debit/credit transaction** that is associated with the Loyalty transaction to be voided.
 - Click the **Order ID hyperlink** of the debit/credit transaction to open its **Order History** page.
 - When the Order History page opens, click the **Associated Transactions** button.
 - Identify the **Loyalty transaction** to be voided, and click its **Order ID hyperlink**.
 - When the Order History page of the Loyalty transaction opens, click the **Void** button.
 - Go to step 2.
2. Click the **Process** button to submit the transaction.
3. Print or e-mail the **transaction receipts**, which contain important transaction reference numbers and cardholder messages. (See “Printing or e-mailing a receipt” on p. 12.)

Receipts

Printing or e-mailing a receipt

Following the submission of a Loyalty transaction (i.e. after you click the **Process** button), a Host response page opens detailing the results of the transaction.

Follow the steps below to print or e-mail copies of the transaction receipt for your own records and for your cardholder.

Note: The print/e-mail buttons appear in the “Action Items” section of the transaction page.

Printing a receipt

- Click the **Print Receipt - # x #** button. The Print dialog box opens.
- Select a **printer** from the “Print” dialog box.
- Click the **Print** button (in the dialog box) to initiate the **print job** from your printer.

E-mailing a receipt

- Click the **Send Email Receipt** button.
- Key the **cardholder’s e-mail address** into the “Email Address” field.
- Click the **Send Receipt & Close** button.

Figure 1: Sample receipt for a cash Loyalty transaction

Merchant Name Merchant Address Merchant City & Province		
TXN TYPE	PURCHASE	TRX type
ORDER ID	gft1234567890	
CARD NUM	*****1234	Program name
CARD TYPE	Rewards	
CLERK ID	Username	
DATE	MM DD YYYY 00:00 AM	
TERM ID	12345678	Loyalty TRX Reference #
BAT/REF NUM	00 - (12345678)	
RESULT	APPROVED - 000	
TXN AMOUNT	\$ 1,000,000.00	TRX total \$ amt
TXN POINTS	0000 pts	Pts. awarded [+/-] this TRX
BALANCE	0000 pts	
LIFE BAL	0000 pts	Ttl. pts. earned on card

Current pts. balance on card (incl. TXN POINTS)

Thank you for your purchase. Always read the receipts for your rewards!

Figure 2: Sample receipt for a debit/credit Loyalty transaction

Merchant Name Merchant Address Merchant City & Province		
TYPE	PURCHASE	TRX type
ORDER ID	ABC1234567890	
CARD NUM	*****1234	
ACCOUNT	XXXXXXXXXX	
DATE	MM DD YYYY 00:00 AM	
REF NUM	123456789012345678 A	
AUTH CODE	123456	
AMOUNT	\$ 1,000,000.00	TRX total \$ amt
SIGNATURE		
Cardholder will pay card issuer above amount pursuant to Cardholder Agreement		
00 APPROVED - THANK YOU 000		
Retain this copy for your records		
Rewards		Program name
You have earned 0000 points.		Pts. awarded [+/-] this TRX
Your current balance is 0000 points.		
The lifetime balance is 0000 points.		Ttl. pts. earned on card
REF NUM	12345678	Loyalty TRX Reference #
CARD NUM	*****1234	

Current pts. balance on card (incl. earned points)

Thank you for your purchase. Always read the receipts for your rewards!

Stored Loyalty transactions

This report lists Loyalty card transactions processed within the last 18 months.

1. Click on **REPORT** in the main menu bar.
2. Click on **loyalty transactions** in the sub-menu bar.
3. Select a **common date** and/or **specific time criteria**:
Common Date:
 - Select the **radio** button under “Date.”
 - Select a **date** from the drop-down list.Specific Date/Time:
 - Select the **“From/To” radio** button.
 - Select **dates/times** in the “From” and “To” drop-down lists.
4. If desired, refine the search as follows:
To refine the search by **Transaction Type** and/or **Transaction Response**:
 - Select the appropriate **checkboxes**, and then select the corresponding **sub-criteria** (e.g. “Purchase,” “Refund,” “Approved,” “Declined,” etc.).To refine the search by **Other criteria** (e.g. “Card Number,” “Order ID,” “Customer ID,” etc.):
 - Select the appropriate **checkboxes** under “Other Criteria.”
5. If desired, organize the results by selecting **“Sort By” criteria** (“Date,” “Rows Per Page,” and “Ascending/Descending”).
6. If desired, save the current search criteria by clicking the **Save Settings** button.
7. Click the **Submit Search** (or **Perform Query**) button to generate the report.
To export the results to a file for printing and/or data analysis:
 - Click the **Export Transactions to File** button.
 - Choose whether to view the **CSV-formatted data** in another program or save the **data** to disk as a file.
 - Print and/or view the **data** from within the native program of the file format.

Generating a Batch Totals Report

This report lists the totals of Loyalty card transactions stored in e-Select plus memory for the current batch **without** closing the current batch.

1. Click on **REPORT** in the main menu bar.
2. Click on **batches** in the sub-menu bar.
3. Select the **checkbox** of the Ernex Terminal ID to be viewed.
4. Select a **common date** and/or **specific time criteria**:
Common Date:
 - Select the **radio** button under “Date.”
 - Select a **date** from the drop-down list.Specific Date/Time:
 - Select the **“From/To” radio** button.
 - Select **dates/times** in the “From” and “To” drop-down lists.
5. If desired, refine the search as follows:
 - To refine the search by **“Batch Date,” “Batch Status,”** and/or **“Batch Number,”** select the appropriate **checkboxes** for each criterion.
6. If desired, organize the results by selecting **“Sort By” criteria** (“Terminal ID,” “Batch Status,” or “Date/Time”).
7. If desired, save the **current search criteria** by clicking the **Save Settings** button.
8. Click the **Submit Search** (or **Perform Query**) button to generate the **report**.
9. Click the **Details** button to view the **report**.
To export the results to a file for printing and/or data analysis:
 - Click the **Export Transactions to File** button.
 - Choose whether to view the **CSV-formatted data** from within the another program or save the **data** to disk as a file.
 - Print and/or view the **data** from within the native program of the file format.

Troubleshooting

Closing a batch

This transaction closes the current batch of Loyalty card transactions and settles with the Moneris/Ernex Host.

Important: A Batch Close must be completed daily.

Note: We recommend printing a Batch Report (see “Generating a Batch Totals Report” on p. 15) *before closing the batch to ensure that batch totals are balanced. If the totals are not balanced, please contact Merchant Customer Service.*

1. Click on **REPORT** in the main menu bar.
2. Click on **batches** in the sub-menu bar.
3. Click the **Close Batch** button appearing beside the Ernex Terminal ID to be closed.
 - To print/view the Batch details, generate a **Batch report**. (See “Generating a Batch Totals Report” on p. 15.)

If an error message appears on the Merchant Resource Center transaction page (or the optional 7800 PINpad display) and is listed in the table below, follow the instructions in the table’s Solution column. If the problem is still not resolved, call Merchant Customer Service at **1-866-319-7450**.

Merchant Resource Center

Error message	Solution
“Card problem. Please try again.”	The card number is invalid, or the card type that you entered cannot be used for Loyalty card transactions. If you are doing a financial transaction, try entering a different card, or cancel the transaction by clicking the onscreen Cancel Transaction button.
“Matching Transaction Not Found.”	The Reference number that you entered in does not match any known Reference number. To process the Refund, key in the Reference Number that appears on the original transaction receipt.
“No totals returned from batch close.”	There were no Loyalty transactions in the batch that you closed.
“Please specify a valid number of points.”	The number that you entered is invalid. When you key in the number, do not use a decimal point (e.g. to enter “one thousand” points, key in 1000 not 1000.00).
Only one Reward coupon appears on a receipt even though the Loyalty card has reached the Reward Threshold Level multiple times for Automatic Redemptions.	For Automatic Redemptions, a cardholder may redeem only one Reward coupon per transaction (a Reward is equal to the Reward Threshold Level). Inform the cardholder that he/she can receive the remaining Reward coupons during subsequent transactions with the same card.

Need help?

Please contact Merchant Customer Service toll-free at **1-866-319-7450** (open 24 hours a day, 7 days a week).

If you use Merchant Direct, you can also contact us online. Simply log in to Merchant Direct and use the Message Centre to send a secure message directly to Merchant Customer Service.

Shop for point-of-sale supplies and paper online at **shopmoneris.com**.

Important: If you are experiencing payment processing problems with e-Select plus, please refer to the *Moneris e-Select plus User Guide* available at eselectplus.ca/en/downloadable-content.

(You will be required to register and log in to access the downloadable content.)



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Your Loyalty card processing is governed by your Moneris Loyalty Program Agreement with Moneris. It is the merchant's responsibility to ensure that proper card processing procedures are followed at all times. Please refer to your Loyalty Program manuals and your Moneris Loyalty Program Agreement for details. The Moneris Loyalty Program manuals are available for free download at **moneris.com**.