



Setting up Your Terminal

Moneris® Mobile 8300



IMPORTANT: READ FIRST

If this is your first POS terminal with Moneris:

Enclosed you should find your Moneris Visa Merchant Agreement/Moneris MasterCard Merchant Agreement/Moneris Debit Card and Terminal Agreement, Terms and Conditions. If this document is not enclosed, please do not proceed with this installation. Instead, contact us at **1-866-319-7450**. Once you have obtained the required document, please proceed with your installation.

Before you get started

Important Notes

Your terminal is pre-programmed with a temporary password. For your own protection we strongly recommend that you change the temporary password to a secure password of your own. Follow the steps for *Changing the terminal password* found in the *Additional options* section of this guide.

The terminal language cannot be changed until the steps in *Initialization and logon* have been completed. If required, follow the steps for *Changing the terminal language* found in the *Additional options* section of this guide.

1. Please confirm that you received:
 - The Moneris Mobile 8300 terminal.
 - The SIM card.
 - The battery.
 - The charge base.
 - The power cable and power adaptor cable.
2. Make sure you have the following information (provided when Moneris contacted you to confirm your terminal order):
 - Moneris Merchant ID: If you currently have a nine-digit Merchant ID beginning with a 1, 2, or 4, simply add 0030 to the beginning (i.e. 123456789 becomes 0030123456789).
 - Settlement type: **System Close** (Moneris automatically settles your transactions at the end of each day) or **Merchant Close** (you are responsible for settlement/close batch at the end of each day).
 - Communications type: **IP/Ethernet**.
 - Optional features: e.g. **gift cards**, **Ernex Terminal ID**.

If any of the above required elements are missing, please call the General Inquiries number below.

General Inquiries: 1-866-319-7450

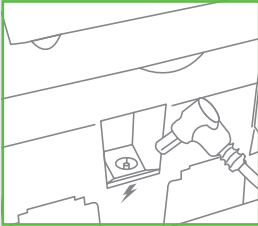
Hardware status light

- **Green (solid):** Terminal is charged and ready for use.
*Note: When ** SLEEP MODE ** appears at the top of the display, the terminal is running at reduced power to extend battery life. Press any key to exit sleep mode.*
- **Red (flashing slowly):** Out of paper.
- **Red (flashing quickly):** Low battery; needs to be recharged.
- **Amber (flashing):** Battery is charging.
- **Off:** The terminal is off.

Follow these easy steps

1

Set up the charge base



- Locate the power cable and the power adaptor cable. Plug the power cable into the power adaptor, then plug the other end of the power adaptor cable into the power port (⚡) on the charge base.
- Plug the other end of the power cable into a power source.

Recommendations: Always connect the two parts of the power adaptor cable and insert the connector adaptor into the Moneris 8300 charge base BEFORE plugging the power cable into a wall outlet. Always plug the power cable into the power source last to avoid power surges. Use a power bar with surge protection where possible.

IMPORTANT: You must use the exact power adaptor and cables provided by Moneris Solutions to work with the Moneris Mobile 8300 charge base and terminal. Failure to do so may affect the operability of, or cause damage to, the equipment.

2

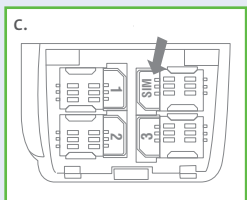
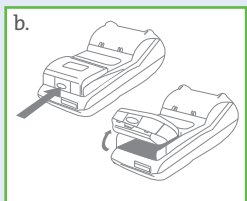
Insert the SIM card

- Power off the terminal:
Press the red **CANC ANNUL** key until “Shutting Down” appears on the screen.
- Remove the battery.
- Insert the SIM card into the slot labelled “SIM.”

Note: There is only one slot for the SIM card, located next to three numbered slots.

IMPORTANT: Ensure the metal contacts are face down and the SIM card is inserted so its shape matches the outline on the slot.

- Reattach the battery.
- Press and hold the green **OK** key until the screen lights up, then wait until the application menu appears with the options DEBIT & CREDIT and GIFT & LOYALTY.

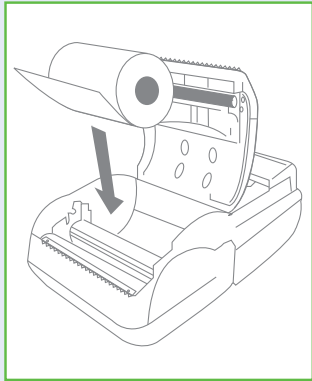


3

Load a paper roll

Note: You must use thermal-sensitive paper rolls.

- Gently pull up on the latch, then lift the printer cover up and back.
 - Prepare the new paper roll: Remove the protective strip OR, if the leading edge of the paper is glued, loosen it and unwind the roll past any glue residue on the paper.
 - Place the paper roll into the printer tray with the printable surface of the roll facing downward.
 - Pull the leading edge of the paper up until any glue residue on the paper roll is past the cutting teeth of the printer.
 - Close the printer cover and lock it by gently pressing directly on it until it clicks shut.
 - Turn the terminal over, then tear off the loose end of the paper by pulling it towards the keypad and then sideways across the teeth.
 - Select **DEBIT & CREDIT** then press the **3** key to feed paper through the printer and ensure it is working properly.
- Shop for point-of-sale supplies and paper online at shopmoneris.com.



4

Charge the battery

- Place the terminal on the charge base.
- Ensure the hardware status light is amber coloured and flashing.
- Leave the terminal on the charge base for at least six hours the first time you charge the battery.

Note: Additional batteries may be ordered through shopmoneris.com.



NEED HELP? 1-866-319-7450

Tips for moving through the menus

- To scroll down or up, press the **first purple key on the left**. The arrow above the key indicates the direction, e.g. if the arrow points down, you can scroll down.
- To change the direction of the arrow, press the yellow **CORR** key.
- To select a menu item, press the **grey function key (F1, F2, F3 or F4)** that it appears beside.
- To finish entering information and move on to the next step, press the green **OK** key.

Entering merchant IDs and terminal IDs

1. Select **DEBIT & CREDIT**.
2. When the transaction menu appears, press the green **OK** key to access the CONFIGURATION menu.
3. Select **Setup**, key in the temporary password and press the green **OK** key.
4. Scroll down and select **Merchant**. “Term Id” appears.
5. Select **Edit**, key in the **Terminal ID number** (the eight-digit number starting with “05”, found on the back of the terminal, e.g. 05123456) and press the green **OK** key.
6. Select **Next** until “Merch Num” appears.
7. Select **Edit**, key in your **13-digit Merchant number** (e.g. 0030123456789) and press the green **OK** key.
8. Select **Exit**, then select **OK** to save changes.
9. Press the red **CANC ANNUL** key then the * (**asterisk**) key to return to the applications menu.

Proceed to *Initialization and logon* in this guide.

Initialization and logon

1. Select **DEBIT & CREDIT**.
2. When the transaction menu appears, press the green **OK** key to access the CONFIGURATION menu.
3. Scroll down and select **Initialize**.
4. When “Retain Settings?” appears, select **Yes**.
5. When “Transmitting...” and “Receiving...” appear, please wait while the terminal communicates with Moneris.
6. When the initialization is finished, “Init Successful” appears, then the transaction menu appears.
7. Press the green **OK** key to access the configuration menu.
8. Scroll down and select **Host Logon**.
9. Key in the temporary password and press the green **OK** key.
10. “Logon Successful” appears, then the transaction menu appears. Your terminal is ready to process transactions.

Additional options

Changing the terminal language

Note: The terminal language can only be changed AFTER the terminal has been successfully initialized (see Initialization and logon in this guide).

1. Select **DEBIT & CREDIT**.
2. When the transaction menu appears, press the green **OK** key to access the CONFIGURATION menu.
3. Scroll down and select **Set Language**.
4. Select **ENG** (English) or **FR** (French).
5. Press the *** (asterisk)** key to return to the applications menu.

Changing the terminal password

IMPORTANT: For security purposes, we strongly recommend you change the terminal's temporary password to a secure password of your own. The password should NOT be changed until AFTER the terminal has been successfully initialized (see the *Initialization and logon* section in this guide). The password can be 5-10 digits long and must consist of numbers only.

1. Select **DEBIT & CREDIT**.
2. When the transaction menu appears, press the green **OK** key to access the CONFIGURATION menu.
3. Select **Setup**, key in the temporary password and press the green **OK** key.
4. Scroll down and select **TERMINAL**.
5. Select **Next** until "Manager Pwd" appears.
6. Select **Edit**, key in your **new password** and press the green **OK** key.
7. Select **Exit**, then select **OK** to save changes.
8. Press the red **CANC ANNUL** key, then the *** (asterisk)** key to return to the applications menu.

Enabling cashback, tip or invoice number

1. Select **DEBIT & CREDIT**.
2. When the transaction menu appears, press the green **OK** key to access the CONFIGURATION menu.
3. Select **Setup**, key in your new password (or if you have not changed it, key in the temporary password) and press the green **OK** key.

For cashback option

To change the default values for cashback, please refer to the *Mobile 8300 Operating Manual* available for download from moneris.com/8300.

1. Scroll down and select **Terminal**.
2. Select **Next** until "CashBack Option" appears.
3. Select **Edit** then select **ON**.
4. Select **Exit**, then select **OK** to save changes.
5. Press the red **CANC ANNUL** key, then the *** (asterisk)** key to return to the applications menu.

For basic tip processing

To change the default values for the enhanced tip options, please refer to the *Mobile 8300 Operating Manual* available for download from moneris.com/8300.

1. Scroll down and select **Terminal**.
2. Select **Next** until “Tip Processing” appears.
3. Select **Edit** then select **Next** until “On – Prompt” appears then select **Slct**.
4. Select **Exit**, then select **OK** to save changes.
5. Press the red **CANC ANNUL** key, then the *** (asterisk)** key to return to the applications menu.

For invoice number

1. Scroll down and select **Merchant**.
2. Select **Next** until “Ask Inv Num” appears.
3. Select **Edit** then select **ON**.
4. Select **Exit**, then select **OK** to save changes.
5. Press the red **CANC ANNUL** key, then the *** (asterisk)** key to get back to the main menu.

Enabling gift cards

Didn't order gift cards but would like to find out more? Please call us at **1-866-319-7450**.

1. Select **GIFT & LOYALTY**.
2. When the Ernex transactions menu (ERNEXGL) appears, scroll down and select **Setup**.
3. Key in your **new password** (or if you haven't changed it yet, key in the temporary password) and press the green **OK** key.
4. Select **Merchant**. “Merchant ID” appears.
5. Select **Edit**, then key in your **Moneris Merchant ID** and press the green **OK** key.
6. Select **Next**. “Moneris Term ID” appears.
7. Select **Edit**, then key in the **Moneris Terminal ID** and press the green **OK** key.
8. Select **Next**. “Ernex Term ID” appears.
9. Select **Edit**, then key in the **Ernex Terminal ID** (provided to you when Moneris confirmed your terminal order) and press the green **OK** key.
10. Select **Exit**, then select **OK** to save changes. The terminal returns to the SETUP menu.
11. Scroll down and select **INITIALIZATION**. “Ernex Term ID” appears.
12. Press the green **OK** key. The terminal will complete the initialization and return to the SETUP menu.
13. Press the red **CANC ANNUL** key, then the *** (asterisk)** key to return to the applications menu.

Your terminal is ready to process gift card transactions.

For instructions on performing gift card transactions, please refer to the *Moneris Quick Reference Guide for Gift Card Transactions*.

Online statements and reports

Check your monthly statement online using Moneris Merchant Direct. Merchant Direct provides 24/7 access to daily card transaction data (available by 7 a.m. the next morning and stored for six months) and monthly consolidated statements (available by the third day of the next month and stored for up to two years).

For detailed instructions, please refer to the *Thank You for Your Business* guide and page 9 of the *Merchant Operating Manual* included in this package.

For more information

- On performing transactions and end-of-day procedures, please refer to the *Using Your Terminal* guide in this package.
- On all of the options available on your terminal and how to enable them, please refer to the *Mobile 8300 Operating Manual*. Visit moneris.com/8300 to download a copy.



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