



## **Moneris Mobile 8100**

# **MERCHANT OPERATING MANUAL**



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# CHAPTER 1: Getting Started

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This guide explains how to use the terminal's transaction processing features and provides information on how to configure the terminal operating features such as the modem and backlighting options and the debit and credit transaction functions. It also explains how to run close batch and balance reports.

## 1.1: Setting Up Your Terminal

Before you can begin using your **Mobile 8100** terminal, you will need to:

1. Unpack your terminal and confirm that all items listed in *Section 1.2: Terminal Package Contents* are there.
2. Load paper into the terminal's paper well.  
See *Section 1.3: Loading Paper* for instructions.
3. Set up the charging base and fully charge the terminal's battery.  
See *section 1.4: Setting Up the Slow Charging Base* and *4.1: Charging the Battery* for instructions.

**IMPORTANT:** *The battery must be FULLY charged before using the terminal for the first time.*

4. Take the terminal off the base.
5. If the terminal is not already on, turn it on by pressing **OK**. The terminal will display `TERMINAL SETUP REQUIRED`.
6. Change the password.  
See *Section 6.6: Change Password – ADMIN 12*.

**IMPORTANT:** *The terminal will not accept any transaction or ADMIN function until the default password is changed. If an attempt is made to process a transaction, the terminal will display the following error message `TRANSACTION NOT ALLOWED`.*

7. Configure the terminal options.  
See *Section 5.1: Terminal Configuration - ADMIN 08*.
8. Configure the communications.  
See *Section 5.2: PPP Configuration - ADMIN 45*.
9. Initialize the terminal.  
See *Section 6.2: Initialization – ADMIN 01*.
10. Perform a Log On transaction.  
See *Section 6.3: Logon – ADMIN 02*.

Refer to *CHAPTER 4: Operating Your Terminal* for information on operating the **Mobile 8100** and navigating the menus.

Refer to *CHAPTER 7: Processing Credit Card Transactions* and *CHAPTER 8: Processing Debit Card Transactions* for instructions on performing financial transactions.

### 1.2: Terminal Package Contents

The following items should be included in the package your terminal arrived in.

**Note:** *Call the Moneris Help Desk to purchase additional stationary including paper rolls, replacement batteries, etc.*

| QUANTITY | ITEM  |
|----------|---|
| 1        | <b>Mobile 8100</b> terminal   |
| 2        | Removable Battery pack  |
| 2        | Thermal paper roll  |
| 1        | Slow Charging Base  |
| 1        | AC Power adaptor  |
| 1        | Carrying case/holster   |
| 1        | <b>Mobile 8100</b> Quick Reference Guide<br>(For additional copies, go to <a href="http://www.moneris.com/merchant/qrguides">www.moneris.com/merchant/qrguides</a> and click on "Mobile 8100".) |

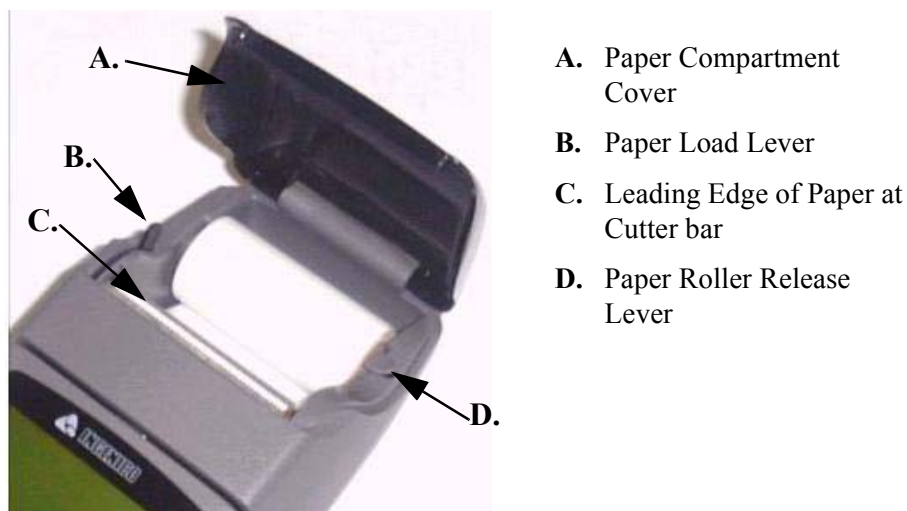
## 1.3: Loading Paper

Do not wait until the paper roll is empty to load a new roll. When the red stripe first appears on printout paper, replace the paper roll.


**Note:** Call the Moneris Help Desk to purchase paper rolls.

Refer to *Figure 1.1: Loading Paper in the Mobile 8100* to view the open paper compartment.

**Figure 1.1: Loading Paper in the Mobile 8100**

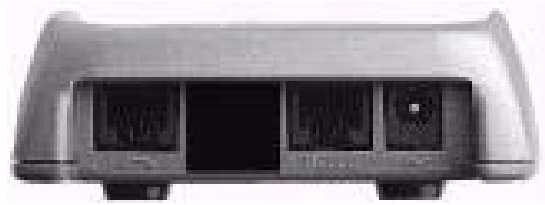


To load a new paper roll into the **Mobile 8100** paper compartment:

1. Open the paper compartment cover (A) by grasping the black cover on either side of the cutter bar (C) and pulling upwards.
2. Disengage the friction roller by pulling the paper load lever (B) towards the front of the terminal.
3. Release the paper roll by pressing the release lever (D) on the right hand side.
4. Remove the paper roll.
5. Place the new paper roll in the black printer cover (A) (this makes it easier to feed the paper under the roller) with the leading edge feeding from the bottom of the roll toward the front of the terminal.
6. Feed the leading edge of the paper under the paper roller (underneath (C), not visible on the diagram) until the paper comes out the top of the roller. Pull gently on the end of the paper to ensure it is straight in the roller.
7. Re-engage the paper roller by moving the paper load lever (B) towards the back of the terminal until it clicks.
8. Place the new paper roll in the paper well by pressing the release lever (D) and sliding the paper roll onto the left-hand spindle (the spindles will click back in place) then releasing the lever (D).
9. Close the cover (A).
10. Test the operation of the printer by pressing the paper feed key (  ).

### 1.4: Setting Up the Slow Charging Base

Figure 1.2: Ports on the back of the *Mobile 8100* Charging Base



|           |           |           |
|-----------|-----------|-----------|
| <b>A.</b> | <b>B.</b> | <b>C.</b> |
| Phone     | RS232     | AC Power  |
| Line      | Port      | Jack      |

1. Connect the power adaptor provided in the *Mobile 8100* package to the AC Power Jack marked with a ⚡ (lightning bolt, see item C. on *Figure 1.2: Ports on the back of the Mobile 8100 Charging Base*) on the back of the charging base.

**WARNING:** *You must use the exact AC power adaptor and cable provided with the terminal by Moneris Solutions. Failure to do so may affect the operability of, or cause damage to the terminal and Moneris Solutions shall have no liability whatsoever for a failure to follow these instructions. Many adapters appear similar and will plug into the terminal but will not work properly.*

2. Plug the other end of the power adaptor into a wall jack.

After unpacking it is important to provide an initial charge to the battery. This is required for the battery pack to reach full capacity quickly. See *Section 4.1: Charging the Battery* for instructions.

Refer to *Section 2.1.8: Battery Pack* for additional information on battery use and care.

# CHAPTER 2: About Your Terminal

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The **Mobile 8100** is a fully self-contained wireless terminal with an integrated printer. The terminal communicates with Moneris using a RF data network. This network is similar to that used for mobile phones except that it is for data only.

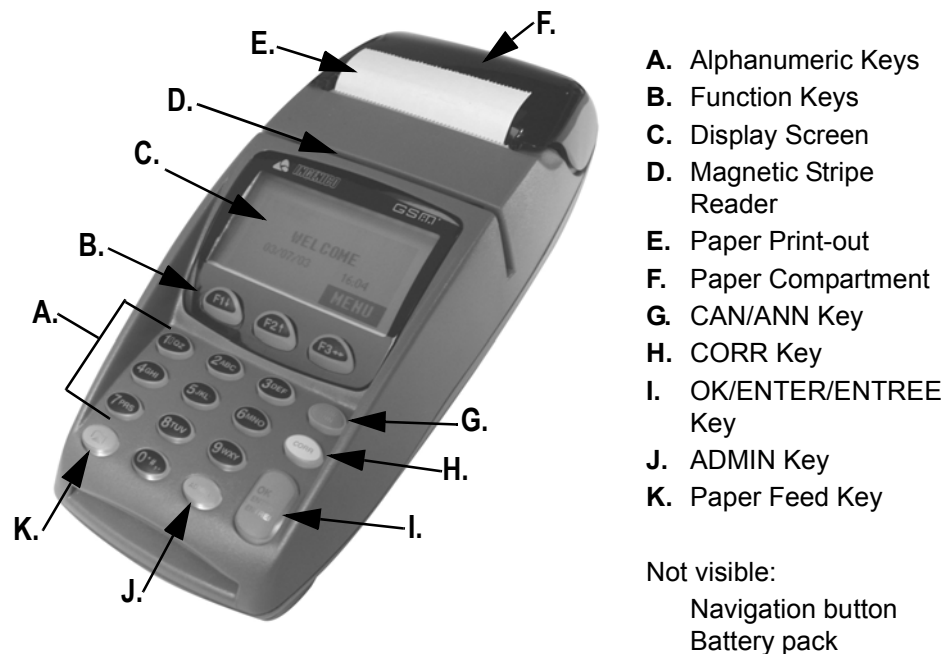
The terminal can be set-up to accept and process credit and debit transactions including:

- VISA
- MasterCard
- American Express (AMEX)
- Diners Club/enRoute
- Interac Direct Payment/Debit cards

**Note:** *If you accept Debit cards, your terminal acts as a PINPad.*


## 2.1: Terminal Components

Figure 2.1: The **Mobile 8100** Terminal



### 2.1.1: Keypad

The keypad has 18 keys described below, with backlighting:

| KEY   | ITEM # ON<br>Figure 2.1: | EXPLANATION  |
|---|--------------------------|--|
| ALPHANUMERIC KEYS   | A                        | <p>These keys allow you to enter:</p> <ul style="list-style-type: none"> <li>a numeric response to a prompt. The decimal automatically inserts on dollar amount entered.<br/>Example: \$145.27 – enter 14527</li> <li>alphabetic characters. Press the number key containing the character then press the <b>ADMIN</b> key until the desired letter/character is displayed.</li> </ul> |
| F1, F2, F3  | B                        | <p>Use these keys to:</p> <ul style="list-style-type: none"> <li>select the function displayed on the screen above the key.</li> <li>scroll down, up or sideways when additional information is available.</li> </ul>  |
| CAN/ANN   | G                        | <p>This red key:</p> <ul style="list-style-type: none"> <li> Cancels the current transaction or report and returns the terminal to the idle prompt.</li> </ul>   |
| CORR  | H                        | <p>This yellow key will either clear:</p> <ul style="list-style-type: none"> <li>the entire currently displayed value OR</li> <li>one character at a time of a value that has just been keyed in</li> </ul>  |
| OK<br>ENTER<br>ENTREE   | I                        | <p>This green key allows you to:</p> <ul style="list-style-type: none"> <li>confirm user-entered data</li> <li>confirm default data</li> <li>select a menu item</li> </ul> <p>Referred to in this document as <b>OK</b>.</p>   |
| ADMIN   | J                        | <p>This blue key allows you to:</p> <ul style="list-style-type: none"> <li>access administrative functions</li> <li>select alphabetic and punctuation characters from the keyboard.</li> </ul>   |
| <br>(Paper Feed) | K                        | <p>This blue key advances 20mm of paper through the integrated printer.</p>  |

### 2.1.2: Display Screen

The display screen (item C. on *Figure 2.1: The Mobile 8100 Terminal*) has a 4 line x 16 character LCD graphic display, with backlighting.

### 2.1.3: Navigation Button

Located on the left side of the terminal, the navigation button allows you to move through menus and select options.

| PRESS THE NAVIGATION BUTTON...    | RESULT  | ACTS LIKE PRESSING: |
|-----------------------------------|---|---------------------|
| towards the front of the terminal | option displayed above <b>F1</b> is selected                                    | <b>F1</b> ↓         |
| towards the back of the terminal  | option displayed above <b>F2</b> is selected                                    | <b>F2</b> ↑         |
| straight in                       | displays the next menu (i.e. the option displayed above <b>F3</b> is selected.) | <b>F3</b> ↔         |

### 2.1.4: Magnetic Stripe Card Reader

Your terminal is equipped with a bi-directional magnetic stripe reader located immediately above the display (item D. on *Figure 2.1: The Mobile 8100 Terminal*). The magnetic stripe on the card should face down and to the rear of the terminal. The card should be swiped at uniform speed and pressure, ensuring that the card remains in contact with the bottom of the track throughout the entire swipe action.

### 2.1.5: SmartCard Reader

Your terminal is equipped with a SmartCard reader slot at the front of the terminal for future use.

### 2.1.6: Printer

The built-in-printer (located under item F. on *Figure 2.1: The Mobile 8100 Terminal*) is a high-speed (6 lines per second) thermal printer that can print graphics and provides the following:

- Multiple receipts: One receipt is always printed. Follow the prompts to print a second copy. If you print more than one copy, the first copy is for your records, the second copy is the cardholder copy, the third copy is a duplicate cardholder copy.
- Reports of transactions, totals, etc.

**IMPORTANT:** *Retain your copy of all approved Credit and Debit card receipts for **one year**.*

See *section 1.3: Loading Paper* for instructions on loading paper into the printer.

### 2.1.7: RF Modem

The terminal is equipped with a 1xRTT modem for exchanging data over a 1xRTT wireless network.

### 2.1.8: Battery Pack

The **Mobile 8100** is powered by a removable Ni-MH (Nickel Metal-Hydride) battery. The battery pack is accessed from the bottom of the terminal.

**Note:** *Call the Moneris Help Desk to purchase additional batteries.*

#### Under normal conditions of use:

- after a full charge the terminal is expected to provide 50 or more transactions before a recharge is required.
- the full charge time is 16 hours

#### Under exceptional conditions of use:

- the terminal has a “reserve” capacity that can be used in the event that more transactions are needed after the battery needs recharging (i.e. the printer begins slowing down).

**Note:** *The print time for a transaction processed using “reserve” capacity will be significantly longer.*

- After extended use of the “reserve” capacity, the terminal will require additional charge time
- If the terminal has been inactive a number of weeks it may require another 16-hour initial charge.

### Battery Voltage Status

When the battery voltage:

- is becoming low, the printer slows down
- becomes low, the “battery low” sign is displayed
- becomes very low, the “battery low” sign flashes and the terminal double-beeps

### Tips for Conserving Battery Voltage

- Configure the Power Off Time (see section 5.1: *Terminal Configuration - ADMIN 08*) to set the amount of time that the terminal will remain idle before automatically powering off (while powered by the battery) in order to conserve battery power.

**Note:** *The terminal will not power off when it is on the charging base.*

- If you know you will not be using the terminal for a period of time longer than the power-off time, use ADMIN 00 to turn the terminal off and conserve battery power.

## **2.1.9: Charging Base**

**Figure 2.2: The *Mobile 8100* Charging Base**



The battery charging base has a green LED that lights up when the battery is on the base and being charged.

See *section 1.4: Setting Up the Slow Charging Base* for instructions on setting up the slow charging base and *section 4.1: Charging the Battery* for instructions on using it.

There are two charging bases available for the **Mobile 8100**:

- Slow charging base
- Vehicle charging base

### **Slow Charging Base**

This base takes approximately 16 hours to fully charge the **Mobile 8100** battery, however it can be used to maintain the charge of the battery in between processing transactions. It receives power from a regular wall jack using the power adaptor provided.

### **Vehicle Charging Base**

This is also a slow charging base, however this base must receive power from a 12VDC vehicle battery (i.e. hardwired into the vehicle's battery) or through a cigarette lighter power adaptor.

## **2.1.10: Power Adaptor**

The power adaptor is used to provide power to the Slow Charging Base.

Use only the power adaptor supplied with your **Mobile 8100** charging base. Many adaptors look similar and will connect to the **Mobile 8100** charging base, but will not work properly. The wrong adaptor can cause unpredictable behaviour, poor charging and possibly damage to the base, battery and terminal.

### 2.2: Equipment Care and Cleaning

- Clean the terminal with a soft cloth moistened with a mild detergent solution.
- Never spray cleaning solution directly onto the terminal as drips may enter the unit.
- Do not use Isopropyl Alcohol based cleaning products.
- Avoid spilling or spraying liquids on components.
- Do not expose components to adverse temperatures (below 5° or above 40° C) or other environmental conditions such as rain and snow.
- It is recommended that merchants obtain their POS stationery and paper rolls from Moneris to ensure that these supplies comply with the applicable specifications. Contact the Moneris Help Desk to obtain additional supplies for your terminal.
- For equipment failure contact the Moneris Help Desk (see page *A.3.1: Terminal Problems*).
- Any additional hardware accessories must be approved by the manufacturer of the terminal.
- You are responsible for any loss or damage to a terminal including fire, theft, breakage due to carelessness etc.

**IMPORTANT:** *Misuse of equipment could result in replacement liability. Please refer to your terminal lease agreement.*

#### 2.2.1: Battery Care and Handling

- Keep batteries out of the reach of children.
- Do not heat or throw batteries in a fire.
- Do not use in an airtight box.
- Do not use the battery or try to fix it if it is damaged or is leaking liquid.

# CHAPTER 3: Features and Procedures

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## 3.1: Features

These features relate to the operation of the **Mobile 8100** terminal.

- Backlighting on display and keypad
- Invoice Number entry
- Multiple Terminal Reporting
- Training Mode
- Balance Prompt during Close Batch
- Password Protection

These functions relate specifically to credit and debit transactions.

- Tip Entry by the cardholder on the terminal
- Tip Line printed on Pre-authorization receipts
- Signature Line on Credit Card Transactions

### 3.1.1: Backlighting on the Display and Keypad

This option allows for illumination of the display and keypad for use in low light conditions.

**IMPORTANT:** *Using the backlight when operating on battery power reduces the number of transactions the terminal can perform per battery charge.*

### 3.1.2: Invoice Number Entry

This feature prompts the operator to enter an invoice number with every Credit and Debit card transaction. Any number used to reference individual transactions can be entered (e.g. invoice, sales order or purchase order number). The number entered will be printed on the receipt. If this feature is activated, the prompt appears for every transaction but can be bypassed by pressing **OK**.

### 3.1.3: Multiple Terminal Reporting

This feature allows you to manage end-of-day processes, including Batch Totals and Close Batch for a number of terminals from one terminal.

Each terminal must be setup with a terminal name created using 1 to 6 numbers or letters. The same terminal name cannot be used on more than one terminal. You can identify up to 100 different terminal names (this would require 100 different terminals) for each Moneris Merchant ID.

### 3.1.4: Training Mode

The **Mobile 8100** terminal is able to simulate financial transactions in “TRAINING MODE”. Transactions processed in training mode will NOT affect your cus-

tomers' accounts or your business accounts. Financial settlement does NOT occur for transactions processed while your terminal is in training mode.

### 3.1.5: Balance Prompt on Batch Close

This enables the `Balanced?` prompt during the batch close process and prints the balance status on the Batch Balance Report. Responding "Yes" to this prompt flags a closed batch transaction with an "Out of Balance" condition if there is a discrepancy between the terminal totals and the Moneris Host totals.

**Note:** *This is for in-store reporting purposes only.*

### 3.1.6: Password Protection

For security purposes, the **Mobile 8100** terminal can be password protected to restrict access to all transactions, configuration and reporting functions.

Moneris recommends that password protection be enabled to help prevent unauthorized use of the terminal.

### 3.1.7: Tip Entry by Cardholder on the Terminal

This function enables the cardholder to key in a tip amount on the **Mobile 8100** keypad during debit and credit transactions. During a purchase transaction the cardholder is prompted to enter a tip amount (\$0.00 is a valid amount) after accepting the original amount. The customer receipt includes the subtotal amount, tip amount and total amount. This function eliminates the need to process Pre-AuthORIZATIONS followed by Advices (Pre-Auth Completions) for tip values on credit card transactions.

### 3.1.8: Tip Line Printed on Pre-Authorization Receipts

The feature adds a tip line to the printed pre-authorization receipt for credit card purchase transactions.

**Note:** *If Tip Entry is enabled, typically this is disabled because the tip amount is entered on the terminal by the cardholder during the transaction.*

### 3.1.9: Signature Line on Credit Card Transaction Receipts

This feature allows you to control whether the signature line will be printed on receipts for all Credit card transactions.

If enabled, the signature line is printed:

- on the merchant copy of purchase and refund correction receipts
- on the cardholder copy of refund and purchase correction receipts.

**IMPORTANT:** *Merchants that process transactions in "card present" environments must enable the signature line and have the appropriate signature on the receipt.*

## **3.2: Procedures**

- Debit Cardholder Disputes.
- Code 10 Authorization.
- Securing Your Terminal.
- Stored Credit and Debit Transactions.

### **3.2.1: Debit Cardholder Disputes**

Merchants should not attempt to resolve or compensate Debit cardholder disputed transactions. Direct the cardholder to their financial institution.

### **3.2.2: CODE 10 Authorization**

If you feel that a customer, card or transaction is suspicious and needs investigating call the credit card authorization centre and ask for a Code 10. This will immediately alert the operator without alarming your customer. The operator will ask you some “YES/NO” questions and then provide instructions. Here are some examples of situations in which you would call for a Code 10.

- If the signature on the card and the signature on the POS receipt do not seem to match.
- If the card has been tampered with.
- If the name on the card is inconsistent with the person’s gender.
- If the customer is purchasing an unusual number of expensive items.
- If the customer’s purchases seem randomly selected, with little regard for size, quality or value.
- If the customer seems nervous, or signs slowly with uncertainty.

### **3.2.3: Securing Your Terminal**

To minimize the risk of unauthorized transactions being processed through your terminal use a password and log the terminal off at the end of each business day.

- While configuring your terminal, enable a password that must be entered in order to begin any transaction or report. This will help prevent unauthorized operators from using the terminal.
- At the end of each business day, log the terminal OFF (after performing a CLOSE BATCH transaction). See *Section 6.4: Logoff – ADMIN 03* for instructions. At the start of the next business day, log your terminal back on. See *section 6.3: Logon – ADMIN 02* for instructions.

### **3.2.4: Stored Credit & Debit Transactions**

Your **Mobile 8100** terminal can store 500 APPROVED Credit and Debit transaction records. When the terminal memory reaches capacity, the oldest transaction will be replaced by the newest transaction. If your terminal is replaced, the memory cannot be transferred to the replacement terminal and is therefore lost.



# CHAPTER 4: Operating Your Terminal

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The **Mobile 8100** terminal enables operators to process credit and debit transactions anywhere they receive wireless communications coverage.

## 4.1: Charging the Battery

The terminal is powered by a Ni-MH (Nickel Metal Hydride) battery that attaches to the bottom of the terminal. The battery recharges while it is on the charging base and NOT in use.

The battery can be charged by itself or with the terminal attached to it.

1. If the terminal is attached, ensure that the battery is seated properly on the back of the terminal.
2. Place the battery on the charging base, ensuring that the metal contacts on the battery touch the metal contacts on the base.
3. The green light on the front of the base will light up when the battery is seated on the base properly and is being charged.

**Note:** *If the terminal is attached to the battery on the base, the terminal will power-up and remain on while the battery is being charged.*

**IMPORTANT:** *If you are charging the battery for the first time, it must remain on the base for at least 16 hours in order to be fully charged.*

Refer to *Section 2.1.8: Battery Pack* for more information on battery use and care.

## 4.2: Powering Up the Terminal

Press the **OK** key to power the terminal back up after it has powered off.

The modem powers up in off-line mode. It logs onto the network during the first transaction that is performed.

## 4.3: Powering Off the Terminal - ADMIN 00

Use this function to turn the terminal off and conserve battery power.

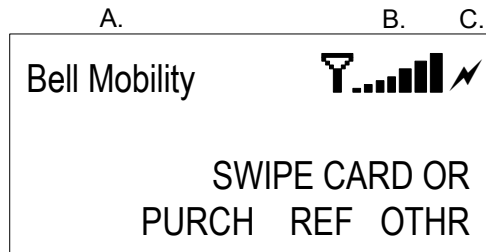
| TERMINAL DISPLAY                | OPERATOR'S ACTIONS                         |
|---------------------------------|--|
| SWIPE CARD OR<br>PURCH REF OTHR | Press <b>ADMIN</b> .                       |
| ENTER ADMIN CODE                | Key in <b>00</b> and press <b>OK</b> .     |
| CDMA SHUT DOWN<br>IN PROGRESS   | The terminal is shutting down.             |
|                                 | Process complete when the screen is blank. |

### 4.4: Understanding the Wireless Signal Status Symbols

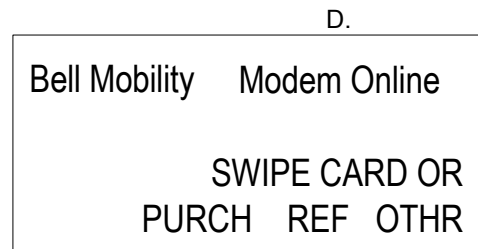
The **Mobile 8100** can only process transactions when the terminal is located within the coverage area of the wireless network.

#### WIRELESS STATUS SYMBOLS

##### Modem Offline and Terminal on the Charging Base



##### Modem Online and Terminal off the Charging Base



##### Wireless Service Provider (item A. on the diagram):

This text indicates which wireless network the modem will connect to or is connected to already.

If a network has not been found, the text `Network Search` is displayed while the modem continues searching for a network.

##### Signal Strength (item B. on the diagram):

This symbol indicates the strength of the signal the modem is receiving. Each bar indicates a percentage of signal quality: 5%, 20%, 35%, 50%, 65%, 85%, 100%. This symbol only appears when the modem is NOT online.

##### Thunderbolt (item C. on the diagram):

This symbol (⚡) only appears when the terminal is on the charging base and the battery is being charged.

##### Modem Online (item D. on the diagram):

This text indicates that the modem has successfully connected to the wireless network and is ready to process transactions immediately.

## 4.5: Selecting Display Language - ADMIN F1

The terminal has been configured to include both English and French language prompts. This Admin function toggles the terminal display language between English and French. You can switch languages before or after you log on.

Repeat this process to revert to English language prompts.

### Before You Log On

| TERMINAL DISPLAY        | OPERATOR'S ACTIONS   |
|-------------------------|----------------------|
| READY<br>PLEASE LOGON   | Press <b>ADMIN</b> . |
| ENTER ADMIN CODE        | Press <b>F1</b>      |
| PRET<br>PRIERE D'ENTRER | Process complete.    |

### After You Log On

| TERMINAL DISPLAY                 | OPERATOR'S ACTIONS   |
|----------------------------------|----------------------|
| SWIPE CARD OR<br>PURCH REF OTHR  | Press <b>ADMIN</b> . |
| ENTER ADMIN CODE                 | Press <b>F1</b>      |
| PASSER CART OU<br>ACHAT REM AUTR | Process complete.    |

### 4.6: Reprinting Transactions

There are three ways to reprint transaction receipts and reports:

- **ADMIN F2** - Reprint Last Transaction (see *section 4.6.1:*)
- select REPRINT at the end of a transaction (see *section 4.6.2:*)
- **ADMIN 66** - Transaction Inquiry (see *section 6.10:*)

When you reprint a transaction receipt or a report, the text “\*DUPLICATE\*” will be printed on the top, middle and bottom lines.

#### 4.6.1: ADMIN F2

To print a copy of the most recently printed transaction receipt or report:

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS  |
|---------------------------------|---|
| SWIPE CARD OR<br>PURCH REF OTHR | Press <b>ADMIN</b> .  |
| ENTER ADMIN CODE                | Press <b>F2</b>   |
| PRINTING<br>XXXXXXX             | The receipt or report is printed.<br>XXXXXXX is replaced with the transaction type or report name.<br><br><b>Note:</b> <i>If the terminal memory is empty or the last transaction or report cannot be reprinted, the terminal will display NOTHING TO PRINT FROM LAST TRANS. Press <b>CAN</b> to return to the idle prompt.</i> |
| SWIPE CARD OR<br>PURCH REF OTHR | Process complete.   |

#### 4.6.2: Select REPRINT

To print a copy of the most recently printed transaction receipt immediately after the transaction is complete:

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS  |
|---------------------------------|---|
| SELECT<br>REPRINT EXIT          | Press <b>F1</b> .   |
| PRINTING<br>XXXXXXX             | The duplicate receipt or report is printed.<br>XXXXXXX is replaced with the transaction type or report name |
| SELECT<br>REPRINT EXIT          | Press <b>F3</b> to complete the transaction.  |
| SWIPE CARD OR<br>PURCH REF OTHR | Process complete.   |

## 4.7: Navigating the Menus

To process a transaction on the **Mobile 8100**, the operator must select the transaction from a menu or sub-menu beginning at the idle prompt (SWIPE CARD OR).

### 4.7.1: Idle Prompt

From the idle prompt...

|                |
|----------------|
| SWIPE CARD OR  |
| PURCH REF OTHR |
| F1 F2 F3       |

...you can access the terminal transaction features and functions by using the Function keys (**F1**, **F2** and **F3**).

#### To begin a Purchase from the idle prompt...

- Press the **F1** key  
OR
- Swipe the customer's card.

The Purchase screen appears...

|          |
|----------|
| PURCHASE |
|----------|

... and a Purchase transaction is initiated. See section 7.1: *Purchase* for credit transactions and 8.1: *Purchase* for debit transactions.

#### To begin a Refund from the idle prompt...

- Press the **F2** key.

The Refund screen appears...

|        |
|--------|
| REFUND |
|--------|

...and a Refund is initiated. See section 7.3: *Refund* for credit transactions and 8.3: *Refund* for debit transactions.

### 4.7.2: Pre-Auth Menu

To access the Pre-Auth menu from the idle prompt:

- Press the **F3** key.

The Pre-Auth menu screen appears...

|               |     |      |
|---------------|-----|------|
| SWIPE CARD OR |     |      |
| PAUTH         | ADV | OTHR |
| F1            | F2  | F3   |

- Press the **F1** key to initiate a Pre-Authorization (PAUTH) transaction. (See section 7.5: *Pre-Authorization* for further instructions.)
- Press the **F2** key to initiate an Advice (ADV) transaction. (See section 7.6: *Pre-Authorization Completion (Advice) from the SAME BATCH* and 7.7: *Pre-Authorization Completion (Advice) from a PREVIOUS BATCH* for further instructions.)
- Press the **F3** key to display the Correction menu.

### 4.7.3: Correction Menu

To access the Correction menu:

- Press the **F3** key.

The Correction menu screen appears...

|               |      |      |
|---------------|------|------|
| SWIPE CARD OR |      |      |
| PCOR          | RCOR | OTHR |
| F1            | F2   | F3   |

- Press the **F1** key to initiate a Purchase Correction (PCOR) transaction. See section 7.2: *Purchase Correction* for credit transactions and 8.2: *Purchase Correction* for debit transactions.
- Press the **F2** key to initiate a Refund Correction (RCOR) transaction. See section 7.4: *Refund Correction* for credit transactions and 8.4: *Refund Correction* for debit transactions.
- Press the **F3** key to return to the idle prompt.

## 4.8: Correcting Data Entry Errors

If you make an error while entering data on the keypad, press the **CORR** key to erase the information one character at a time and then re-enter it. To delete the complete entry and return to the previous data entry field, press the **CAN** key.

# CHAPTER 5: Configuring Your Terminal

Before you begin using your **Mobile 8100** terminal to process transactions, you must power up your terminal and then configure it, inputting any special values and parameters needed for the options you wish to use.

Refer to *CHAPTER 3: Features and Procedures* to determine what features and functions you wish to enable during configuration.

**Note:** *Some features may require additional services from the Moneris Host. Please contact your sales representative*

When you have finished configuring your terminal, print a Configuration Parameters report (see section 5.4: *Print Configuration Parameters – ADMIN 16* for instructions) and keep it in a safe place for reference in the event you need to reconfigure your terminal.

## 5.1: Terminal Configuration - ADMIN 08

- To chose a specific setting, press **F1** or **F3** to select the setting displayed above the key.
- To key in a different value, press **CORR** then key in the new value.
- To keep the current setting, simply press **OK**.

| TERMINAL DISPLAY                  | OPERATOR'S ACTIONS   |
|-----------------------------------|--|
| SWIPE CARD OR<br>PURCH REF OTHR   | Press <b>ADMIN</b> .   |
| ENTER ADMIN CODE                  | Key in <b>08</b> and press <b>OK</b> .   |
| TERMINAL CONFIG<br>ENTER PASSWORD | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .  |
| BACKLIGHT?<br>ON OFF              | Press <b>F1</b> to turn the display screen light ON.<br><b>Note:</b> <i>Using the backlight when operating on battery power reduces the number of transactions the terminal can perform on a battery charge.</i><br>Press <b>F3</b> to turn the display screen light OFF.                                      |
| PREAUTH TIP LINE<br>YES NO        | Press <b>F1</b> to print a TIP LINE on credit pre-authorization receipts.<br>Press <b>F3</b> to turn off printing of a tip line.<br><b>Note:</b> <i>If Tip Entry is enabled, the Pre-Auth Tip Line is not necessary as the tip amount can be entered by the customer on the terminal during a transaction.</i> |

## Configuring Your Terminal

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS  |
|---------------------------------|---|
| ENABLE TIP ENTRY<br>YES NO      | Press <b>F1</b> to prompt the Cardholder for tip entry on the keypad.<br>Press <b>F3</b> to turn TIP ENTRY off.   |
| CREDIT SIGN LINE<br>YES NO      | Press <b>F1</b> to print a signature line on credit receipts.<br>Press <b>F3</b> to turn off the printing of a signature line on credit receipts.<br><b>Note:</b> <i>The Credit Signature MUST be turned on if transactions are performed in a "card present" environment.</i>  |
| INVOICE NUMBERS?<br>YES NO      | Press <b>F1</b> to enable the Invoice Number prompt during transactions.<br>Press <b>F3</b> to disable the Invoice Number prompt.   |
| BALANCE PROMPTS?<br>YES NO      | Press <b>F1</b> to enable the Totals Balanced? prompt during the Close Batch transaction.<br>Press <b>F3</b> to disable the Balanced? prompt.   |
| PURCHASE CARD ON<br>YES NO      | FEATURE NOT CURRENTLY AVAILABLE.<br>Press <b>OK</b> to LEAVE OFF.   |
| POWER OFF TIME<br>05            | To accept the number of minutes displayed (default value = 05), press <b>OK</b> .<br>To change the setting, enter the desired number of minutes (min = 01, max = 10) and press <b>OK</b> .<br>If this value = 00, the terminal will NOT time-out.<br><b>Note:</b> <i>The lower the value, the more this feature helps to conserve battery power.</i>                                      |
| NUMBER OF COPIES<br>2           | To accept the displayed value (default value = 2), press <b>OK</b> .<br>To change the number of receipts to be printed, enter the desired number of copies (min = 1, max = 3) and press <b>OK</b> .<br><b>Note:</b> <i>If the number of copies is greater than 1, the first copy is the Merchant copy, the second copy is the cardholder copy and the third copy is a Duplicate copy.</i> |
| PASSWORD PROTECT<br>YES NO      | To display the Enter Password prompt on all transactions and administrative functions, press <b>F1</b> for YES.   |
| SWIPE CARD OR<br>PURCH REF OTHR | Process complete.   |

## 5.2: PPP Configuration - ADMIN 45

This function sets up the parameters for communicating with the wireless network.

These parameters must be entered before attempting to process transactions and ADMIN functions that require the terminal to communicate with the Moneris Host.

- To scroll up, press **F1**
- To scroll down, press **F2**
- To select the highlighted option, press **OK**.
- To key in alphabetic character and punctuation, see section 2.1.1: *Keypad* for instructions.

| TERMINAL DISPLAY   | OPERATOR'S ACTIONS   |
|--|--|
| SWIPE CARD OR<br>PURCH REF OTHR  | Press <b>ADMIN</b> .   |
| ENTER ADMIN CODE   | Enter <b>45</b> and press <b>OK</b> .  |
| PPP CONFIG<br>ENTER PASSWORD   | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .  |
| <b>PPP CONFIG</b><br><hr/> SET SERVER IP<br>SET SERVER PORT<br>SET APN | Press <b>OK</b> to select SET SERVER IP.<br><br><b>Note:</b> <i>This menu times out in 60 seconds and the terminal returns to the idle prompt.</i> |
| ENTER TARGET IP  | Key in the Moneris Host IP address and press <b>OK</b> .<br><br><b>Note:</b> <i>Periods are automatically entered in this field.</i>               |
| ENTER TARGET IP<br>OK - VALID ENTRY                                    | If you have keyed in a new address, this prompt appears.<br>Press <b>OK</b> to return to the PPP CONFIG menu.                                      |
| <b>PPP CONFIG</b><br><hr/> SET SERVER IP<br>SET SERVER PORT<br>SET APN | Press <b>F1</b> then <b>OK</b> to select SET SERVER PORT.  |
| ENTER IP PORT<br>(0-65535)   | Key in the port number and press <b>OK</b> .   |
| ENTER IP PORT<br>OK - VALID ENTRY                                      | Press <b>OK</b> to return to the PPP CONFIG menu.  |

# Configuring Your Terminal

| TERMINAL DISPLAY  | OPERATOR'S ACTIONS  |
|---|---|
| PPP CONFIG<br><u>SET SERVER PORT</u><br>SET APN<br>PRINT PPP CONFIG       | Press <b>F1</b> then <b>OK</b> to select SET APN.   |
| ENTER APN   | Key in the Moneris Access Point Name and press <b>OK</b> .<br><br><b>Note:</b> <i>You must manually enter the periods in the APN in this field.</i>                                     |
| APN SET<br>XXXXXXXXXXXXXXXXXXXX   | "XXXX..." is the Access Point Name you just keyed in.<br>If it is correct, press <b>OK</b> to return to the PPP CONFIG menu.<br>If not, press <b>CORR</b> and key in the APN correctly. |
| PPP CONFIG<br><u>SET APN</u><br>PRINT PPP CONFIG<br>SET SERVER IP         | Press <b>F1</b> then <b>OK</b> to select PRINT PPP CONFIG.  |
| PRINTING  | Please wait while the PPP SETTINGS report prints a list of the communications settings.   |
| PPP CONFIG<br><u>PRINT PPP CONFIG</u><br>SET SERVER IP<br>SET SERVER PORT | Press <b>CAN/ANN</b> to return to the idle prompt.  |
| SWIPE CARD OR<br>PURCH REF OTHR   | Process complete.   |

### 5.3: Multiple Terminal Setup – ADMIN 80

This function allows you to enable Multi-terminal Reporting, which allows you to close batches and print totals reports for a group of terminals from one terminal.

Multi-terminal Reporting is composed of two functions:

- **Multiple Terminal Batch Closing** allows you to close, by Terminal Name, any terminals associated with the same Merchant Number as the terminal on which you are performing the Close Batch.
- **Multiple Terminal Deposit Totals** allows you to obtain deposit totals, by Terminal Name, for any terminals associated with the same Merchant Number as the terminal on which you are performing the Close Batch.

In order to process a close batch for a group of terminals you must have:

- more than one terminal associated with your merchant number
- a unique name associated with each terminal
- each terminal set up to allow Close by ADMIN 99.

#### 5.3.1: Enable Multi-terminal Transactions

| TERMINAL DISPLAY  | OPERATOR'S ACTIONS  |
|---|---|
| SWIPE CARD OR<br>PURCH REF OTHR                               | Press <b>ADMIN</b> .  |
| ENTER ADMIN CODE  | Enter <b>80</b> and press <b>OK</b> .   |
| MULTI TERM TRANS<br>ENTER PASSWORD                            | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .   |
| MULTI TERM TRANS<br>YES NO                                    | Select <b>F1</b> to enable Multi-terminal Reporting.<br>Select <b>F2</b> to disable Multi-terminal Reporting on this terminal and set this terminal's Terminal Name to spaces.  |
| <b>If you selected F1 (Yes) the following prompt appears:</b> |   |
| MERCH TERM NAME   | Key in the terminal name and press <b>OK</b> . (Refer to section 2.1.1: <i>Keypad</i> for instructions on entering alphabetic characters.)<br>If a terminal name is displayed and you wish to keep it, press <b>OK</b> .<br>If a terminal name is displayed and you wish to change it, press <b>CORR</b> , key in the new name and press <b>OK</b> .<br><b>Note:</b> A maximum of 100 names can be associated with a Merchant Number. |
| CLOSE BY ADMN 99<br>YES NO                                    | Press <b>F1</b> to allow this terminal to be closed by another terminal using the Multiple Terminal Report (ADMIN 85).  |

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS |
|---------------------------------|--------------------|
| SWIPE CARD OR<br>PURCH REF OTHR | Process complete.  |

### 5.3.2: Managing Terminal Names

A maximum of 100 terminal names can be associated with a Merchant Number.

While terminal names must be unique, if they begin with the same character or same set of characters, they can be closed as a group.

For example, if you have 5 terminals named A112, A113, A223, B134 and B145 you can close them all from one terminal:

- individually by name
- by group prefix:
  - Group Prefix **A** (includes only terminals A112, A113 and A223)
  - Group Prefix **A1** (includes only terminals A112 and A113)
  - Group Prefix **B1** (includes only terminals B134 and B145)
- all at once.

## 5.4: Print Configuration Parameters – ADMIN 16

You can review the current terminal configuration settings by printing a report from the terminal, rather than scrolling through all the screens. A configuration report is printed listing the current settings for all configurable options.

| TERMINAL DISPLAY                  | OPERATOR'S ACTIONS  |
|-----------------------------------|---|
| SWIPE CARD OR<br>PURCH REF OTHR   | Press <b>ADMIN</b> .  |
| ENTER ADMIN CODE                  | Enter <b>16</b> and press <b>OK</b> .                           |
| PRT PARAMS LIST<br>ENTER PASSWORD | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> . |
| PRINTING                          | The transaction is in progress, please wait.                    |
| SWIPE CARD OR<br>PURCH REF OTHR   | Process complete.   |

**IMPORTANT:** *As a precaution we suggest you perform the ADMIN 16 function once your terminal is set up and store the print-out in a safe location for future reference.*

# CHAPTER 6: Administrative Functions

Administrative functions allow you to manage and configure the features on your **Mobile 8100** terminal. These include daily functions such as logging on and off, producing reports and processing end-of-day settlement and occasional functions such as Host Initialization.

## 6.1: Accessing Admin Functions

The blue **ADMIN** key allows you to access administrative functions and to select alpha characters from the keyboard. For a detailed description of Admin functions refer to the sub-section for that function in this chapter.

To access an Admin function:

1. Press the **ADMIN** key.
2. Key in the 2-digit Admin Code.
3. Press **OK**. The terminal may ask you to ENTER PASSWORD (if enabled).
4. Key in the Password and press **OK**.

| ADMIN CODES (BY CODE): |                                  |
|------------------------|----------------------------------|
| 00                     | Power off the terminal           |
| 01                     | Initialization                   |
| 02                     | LOGON                            |
| 03                     | LOGOFF                           |
| 05                     | Training Mode                    |
| 08                     | Terminal Configuration           |
| 12                     | Change Password                  |
| 16                     | Print Configuration/Parameters   |
| 40                     | Print Help List                  |
| 44                     | RF Status                        |
| 45                     | PPP Communications Configuration |
| 60                     | Print Stored Transactions        |
| 66                     | Transaction Inquiry              |
| 77                     | Deposit Totals Inquiry           |
| 80                     | Multiple Terminal Setup          |
| 85                     | Multiple Terminal Report         |
| 99                     | Close Batch/Balance              |

| ADMIN CODES (BY FUNCTION):       |    |
|----------------------------------|----|
| Change Password                  | 12 |
| Close Batch/Balance              | 99 |
| Deposit Totals Inquiry           | 77 |
| Initialization                   | 01 |
| LOGOFF                           | 03 |
| LOGON                            | 02 |
| Multiple Terminal Report         | 85 |
| Multiple Terminal Setup          | 80 |
| Power off the terminal           | 00 |
| PPP Communications Configuration | 45 |
| Print Configuration/Parameters   | 16 |
| Print Help List                  | 40 |
| Print Stored Transactions        | 60 |
| RF Status                        | 44 |
| Terminal Configuration           | 08 |
| Training Mode                    | 05 |
| Transaction Inquiry              | 66 |

## Administrative Functions

The **ADMIN** key can also be used with two of the Function keys:

| ADMIN CODES<br>(BY FUNCTION KEY): |                             |
|-----------------------------------|-----------------------------|
| F1                                | Change Display Language     |
| F2                                | Reprint Last Receipt/Report |

| ADMIN CODES (BY FUNCTION):  |    |
|-----------------------------|----|
| Change Display Language     | F1 |
| Reprint Last Receipt/Report | F2 |

## 6.2: Initialization – ADMIN 01

**ADMIN 01** establishes the initial communication link between your terminal and Moneris. It is not necessary to perform this function on a daily basis, however, from time to time you may be requested to re-initialize your terminal.

### 6.2.1: First Initialization

| TERMINAL DISPLAY                 | OPERATOR'S ACTIONS  |
|----------------------------------|---|
| SWIPE CARD OR<br>PURCH REF OTHR  | Press <b>ADMIN</b> .  |
| ENTER ADMIN CODE                 | Key in <b>01</b> and press <b>OK</b> .                          |
| INITIALIZATION<br>ENTER PASSWORD | Enter your Password ( <i>if enabled</i> ) and press <b>OK</b> . |
| ENTER MERCH ID                   | Key in your Moneris merchant ID and press <b>OK</b> .           |
| Please Wait,<br>Processing       | Transaction in progress, please wait.                           |
| READY<br>PLEASE LOGON            | Refer to <i>Section 6.3: Logon – ADMIN 02</i> .                 |

### 6.2.2: Re-Initialization

| TERMINAL DISPLAY                 | OPERATOR'S ACTIONS  |
|----------------------------------|---|
| SWIPE CARD OR<br>PURCH REF OTHR  | Press <b>ADMIN</b> .  |
| ENTER ADMIN CODE                 | Key in <b>01</b> and press <b>OK</b> .  |
| INITIALIZATION<br>ENTER PASSWORD | Enter your Password ( <i>if enabled</i> ) and press <b>OK</b> .   |
| RETAIN SETTINGS?<br>YES NO       | Press <b>F1</b> to retain values previously entered.  |
| Please Wait,<br>Processing       | The terminal communicates with the Moneris Host.  |
| CLEAR STORAGE?<br>YES NO         | Press <b>F1</b> to clear stored financial transactions held in terminal's memory.<br>Press <b>F3</b> to retain stored financial transactions held in terminal's memory. |
| READY<br>PLEASE LOGON            | Process complete.<br>Refer to <i>Section 6.3: Logon – ADMIN 02</i> .  |

### 6.3: Logon – ADMIN 02

The terminal should be logged on to the Moneris Host at the beginning of each business day or shift. The terminal keeps a batch balance for the period.

**ADMIN 02** is required in the following instances:

- When your terminal is first set-up.
- To LOGON to your terminal when it has been LOGGED OFF.
- Whenever your terminal is re-initialized.

**IMPORTANT:** *The password is always required to LOGON.*

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS  |
|---------------------------------|---|
| READY<br>PLEASE LOGON           | Press <b>ADMIN</b> .  |
| ENTER ADMIN CODE                | Key in <b>02</b> and press <b>OK</b> .  |
| LOGON<br>ENTER PASSWORD         | Key in your Password and press <b>OK</b> .  |
| Please Wait,<br>Processing      | The terminal communicates with the Moneris Host.  |
| SWIPE CARD OR<br>PURCH REF OTHR | Process complete.<br><b>Note:</b> <i>The text Modem Online appears in the top right corner of the display screen.</i> |

### 6.4: Logoff – ADMIN 03

The terminal should be logged off the Moneris Host at the end of each business day or shift. Typically this would be done after a Close Batch transaction has been performed. Once the terminal is logged off, you can no longer process transactions (until the terminal is logged on again).

**IMPORTANT:** *The password is required to LOGON again.*

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS   |
|---------------------------------|--|
| SWIPE CARD OR<br>PURCH REF OTHR | Press <b>ADMIN</b> .   |
| ENTER ADMIN CODE                | Key in <b>03</b> and press <b>OK</b> .                               |
| LOGOFF<br>ENTER PASSWORD        | Enter your Password ( <i>if enabled</i> ) and press <b>OK</b> .      |
| Please Wait,<br>Processing      | Transaction in progress, please wait.                                |
| READY<br>PLEASE LOGON           | Process complete.<br>Refer to <i>Section 6.3: Logon – ADMIN 02</i> . |

### 6.5: Training Mode – ADMIN 05

Training mode is used to train employees how to operate the terminal in a simulated environment on Credit and Debit card transactions. Training mode can only be accessed if your terminal has been configured, initialized and logged on.

**IMPORTANT:** *Transactions processed in training mode will NOT affect customer or merchant accounts. Once training has been completed, Training Mode must be “exited” or live transactions will not be authorized and no funds will be transferred. The terminal is ready for regular customer transactions ONLY when the terminal display reads SWIPE CARD OR.*

Changes to note when the terminal is in Training Mode:

- The idle prompt displays TRAIN SWIP CRD rather than SWIPE CARD.
- All receipts for transactions performed in Training Mode have the text “\*TRAINING\*” printed at the top, middle and bottom of the receipt.
- During financial training transactions, the “\$” is replaced with an “\*”.
- The password for training transactions is always “12345”.

The following transactions can NOT be performed in Training Mode:

- Initialization (Admin 01)
- Logon (Admin 02)
- Logoff (Admin 03)
- Configuration (Admin 08)

- Change password (Admin 12)
- any Multiple Terminal configuration or reporting (Admin 80 and 85)

### 6.5.1: To Enter Training Mode

| TERMINAL DISPLAY                 | OPERATOR'S ACTIONS   |
|----------------------------------|--|
| SWIPE CARD OR<br>PURCH REF OTHR  | Press <b>ADMIN</b> .   |
| ENTER ADMIN CODE                 | Key in <b>05</b> and press <b>OK</b> .   |
| TRAINING<br>ENTER PASSWORD       | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .  |
| CLEAR TRAINING<br>TOTALS? YES NO | Press <b>F2</b> to clear all transactions in the training memory.<br>Press <b>F3</b> to retain transactions in the training memory.  |
| TRAIN SWIP CRD<br>PURCH REF OTHR | Process complete.<br><br><b>Note:</b> <i>The prompt has changed to:</i><br><b>TRAIN SWIP CRD</b><br><br><b>Note:</b> <i>The Training password is always 12345 regardless of what the Password has been set to in ADMIN 12.</i><br><br>The device may now be used to simulate Credit and Debit transactions. The transactions will not be captured and there <i>will not be any financial impact to your account.</i> |

**IMPORTANT:** *Ensure that you EXIT training mode prior to processing real customer transactions.*

### 6.5.2: To Exit Training Mode

| TERMINAL DISPLAY                 | OPERATOR'S ACTIONS   |
|----------------------------------|--|
| TRAIN SWIP CRD<br>PURCH REF OTHR | Press <b>ADMIN</b> .   |
| ENTER ADMIN CODE                 | Key in <b>05</b> and press <b>OK</b> .   |
| TRAINING<br>ENTER PASSWORD       | Enter the Training password (12345) and press <b>OK</b> .  |
| SWIPE CARD OR<br>PURCH REF OTHR  | Process complete.<br><br><b>Note:</b> <i>The prompt has changed BACK to:</i><br><b>SWIPE CARD OR</b><br><br>Real customer transactions WILL NOW be authorized and funds WILL NOW be transferred based on these transactions. |

### 6.6: Change Password – ADMIN 12

This admin function sets the password. The password can be 4 to 8 numeric digits. Do NOT set the password to “12345”. This is the password used in Training Mode and it should not be used to restrict access to live transactions.

**IMPORTANT:** *If you are setting the terminal up for the first time, you must use this function to change the default password before attempting to process any transactions or ADMIN functions.*

If PASSWORD PROTECT is enabled in ADMIN 08 (see section 5.1: *Terminal Configuration - ADMIN 08*), this password is required to access all transactions and ADMIN functions.

If PASSWORD PROTECT is disabled in ADMIN 08 (see section 5.1: *Terminal Configuration - ADMIN 08*), this password is still required to perform a LOGON transaction, to change the password and perform Multi-terminal Reporting (if enabled).

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS   |
|---------------------------------|--|
| SWIPE CARD OR<br>PURCH REF OTHR | Press <b>ADMIN</b> .   |
| ENTER ADMIN CODE                | Key in <b>12</b> and press <b>OK</b> .   |
| CURRENT PASSWORD                | Enter the current password and press <b>OK</b> .   |
| NEW PASSWORD                    | Enter the new password (min. 4, max. 8 numeric digits) and press <b>OK</b> .                               |
| REPEAT NEW PSWD                 | Enter the new password again to confirm that it was entered correctly the first time and press <b>OK</b> . |
| SWIPE CARD OR<br>PURCH REF OTHR | Process complete.  |

### 6.7: Printing a Help List – ADMIN 40

Prints a list of the terminal administrative functions.

| TERMINAL DISPLAY                  | OPERATOR'S ACTIONS  |
|-----------------------------------|---|
| SWIPE CARD OR<br>PURCH REF OTHR   | Press <b>ADMIN</b> .  |
| ENTER ADMIN CODE                  | Key in <b>40</b> and press <b>OK</b> .                          |
| PRINT HELP LIST<br>ENTER PASSWORD | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> . |
| PRINTING                          | Transaction in progress, please wait.                           |
| SWIPE CARD OR<br>PURCH REF OTHR   | Process complete.   |

## 6.8: RF Status - ADMIN 44

This function takes the modem off-line in order check the strength of the signal the terminal is receiving from the wireless network.

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS   |
|---------------------------------|--|
| SWIPE CARD OR<br>PURCH REF OTHR | Press <b>ADMIN</b> .   |
| ENTER ADMIN CODE                | Key in <b>44</b> and press <b>OK</b> .   |
| RF STATUS<br>ENTER PASSWORD     | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .  |
| Please Wait,<br>Closing Network | Transaction in progress, please wait.  |
| SWIPE CARD OR<br>PURCH REF OTHR | <p>Process complete.</p> <p><b>Note:</b> <i>The signal strength symbol appears in the top right corner of the display screen.</i></p> <p>The terminal will reconnect to the wireless network at the beginning of the next transaction that requires communication with the Moneris Host.</p> |

### 6.9: Print Stored Transactions - ADMIN 60

Use this function to print a list of all APPROVED (successful) transactions by date or by batch number as well as transaction type totals for all card types and grand totals by transaction type.

**Note:** *The terminal's memory retains up to 500 transactions. When capacity is reached, the oldest transaction drops from memory. If your terminal is replaced, its memory is NOT transferred to the replacement terminal. This will have no financial impact on your business bank account.*

| TERMINAL DISPLAY   | OPERATOR'S ACTIONS  |
|--|---|
| SWIPE CARD OR<br>PURCH REF OTHR  | Press <b>ADMIN</b> .  |
| ENTER ADMIN CODE   | Enter <b>60</b> and press <b>OK</b> .   |
| PRT STORED TRANS<br>ENTER PASSWORD   | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .   |
| SELECT BY:<br>BATCH                      DATE                                | Press <b>F1</b> for a list of transactions in a specific batch.<br>Press <b>F3</b> for a list of transactions that occurred on a specific date. |
| <b>If F1 was selected for a listing of transactions in a specific batch:</b> |   |
| ENTER BATCH<br>NUMBER  | Key in the batch number and press <b>OK</b> .<br>For the current open batch just press <b>OK</b> .  |
| <b>If F3 was selected for a listing of transactions on a specific date:</b>  |   |
| ENTER DATE<br>(YY) MMDD  | Enter date (YY)MMDD (YY is optional) and press <b>OK</b> .<br>For the current date, just press <b>OK</b> .                                      |
| PROCESSING<br>PRINTING   | Keep the stored transaction printout for your files.<br>The terminal returns automatically to the idle prompt.                                  |
| SWIPE CARD OR<br>PURCH REF OTHR  | Process complete.   |

## 6.10: Transaction Inquiry – ADMIN 66

Use this function to view or print details of a transaction or transactions by card type, number, amount, transaction code or date. If more than one transaction fits the selected criteria (see below for criteria codes), the results are displayed or printed in chronological order.

**IMPORTANT:** *To enter alphabetic characters as search criteria, press the number key containing the character then press the ADMIN key until the desired character is displayed.*

| TERMINAL DISPLAY                    | OPERATOR'S ACTIONS  |
|-------------------------------------|---|
| SWIPE CARD OR<br>PURCH REF OTHR     | Press <b>ADMIN</b> .  |
| ENTER ADMIN CODE                    | Key in <b>66</b> and press <b>OK</b> .  |
| TRANSAC INQUIRY<br>ENTER PASSWORD   | Key in your password ( <i>if enabled</i> ) and press <b>OK</b> .  |
| ENTER CARD TYPE                     | Key in a Card Type code and press <b>OK</b> OR<br>Press <b>OK</b> to include all card types.<br>See below for criteria codes.   |
| ENTER CARD<br>NUMBER                | Enter a card number and press <b>OK</b> OR<br>Press <b>OK</b> to include all card numbers.  |
| ENTER AMOUNT                        | Key in a transaction amount and press <b>OK</b> .<br>OR<br>Press <b>OK</b> to include transactions of any amount.   |
| ENTER TRANS CODE                    | Key in a Transaction Type code and press <b>OK</b> OR<br>Press <b>OK</b> to include all transaction types.<br>See below for criteria codes.   |
| ENTER DATE<br>(YY)MMDD              | Key in a date and press <b>OK</b> OR<br>Press <b>OK</b> to include all dates.   |
| PRINT DISPLAY                       | Press <b>F1</b> to print the list of matching transactions.<br>Press <b>F3</b> to view matching transactions on the display screen.   |
| <b>If F1 (print) was pressed:</b>   |   |
| PRINTING                            | The list of matching transactions is printed and the terminal returns automatically to the idle prompt.   |
| <b>If F3 (display) was pressed:</b> |   |
| START OF RECORDS                    | The first matching transaction is displayed.<br>Press <b>F1</b> to scroll down through the list.<br>Press <b>F2</b> to scroll up through the list.<br>Press <b>F3</b> to view additional information about the displayed transaction. |

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS   |
|---------------------------------|--|
| END OF RECORDS                  | The terminal has displayed all matching transactions.<br>Press <b>CAN</b> to return to the idle prompt |
| SWIPE CARD OR<br>PURCH REF OTHR | Process complete.  |

### 6.10.1: Search Criteria Codes

#### Card Type Codes

Use these codes to select a specific card type when performing a Transaction Inquiry (Admin 66)

| CARD TYPE        | ENTER... |
|------------------|----------|
| Debit            | D        |
| Visa             | V        |
| MasterCard       | M        |
| Diners Card      | DI       |
| American Express | A        |
| enRoute          | E        |

#### Transaction Type Codes

Use these codes to select a specific transaction type when performing a Transaction Inquiry (Admin 66)

| TRANSACTION TYPE    | IF THE TERMINAL DISPLAY IS: |        |
|---------------------|-----------------------------|--------|
|                     | ENGLISH                     | FRENCH |
| Purchase            | P                           | AC     |
| Refund              | R                           | R      |
| Pre-Auth            | PA                          | PA     |
| Advice              | A                           | A      |
| Purchase Correction | PC                          | CA     |
| Refund Correction   | RC                          | CR     |

### 6.10.2: Displayed Transactions

The first screen of information about a matching transaction contains the card number (NNNNNNNNNN), the transaction code (tt), the card type code (cc) and the transaction amount (\$nnnnnn.nn):

|                 |  |
|-----------------|--|
| First<br>Screen | NNNNNNNNNNNNNNNNNNN<br>tt cc \$nnnnnn.nn |
|-----------------|--|

The second screen of information about a matching transaction (reached by pressing **F3**) contains the credit or account type code (pp), the Auth # (AAAAAA), the original sequence number (sss-sss), the credit expiry date (MMYY) or a blank for debit transactions, and the date and time the transaction was processed (mmdd/hhmm):

|                  |                                    |
|------------------|------------------------------------|
| Second<br>Screen | ppAAAAAA sss-sss<br>MMYY mmdd/hhmm |
|------------------|------------------------------------|

The third screen of information about a matching transaction (reached by pressing **F3**) contains the invoice number (IIIII) and only appears if the invoice number prompt has been enabled and a value was entered at the prompt during the transaction:

|                 |       |
|-----------------|-------|
| Third<br>Screen | IIIII |
|-----------------|-------|



# CHAPTER 7: Processing Credit Card Transactions

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The terminal electronically authorizes and captures credit transactions. These transactions are settled with the merchant account during the Batch Close process. The functionality for completing a purchase will vary depending upon how the terminal has been configured.

**IMPORTANT:** *The instructions in this manual assume that password protection and the invoice number prompt have been enabled. These steps are shaded to indicate that they are optional.*

This section includes instructions on performing the following transactions:

- Purchases
- Purchase Corrections
- Refunds
- Refund Corrections
- Pre-authorized Credit Purchases
- Pre-authorization Completions

**Note:** *Before you begin a financial transaction, the terminal must be logged on (refer to section 6.3: Logon – ADMIN 02 for instructions).*

Additional options that affect credit transactions:

- password: shaded and noted as “*(if enabled)*” in instructions
- invoice number: shaded and noted as “*(if enabled)*” in instructions
- tip entry (see section 7.8: *Purchase with Tip Entry* for instructions)

## Processing Credit Card Transactions

### 7.1: Purchase

This transaction electronically authorizes and captures Credit card purchases. Settlement to your business account occurs electronically for all CLOSED batches.

| TERMINAL DISPLAY                   | OPERATOR'S ACTIONS   |
|------------------------------------|--|
| SWIPE CARD OR<br>PURCH REF OTHR    | Swipe the customer card.<br><b>Note:</b> See section 7.9: <i>Manual Entry of a Credit Card for Purchase</i> for instructions on keying in a credit card number for a Purchase transaction. |
| PURCHASE<br>ENTER PASSWORD         | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .  |
| 9999999999999999<br>INVOICE NUMBER | The card number of the card you swiped appears on the display (99999...).<br>Enter an Invoice Number ( <i>if enabled</i> ) and press <b>OK</b> .   |
| PURCHASE<br>ENTER AMOUNT           | Enter the amount of the purchase and press <b>OK</b> .   |
| Please Wait,<br>Processing         | Transaction in progress, please wait.  |
| APPROVED<br>#####                  | No operator action required.<br>The Merchant copy of the receipt is printed.<br>Have the cardholder sign this copy.  |
| PRESS ENTER FOR<br>NEXT COPY       | Tear off the merchant copy of the receipt and have the cardholder sign it.<br>Press <b>OK</b> to print the Cardholder copy.  |
| PRINTING<br>PURCHASE               | Give the Cardholder copy to your customer and keep the signed Merchant copy for your records.  |
| APPROVED<br>#####                  | Press <b>OK</b> .  |
| SELECT<br>REPRINT EXIT             | Press <b>F1</b> for an additional copy of the receipt.<br>Press <b>F3</b> to end transaction.  |
| SWIPE CARD OR<br>PURCH REF OTHR    | Transaction complete.  |

## 7.2: Purchase Correction

You can correct a credit purchase transaction processed in the current batch on the same terminal.

You must process this correction transaction on the same day in the same batch as the original (incorrect) purchase and it must be for the full value of the original (incorrect) purchase.

To complete the sale, process another Purchase transaction for the correct amount.

| TERMINAL DISPLAY                   | OPERATOR'S ACTIONS   |
|------------------------------------|--|
| SWIPE CARD OR<br>PURCH REF OTHR    | Press <b>F3</b> to select OTHR.  |
| SWIPE CARD OR<br>PAUTH ADV OTHR    | Press <b>F3</b> to select OTHR.  |
| SWIPE CARD OR<br>PCOR RCOR OTHR    | Press <b>F1</b> to select PURCHASE CORRECTION.   |
| PURCHASE CORRECT<br>ENTER PASSWORD | Enter your password and press <b>OK</b> .  |
| PURCHASE CORRECT<br>SWIPE CARD     | Swipe the customer card.   |
| 9999999999999999<br>INVOICE NUMBER | Enter the Invoice Number ( <i>if enabled</i> ) listed on the original receipt and press <b>OK</b> .            |
| ENTER ORIGINAL<br>AUTH NUMBER      | Enter the 6-digit AUTH# from the Purchase receipt and press <b>OK</b> .  |
| PURCHASE CORRECT<br>ENTER AMOUNT   | Enter the amount of the original purchase and press <b>OK</b> .  |
| Please Wait,<br>Processing         | Transaction in progress, please wait.  |
| APPROVED<br>000000                 | No operator action required.<br>The Merchant copy of receipt is printed.<br>You, the merchant, sign this copy. |
| PRESS ENTER FOR<br>NEXT COPY       | Press <b>OK</b> to print the Cardholder copy.  |
| PRINTING<br>PURCHASE CORRECT       | Give the Cardholder copy to your customer and keep the signed Merchant copy for your records.                  |
| APPROVED<br>000000                 | Press <b>OK</b> .  |
| SELECT<br>REPRINT EXIT             | Press <b>F1</b> REPRINT for a third printout of receipt.<br>Press <b>F3</b> EXIT to end transaction.           |
| SWIPE CARD OR<br>PURCH REF OTHR    | Transaction complete.  |

## Processing Credit Card Transactions

### 7.3: Refund

This transaction allows you to perform a refund for any credit purchase, regardless of the batch or terminal on which the original transaction was processed. The refund can be for the full or partial value of the original purchase amount.

| TERMINAL DISPLAY                   | OPERATOR'S ACTIONS   |
|------------------------------------|--|
| SWIPE CARD OR<br>PURCH REF OTHR    | Press <b>F2</b> to select REF (REFUND).  |
| REFUND<br>ENTER PASSWORD           | Enter your password and press <b>OK</b> .  |
| REFUND<br>SWIPE CARD               | Swipe the customer card.   |
| 9999999999999999<br>INVOICE NUMBER | Enter the Invoice Number ( <i>if enabled</i> ) from the Purchase receipt and press <b>OK</b> .                     |
| ENTER ORIGINAL<br>AUTH NUMBER      | Enter the authorization number from the original receipt and press <b>OK</b> .                                     |
| REFUND<br>ENTER AMOUNT             | Enter amount to be refunded and press <b>OK</b> .  |
| Please Wait,<br>processing         | Transaction in progress, please wait.  |
| APPROVED<br>000000                 | No operator action required.<br>The Merchant copy of the receipt is printed.<br>You, the merchant, sign this copy. |
| PRESS ENTER FOR<br>NEXT COPY       | Press <b>OK</b> to print the Cardholder copy.  |
| PRINTING<br>REFUND                 | Give the Cardholder copy to your customer and keep the signed Merchant copy for your records.                      |
| APPROVED<br>000000                 | Press <b>OK</b> .  |
| SELECT<br>REPRINT EXIT             | Press <b>F1</b> REPRINT for a third printout of receipt.<br>Press <b>F3</b> EXIT to end transaction.               |
| SWIPE CARD OR<br>PURCH REF OTHR    | Transaction complete.  |

## 7.4: Refund Correction

You can correct a credit refund transaction processed in the current batch on the same terminal.

You must process this correction transaction on the same day in the same batch as the original (incorrect) refund and it must be for the full value of the original (incorrect) refund.

To complete the refund, process another Refund transaction for the correct amount.

| TERMINAL DISPLAY                   | OPERATOR'S ACTIONS  |
|------------------------------------|---|
| SWIPE CARD OR<br>PURCH REF OTHR    | Press <b>F3</b> to select OTHR.   |
| SWIPE CARD OR<br>PAUTH ADV OTHR    | Press <b>F3</b> to select OTHR.   |
| SWIPE CARD OR<br>PCOR RCOR OTHR    | Press <b>F2</b> to select REFUND CORRECTION.  |
| REFUND<br>ENTER PASSWORD           | Enter your password and press <b>OK</b> .   |
| REFUND CORRECT<br>SWIPE CARD       | Swipe the customer card.  |
| 9999999999999999<br>INVOICE NUMBER | Enter the Invoice Number ( <i>if enabled</i> ) and press <b>OK</b> .  |
| ENTER ORIGINAL<br>AUTH NUMBER      | Enter the 6-digit AUTH# from the Refund receipt and press <b>OK</b> .   |
| REFUND CORRECT<br>ENTER AMOUNT     | Enter the amount of the original refund and press <b>OK</b> .   |
| Please Wait,<br>Processing         | Transaction in progress, please wait.   |
| APPROVED<br>000000                 | No operator action required.<br>The Merchant copy of the receipt is printed.<br>Have the cardholder sign this copy. |
| PRESS ENTER FOR<br>NEXT COPY       | Press <b>OK</b> to print the Cardholder copy.   |
| PRINTING<br>REFUND CORRECT         | Give the Cardholder copy to your customer and keep the signed Merchant copy for your records.                       |
| APPROVED<br>000000                 | Press <b>OK</b> .   |
| SELECT<br>REPRINT EXIT             | Press <b>F1</b> REPRINT for a third printout of receipt.<br>Press <b>F3</b> EXIT to end transaction.                |

## Processing Credit Card Transactions

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS    |
|---------------------------------|-----------------------|
| SWIPE CARD OR<br>PURCH REF OTHR | Transaction complete. |

### 7.5: Pre-Authorization

Use this transaction to obtain authorization for a purchase transaction where the final dollar value of the transaction is unknown. (e.g.) In a restaurant environment, a tip may be added. This function provides authorization **ONLY** and does not **CAPTURE** the transaction for deposit. Moneris will capture the final purchase amount when a Pre-authorized Completion transaction is performed.

| TERMINAL DISPLAY                   | OPERATOR'S ACTIONS  |
|------------------------------------|---|
| SWIPE CARD OR<br>PURCH REF OTHR    | Press <b>F3</b> to select OTHR.   |
| SWIPE CARD OR<br>PAUTH ADV OTHR    | Press <b>F1</b> to select PRE-AUTHORIZATION.  |
| PREAUTHORIZATION<br>ENTER PASSWORD | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .   |
| PREAUTHORIZATION<br>SWIPE CARD     | Swipe the customer's Credit card.   |
| 9999999999999999<br>INVOICE NUMBER | Enter the Invoice Number ( <i>if enabled</i> ) and press <b>OK</b> .  |
| PREAUTHORIZATION<br>ENTER AMOUNT   | Enter amount to be pre-authorized and press <b>OK</b> .   |
| Please Wait,<br>Processing         | Transaction in progress, please wait.   |
| APPROVED<br>000000                 | No operator action required.<br>The Merchant copy of the receipt is printed.<br>Have the cardholder sign this copy. |
| PRESS ENTER FOR<br>NEXT COPY       | Press <b>OK</b> to print the cardholder copy.   |
| PRINTING<br>PREAUTHORIZATION       | Give the Cardholder copy to your customer and retain the SIGNED Merchant copy for your records.                     |
| APPROVED<br>000000                 | Press <b>OK</b> .   |
| SELECT<br>REPRINT EXIT             | Press <b>F1</b> REPRINT for a third printout of receipt.<br>Press <b>F3</b> EXIT to end transaction.                |
| SWIPE CARD OR<br>PURCH REF OTHR    | Transaction complete.   |

## 7.6: Pre-Authorization Completion (Advice) from the SAME BATCH

This function completes a pre-authorization purchase processed on the terminal in a closed batch. This function captures the transaction for settlement.

| TERMINAL DISPLAY                     | OPERATOR'S ACTIONS  |
|--------------------------------------|---|
| SWIPE CARD OR<br>PURCH REF OTHR      | Press <b>F3</b> to select OTHR.   |
| SWIPE CARD OR<br>PAUTH ADV OTHR      | Press <b>F2</b> to select ADVICE.   |
| ADVICE<br>ENTER PASSWORD             | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .   |
| FIND ORIGINAL?<br>YES NO             | Press <b>F1</b> YES to find the original transaction.   |
| ENTER SEQUENCE #<br>OF ORIGINAL TRAN | Enter the last 6 digits of the RCPT # on the Pre-authorization receipt and press <b>OK</b> .            |
| 9999999999999999<br>OK TO CONTINUE   | If the correct Credit card number is displayed, press <b>OK</b> .                                       |
| OLD \$#.##<br>ENTER NEW AMOUNT       | Enter the final amount of the transaction (including tip amount if any) and press <b>OK</b> .           |
| Please Wait,<br>Processing           | Transaction in progress, please wait.   |
| APPROVED<br>000000                   | No operator action required.<br>The Merchant copy of receipt is printed.                                |
| PRESS ENTER FOR<br>NEXT COPY         | Press <b>OK</b> to print the Cardholder copy.   |
| PRINTING<br>ADVICE                   | Retain this Merchant copy with the Merchant copy of the original Pre-Auth transaction for your records. |
| APPROVED<br>000000                   | Press <b>OK</b> .   |
| SELECT<br>REPRINT EXIT               | Press <b>F1</b> REPRINT for a third printout of receipt.<br>Press <b>F3</b> EXIT to end transaction.    |
| SWIPE CARD OR<br>PURCH REF OTHR      | Transaction complete.   |

### 7.7: Pre-Authorization Completion (Advice) from a PREVIOUS BATCH

This function completes a pre-authorization purchase processed on the terminal in a closed batch or a voice-authorized transaction. This function captures the transaction for settlement.

| TERMINAL DISPLAY                               | OPERATOR'S ACTIONS   |
|--|--|
| SWIPE CARD OR<br>PURCH REF OTHR                | Press <b>F3</b> to select OTHR.  |
| SWIPE CARD OR<br>PAUTH ADV OTHR                | Press <b>F2</b> to select ADV (ADVICE).  |
| ADVICE<br>ENTER PASSWORD                       | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .  |
| FIND ORIGINAL?<br>YES NO                       | Press <b>F3</b> NO to re-enter the card and transaction information.   |
| ADVICE<br>SWIPE CARD                           | Swipe the card (if it is still available) OR<br>Key in the card number from the Pre-Auth receipt and press <b>OK</b> . |
| <b>If you swiped the credit card:</b>          |  |
| 9999999999999999<br>INVOICE NUMBER             | Enter the Invoice Number ( <i>if enabled</i> ) from the Pre-authorization receipt and press <b>OK</b> .                |
| <b>If you keyed in the credit card number:</b> |  |
| EXPIRY DATE<br>MMYY                            | Key in the expiry date and press <b>OK</b> .   |
| ADVICE<br>INVOICE NUMBER                       | Enter the Invoice Number ( <i>if enabled</i> ) from the Pre-authorization receipt and press <b>OK</b> .                |
| ENTER ORIGINAL<br>AUTH NUMBER                  | Enter the AUTH# from the Pre-authorization receipt and press <b>OK</b> .   |
| ADVICE<br>ENTER AMOUNT                         | Enter the final amount of the transaction (including tip amount if any) and press <b>OK</b> .                          |
| Please Wait,<br>Processing                     | Transaction in progress, please wait.  |
| APPROVED<br>000000                             | No operator action required.<br>The Merchant copy of the receipt is printed.   |
| PRESS ENTER FOR<br>NEXT COPY                   | Press <b>OK</b> to print the Cardholder copy.  |
| PRINTING<br>ADVICE                             | Retain this Merchant copy with the Merchant copy of the original Pre-Auth transaction for your records.                |

## Processing Credit Card Transactions

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| TERMINAL DISPLAY                | OPERATOR'S ACTIONS   |
|---------------------------------|--|
| APPROVED<br>000000              | Press <b>OK</b> .  |
| REPRINT      SELECT<br>EXIT     | Press <b>F1</b> REPRINT for a third printout of receipt.<br>Press <b>F3</b> EXIT to end transaction. |
| SWIPE CARD OR<br>PURCH REF OTHR | Transaction complete.  |

## Processing Credit Card Transactions

### 7.8: Purchase with Tip Entry

This transaction electronically authorizes and captures Credit card purchases. Settlement to your business account occurs electronically for all CLOSED batches.

| TERMINAL DISPLAY                   | OPERATOR'S ACTIONS  |
|------------------------------------|---|
| SWIPE CARD OR<br>PURCH REF OTHR    | Swipe customer card.  |
| PURCHASE<br>ENTER PASSWORD         | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .   |
| 9999999999999999<br>INVOICE NUMBER | The card number of the card you swiped appears on the display (99999...)<br>Enter an Invoice Number ( <i>if enabled</i> ) and press <b>OK</b> . |
| PURCHASE<br>ENTER AMOUNT           | Enter the amount of the purchase and press <b>OK</b> .  |
| PRESS OK AND<br>PASS TO CUSTOMER   | Press <b>OK</b> to confirm the amount. Pass terminal to customer.   |
| WELCOME<br>BONJOUR                 | The customer waits for the Purchase prompt to appear.   |
| PURCHASE<br>\$00.00 OK?            | To accept the Purchase amount, the customer will press <b>OK</b> .  |
| ENTER TIP AMOUNT<br>\$00.00        | The Customer will enter a tip amount ( <i>if enabled</i> ) and press <b>OK</b> .  |
| PURCHASE<br>\$00.00 OK?            | To accept the new purchase amount (with tip included if enabled) customer presses <b>OK</b> .   |
| PURCHASE<br>\$00.00                | Retrieve terminal from customer.  |
| Please Wait,<br>Processing         | Transaction in progress, please wait.   |
| APPROVED<br>000000                 | The Merchant copy of receipt is printed.<br>Have the cardholder sign this copy.   |
| PRESS ENTER FOR<br>NEXT COPY       | Press <b>OK</b> to print the Cardholder copy.   |
| PRINTING<br>PURCHASE               | Give the Cardholder copy to your customer and retain the SIGNED Merchant copy for your records.   |
| APPROVED<br>000000                 | Press <b>OK</b> .   |
| SELECT<br>REPRINT EXIT             | Press <b>F1</b> for a third printout of receipt.<br>Press <b>F3</b> to end transaction.   |
| SWIPE CARD OR<br>PURCH REF OTHR    | Transaction complete.   |

## 7.9: Manual Entry of a Credit Card for Purchase

If the credit card stripe cannot be read on the terminal's magnetic stripe reader (this may be a card stripe problem or a stripe reader problem), you can process the transaction by keying in the credit card information.

**IMPORTANT:** *Be sure to obtain an imprint of the credit card (using a paper sales draft and a manual imprinter) in order to minimize the possibility of chargeback issues.*

| TERMINAL DISPLAY                  | OPERATOR'S ACTIONS   |
|-----------------------------------|--|
| SWIPE CARD OR<br>PURCH REF OTHR   | Key in the card number (it will appear on the display as it is entered) and press <b>OK</b> .<br><br><b>Note:</b> <i>See section 7.1: Purchase for instructions on swiping a credit card for a Purchase transaction.</i> |
| PURCHASE<br>ENTER PASSWORD        | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .  |
| EXPIRY DATE<br>MMYY               | Key in the 4-digit expiry from the credit card and press <b>OK</b> .   |
| PURCHASE<br>INVOICE NUMBER        | Key in an Invoice Number ( <i>if enabled</i> ) and press <b>OK</b><br>OR<br>Simply press <b>OK</b> to leave this field blank.  |
| PURCHASE<br>ENTER AMOUNT          | Enter the amount of the purchase and press <b>OK</b> .   |
| Please Wait,<br>Processing        | Transaction in progress, please wait.  |
| PRESS ENTER FOR<br>NEXT COPY      | Tear off the merchant copy of the receipt and have the cardholder sign it.<br>Press <b>OK</b> to print customer copy.  |
| PRINTING<br>PURCHASE              | Give the second copy to your customer and retain the SIGNED COPY for your records.   |
| APPROVED<br>#####                 | Press <b>OK</b> .  |
| SELECT<br>REPRINT            EXIT | Press <b>F1</b> for an additional copy of the receipt.<br>Press <b>F3</b> to end transaction.  |
| SWIPE CARD OR<br>PURCH REF OTHR   | Transaction complete.  |



# CHAPTER 8: Processing Debit Card Transactions

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The terminal electronically authorizes and captures debit transactions. These transactions are settled with the merchant account during the Batch Close process. The functionality for completing a purchase will vary depending upon how the terminal has been configured.

**IMPORTANT:** *The instructions in this manual assume that password protection and the invoice number prompt have been enabled. These steps are shaded to indicate that they are optional.*

This section includes instructions on performing the following transactions:

- Purchases
- Purchase Corrections
- Refunds
- Refund Corrections

**Note:** *Before you begin a financial transaction, the terminal must be logged on (refer to section 6.3: Logon – ADMIN 02 for instructions).*

Additional options that affect debit transactions:

- password: shaded and noted as “*(if enabled)*” in instructions
- invoice number: shaded and noted as “*(if enabled)*” in instructions
- tip entry (see section 8.5: *Debit Purchase with Tip Entry* for instructions)

## Processing Debit Card Transactions

### 8.1: Purchase

This transaction electronically authorizes and captures Debit card purchases. Settlement to your business account occurs electronically for all CLOSED batches.

| TERMINAL DISPLAY                 | OPERATOR'S ACTIONS   | CUSTOMER'S ACTIONS  |
|----------------------------------|--|---|
| SWIPE CARD OR<br>PURCH REF OTHR  | Swipe customer card.   |   |
| PURCHASE<br>ENTER PASSWORD       | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .                          |   |
| PURCHASE<br>INVOICE NUMBER       | Enter Invoice Number ( <i>if enabled</i> ) and press <b>OK</b> .                         |   |
| PURCHASE<br>ENTER AMOUNT         | Enter amount of the purchase transaction and press <b>OK</b> .                           |   |
| PRESS OK AND<br>PASS TO CUSTOMER | Press <b>OK</b> to confirm the amount. Pass terminal to customer.                        |   |
| WELCOME<br>BONJOUR               | No operator action required.   | Customer takes terminal from the operator.                                      |
| PURCHASE<br>\$00.00 OK?          |  | Press <b>OK</b> to accept the purchase amount displayed.                        |
| SELECT ACCOUNT<br>CHQ SAV        |  | Press <b>F1</b> CHQ for chequing acct.<br>Press <b>F3</b> SAV for savings acct. |
| ENTER PIN AND OK<br>PIN =        |  | Enter PIN number and press <b>OK</b> .  |
| PURCHASE<br>* \$00.00            | Retrieve terminal from customer.   |   |
| Please Wait,<br>Processing       | Transaction in progress, please wait.<br>Return card to customer.                        |   |
| APPROVED<br>000000               | The Merchant copy of the receipt will print.   |   |
| PRESS ENTER FOR<br>NEXT COPY     | Press <b>OK</b> to print the cardholder copy of the receipt.                             |   |
| PRINTING<br>PURCHASE             | Give the cardholder copy to your customer and retain the Merchant copy for your records. |   |
| APPROVED<br>000000               | Press <b>OK</b> .  |   |
| REPRINT SELECT<br>EXIT           | Press <b>F1</b> for a third printout of receipt.<br>Press <b>F3</b> to end transaction.  |   |

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS    | CUSTOMER'S ACTIONS |
|---------------------------------|-----------------------|--------------------|
| SWIPE CARD OR<br>PURCH REF OTHR | Transaction complete. |                    |

### 8.2: Purchase Correction

You can correct a debit purchase transaction processed in the current batch on the same terminal.

You must process this correction transaction on the same day in the same batch as the original (incorrect) purchase and it must be for the full value of the original (incorrect) purchase.

To complete the sale, process another Purchase transaction for the correct amount.

| TERMINAL DISPLAY                   | OPERATOR'S ACTIONS   | CUSTOMER'S ACTIONS  |
|------------------------------------|--|---|
| SWIPE CARD OR<br>PURCH REF OTHR    | Press <b>F3</b> to select OTHER.   |   |
| SWIPE CARD OR<br>PAUTH ADV OTHR    | Press <b>F3</b> to select OTHER.   |   |
| SWIPE CARD OR<br>PCOR RCOR OTHR    | Press <b>F1</b> to select PURCHASE CORRECTION.   |   |
| PURCHASE CORRECT<br>ENTER PASSWORD | Enter your password and press <b>OK</b> .  |   |
| PURCHASE CORRECT<br>SWIPE CARD     | Swipe the customer card.   |   |
| PURCHASE CORRECT<br>INVOICE NUMBER | Enter the original Invoice/P.O. number listed on receipt ( <i>if enabled</i> ) and press <b>OK</b> . |   |
| ENTER ORIGINAL<br>AUTH NUMBER      | Enter the 6-digit AUTH# from the Purchase receipt and press <b>OK</b> .                              |   |
| PURCHASE CORRECT<br>ENTER AMOUNT   | Enter amount of original purchase and press <b>OK</b> .  |   |
| PRESS OK AND<br>PASS TO CUSTOMER   | Press <b>OK</b> to confirm the amount. Pass terminal to customer.                                    |   |
| WELCOME<br>BONJOUR                 | No operator action required.   |   |
| PURCHASE CORRECT<br>\$00.00 OK?    |  | If customer accepts the correction amount, they press <b>OK</b> .               |
| SELECT ACCOUNT<br>CHQ SAV          |  | Press <b>F1</b> CHQ for chequing acct.<br>Press <b>F3</b> SAV for savings acct. |

## Processing Debit Card Transactions

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS   | CUSTOMER'S ACTIONS                     |
|---------------------------------|--|--|
| ENTER PIN & OK<br>PIN =         |  | Enter PIN number and press <b>OK</b> . |
| PURCHASE CORRECT<br>* \$00.00   | Retrieve terminal from customer.   |  |
| Please Wait,<br>PRocessing      | Transaction in progress, please wait.<br>Return card to customer.                                    |  |
| APPROVED<br>000000              | The Merchant copy of the receipt will print.   |  |
| PRESS ENTER FOR<br>NEXT COPY    | Press <b>OK</b> to print the cardholder copy.  |  |
| PRINTING<br>PURCHASE CORRECT    | Give the cardholder copy to your customer and keep the Merchant copy for your records.               |  |
| APPROVED<br>000000              | Press <b>OK</b> .  |  |
| REPRINT      SELECT<br>EXIT     | Press <b>F1</b> REPRINT for a third printout of receipt.<br>Press <b>F3</b> EXIT to end transaction. |  |
| SWIPE CARD OR<br>PURCH REF OTHR | Transaction complete.  |  |

### 8.3: Refund

This transaction allows you to perform a refund for any debit purchase, regardless of the batch or terminal on which the original transaction was processed. The refund can be for the full or partial value of the original purchase amount.

| TERMINAL DISPLAY                   | OPERATOR'S ACTIONS  | CUSTOMER'S ACTIONS  |
|------------------------------------|---|---|
| SWIPE CARD OR<br>PURCH REF OTHR    | Press <b>F2</b> to select REF (REFUND).   |   |
| PURCHASE CORRECT<br>ENTER PASSWORD | Enter your password and press <b>OK</b> .   |   |
| REFUND<br>SWIPE CARD               | Swipe the customer's Debit card.  |   |
| REFUND<br>INVOICE NUMBER           | Enter the original Invoice number listed on receipt ( <i>if enabled</i> ) and press <b>OK</b> . |   |
| REFUND<br>ENTER AMOUNT             | Key in the amount of the refund and press <b>OK</b> .   |   |
| PRESS OK AND<br>PASS TO CUSTOMER   | Press <b>OK</b> to confirm the amount. Pass terminal to customer.                               |   |
| WELCOME<br>BONJOUR                 | No operator action required.  |   |
| REFUND<br>\$00.00 OK?              |   | If customer accepts the refund amount, they press <b>OK</b> .                   |
| SELECT ACCOUNT<br>CHQ SAV          |   | Press <b>F1</b> CHQ for chequing acct.<br>Press <b>F3</b> SAV for savings acct. |
| ENTER PIN & OK<br>PIN =            |   | Enter PIN number and press <b>OK</b> .  |
| REFUND<br>* \$00.00                | Retrieve terminal from customer.  |   |
| Please Wait,<br>Processing         | Transaction in progress, please wait.<br>Return card to customer.                               |   |
| APPROVED<br>000000                 | The Merchant copy of the receipt will print.  |   |
| PRESS ENTER FOR<br>NEXT COPY       | Press <b>OK</b> to print the cardholder copy.   |   |
| PRINTING<br>REFUND                 | Give the cardholder copy to your customer and retain the Merchant copy for your records.        |   |
| APPROVED<br>000000                 | Press <b>OK</b> .   |   |

## Processing Debit Card Transactions

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| TERMINAL DISPLAY                    | OPERATOR'S ACTIONS   | CUSTOMER'S ACTIONS |
|-------------------------------------|--|--------------------|
| SELECT<br>REPRINT      EXIT         | Press <b>F1</b> REPRINT for a third printout of receipt.<br>Press <b>F3</b> EXIT to end transaction. |                    |
| SWIPE CARD OR<br>PURCH   REF   OTHR | Transaction complete.  |                    |

## 8.4: Refund Correction

You can correct a debit refund transaction processed in the current batch on the same terminal.

You must process this correction transaction on the same day in the same batch as the original (incorrect) refund and it must be for the full value of the original (incorrect) refund.

To complete the refund, process another Refund transaction for the correct amount.

| TERMINAL DISPLAY                   | OPERATOR'S ACTIONS  | CUSTOMER'S ACTIONS  |
|------------------------------------|---|---|
| SWIPE CARD OR<br>PURCH REF OTHR    | Press <b>F3</b> to select OTH (OTHER).  |   |
| SWIPE CARD OR<br>PAUTH ADV OTHR    | Press <b>F3</b> to select OTH (OTHER).  |   |
| SWIPE CARD OR<br>PCOR RCOR OTHR    | Press <b>F2</b> to select RCOR (REFUND CORRECTION).   |   |
| PURCHASE CORRECT<br>ENTER PASSWORD | Enter your password and press <b>OK</b> .   |   |
| REFUND CORRECT<br>SWIPE CARD       | Swipe the customer's Debit card.  |   |
| REFUND CORRECT<br>INVOICE NUMBER   | Enter the original Invoice number listed on receipt ( <i>if enabled</i> ) and press <b>OK</b> . |   |
| ENTER ORIGINAL<br>AUTH NUMBER      | Enter the 6-digit AUTH# from the original Refund receipt and press <b>OK</b> .                  |   |
| REFUND CORRECT<br>ENTER AMOUNT     | Enter amount of original refund and press <b>OK</b> .   |   |
| PRESS OK AND<br>PASS TO CUSTOMER   | Press <b>OK</b> to confirm the amount. Pass terminal to customer.                               |   |
| WELCOME<br>BONJOUR                 | No operator action required.  |   |
| REFUND CORRECT<br>\$00.00 OK?      |   | If customer accepts the refund correction amount, they press <b>OK</b> .        |
| SELECT ACCOUNT<br>CHQ SAV          |   | Press <b>F1</b> CHQ for chequing acct.<br>Press <b>F3</b> SAV for savings acct. |
| ENTER PIN & OK<br>PIN =            |   | Enter PIN number and press <b>OK</b> .  |
| REFUND CORRECT<br>* \$00.00        | Retrieve terminal from customer.  |   |

## Processing Debit Card Transactions

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS  | CUSTOMER'S ACTIONS |
|---------------------------------|---|--------------------|
| Please Wait,<br>Processing      | Transaction in progress, please wait.<br>Return card to customer.                                       |                    |
| APPROVED<br>000000              | The Merchant copy of the receipt will<br>print.   |                    |
| PRESS ENTER FOR<br>NEXT COPY    | Press <b>OK</b> to print the cardholder copy.   |                    |
| PRINTING<br>REFUND CORRECT      | Give the cardholder copy to your cus-<br>tomer and retain the Merchant copy for<br>your records.        |                    |
| APPROVED<br>000000              | Press <b>OK</b> .   |                    |
| SELECT<br>REPRINT      EXIT     | Press <b>F1</b> REPRINT for a third printout<br>of receipt.<br>Press <b>F3</b> EXIT to end transaction. |                    |
| SWIPE CARD OR<br>PURCH REF OTHR | Transaction complete.   |                    |

## 8.5: Debit Purchase with Tip Entry

When Tip Entry is enabled in ADMIN 08, there are two additional cardholder prompts that allow the cardholder to add a tip amount to their purchase. The additional prompts are italicized in the instructions below.

| TERMINAL DISPLAY                   | OPERATOR'S ACTIONS   | CUSTOMER'S ACTIONS  |
|------------------------------------|--|---|
| SWIPE CARD OR<br>PURCH REF OTHR    | Swipe customer card.   |   |
| PURCHASE<br>ENTER PASSWORD         | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .                          |   |
| INVOICE NUMBER<br>0000             | Enter or accept Invoice/P.O. Number ( <i>if enabled</i> ) and press <b>OK</b> .          |   |
| ENTER AMOUNT<br>\$00.00            | Enter amount of the purchase transaction and press <b>OK</b> .                           |   |
| PRESS OK AND<br>PASS TO CUSTOMER   | Press <b>OK</b> to confirm the amount. Pass terminal to customer.                        |   |
| WELCOME<br>BONJOUR                 | No operator action required.   |   |
| PURCHASE<br>\$00.00 OK?            |  | If the customer accepts the purchase amount, they press <b>OK</b> .             |
| <i>ENTER TIP AMOUNT<br/>\$0.00</i> |  | <i>Enter tip amount and press <b>OK</b>.<br/>0.00 is a valid amount.</i>        |
| <i>PURCHASE<br/>\$0.00 OK?</i>     |  | <i>To accept the purchase plus tip amount, press <b>OK</b>.</i>                 |
| SELECT ACCOUNT<br>CHQ SAV          |  | Press <b>F1</b> CHQ for chequing acct.<br>Press <b>F3</b> SAV for savings acct. |
| ENTER PIN & OK<br>PIN =            |  | Enter PIN number and press <b>OK</b> .  |
| PURCHASE<br>* \$00.00              | Retrieve terminal from customer.   |   |
| Please Wait,<br>Processing         | Transaction in progress, please wait.<br>Return card to customer.                        |   |
| APPROVED<br>000000                 | The Merchant copy of the receipt will print.   |   |
| PRESS ENTER FOR<br>NEXT COPY       | Press <b>OK</b> to print the cardholder copy.  |   |
| PRINTING<br>PURCHASE               | Give the cardholder copy to your customer and retain the Merchant copy for your records. |   |

## Processing Debit Card Transactions

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| TERMINAL DISPLAY                | OPERATOR'S ACTIONS  | CUSTOMER'S ACTIONS |
|---------------------------------|---|--------------------|
| APPROVED<br>000000              | Press <b>OK</b> .   |                    |
| REPRINT      SELECT<br>EXIT     | Press <b>F1</b> REPRINT for a third printout<br>of receipt.<br>Press <b>F3</b> EXIT to end transaction. |                    |
| SWIPE CARD OR<br>PURCH REF OTHR | Transaction complete.   |                    |

# CHAPTER 9: Balancing and Closing Your Terminal

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In order to have the funds from your POS transactions deposited into your account, you must close the Batch containing those transactions on the Moneris Host. Moneris recommends that you process a Close Batch transaction at least once a day. Most merchants use this option: to change options, see your Moneris sales representative.

Moneris also recommends performing a Print Stored Transactions report by Batch before performing a Close Batch. This will give you a print-out of the transactions in the Batch before the Close Batch clears the terminal's memory.

## 9.1: Deposit Totals Inquiry - ADMIN 77

This function produces a report of the current deposit totals on the Moneris Host. The report prints totals by card type from the Moneris Host then prints grand totals by transaction type calculated by the terminal.

**Note:** *The terminal must be logged on in order to produce the report.*

| TERMINAL DISPLAY                 | OPERATOR'S ACTIONS  |
|----------------------------------|---|
| SWIPE CARD OR<br>PURCH REF OTHR  | Press <b>ADMIN</b> .  |
| ENTER ADMIN CODE                 | Enter <b>77</b> and press <b>OK</b> .                           |
| DEPOSIT TOTALS<br>ENTER PASSWORD | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> . |
| Please Wait,<br>Processing       | Transaction in progress, please wait.                           |
| PRINTING                         | The Batch balance report is printed.                            |
| SWIPE CARD OR<br>PURCH REF OTHR  | Process complete.   |

### 9.2: Close Batch and Balance

There are two ways to perform a Close Batch:

- the Close Batch transaction - ADMIN 99. See *section 9.2.2*: for instructions.
- the Multi-Terminal Reporting transaction (if enabled) - ADMIN 85. See *section 9.2.3*: for instructions

Both methods consist of two parts. The first part compares the approved transaction totals stored in your terminal's memory to the totals stored on the Moneris Host. The second part automatically deposits the appropriate funds into your business account if your terminal and the Host totals match.

If the Balanced Prompt option is enabled, you will be prompted to confirm that the Moneris Host totals match your calculated totals before the Close Batch request is sent to the Host. If your calculated totals match the Moneris Host totals, the terminal will print (BAL - YES) at the bottom of the Close Batch report. If they do not, (BAL - NO) will be printed at the bottom of the report.

The ADMIN 99 function performs two tasks:

- requests and prints the Batch Balance report of current batch totals
- sends a close batch request to the Moneris Host.

If the operator presses **F3** after the Batch Balance report, the transaction is finished and the terminal returns to the SWIPE CARD prompt.

If the operator presses **F1** after the Batch Balance report, the transaction continues and closes the current batch, then returns to the SWIPE CARD prompt. This is typically done at the end of the business day.

#### 9.2.1: Verifying Batch Balances – ADMIN 99 then F3

Perform the batch balance prior to batch close to ensure that both the terminal and host transaction totals are balanced.

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS  |
|---------------------------------|---|
| SWIPE CARD OR<br>PURCH REF OTHR | Press <b>ADMIN</b> .  |
| ENTER ADMIN CODE                | Enter <b>99</b> and press <b>OK</b> .                           |
| CLOSE BATCH<br>ENTER PASSWORD   | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> . |
| Please Wait,<br>Processing      | Transaction in progress, please wait.                           |
| PRINTING                        | The Batch balance report is printed.                            |
| CLOSE EXIT                      | Press <b>F3</b> to EXIT.  |
| PRINTING                        | "End of report" is printed.                                     |
| SWIPE CARD OR<br>PURCH REF OTHR | Process complete.   |

### 9.2.2: Close Batch – ADMIN 99 then F1

The Batch Close function closes the current batch of transactions and opens a new batch. The terminal sends the totals of all online credit and debit card purchases, refunds and purchase and refund corrections to the card host for settlement and deposit to the merchant’s bank account.

| TERMINAL DISPLAY                              | OPERATOR'S ACTIONS  |
|---|---|
| SWIPE CARD OR<br>PURCH REF OTHR               | Press <b>ADMIN</b> .  |
| ENTER ADMIN CODE                              | Enter <b>99</b> and press <b>OK</b> .   |
| CLOSE BATCH<br>ENTER PASSWORD                 | Enter your password ( <i>if enabled</i> ) and press <b>OK</b> .   |
| Please Wait,<br>Processing                    | Transaction in progress, please wait.   |
| PRINTING                                      | The Batch Balance report is printed.  |
| CLOSE            EXIT                         | Press <b>F1</b> to Close  |
| TOTALS BALANCED?<br>YES                    NO | If this prompt is enabled in ADMIN 08:<br>Press <b>F1</b> YES to confirm your calculated totals match the totals from the Moneris Host.<br>Press <b>F3</b> NO to indicate your calculated totals do NOT match the totals from the Moneris Host. |
| Please Wait<br>Processing                     | Transaction in progress, please wait.   |
| SWIPE CARD OR<br>PURCH REF OTHR               | Process complete.   |

### 9.2.3: Multiple Terminal Reporting - ADMIN 85

If you have enabled Multi-Terminal Reporting (see section 5.3: *Multiple Terminal Setup – ADMIN 80*) you can use this function to produce Batch Balance reports and close the batch for all named terminals associated with the same merchant number.

#### Deposit Totals Report for Multiple Terminals

| TERMINAL DISPLAY                   | OPERATOR'S ACTIONS   |
|------------------------------------|--|
| SWIPE CARD OR<br>PURCH REF OTHR    | Press <b>ADMIN</b> .   |
| ENTER ADMIN CODE                   | Enter <b>85</b> and press <b>OK</b> .  |
| MULTI TERM CLOSE<br>ENTER PASSWORD | Enter your password and press <b>OK</b> .  |
| CLOSE BATCHES?<br>YES NO           | Select <b>F3</b> to print the Deposit Totals report then return to the idle prompt <b>WITHOUT</b> closing the batch.   |
| GET DEPOSIT TTLS<br>YES NO         | Select <b>F1</b> to print the Deposit Totals report.<br>Select <b>F3</b> to return to idle prompt and end the transaction.   |
| SELECT TERMINAL<br>NAME GRP ALL    | Select <b>F1</b> to select terminals by terminal name.<br>Select <b>F2</b> to select terminals by terminal group prefix (see section 5.3.2: <i>Managing Terminal Names</i> for information on terminal group prefixes).<br>Select <b>F3</b> to begin processing the transaction for all terminals. |
| <b>If F1 (NAME) was selected:</b>  |  |
| MERCH TERM NAME                    | Key in the Terminal Name and press <b>OK</b> .   |
| <b>If F2 (GRP) was selected:</b>   |  |
| ENTER GRP PREFIX                   | Key in the Terminal Group Prefix and press <b>OK</b> .   |
| NAME GRP NEXT<br>XMIT              | Press <b>F1</b> to select another terminal name.<br>Press <b>F2</b> to select another group prefix.<br>Press <b>F3</b> to begin processing the transaction.  |
| Please Wait,<br>Processing         | Transaction in progress, please wait.  |
| PRINTING                           | The Deposit Totals report will print for each terminal selected.   |

| TERMINAL DISPLAY                | OPERATOR'S ACTIONS |
|---------------------------------|--------------------|
| SWIPE CARD OR<br>PURCH REF OTHR | Process complete.  |

### Close Batch for Multiple Terminals

| TERMINAL DISPLAY                   | OPERATOR'S ACTIONS  |
|------------------------------------|---|
| SWIPE CARD OR<br>PURCH REF OTHR    | Press <b>ADMIN</b> .  |
| ENTER ADMIN CODE                   | Enter <b>85</b> and press <b>OK</b> .   |
| MULTI TERM CLOSE<br>ENTER PASSWORD | Enter your password and press <b>OK</b> .   |
| CLOSE BATCHES?<br>YES NO           | Select <b>F1</b> to print the Current Batch Totals reports and close the batches.   |
| GET DEPOSIT TTLS<br>YES NO         | Select <b>F1</b> to print the Deposit Totals reports as well before closing the batches.<br>Select <b>F3</b> to close the batches without printing the Deposit Totals reports.                      |
| SELECT TERMINAL<br>NAME GRP ALL    | Select <b>F1</b> to select terminals by terminal name.<br>Select <b>F2</b> to select terminals by terminal group prefix.<br>Select <b>F3</b> to begin processing the transaction for all terminals. |
| <b>If F1 (NAME) was selected:</b>  |   |
| MERCH TERM NAME                    | Key in the Terminal Name and press <b>OK</b> .  |
| <b>If F2 (GRP) was selected:</b>   |   |
| ENTER GRP PREFIX                   | Key in the Terminal Group Prefix and press <b>OK</b> .  |
| NAME GRP NEXT<br>XMIT              | Press <b>F1</b> to select another terminal name.<br>Press <b>F2</b> to select another group prefix.<br>Press <b>F3</b> to begin processing the transaction.   |
| Please Wait,<br>Processing         | Transaction in progress, please wait.   |
| PRINTING                           | The reports will print for each terminal selected.  |
| SWIPE CARD OR<br>PURCH REF OTHR    | Process complete.   |



# APPENDIX A: Troubleshooting

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## A.1: Support and Contact Information

Please have your Moneris merchant number available before calling for assistance.

| FOR TECHNICAL INFORMATION OR ASSISTANCE WITH:   | CONTACT                                | TOLL FREE 24 HOURS A DAY 7 DAYS A WEEK |
|---|--|--|
| <ul style="list-style-type: none"><li>• equipment problems</li><li>• processing financial transactions</li><li>• processing non-financial transactions</li><li>• terminal set-up</li><li>• wireless RF network problems</li><li>• balancing your terminal</li><li>• security features and liability concerns</li><li>• ordering terminal supplies (including paper rolls)</li><li>• voice authorization</li></ul> | <b>Moneris Merchant Service Centre</b> | <b>1-866-319-7450</b>                  |

## A.2: Additional Documentation

To download additional copies of this *Merchant Operating Manual*, visit [www.moneris.com/merchant/manuals/index.html](http://www.moneris.com/merchant/manuals/index.html) and select **Mobile 8100**.

To download a copy of the 3100 IP *Quick Reference Guide for Debit and Credit Procedures*, visit [www.moneris.com/merchant/qrguides](http://www.moneris.com/merchant/qrguides) and select **Mobile 8100**.

### A.3: Purchase Back-up Procedures

#### A.3.1: Terminal Problems

Use the following procedure to complete a credit Purchase transaction when you are unable to process the transaction through your terminal due to system hardware problems.

1. Prepare a paper sales draft with full details, including:
  - An imprint of the Credit card (account number, issue/expiry date and cardholder name must be legible).
  - Date of transaction.
  - Amount of transaction.
  - Cardholder signature.
  - Authorization number\*.

**IMPORTANT:** *If the amount of the transaction exceeds your “DOWNTIME FLOOR LIMIT”, obtain a VOICE AUTHORIZATION by calling the Moneris Voice Authorization number.*

2. Once the cardholder has signed the manual sales draft, compare the signature to that located on the signature panel of the credit card. (Immediately report discrepancies between the signature and the name to the Moneris Voice Authorization number).
3. Provide the cardholder with the CARDHOLDER copy of the manually prepared sales draft and retain the MERCHANT COPY for your records.
4. Contact the Moneris Help Desk (see section *A.1: Support and Contact Information* for contact information) to report a hardware problem.
5. Once your **Mobile 8100** terminal is operational, the transactions that occurred while your terminal was not available can be manually entered through the **Mobile 8100** terminal.

**IMPORTANT:** *If you obtained a VOICE AUTHORIZATION number for the transaction, perform a Pre-Authorization Completion following the instructions in Section 7.7: Pre-Authorization Completion (Advice) from a PREVIOUS BATCH.*

#### A.3.2: Customer Card Problem

Use the following procedure to complete a credit Purchase transaction when you are unable to process the transaction through your terminal because the customer’s credit card cannot be read by the magnetic stripe reader.

1. Manually key in the credit card details including card number and issue/expiry date.
2. Prepare a paper sales draft with full details, including:
  - An imprint of the Credit card (account number, issue/expiry date and cardholder name must be legible).
  - Date of transaction.
  - Amount of transaction.
  - Cardholder signature.
  - Authorization number.

3. Once the cardholder has signed the manual sales draft, compare the signature to that located on the signature panel of the card. (Immediately report discrepancies between the signature and the name to the Moneris Voice Authorization number).
4. Provide the cardholder with the CARDHOLDER copy of the manually prepared receipt and retain the MERCHANT COPY for your records.

### **A.3.3: Printer Problems**

If your printer is not working and you are unable to print a customer receipt, process Credit transactions as outlined below then contact the Moneris Help Desk to report the problem. Do not process Debit transactions until the printer is fixed.

1. Process the transaction through your terminal and manually prepare a sales draft with these full details:
  - an imprint of the Credit card with the account number and issue/expiry date clearly legible.
  - date of transaction.
  - amount of transaction.
  - cardholder signature.
  - authorization number displayed on the terminal screen
2. Provide the CARDHOLDER copy of the sales draft to your customer and retain the MERCHANT copy for your records.

## **A.4: Battery Voltage Status**

| <b>CONDITION</b>   | <b>THE BATTERY VOLTAGE IS...</b>            |
|--|---|
| The printer slows down                                       | becoming low                                |
| The “battery low” sign is displayed                          | low   |
| The “battery low” sign flashes and the terminal double-beeps | too low to continue processing transactions |

### A.5: Error Messages

This list should be reviewed for possible solutions to specific problems when an error message appears on your **Mobile 8100** terminal.

| TERMINAL DISPLAY              | RESOLUTION  |
|-------------------------------|---|
| ALREADY COMPLETE              | The user is attempting to complete a transaction (stored in Advice) that has already been completed.<br>Check the Sequence Number and re-try the transaction.   |
| CANCEL      RETRY             | The transaction failed because of incorrect data entry:<br>Press <b>F1</b> or <b>CAN</b> to return to the idle prompt OR<br>Press <b>F3</b> to display one of the screens listed below (which screen appears depends upon how the terminal has been configured).<br><br><b>XXXXXXXXXXXX</b><br><b>ENTER AMOUNT</b><br>Xs represent the credit card number. Re-enter the amount and continue as prompted.<br><br><b>SELECT ACCOUNT</b><br><b>CHQ          SAV</b><br>Pass terminal to the customer to select the appropriate account, continue processing transaction as prompted.<br><br><b>ENTER PIN &amp; OK</b><br><b>PIN =</b><br>Pass terminal to customer to enter his PIN number, continue processing the transaction as prompted. |
| CANCELLED                     | The <b>CAN</b> key was pressed to abort the current transaction.  |
| CARD PROBLEM<br>PLEASE RETRY  | The card was incorrectly swiped through the MSR and the terminal could not read the card.<br>OR<br>There is a problem with the magnetic stripe on the card.<br>Try swiping the card again. If this message re-appears, ask the cardholder for another payment method (e.g. a different card or cash).   |
| CDMA SHUT DOWN<br>IN PROGRESS | The terminal is powering off and disconnecting from the wireless network.<br>Wait until the display screen goes blank then press <b>OK</b> to turn the terminal back on.  |

| TERMINAL DISPLAY                    | RESOLUTION  |
|-------------------------------------|---|
| COMM ERROR 401<br>(###) COMM ERROR  | <p>Communication between the terminal and the Moneris Host has experienced an error during transmission.</p> <p>Press the <b>CAN</b> key and retry the transaction. If the message re-appears, call the Moneris Help Desk for assistance.</p>                 |
| COMM ERROR 403<br>CONNECTION LOST   | <p>Host connection has been lost during transmission of a transaction request – usually due to bad coverage or a lack of coverage.</p> <p>Press the <b>CAN</b> key, move to a location with better coverage (if possible) and retry the transaction.</p>      |
| COMM ERROR 406<br>NO NETWORK RESP   | <p>The Moneris Host is not responding to the terminal's request to complete the transaction.</p> <p>Press the <b>CAN</b> key and retry the transaction. If the message re-appears, call the Moneris Help Desk for assistance.</p>                             |
| DECLINED-RETRY<br>TERMINAL TIMEOUT  | <p>The cardholder has waited too long to respond to a prompt on the terminal and the terminal has cancelled the transaction.</p> <p>Press <b>CAN</b> then re-start the transaction.</p>   |
| ENTER IP PORT<br>PORT RANGE ERROR   | <p>An invalid IP port number has been entered. Valid values are numeric, from 0 to 65535.</p> <p>Press <b>OK</b>, check the port number and re-enter it.</p>  |
| ENTER TARGET IP<br>INVALID ENTRY!   | <p>An invalid target IP address has been entered. Valid values are numeric, with a total of 12 digits. Each group of 3 digits must fall within the range 000 to 255.</p> <p>Press <b>OK</b>, check the IP address and re-enter it.</p>                        |
| EXCEEDS REFUND<br>TRANSACTION LIMIT | <p>The credit refund amount being entered is greater than the refund ceiling limit. (The limit is set in at Moneris host and is downloaded via the Initialization function.)</p>  |
| FAILED TO INIT<br>CALL HELP CENTRE  | <p>Initialization was unsuccessful due to a terminal or host problem.</p> <p>Press <b>CAN</b> to return to the idle prompt then call the Moneris Help Desk for assistance.</p>  |
| FAILED TO INIT<br>MERCHANT ID ERR   | <p>Initialization was unsuccessful due to an invalid Merchant ID.</p> <p>Press <b>CAN</b> to return to the idle prompt, check the merchant ID and re-try the Initialization.</p> <p>If the message re-appears, call the Moneris Help Desk for assistance.</p> |

| TERMINAL DISPLAY                    | RESOLUTION   |
|-------------------------------------|--|
| INACTIVE CDMA                       | A problem has been encountered with the 1xRTT modem when the terminal was powered on. Remove the battery pack, wait 30 seconds then reinstall the battery.<br>If the message re-appears, call the Moneris Help Desk for assistance.  |
| INIT COMM ERROR                     | The terminal failed to initialize to the Moneris Host. Press <b>CAN</b> and re-try the Initialization.<br>If this message re-appears, call the Moneris Help Desk for assistance.   |
| INITIALIZE ERROR<br>RETRYING TRANS  | If the initialization process does not successfully complete, the terminal will automatically retry once.  |
| INVALID CARD #<br>PLEASE RETRY      | The manually-entered credit card number is incorrect.<br>Check the card number and re-enter it.  |
| INVALID DATE<br>PLEASE RE-ENTER     | The Month and/or Day value was entered incorrectly.<br>Check the date and re-enter it.   |
| INVALID ENTRY<br>PLEASE RE-ENTER    | An invalid code was entered in ADMIN 66.<br>Check the code and re-enter it.  |
| INVALID EXP DATE<br>PLEASE RE-ENTER | The Expiry date month or year value was entered incorrectly.<br>Check the expiry date and re-enter it.   |
| KEY ERROR<br>CALL HELP CENTRE       | There is a security problem with the debit transaction.<br>Press <b>CAN</b> to return to the idle prompt then call the Moneris Help Desk for assistance.   |
| LOCKED XXXX<br>CALL HELP CENTRE     | A password has been entered incorrectly five times in a row and the terminal is now locked.<br>Call the Moneris Help Desk to obtain the Unlock Password in order to re-set the terminal.<br><br><b>Note:</b> <i>The Unlock Password is created dynamically each time you call Moneris, so it cannot be re-used if the terminal locks up again.</i> |
| MISMATCHED                          | When you keyed in the last 4 digits of the card number, the numbers you entered did not match the numbers on the card stripe.<br>Check the card number and re-enter the last 4 digits.   |
| MODEM ERROR<br>CALL HELP DESK       | There is a problem with the modem hardware.<br>Call the Moneris Help Desk for assistance.  |

| TERMINAL DISPLAY                  | RESOLUTION  |
|-----------------------------------|---|
| NET CONNECT FAIL                  | The connection to the APN of the 1xRTT network has failed.<br>Press <b>CAN</b> and retry the transaction.<br>If this message reappears, call the Moneris Help Desk for assistance.                                  |
| NET OPEN FAILED                   | The 1xRTT network cannot be opened for communications.<br>Press <b>CAN</b> and retry the transaction.<br>If this message reappears, call the Moneris Help Desk for assistance.                                      |
| NOTHING TO PRINT FROM LAST TRANS  | The user has attempted to reprint the last report or receipt and there is no data available to print.<br>Press <b>CAN</b> then re-start the transaction.  |
| PASSWORD MISMATCH                 | The password entered at the REPEAT NEW PSWD prompt did not match the NEW PASSWORD.<br>Check the password and re-enter it.   |
| SET ADMIN 45                      | You have tried to process a transaction that requires host communication before configuring the PPP settings.<br>Configure the PPP communications settings (see section 5.2: <i>PPP Configuration - ADMIN 45</i> ). |
| SYSTEM PROBLEM PLEASE RETRY       | There is an error with the data format being sent.<br>Press <b>CAN</b> then re-start the transaction.<br>If this message re-appears, call the Moneris Help Desk for assistance.                                     |
| SYSTEM PROBLEM RETRYING TRANS     | Terminal received a bad message from the host and will automatically retry the transaction.<br>Wait for the terminal to retry.  |
| TERM DATA ERROR CALL HELP CENTRE  | Initialization was unsuccessful due to an invalid Terminal ID.<br>Press <b>CAN</b> to return to the idle prompt, then call the Moneris Help Desk for assistance.  |
| TERMINAL PROBLEM CALL HELP CENTRE | The application detects a problem with the internal security processor.<br>Press <b>CAN</b> to return to the idle prompt then call the Moneris Help Desk for assistance.  |
| TRANSACTION NOT ALLOWED           | The financial transaction or ADMIN function selected is not available OR the terminal is not configured.  |

**Troubleshooting**

| TERMINAL DISPLAY                         | RESOLUTION   |
|--|--|
| <p>TRANSACTION<br/>NOT FOUND</p>         | <p>During an ADVICE, the wrong sequence number was entered<br/>OR<br/>During an ADMIN 60 transaction, there are no transactions in the batch number or date selected.<br/>OR<br/>During an ADMIN 66 transaction, there are no transactions that match the selected criteria.<br/>Check the Sequence Number, Batch Number, date or other criteria and re-try the transaction.</p> |
| <p>UNSUPPORTED CARD<br/>PLEASE RETRY</p> | <p>This terminal only supports credit and debit cards, all other cards are unsupported. (example: driver's license or provincial ID cards with a magnetic stripe)</p>  |
| <p>WRONG PASSWORD<br/>PLEASE RE-TRY</p>  | <p>You have entered an incorrect password.<br/>Re-enter the password and press <b>OK</b>.</p>  |

## A.6: Hardware Problems

This list should be reviewed for possible solutions to specific hardware problems that may occur with your **Mobile 8100** terminal.

| <b>PROBLEM</b>   | <b>RESOLUTION</b>  |
|--|--|
| Battery gets warm  | The battery has been left on the charger too long.<br>- Do not leave the battery on the charger for longer than 16 hours at a time.<br>- Do not place the terminal with the battery attached back on the charger in between every transaction. |
| No signal or weak signal within buildings or in specific areas | Contact your wireless service provider.  |



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