



Moneris Mobile 8300 OPERATING MANUAL

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1. Introduction

1.1 Getting Started

You must prepare your terminal before you process transactions:

1. [Set up the hardware.](#)
2. [Configure the terminal.](#)
3. [Initialize the terminal.](#)
4. [Log on to the Moneris Host.](#)

Once the terminal is ready to use, practice performing transactions in [Demo Mode](#) to ensure that any errors made while learning to perform transactions do not affect your business account.

1.2 Learning About the Terminal

The Moneris Mobile 8300 terminal is a stand-alone, long-range wireless Debit and Credit card payment system that connects to the point-of-sale (POS) services provided by Moneris Solutions.

To introduce yourself to the terminal, read these sections :

- [Moneris Mobile 8300 Hardware](#)
- [Features and Procedures](#)
- [Demo Mode](#)
- [The Menu Feature](#)

1.3 Caring for your Moneris Hardware

Proper care of your [terminal](#) and [battery](#) will help ensure uninterrupted service. Here are some recommendations for maintaining the hardware in good working order:

IMPORTANT: Misuse of equipment can result in replacement liability.

- DO clean the hardware components with a dry or slightly damp cloth rinsed in a mild soap solution.
- Do NOT use solvents, detergents, cleaning fluids or abrasives on any of the hardware components.
- Avoid spilling liquids on components.
- Do NOT expose components to extreme temperatures.

1.3.1 Caring for the Terminal

- Clean the Magnetic Stripe Reader (MSR) periodically, using a Moneris POS cleaning card. These cards can be ordered online at shopmoneris.com or by phone at 1-866-421-1666.

Note: Do NOT use the MSR cleaning card in the Chip Card Reader.

- 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 Merchant Service Centre](#) to obtain additional supplies for your terminal or order online at shopmoneris.com.
- [Load the paper](#) into the printer correctly.

1. Introduction

- If the terminal has battery recharging or communication problems, gently clean the golden contact on the battery and in the terminal's battery compartment with a damp cloth. Do not scratch or scrape the surface of the contacts.

1.3.2 Caring for the Battery

- The [battery](#) must be attached to the terminal for charging. Never charge the battery on the charging base by itself.
- If the terminal has been inactive for a number of weeks, a full recharge may be necessary.
- Avoid overcharging or overheating the battery.

1.3.3 Caring for the Charging Base

- Avoid unnecessary movement of the [charging base](#) to prevent accidental disconnection of the power cables.

IMPORTANT: You must use the exact battery charging cable and power adaptor provided with the terminal by Moneris Solutions and use only batteries provided 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.

2. Features and Procedures

Your terminal can be set up to accept and process a variety of transactions for a variety of card types including debit cards, credit cards (includes private label cards and corporate cards), gift cards and loyalty cards. The terminal can accept credit cards and debit cards with the new chip technology on them as well as the traditional magnetic stripe.

2.1 Standard Features

These features are available and enabled on all Moneris Mobile 8300 terminals.

- [Backlight](#)
- [Language selection](#)
- [Card information security](#)
- [Communications status](#)
- [Menu-driven interface](#)
- [Removable, interchangeable batteries](#)
- [Sleep Mode](#)
- [Demo Mode](#)

2.1.1 Language Selection for Display, Receipts and Reports

The Moneris Mobile 8300 supports two language selections: 1) [Merchant Language](#) and 2) [Customer Language](#).

Merchant Language

Supported languages:

1. English
2. French

Used to:

1. Display merchant prompts
2. Print merchant copies of receipts
3. Print reports

Initial setting:

Set on the Moneris Host.

Changing the language:

The Merchant Language can be changed at any time. For details, see [Selecting the Terminal Language](#).

Customer Language

Supported languages:

1. English
2. French

Used to:

1. Display customer prompts
2. Print copies of customer receipts

Initial setting:

Default is set by the Merchant Language but is set for each individual transaction based on the Language Code on the customer's card.

Changing the language:

If the Language Code is not present on the customer's card or if the code is neither English nor French, the customer is prompted to select either English or French. For details, see [Selecting the Terminal Language](#).

2.1.2 Card Information Security

To reduce the risk of fraudulent card use, masking and/or truncation are applied to card numbers and expiry dates printed on receipts and reports.

Masking replaces a card's numbers (except for the last 4) with *'s. For example, the card number 1234 5678 9012 3456 is printed as *****3456.

If a card number is truncated, only the last 4 digits are printed. For example, the card number 1234 5678 9012 3456 would appear as 3456.

Card Numbers on Receipts

Numbers of debit and credit cards are always masked on both Merchant and Customer copies of transaction receipts.

Note: Each Moneris Gift & Loyalty program can have its own card masking rules that are configured on the Moneris/Ernex host.

Card Numbers on Reports

Card numbers are truncated on all reports containing transaction details.

Reports that require the manager password, e.g. Batch Review, display the entire card number but the resulting report prints the truncated card number.

Expiry Date on Receipts

The credit card expiry date is not printed on receipts for credit card transactions.

Expiry Date on Reports

The credit card expiry date is printed in full on all reports containing transaction details.

2.1.3 Communications Status

The terminal connects to the Moneris Host each time you begin a transaction (it does not make any noise when it attempts to connect). As the terminal communicates with the Moneris Host, it displays "Processing" to indicate that the transaction is proceeding correctly. If there is a problem with the communications, an error message will appear.

The terminal also provides information on the [status of the wireless communication](#) between the terminal and the wireless service provider.


2.1.4 The Menu Feature

The Menu Feature


All transactions and functions can be accessed through menus and sub-menus starting at the [applications menu](#).

Navigating through menus:

To scroll down:

Select the  icon (press the left-most purple key) to move down to the next menu screen.

To scroll up:

1. Press the yellow **CORR** key to change the direction of the arrow on the display screen.
2. Select the  icon (press the left-most purple key) to move up to the next menu screen.

To select an item:

Press the function key beside the menu item (e.g., on the [transactions menu](#), press **F1** to select Purchase).

Navigating through parameters:

To move to the next feature:

Select **Next**.

To move back to the last feature displayed:

Select **Previous**.

Changing the value of a parameter:

1. Select **Edit**.
2. Select **Next** to scroll through the values and select **Slect** to select a displayed value.

OR

Key in a new value and press the green **OK** key.






3. Select **Next** to move to the next feature.

When you are finished making changes:

1. Select **Exit**. The "Save Changes?" prompt appears.
2. Select **OK**. The menu re-appears.

2. Features and Procedures

Icons displayed on the menus:

Icon	Indicates:
	Signal strength
	Wireless connectivity
	CommServer is being used for communications
	Battery strength
	Terminal is powered by the charging base (rather than running on the battery)

The Applications Menu

The applications menu gives you access to the applications available on the terminal. When the terminal is not performing any transactions or functions and has been idle for a pre-set period of time, it displays the applications menu.

The applications are listed here in the order they appear on the menu.

MM/ DD/ YY HH:MM	F0
DEBIT & CREDIT	F1
GIFT & LOYALTY	F2
	F3
	F4
	F5

The Applications Menu

To access the applications menu from any screen:

Press the * (**ASTERISK**) key.

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

The Transactions (DEBIT & CREDIT) Menu

This transactions menu allows you to select the type of transaction you want to process. The menu also provides access to the [CONFIGURATION menu](#) (press the green **OK** key) and to the [REPORTS menu](#) (press the 1st **purple** key on the right).

The transactions are listed here in the order they appear on the menu. Some items may not appear on the terminal until a specific feature is enabled.

MM/DD/YY	HH:MM	Select this menu item to:
	Purchase	process a Credit or Debit Purchase
	Pre Auth	open the Pre Auth menu
	Refund	process a Credit or Debit Refund
	Advice	process a Credit Advice
	Correction	process a Credit or Debit Correction (void)
	Batch Close	process a Batch Close
	Batch Review	search for a transaction in the open batch
	Batch Clear	clear the batch on the terminal

The Transactions Menu

To access the transactions (DEBIT & CREDIT) menu:

On the [applications menu](#), select **DEBIT & CREDIT**.

To return to the applications menu:

Press the * (**ASTERISK**) key.

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

The Pre Auth Menu

This menu allows you to select the type of pre-authorization transaction you wish to process.

The transactions are listed here in the order they appear on the menu.

Pre Auth	Select this menu item to:
Pre Auth	process a Pre-Authorization
Completion	process a Pre-Authorization Completion
Del Pre Auth	process a Pre-Authorization Deletion
Pre-Auth Rpt	print the Pre-Auth Transactions Report

The Pre Auth Menu

2. Features and Procedures

To access the Pre Auth menu:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.
2. Select **Pre Auth**.

To return to the applications menu:

Press the red **CANC ANNUL** key then press the * (**ASTERISK**) key.

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

The REPORTS Menu

This menu allows you to produce a variety of reports containing information about transactions stored in the terminal memory, transactions stored on the Moneris host and the configuration of the terminal.

The terminal must be [initialized](#) before this menu can be accessed.


The reports are listed in the order they appear on the menu. Some items may not appear on the terminal until a specific feature is enabled.

REPORTS	This report contains:
Stored Trans	a list of all transactions in the terminal memory
Deposit Totals	a list of deposit totals by card and transaction type
Clerk SubTotals	a list of totals for one or more clerks (only active if clerk IDs are configured)
Multi Terminal	a Deposit Totals report for one or more terminals
Merch SubTotals	a list of totals in the current batch by card and transaction type
Tip Report	a list of tip activity for the current batch by clerk and period (only active if Clerk and Tip Processing are enabled)
Terminal Parns	a list of the current settings for each parameter
Terminal Stats	a list of the number of occurrences of error situations
EMV Param Rpt	a list of chip program parameters by card type
EMV Diagnostics	prints the data on the last transaction if a chip card was used

The REPORTS Menu

To access the REPORTS menu:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **REPORTS** key (first purple key on the right, below the  icon on the screen).

To return to the applications menu:

Press the red **CANC ANNUL** key then press the * (**ASTERISK**) key.

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

The CONFIGURATION Menu

This menu allows you to configure a number of features and procedures and perform administrative functions.

The parameters and functions are listed in the order they appear on the menu.

CONFIGURATION	Select this menu item to:
Setup	configure parameters on the terminal
Servers	configure server/clerk IDs
Terminal Name	configure multi-terminal names
Menus/Keys	configure password level on menus
Set Language	set the display language
Initialize	initialize the terminal to the Moneris host
Host Logon	log the terminal on to the Moneris host
Host Logoff	log the terminal off of the Moneris host
About	display application version information (press the green OK key to exit)
Contrast	increase or decrease the contrast of the display (The display changes immediately.)

The CONFIGURATION Menu

To access the CONFIGURATION menu:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.
2. Press the green **OK** key.

To return to the applications menu:

Press the red **CANC ANNUL** key then press the * (**ASTERISK**) key.

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

2. Features and Procedures

The Setup Menu

This menu allows you to set values for a number of parameters on your terminal.

The parameters are listed in the order they appear on the menu. Some items may not appear on the terminal until a specific feature is enabled.

SETUP	Select this menu item to:
Demo	Enter and exit Demo Mode
Printer	Configure the receipt format
Terminal	Configure a variety of features on the terminal
Merchant	Configure a variety of features
Comm	Configure dial communications-related parameters
Host	Configure communications type parameters
Merchant IDs	Configure additional receipt parameters
IP Hosts	Do Not Use
Lock Kbd	Do Not Use
Date/Time	Do Not Use
Cashback	Configure Cashback parameters
Edit Cards	Do Not Use

The Setup Menu

To access the Setup menu:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.
2. Press the green **OK** key to display the CONFIGURATION menu.
3. Select **Setup**.
4. At the "Password:" prompt, key in the [manager password](#) and press the green **OK** key.

To return to the applications menu:

Press the red **CANC ANNUL** key then press the * (**ASTERISK**) key.

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

Terminal Parameters (Edit Terminal Menu)

The Edit Terminal menu allows you to edit Terminal parameters.

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (press the green OK key) > Setup menu > Terminal > Edit Terminal menu

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

IMPORTANT: Do Not Edit the parameters in this menu unless directed by Moneris. Only some of the menu's parameters are listed below. You can ignore all other parameters.

Tip% nn.nn

Sets a predetermined percentage of [tip automatically added to Purchase transaction amounts](#) (0-9999). If set to **0** (default) no tip is added.

Key in a percentage and press the green **OK** key.

Tip Processing

Enables/disables [tip prompting](#) on Purchase, Pre-Authorization Completion and Advice transactions.

Enables/disables printing of the [tip line](#) on Pre-Authorization transaction receipts.

None (default)

On - Prompt

Sug Tip% 1 nn

default = 15

Sug Tip% 2 nn

default = 20

Sug Tip% 3 nn

default = 25

The **Sug Tip% 1 nn**, **Sug Tip% 2 nn** and **Sug Tip% 3 nn** parameters determine up to three suggested tip amounts for [gratuity guidelines](#) printed on Pre-Authorization receipts.

Note: The [Tip Processing](#) and [Gratuity Guide?](#) parameters must be enabled.

The parameters also determine the suggested tip amounts displayed when [Enhanced Tip Processing](#) is enabled ([EnhancedTipProc](#) parameter is set to **On**).

Note: If all three parameters are set to **0**, selecting % on Enhanced Tip Processing prompts the customer to key in a % amount. The Gratuity Guide? parameter does not need to be enabled to use Enhanced Tip Processing.

Key in a percentage and press the green **OK** key.

Manager Pwd

Changes the [manager password](#).

Key in password and press the green **OK** key.

2. Features and Procedures

Clrk/Srvr Mode

Enables/disables the [Clerk Id:](#) prompt.

0 - None (default)

2 - Prompt

Note: If the [Use Def. Clrk?](#) parameter is enabled, the prompt is disabled.

Idle Timeout

Sets the number of seconds the error message is displayed before the terminal returns the "Swipe or Insert Card" prompt.

Key in number of seconds and press the green **OK** key.

PINpad Type

Configures the PINpad type, if one is connected to the terminal.

IPP - Standalone mode (default).

External XPI - An external PINpad is connected.

None - No PINpad type set. Do not use.

Note: You must [power down](#) and then [restart](#) the terminal after switching the PINPad Type between **IPP** and **External XPI**.

PABX Code

Do Not change this parameter unless directed to do so by Moneris.

Not used

Histories Limit

Do Not change this parameter unless directed to do so by Moneris.

Show CB Choices

Enables/disables the display of debit transaction [Cashback](#) pre-set amounts on the terminal. On the terminal, the customer can also select **Other** to key an amount of their choice.

On - pre-set amounts are displayed for selection by the customer (default)

Off - the customer must key in a cashback amount

Note: The [CashBack Option](#) parameter must be enabled. The desired pre-set amounts are configured via the [Amt 1](#), Amt 2 and Amt 3 parameters.

Idle Time Fmt

Sets the time format of the clock displayed on the [transactions menu](#).

24 Hr (e.g. 14:24)

12 Hr (e.g. 02:24pm)

Terminal Beep

Enables/disables key beeping.

On (default)

Off

Process Tax

Enables/disables tax amount prompting on [Purchasing Card](#) transactions (the "xST Amt: \$" prompt).

On

Off (default)

Note: You must enable the [Commercial on?](#) parameter. The **Tax Type (xST)** parameter is configured on the Moneris host.

Trning Settle?

Enables/disables settlement during [Demo Mode](#).

On

Off (default)

CashBack Option

Enables/disables the [Cashback Option](#) on Debit transactions.

On

Off (default)

Note: The [Show CB Choices](#) parameter must be enabled. You can configure the pre-set cashback amounts ([Amt 1](#), Amt 2, Amt 3) that are displayed for selection by the customer. You can also configure the maximum dollar amount the customer can request as cashback ([Amt Limit](#)).

Commercial On?

Enables/disables processing of [Purchasing Cards](#) (a.k.a., Commercial Cards or Corporate Cards).

On

Off (default)

Gratuity Guide?

Enables/disables printing of three suggested tip amounts on Pre-Authorization receipts.

On

Off (default)

Note: The [Tip Processing](#) parameter must be enabled. You can configure the amounts via the three [Sug Tip%](#) parameters.

Receipt Parameters Menu (Edit PCT)

The Edit PCT menu allows you to edit Printer parameters.

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (press the green OK key) > Setup menu > Printer > Edit PCT menu

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

IMPORTANT: Do Not Edit the parameters in this menu unless directed by Moneris. Only some of the menu's parameters are listed below. You can ignore all other parameters.

2. Features and Procedures

Header Line 2 to 5

The third through sixth lines of text that appears after your merchant name and address at the top of the receipt.

You may also edit the [Header Line 1](#) and [Header Line 6](#) parameters

Key in [alphanumeric text](#) (max. 40 characters) and press the green **OK** key.

Footer 1 to 3

The text that appears at the bottom of the receipt.

You may also edit the [Footer 4](#) parameter.

Key in [alphanumeric text](#) (max. 40 characters) and the green **OK** key.

Customer Copy

Determines whether to print a Customer copy of the receipt along with the Merchant copy.

None - no Customer copy prints

Confirm - "Prt Cust Cpy" prompts for confirmation to print Customer copy (YES/NO)

Automatic - automatically prints the Customer copy (default)

Note: For debit transactions, if you set the **Customer Copy** parameter to "None", only the Merchant copy of the receipt initially prints. But if you perform a reprint receipt, the Customer copy is printed.

Note: On signatureless transactions, the Customer copy may or may not be printed depending on the card being used and how your terminal is configured.

Reprint Merch Copy

Determines whether a Merchant copy of the receipt is printed in addition to the Customer copy when [Reprinting Receipts](#).

None - only the Customer copy prints (default)

Confirm - "Reprint Last Merchant Cpy" prompts for confirmation to reprint the Merchant copy (YES/NO)

Automatic (both the Merchant copy and the Customer copy will print)

Note: On [Signatureless Transactions](#), only the Customer copy is printed when [Reprinting Receipts](#) regardless of the Reprint Merch Copy setting.

Prompt Beep Delay

Number of seconds to wait after beeping and displaying the "Tear Receipt; Press OK key" message before printing the customer receipt.

Key in number of seconds and press the green **OK** key.

Default = **120** seconds.

Enable Printer

Enables/disables the printer.

On (default)

Off

Note: Selecting **Off** results in the "printer disabled" message any time a report should be printed or "Printer Error" any time a financial transaction is attempted).

Large Amt Print

Determines whether to print double-wide characters for amount lines, the Sequence number and the Original Auth #.

On (default)

Off

Merchant Parameters (Edit Format Menu)

Use the Edit Format menu to edit Merchant parameters.

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (press the green OK key) > Setup menu > Merchant > Edit Format menu

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

IMPORTANT: Do Not Edit the parameters in this menu unless directed by Moneris. Only some of the menu's parameters are listed below. You can ignore all other parameters.

Term Id

The Moneris Terminal ID.

Key in the Terminal ID and press the green **OK** key.

Merch Num.

Your Moneris Merchant ID.

Key in the Merchant ID and press the **OK** key.

Default Clerk

The [Clerk ID](#) that will be used for all transactions when the [Use Def. Clrk?](#) parameter is enabled.

Key in the [alphanumeric](#) Clerk ID and press the green **OK** key.

GST Tax Reg

QST Tax Reg

PST Tax Reg

HST Tax Reg

Your tax registration number for the tax type.

Key in your [alphanumeric](#) tax registration number and press the green **OK** key.

2. Features and Procedures

Tax Type

The type of tax you are required to apply to all purchases.

0 - No Tax (default)

1 - HST

2 - GST Only

3 - PST/GST

4 - QST/GST

EnhancedTipProc

Enables/disables the [Enhanced Tip Processing](#) feature.

On

Off (default)

Note: The [Tip Processing](#) parameter must be enabled to setup Enhanced Tip Processing.

TipNone

Enables/disables the display of the **No Tip** option on [Enhanced Tip Processing](#).

On

Off (default)

Note: The [EnhancedTipProc](#) parameter must be enabled.

Ask Inv Num?

Enables/disables the [Invoice #:](#) prompt.

On

Off (default)

Chip on PreAuth

Enables/disables the use of chip cards for Pre-Authorization transactions. This parameter does not affect the use of magnetic stripe cards for Pre-Authorization transactions.

On

Off (default)

Note: Many chip cards require a PIN instead of a signature from the cardholder. If a chip and PIN card is used during a Pre-Authorization, the cardholder **MUST** be present to enter their PIN during the transaction. For this reason, some businesses may wish to disable the use of chip cards for Pre-Authorization transactions. If the Chip on Preauth parameter is set to Off, the "Swipe Card" prompt appears instead of the "Swipe or Insert Card" prompt during a Pre-Authorization and you can swipe the card even if it is a chip card.

DispEMVPreAuth

Do Not change this parameter unless directed to do so by Moneris.

Use Def. Clrk?

Enables/disables the automatic use of the [Default Clerk ID](#).

On

Off (default)

Note: The [Default Clerk](#) parameter must be configured.

Dial Communications Parameters (Edit CPT Menu)

Use the Edit CPT menu to edit dial communications parameters. These values may be set on the 8300 but the terminal will not use them.

Transactions menu > CONFIGURATION menu (press the green OK key) > Setup menu > Comm > Edit CPT menu

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

IMPORTANT: Some parameters cannot be edited unless the terminal batch is empty. If the "Edit Not Allwd Batch Not Empty" message appears, perform a [Batch Close](#) transaction then try editing the parameter again.

Pri Auth Phone

The Moneris phone number is automatically loaded into this parameter during [initialization](#).

If blank, key in the Moneris authorization phone number and press the green **OK** key.

Sec Auth Phone

The Moneris phone number is automatically loaded into this parameter during [initialization](#).

Pri Sett Phone

The Moneris phone number is automatically loaded into this parameter during [initialization](#).

Sec Sett Phone

The Moneris phone number is automatically loaded into this parameter during [initialization](#).

Baud Rate

Sets the data transmission rate of the dial modem.

300 BAUD

1200 BAUD (default)

2400 BAUD

4800 BAUD

9600 BAUD

14400 BAUD

Reconnect

Allows the terminal to attempt to automatically reconnect, if the dial connection is lost

On

Off (default)

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Blind Dial

Allows the terminal to dial without checking for a dial tone.

On

Off (default)

Dial Type

Sets the dial type.

Tone (default)

Pulse

Moneris Host Parameters (Edit Hosts Menu)

Use the Edit Hosts menu to edit Moneris Host parameters.

Transactions menu > CONFIGURATION menu (press the green OK key) > Setup menu > Host > Edit Hosts menu

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

IMPORTANT: Some parameters cannot be edited unless the terminal batch is empty. If the "Edit Not Allwd Batch Not Empty" message appears, perform a [Batch Close](#) transaction then try editing the parameter again.

Backup Support

Do Not Use.

Card Imprt

Enables/disables the [Imprint Card Press OK Key prompt](#). This prompt may appear during a Purchase or Refund transaction.

Key in **0** to turn the feature off

Key in **1** to turn the feature on

Additional Merchant Parameters (Edit MIT Menu)

Use the Edit MIT menu to edit additional merchant-related parameters.

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (press the green OK key) > Setup menu > Merchant IDs > Edit MIT menu

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

IMPORTANT: Do Not Edit the parameters in this menu unless directed by Moneris. Only some of the menu's parameters are listed below. You can ignore all other parameters.

Merchant Number

Do Not Change.

Header Line 1

First line of text that appears after your merchant name and address at the top of receipts. You can also edit the [Header Lines 2 through 5](#) parameters.

Key in [alphanumeric text](#) (max. 40 characters) and press the green **OK** key.

Header Line 6

Second line of text that appears after your merchant name and address at the top of receipts. You can also edit the [Header Lines 2 through 5](#) parameters.

Key in [alphanumeric text](#) (max. 40 characters) and press the green **OK** key.

Footer 4

Last line of text that appears at the bottom of receipts. You can also edit the [Footer Lines 1 through 3](#) parameters.

Key in [alphanumeric text](#) (max. 40 characters) and press the green **OK** key.

Ethernet Communication Parameters (Edit ECT Menu)

Use the Edit ECT menu to display the Ethernet communications parameters. These values may be set on the 8300 but the terminal will not use them.

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (press the green OK key) > Setup menu > IP Hosts > Edit ECT

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

IMPORTANT: Do Not Edit the parameters in this menu unless directed by Moneris. Only some of the menu's parameters are listed below. You can ignore all other parameters.

Pri Auth URL

The URL is automatically loaded into this parameter during [Initialization](#).

If blank, key in the Moneris URL and press the green **OK** key.

Pri Auth Port

The port number is automatically loaded into this parameter during [Initialization](#).

If blank, key in the port number and press the green **OK** key.

Sec Auth URL

The URL is automatically loaded into this parameter during [Initialization](#). This is the same value as [Pri Auth URL](#).

Sec Auth Port

The port number is automatically loaded into this parameter during [Initialization](#). This is the same value as [Pri Auth Port](#).

Pri Sett URL

The URL is automatically loaded into this parameter during [Initialization](#). This is the same value as [Pri Auth URL](#).

If blank, key in the Moneris URL and press the green **OK** key.

Pri Sett Port

The port number is automatically loaded into this parameter during [Initialization](#). This is the same value as [Pri Auth Port](#).

If blank, key in the port number and press the green **OK** key.

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Sec Sett URL

The URL is automatically loaded into this parameter during [Initialization](#). This is the same value as [Pri Auth URL](#).

Sec Sett Port

The port number is automatically loaded into this parameter during [Initialization](#). This is the same value as [Pri Auth Port](#).

SSL Enabled

Do Not Edit

Cashback Parameters (Cashback Menu)

Use the Cashback menu to configure parameters related to the [Cashback feature](#).

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (press the green OK key) > Setup menu > Cashback menu

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

Amt 1 (\$10)

default = \$10

Amt 2 (\$20)

default = \$20

Amt 3 (\$30)

default = \$30

Determine the dollar amounts displayed on the terminal when the customer selects the Cashback option on Debit transactions. The value displayed in brackets (e.g., "\$10") is the parameter's current setting.

Select the parameter, key in the new dollar value (must be a multiple of 10) then press the green **OK** key.

Note: The Cashback feature must be enabled ([Cashback Option](#) parameter set to **On**). Each Amt parameter has an allowable range, which is displayed when editing. The range is calculated based on the dollar amounts of the other Amt parameters.

Hint: If you are increasing the amounts, start with **Amt 3** then **Amt 2** then **Amt 1** to avoid overlapping ranges.

Amt Limit (\$40)

default = \$40

The maximum dollar amount customers can request (key in) if they do not select a pre-set Cashback amount. The value displayed in brackets (\$40) is the parameter's current setting.

Select the parameter, key in the new dollar value (must be a multiple of 10) then press the green **OK** key.

Note: The Cashback feature must be enabled ([Cashback Option](#) parameter set to **On**). The maximum value for this parameter is \$990.

Menu and Editing Parameters (Menu Config Menu)

The Menu Config menu allows you to determine the menu items that are displayed and which of these require the [manager password](#) for access.

Transactions menu (DEBIT & CREDIT) > CONFIGURATION menu (press the green OK key) > Menus/Keys > Menu Config menu

Note: For instructions on navigation through the menus, see [The Menu Feature](#).

IMPORTANT: Some parameters cannot be edited unless the terminal batch is empty. If the "Edit Not Allwd Batch Not Empty" message appears, perform a [Batch Close](#) then try editing the parameter again.

Display on Menu options:

Yes

No

Password-Level options:

None

Manager

Main Menu/Keys

Select **S1ct** to display and edit the following sub-items:

- REPRINT
 - Password Level
- REPORTS
 - Password Level
- Quick Setup
 - Password Level
- Cash Receipt
 - Password Level
- Purchase
 - Display on Menu
 - Password Level
- Pre Auth
 - Display on Menu
 - Password Level
- Refund
 - Display on Menu
 - Password Level
- Mail/Phone
 - Display on Menu
 - Password Level

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- Advice
 - Display on Menu
 - Password Level
- Payment
 - Display on Menu
 - Password Level
- Correction
 - Display on Menu
 - Password Level
- Batch Close
 - Display on Menu
 - Password Level
- Batch Review
 - Display on Menu
 - Password Level
- Batch Clear
 - Display on Menu
 - Password Level

CONFIGURATION

Select **Sfct** to display and edit the following sub-items:

- Setup
 - Display on Menu
 - Password Level
- Servers
 - Display on Menu
 - Password Level
- Terminal Name
 - Display on Menu
 - Password Level
- Menus/Keys
 - Display on Menu
 - Password Level
- Set Language
 - Display on Menu
 - Password Level

- Initialize
 - Display on Menu
 - Password Level
- Host Logon
 - Display on Menu
 - Password Level
- Host Logoff
 - Display on Menu
 - Password Level
- Contrast
 - Display on Menu
 - Password Level

SETUP

Select **Slt** to display and edit the following sub-items:

- Cashback
 - Display on Menu
 - Password Level
- Edit Tables
 - Display on Menu
 - Password Level

Pre Auth

Select **Slt** to display and edit the following sub-items:

- Pre-Auth Rpt
 - Display on Menu
 - Password Level

The following items cannot be edited:

- Quick Setup
- Phone
- Terminal
- Communications
- IP Hosts
- REPRINT
- REPORTS
- CONFIGURE SERVER
- DOWNLOAD

2. Features and Procedures


- TERM DOWNLOAD
- BATCH HIST RPTS

2.1.5 Demo Mode

Demo Mode allows you and your employees to practice operating the Moneris Mobile 8300 terminal WITHOUT affecting your terminal total amounts, your financial accounts or your customers' accounts.

Note: Demo Mode is available only if you close your terminal batches on the terminal (Merchant Close). If your terminal uses System Close, you cannot use Demo Mode. (See [Processing a Batch Close](#).)

While the terminal is in Demo Mode:

- The DEMO icon () is displayed on the left side of the screen on all menus (except the applications menu).
- All financial transaction types that are supported on your terminal can be performed in Demo mode.
- All financial transactions will be approved.
- The message APPROVED DEMO will be displayed on the screen.
- All transactions will be stored in the terminal's memory while you remain in Demo mode.
- All receipts for demo transactions and reports on demo totals will have a DEMO banner printed across the top of them.
- The initial transaction amount must be \$1.00 or less.
- If you wish to add a tip to the Purchase amount, the tip amount must be \$1.00 or less.
- If you select or key in a Cashback amount during a Debit Purchase, only \$1.00 is added to the transaction amount regardless of which Cashback amount is selected or keyed in.
- If you change parameter values while the terminal is in demo mode, those changes will not be cleared when you exit Demo mode. Parameter values affect the way the terminal works in both live mode and demo mode. Any changes you make in demo mode will also affect the way terminal works when you perform live transactions.
- If you power off the terminal while it is in Demo mode, it will still be in Demo mode the next time you power up the terminal.

For instructions on using Demo Mode, see:

[Transactions Available in Demo Mode](#)

[Entering Demo Mode](#)

[Exiting Demo Mode](#)

2.2 Optional Features

2.2.1 Optional Features

These features may be available on your terminal depending on the configuration of your Merchant ID on the Moneris Host. If a feature is available on your terminal and you want to use it, you must [enable and configure it](#). If you do not want to use a feature, you can disable it.

Contact the Moneris Merchant Service Centre to discuss these options and determine whether changes to your Merchant ID configuration are required in order to enable them.

IMPORTANT: Some of these programs require agreements with a service provider other than Moneris Solutions. Please ensure that the necessary agreements are in place before attempting to enable those programs on the terminal.

- [Chip Cards](#)
- [Signatureless Transactions](#)
- [Tip Processing](#)
- [Cashback \(Debit transactions\)](#)
- [Clerk IDs and Clerk Sub-totalling](#)
- [Invoice Number Prompting](#)
- [Personalized receipts](#)
- [PAN Fraud Control](#)
- [Manager Password](#)
- [Multi-Terminal Reporting](#)
- [Private Label Cards](#)
- [Corporate Cards](#)
- [Ernex Gift Program](#)
- [Ernex Loyalty Program](#)
- [Moneris Gift Program](#)
- [Moneris Loyalty Program](#)

2. Features and Procedures

2.2.2 Chip Cards

Cards with a chip in them, called "chip cards," must be inserted into the [chip card reader](#) and left in the reader for the entire transaction. The terminal will prompt you when it is time to remove the chip card from the chip card reader.

Chip cards can be customized by the card issuer to have different applications and methods of verifying the cardholder, so different chip cards may have different prompts. Some prompt for a PIN (like a debit card), while others prompt for a signature on the receipt (like a stripe credit card).

If the chip card prompts for a PIN, the cardholder must enter their PIN. If the PIN is wrong, they will be prompted to retry. If they forget their PIN, cancel the transaction, request another form of payment and direct the cardholder to contact the card issuer.

Note: Not all chip card types are currently supported. If you insert an unsupported chip card, you will be prompted to swipe the card.

Note: If you swipe a supported chip card, you will be prompted to insert the chip card.

If the transaction cannot be completed with the chip card, request another form of payment, and tell the cardholder to contact the card issuer.

As a best practice, always look for "VERIFIED BY PIN" on the Merchant copy of the receipt.

If "VERIFIED BY PIN" appears, no signature is required.

If a signature line appears, the cardholder must sign the receipt.

Identifying a Chip Card

Every time a cardholder presents a card:



2.2.3 Signatureless Transactions

A "signatureless" transaction is a swiped Purchase for which a cardholder signature is not required because the Purchase amount is at or below the card's maximum Signatureless Dollar Value (SDV). Depending on the card type and how your terminal is configured, receipts may or may not print for a signatureless transaction.

Note: Signatureless transactions for swiped purchases apply only when a customer uses a swipe-only card, not when the customer is instructed to swipe a chip card.

Maximum Signatureless Dollar Value (SDV)

To determine the maximum SDV for a card, [print an EMV Parameters Report](#) and locate the **Contactless CVM Limit** parameter under the report's section for the card. An SDV of **9999** means there is no maximum limit.

See [Signing Credit Card Receipts](#).

2.2.4 Tip Processing

Tip Processing on the Mobile 8300 has a number of features.

Basic Tip Processing

You can configure the terminal to prompt customers for a tip amount on Purchase, Pre-Authorization Completion and Advice transactions. If the customer enters a tip amount greater than 0, the amount is printed on the receipt below the base amount. For tip amount entry by customers on receipts, Basic Tip Processing prints a blank tip line below the base amount on Pre-Authorization receipts.

Note: Tip Processing is skipped on [Signatureless Transactions](#).

Enhanced Tip Processing

This feature gives customers the option of keying in a dollar amount or a percentage when prompted for a tip on Purchases. If a customer opts for a percentage, the terminal displays up to three pre-configured, selectable percentage amounts. You can also configure your terminal to give customers a No Tip option.

Note: On Pre-Authorizations and Pre-Authorization Completions, Enhanced Tip Processing works the same way as Basic Tip Processing.

Gratuity Guidelines

You can configure the terminal to print suggested tip amounts on the Merchant copy of Pre-Authorization receipts. The tip amounts are calculated on the base amount using three pre-configured percentage amounts.

Tip Percentage on Purchases

You can configure your terminal to automatically add a pre-set Tip Percentage to all Purchase transactions. Tip Percentage is calculated on the base amount and printed on the receipt.

Note: Tip Percentage is skipped on [Signatureless Transactions](#).

For customer tip entry procedures, see [Entering a Tip Amount](#).

To configure Tip Processing, see [Configuring Tip Processing](#).

2.2.5 Cashback

This feature gives your customers the option of withdrawing cash from their debit account when they make a purchase at your place of business. You provide the cash to your customer and your business account is reimbursed for the amount of the Cashback when the Batch Close transaction is processed. Cashback is available only on Debit Purchases.

When customers choose to receive cash back, the terminal prompts them to:

- select a pre-set Cashback amount,
- manually key in another amount, or
- skip Cashback altogether.

Your terminal is configured with three pre-set Cashback amounts (\$10, \$20, \$30), but you can change these to amounts of your choice. Your terminal is also configured with a Cashback limit that is applied when customers manually key an amount instead of selecting a pre-set amount (\$40), but you can change it to an amount of your choice.

For Cashback customer entry procedures, see [Entering a Cashback Amount](#).

To configure the Cashback feature on the terminal, see [Configuring Cashback](#).

2. Features and Procedures

2.2.6 Clerk ID Prompting and Clerk Sub-Totalling

This feature allows you to set up individual Clerk IDs on your terminal. Clerk IDs are unique identifiers that a terminal operator keys in when prompted each time he/she performs a transaction.

This allows you to produce [Clerk Sub-Totals Reports](#) that track financial totals and number of transactions by clerk. Using this feature also allows you to produce [Tip Reports](#) in order to track tip activity by individual clerk.

Each Clerk ID can have one to six alphanumeric characters (punctuation and special characters are not allowed). A maximum of 255 Clerk IDs can be added for one Merchant ID. Once Clerk IDs are set up and associated with your Merchant ID, they can be used on any handheld terminal that has been configured using your Merchant ID.

IMPORTANT: Clerk Subtotals must be cleared on a regular basis (weekly is recommended). If not, the Moneris Host will automatically clear the totals when the number of transactions for a card type processed by a Clerk ID reaches 10,000.

Default Clerk ID

A default Clerk ID can be set up on your terminal to be automatically used on all transactions (no Clerk ID prompting). When this feature is enabled, all transactions performed on that terminal will be added to the Default Clerk IDs totals regardless of which operator performs the transaction.

For the Clerk ID prompting procedure, see [Entering the Clerk ID](#).

To configure Clerk Mode on your terminal, see [Configuring Clerk Mode](#).

2.2.7 Invoice Number Prompting

This feature enables a prompt to key in an Invoice Number for every Credit and Debit financial transaction. If this feature is enabled, you have the option of entering an Invoice Number or bypassing the prompt by simply pressing the green **OK** key when the prompt appears.

The Invoice Number can be up to 10 characters long and any combination of alphabetic and numeric characters (punctuation and special characters are not allowed).

If a [Private Label Card](#) or a [Purchasing Card](#) is used, the Invoice Number can be up to 7 characters long and you cannot bypass prompt.

For Invoice Number Prompting procedures, see [Entering an Invoice Number](#).

To enable Invoice Number Prompting, see [Configuring Invoice Number Prompting](#).

2.2.8 Personalized Receipts

You can configure your terminal to print receipts with personalized headers and footers. You can configure up to six headers and four footers. The language in which receipt text is printed is based on your terminal's [Language Selection](#) configuration.

You can also configure your terminal to print receipts with double-wide characters for amount lines and the [Sequence Number and Approval Code](#) lines.

In addition, you can configure your terminal to determine whether a Customer copy of the receipt after the Merchant copy on credit non-EMV (non-chip) transactions.

To configure your terminal's receipt printing, see [Configuring Receipt Printing](#).

2.2.9 PAN Fraud Control

To reduce the fraudulent use of credit cards, this security feature prompts you to key in the last four digits of a credit card number after the card has been swiped. PAN Fraud Check then compares the keyed-in digits to the information contained in the card's magnetic stripe or chip to confirm that the numbers are valid. If the numbers are invalid, the transaction cannot continue.

This feature is enabled on the Moneris Host.

For PAN Fraud Control procedures, see [Responding to Basic Transaction Prompts](#).

2.2.10 The Manager Password

The Manager Password restricts access to various terminal functions as well as financial transactions that impact your financial account (e.g. refunds and voids).

IMPORTANT: You, the merchant, are solely responsible for the security of the Manager Password at all times. If your Manager Password is compromised, [change the password immediately](#).

There are a number of factors that affect whether the terminal prompts for a Manager Password including how the terminal is set up on the Moneris Host and how you have [configured the use of passwords](#) on the terminal.

Note: On some functions, the "Password:" prompt may still appear regardless of your terminal's configuration.

To change the Manager Password, see [Changing the Manager Password](#).

To configure the use of passwords on your terminal, see [Menu and Editing Parameters \(Menu Config Menu\)](#).

2.2.11 Multi-Terminal Reporting

If you have more than one terminal associated with your Merchant Number operating in one location, Multi-Terminal Reporting allows you to perform a [Batch Close](#) and print a [Deposit Totals Report](#) on all your terminals or a sub-set of the terminals from a single terminal.

In order to use Multi-Terminal Reporting, you must set up a Terminal Name on each terminal you want to include in the function. At any time, you can add a new Terminal Name or delete a Terminal Name.

IMPORTANT: When doing a multi-terminal Batch Close and running the Multi-Terminal Deposit Totals Report, totals are cleared on the terminal on which the functions are performed, but are NOT cleared on the other associated terminals.

To configure Multi-Terminal Reporting, see [Configuring Multi-Terminal Reporting](#).

To use Multi-Terminal Reporting, see [Processing a Multi-Terminal Batch Close and Multi-Terminal Deposit Totals Report](#).

2.2.12 Terminal Names

If you have more than one terminal operating in one location, you can use this feature to identify individual terminals by assigning a unique alphanumeric name to each terminal.

If you are using [Multi-Terminal Batch Close](#), a Terminal Name must be assigned to each terminal you want to include in the [Multi-Terminal Reporting](#) and Batch Close processes.

To enable Multi-Terminal reporting and add/delete Terminal Names, see [Configuring Multi-Terminal Reporting](#).

2. Features and Procedures

2.2.13 Private Label Cards

The Private Label feature allows you to offer your customers a credit card that can be used exclusively in your store or stores.

Purchases

All standard financial transactions can be processed using a Private Label Card. For example, a Private Label Card Purchase transaction follows the same steps as a regular credit card Purchase with one possible additional step: the "Promo Code:" prompt may appear. Promo codes (or promotion codes) are supplied to you by the Private Label Card Issuer.

Payments

There is one transaction that is unique to Private Label Cards. The [Payment](#) transaction is used to apply a dollar amount towards the balance on a cardholder's Private Label Card.

Reporting

Private Label Card transactions appear as a separate card type on all reports that include credit card transactions.

To configure Private Label Cards on the terminal, see [Configuring Private Label Cards](#).

To transact a Payment on a Private Label Card, see [Transacting a Payment on a Private Label Card](#).

2.2.14 Corporate Cards

Corporate Cards (also known as Purchasing Cards) are a special type of credit card that provides enhanced reporting data to help cardholders with cost allocation, tax compliance and account reconciliation.

If the terminal is configured to accept Corporate Cards, it prompts for a Customer Reference Number and tax amounts when a Corporate Card is entered on a transaction. The Customer Reference Number and tax amounts are printed on receipts and also appear on the cardholder's monthly statement from the Corporate Card issuer.

To enable and configure this feature, see [Configuring Corporate Cards](#).

To transact a Purchase on a Corporate Card, see [Transacting a Purchase on a Corporate Card](#).

2.2.15 The Moneris Gift & Loyalty Programs

The Moneris Gift & Loyalty programs allow you to offer your customers an electronic card-based program that is activated and processed through the Moneris Mobile 8300 terminal. There are two programs available:

- **Gift Cards:** allows you to offer your customers stored-value gift cards for pre-defined dollar values as well as variable-value cards and rechargeable cards. This is available for small businesses as the Moneris Gift Card program and as a customized program for national chains.
- **Loyalty Points:** allows you to reward customer loyalty by awarding points based on the dollar value of purchases a cardholder makes. This is available for small businesses as the Moneris Loyalty Card program and as a customized program for national chains.

All transactions, administrative and configuration functions begin at the [GIFT & LOYALTY transactions menu](#).

2.3 Procedures

Listed below are some of the more common procedures followed on the Mobile 8300.

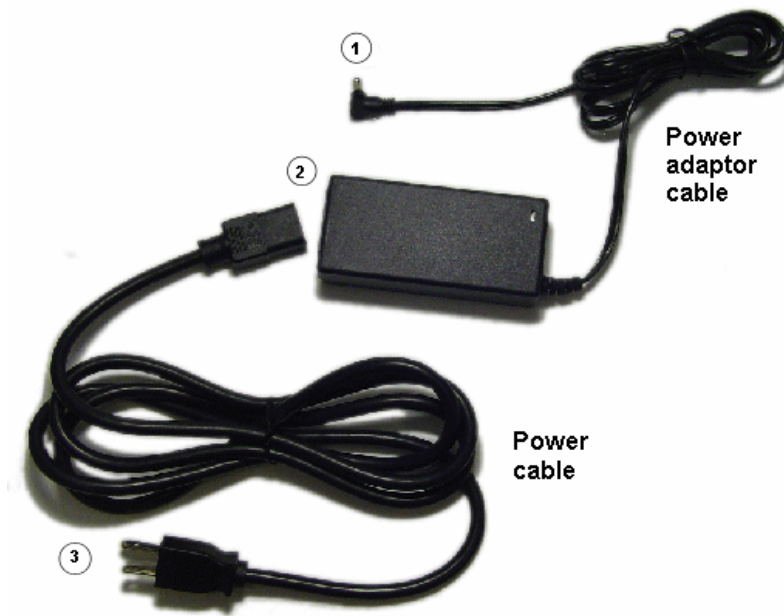
For other, more specific procedures, see [Financial Transactions](#), [Admin Transactions](#), [Reports](#), [End-of-Day Procedure](#) and [Demo Mode Transactions](#).

- [Powering up the terminal](#)
- [Powering down the terminal](#)
- [Attaching the battery to the terminal](#)
- [Removing the battery from the terminal](#)
- [Charging the battery](#)
- [Loading paper in the printer](#)
- [Selecting the terminal language](#)
- [Taking a manual imprint of a credit card](#)
- **Transaction prompts:**
 - [Responding to basic transaction prompts](#)
 - [Entering a tip amount](#)
 - [Entering a Cashback amount on a debit transaction](#)
 - [Entering the Clerk ID](#)
 - [Entering an Invoice number](#)
- **Receipts:**
 - [Finding a transaction's Sequence and Orig Auth numbers](#)
 - [Signing credit card receipts](#)
 - [Reprinting a receipt](#)
 - [Printing a cash receipt](#)
- [Entering alphabetic characters and punctuation](#)
- [Cancelling a transaction](#)
- [Cancelling a report](#)
- **Terminal security:**
 - [Changing the manager password](#)
 - [Requesting a Code 10 Authorization](#)
 - [Dealing with disputed debit transactions](#)

2. Features and Procedures

2.3.1 Powering Up the Mobile 8300

The Moneris Mobile 8300 terminal does not have an ON/OFF switch.



The 8300 Charge Base 2-part Power Cable

IMPORTANT: You must use the exact power adaptor and cable provided with the charging base by Moneris Solutions. Failure to do so may affect the operability of, or cause damage to, the terminal.

To power up (or turn on) the charging base:

1. Plug the power adaptor cable into the power port (⚡) on the [base](#).
2. Plug the power cable into the power adaptor.
3. Plug the other end of the power cable into a power source, e.g. a wall jack or a power bar.

To power up (or turn on) the terminal:

Press and hold the green **OK** key until the display lights up and the keypad backlight comes on.

OR

Place the terminal on the [charging base](#).

The terminal is ready when the [applications menu](#) appears.

2.3.2 Powering Down the Mobile 8300

The Moneris Mobile 8300 terminal does not have an ON/OFF switch.

To help reduce battery usage, power down the terminal when you are not using it.

The terminal will power off automatically when it has remained in [Sleep Mode](#) for approximately 4 hours and the terminal is not sitting on a charging base.

To power down (or turn off) the terminal:

1. Press the * (asterisk) key to access the [applications menu](#).
2. Press and hold down the red **CANC ANNUL** key until the message "Shutting Down 2" appears and the terminal beeps.
3. Release the red **CANC ANNUL** key.

The screen will go blank and the backlight will turn off.

Note: See [Powering Up the Terminal](#).

2.3.3 Loading Paper in the Integrated Printer



Paper well open and empty



Paper well open with roll of paper

To load a paper roll into the terminal:

1. Open the paper well at the back of the terminal.
2. Press the printer latch towards the back of the printer then lift the printer lid up and back.
3. Remove the paper roll that is in the paper well.
4. Prepare the new paper roll: Loosen the glued leading edge of paper and unwind the paper roll past any glue residue on the paper, or remove the protective strip.
5. Place the new paper roll into the paper well with the loose end unrolling from the bottom of the roll towards the top of the terminal.
6. Pull the loose end of the paper towards the top of the terminal at least one inch (2.2 cm) past the metal teeth at the front of the paper well. Make sure any glue residue on the paper role is past the cutting teeth of the printer.
7. Close the printer lid and press firmly on it to ensure that it is securely latched.
8. Tear off the loose end of the paper by pulling it towards the keypad then sideways across the metal teeth.
9. Select **DEBIT & CREDIT** and then press the **3** key to feed paper through the printer and ensure it is working properly.
10. Press the * (**ASTERISK**) key to return to the applications menu.

The printer is ready to print again.

Note: If the printer ran out of paper in the middle of a receipt or report, you may be able to [reprint the receipt or report](#).

2.3.4 Selecting the Terminal Language

The text on the terminal display, receipts and reports can be in one of two languages: English and French. One language can be selected for the Merchant and another for the Customer.

Selecting the Merchant Language

The Merchant Language is used on merchant terminal prompts, the merchant copy of receipts and reports. The language is initially set on the Moneris Host but it can be changed anytime through [the CONFIGURATION menu](#).

IMPORTANT: The language can be changed only AFTER the [terminal's first initialization](#).

To change the Merchant Language:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The [transactions menu](#) appears.
2. Press the green **OK** key to access the CONFIGURATION menu.
3. Scroll down and select **Set Language**.
4. Select **ENG** (English) or **FRN** (French).
5. Press the red **CANC ANNUL** key then press the * (**ASTERISK**) key to return to the applications menu.

Selecting the Customer Language

The Customer Language is used on customer terminal prompts and customer copies of receipts. By default, the language is the same as the Merchant Language but is set for each individual transaction based on the Language Code on the customer's card. When the terminal detects the code, it switches to that language for the duration of the transaction. When the transaction is complete, the terminal reverts to the Merchant Language.

If a Language Code is not present on the card or if it is neither English nor French, the terminal prompts the customer to select either English or French.

To change the Customer Language on the terminal:

1. You or the customer swipes or inserts the card.
2. At the "Select Language" prompt, the customer selects **ENG** or **FRN**.
The selected language is used for the duration of the transaction.

2.3.5 Taking a Manual Imprint of a Credit Card

If the "Imprint Card Press OK Key" prompt appears:

1. Take an imprint of the customer's credit card using the imprinter and the appropriate paper Sales Draft (e.g. a Visa Purchase paper sales draft for a Purchase on a Visa card).

Ensure that the Card Number, Issue Date, Expiry Date and Cardholder Name are legible.

2. Print the transaction date and amount on the paper sales draft.

Note: If the transaction amount is over your Merchant Floor Limit, [call the Moneris Credit Voice Authorization number](#) to obtain a Voice Authorization Number for the transaction and record the Voice Authorization Number on the paper sales draft.

3a. To process a Purchase, have the cardholder sign the sales draft. Ensure the signature matches the signature on the card. If not, [contact the Moneris Merchant Service Centre](#).

OR

3b. To process a Refund, sign the sales draft yourself.

4. Provide the customer with the Cardholder Copy of the Sales Draft and retain the Merchant Copy for your records.

5. Press the green **OK** key to continue the transaction.

2.3.6 Responding to Basic Transaction Prompts

Merchant Prompts

If this prompt appears...	Take this action
Customer Press OK to Continue	Pass the terminal to the customer, who follows the prompts.
Return to Clerk	Retrieve the terminal and press the green OK key to continue.
Last 4 Digits	Key in the last four digits of the card number and press the green OK key.
Exp Date (MMYY)	Key in the card's expiry date (MMYY) and press the green OK key.
Validation Code	Key in the three- or four-digit validation code on the back of the card and press the green OK key.
Code present?	If the code is not there, select No . If the code is not readable, select Xread .
Promo Code:	Key in the six-digit Private Label promotion code and press the green OK key.

Customer Prompts

If this prompt appears...	Take this action
Customer Press OK to Continue	Press the green OK key.
Select Language	Select ENG (English) or FRN (French).
Select Appl:	Select a displayed application by pressing the corresponding function key (F1, F2, etc.).
<Application name>-OK?	Select Yes to confirm use of the displayed application.
Purchase Amount OK?	Check the Purchase amount and select Yes to accept it.
Purchase Total OK?	Check total Purchase + Cashback + Tip Amount and select Yes to accept it.
Select Account:	Select CHQ (Chequing) or SAV (Savings).
Enter PIN & OK:	Key in their PIN (Personal Identification Number) and press the green OK key.
Remove Card	Remove the chip card from the reader.
Return to Clerk	Return the device to you.
Wait for PINPAD	Follow the prompts on the PINpad.

2.3.7 Entering a Tip Amount

Basic Tip Processing

If [Basic Tip Processing](#) is enabled on the terminal, the customer is prompted as shown below on Purchase, Pre-Authorization Completion and Advice transactions.

1. "Tip: \$0.00" appears on the terminal.
- 2a. The customer (or in some cases you) keys in a tip amount to add to the transaction and presses the green **OK** key to continue the transaction with the tip added.

OR

- 2b. The customer presses the green **OK** key without keying in a tip amount and the transaction continues with no tip added.

Note: Tip Processing is skipped on [Signatureless Transactions](#).

Enhanced Tip Processing

IMPORTANT: Basic Tip Processing must be enabled in order for Enhanced Tip Processing to work.

To configure Tip Processing, see [Configuring Tip Processing](#).

If [Enhanced Tip Processing](#) is enabled on the terminal, the customer is prompted as shown below on Purchase transactions.

Note: On Pre-Authorizations and Pre-Authorization Completions, Enhanced Tip Processing works the same way as Basic Tip Processing.

1. "Tip Type:" appears on the terminal.
- 2a. The customer selects %.

If up to three [configured suggested percentages](#) appear with an **Other** selection, the customer selects the desired tip percentage **OR** selects **Other**, keys in a tip percentage and then presses the green **OK** key to continue the transaction with the tip added accordingly.

If no tip percentages have been configured on the terminal, the "Tip %:" prompt appears, and the customer keys in a tip percentage and then presses the green **OK** key to continue the transaction with the tip added accordingly.

OR

- 2b. The customer selects \$.

At the "Tip:" prompt, the customer keys in a tip amount and then presses the green **OK** key to continue the transaction with the tip added.

OR

- 2c. The customer selects **No Tip** (selection is available only if the [No Tip option](#) is enabled on the terminal) and the transaction continues with no tip added.

2. Features and Procedures

2.3.8 Entering a Cashback Amount on a Debit Transaction

If the [Cashback option](#) is enabled on the terminal, the customer is prompted as follows on Debit Purchase transactions.

Note: The Cashback amount is withdrawn from the same account used for the Purchase transaction.

To configure the Cashback option, see [Configuring Cashback](#).

1. The "Cashback?" prompt appears on the terminal.

2a. The customer selects **Yes**.

[Three pre-set amounts](#) appear with an **Other** selection.

If the customer selects a pre-set amount, the transaction continues with the amount added to the Purchase.

If the customer selects **Other**, the "Cash:" prompt appears, and the customer keys in a cash amount then presses the green **OK** key to continue the transaction with the amount added to the Purchase.

If the customer selects **Other** and the keyed in amount exceeds [the maximum Cashback allowed](#), an "Out of range" message appears and the customer is prompted to key in another amount.

OR

2b. The customer selects **No** and the transaction continues with no Cashback amount added.

2.3.9 Entering the Clerk ID

If [Clerk ID prompting](#) is enabled, the terminal prompts you as shown below on all transactions.

1. The "Clerk Id:" prompt appears on the terminal.

2. Key in a Clerk ID (1-6 digits) and press the green **OK** key to continue the transaction.

Note: You are required to key in a Clerk ID when prompted for one.

To configure Clerk ID prompting, see [Configuring Clerk Mode](#).

2.3.10 Entering an Invoice Number

If [Invoice Number prompting](#) is enabled, the terminal prompts you for an Invoice ID on Credit Card and Debit transactions.

1. The "Invoice Id:" prompt appears on the terminal.

2a. Key in an alphanumeric Invoice ID up to 10 characters long and press the green **OK** key to continue the transaction.

OR

2b. Press the green **OK** key to bypass the prompt.

Note: If prompted for an Invoice Number during a [Corporate Card](#) Purchase transaction, you must key in a number with a maximum of 7 characters.

To configure Invoice Number Prompting, see [Configuring Invoice Number Prompting](#).

2.3.11 Finding a Transaction's Sequence and Orig Auth Numbers

Sequence Number

The Sequence Number is printed on the receipt for all transactions. A transaction's Sequence Number is the first 6 of the last 7 digits of the **Seq #** printed on the receipt. For example, if the **Seq #** on a receipt is **0001234560**, the Sequence Number is **123456**.

The Sequence Number is used to select transactions from the terminal memory to process Corrections, Pre-Authorization Completions and Pre-Authorization Deletions, to [reprint receipts](#) and to use the [Batch Review](#) function.

To process a Pre-Authorization Completion or Deletion:

Use the Sequence Number printed on the Pre-Authorization receipt.

Note: If you do not have the Pre-Authorization receipt, print the [Pre-Auth Transactions Report](#) to obtain the Pre-Authorization's Sequence Number.

To process a Correction (transaction void):

Use the Sequence Number printed on the receipt of the transaction you want to void.

Note: If you do not have the original receipt, use the [Batch Review](#) function to obtain the Sequence Number of the transaction you want to void.

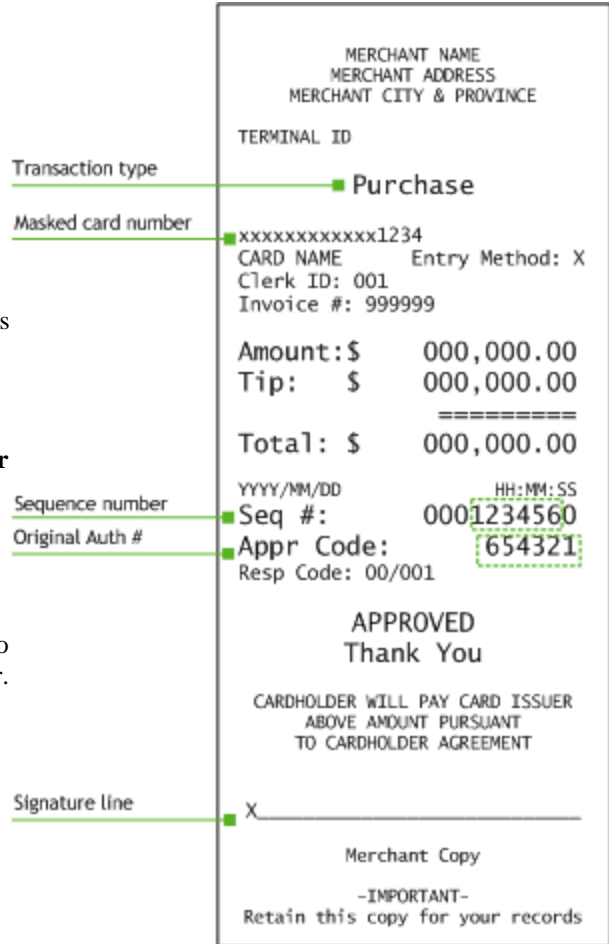
Orig Auth

The Orig Auth # is printed on the receipt for all transactions. A transaction's Orig Auth # is the 6-digit **Appr Code** printed on the receipt (e.g., **654321**).

The Orig Auth # is used to select transactions from the terminal memory to process Refunds.

To process a Refund:

Use the Orig Auth # (**Appr Code**) on the receipt of the transaction you want to refund.



2. Features and Procedures

2.3.12 Signing Credit Card Receipts

General Guidelines

- If a signature line appears on the Merchant copy of a receipt, the cardholder must sign the receipt.
- If **NO SIGNATURE REQUIRED** or **VERIFIED BY PIN** appears on the Merchant copy of a receipt, a signature is not required.
- If a signature line appears on the Customer copy of a receipt, you (the merchant) must sign the receipt.

Signatureless Transactions

A "signatureless" transaction is a swiped Purchase for which a cardholder signature is not required because the Purchase amount is at or below the card's maximum Signatureless Dollar Value (SDV). Depending on the card type and how your terminal is configured, receipts may or may not print for a signatureless transaction.

To configure receipt printing, see [Configuring Receipt Printing](#).

Note: Signatureless transactions for swiped purchases apply only when a customer uses a swipe-only card, not when the customer is instructed to swipe a chip or contactless card.

MERCHANT NAME
MERCHANT ADDRESS
MERCHANT CITY & PROVINCE

TERMINAL ID

Transaction type **Purchase**

Masked card number **xxxxxxx1234**

CARD NAME Entry Method: X
Clerk ID: 001
Invoice #: 999999

Amount: \$ 000,000.00
Tip: \$ 000,000.00
Total: \$ 000,000.00

YYYY/MM/DD HH:MM:SS
Sequence number **0001234560**

Original Auth # **654321**

Appr Code:
Resp Code: 00/001

APPROVED
Thank You

CARDHOLDER WILL PAY CARD ISSUER
ABOVE AMOUNT PURSUANT
TO CARDHOLDER AGREEMENT

Signature line **X**

Merchant Copy
-IMPORTANT-
Retain this copy for your records

2.3.13 Reprinting Receipts

This function prints a duplicate Customer copy of a receipt.


Note: To have the function print the Merchant copy of a receipt as well as the Customer copy, enable the [Reprint Merch Copy](#) parameter (see [Configuring Receipt Printing](#)).

Note: For debit transactions, if you have the [Customer Copy](#) parameter set to "None", only the Merchant copy of the receipt initially prints. But if you perform a reprint receipt, the Customer copy is printed.

To reprint a receipt:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." is displayed then the [transactions menu](#) appears.

2. Press the **REPRINT** key (second **purple** key from the right, below the  icon on the screen).
The REPRINT menu appears.

3a. To reprint the Customer copy of the last transaction receipt, select **Last Receipt**.

OR

3b. To reprint a different receipt, select **Any Receipt**, key in the transaction's [Sequence Number](#) and press the green **OK** key.

The terminal prints the Customer copy of the receipt.

Note: On [Signatureless Transactions](#), only the Customer copy is printed regardless of the [Reprint Merch Copy](#) setting.

4. If the "Reprint Last Merchant Cpy" prompt appears:
 - a. Select **Yes** to print the Merchant Copy of the receipt.

OR

 - b. Select **No** to return directly to the transactions menu.

2.3.14 Printing a Cash Receipt

Use this function to print a receipt for a cash purchase.

To print a cash receipt:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the [transactions menu](#) appears.
2. Press **9** to print a cash receipt.
If the "Clerk Id:" prompt appears, key in your [Clerk ID](#) and press the green **OK** key.
The "Amount: \$" prompt appears.
3. Key in the amount of the purchase and press the green **OK** key.
4. If the "Tip: \$0.00" prompt appears:
 - a. The customer can key in a tip amount and press the green **OK** key.

OR

 - b. You can press the green **OK** key to print a Tip line and Total line on the cash receipt.

2.3.15 Entering Alphabetic Characters and Punctuation

Alphabetic Characters

To key in alphabetic characters:

1. Press the number key with the character you want to display.
2. Press the **ALPHA** key repeatedly until the character appears on the screen.

For example, to key in THANK YOU:

To key in this text:	Press these keys on the keypad:
T	8 ALPHA
H	4 ALPHA ALPHA
A	2 ALPHA
N	6 ALPHA ALPH
K	5 ALPHA ALPHA
[space]	0 ALPHA ALPHA
Y	9 ALPHA ALPHA
O	ALPHA
U	6 ALPHA ALPHA ALPHA
.	8 ALPHA ALPHA
[period]	1 ALPHA ALPHA ALPHA

Note: Use the yellow **CORR** key to delete single characters.

2. Features and Procedures

Punctuation and Special Characters

KEY	CHARACTER
1	. (period or dot) \ (backslash)
2	~ (tilde)
3	%
4	@ (at sign)
5	/ (slash)
6	?
7	[
8]
9	{
*	* (asterisk) , (comma) ' (apostrophe) " (quotation mark) }
0	- (hyphen) (space) + &
#	# (pound or number sign) = : \$ ^

Note: These are not allowed for [Clerk IDs](#) and [Invoice Numbers](#).

2.3.16 Cancelling a Transaction

Note: Once the terminal has begun communicating with the Moneris host, i.e., once the "Processing" message is displayed, the transaction can no longer be cancelled.

To cancel a transaction:

Press the red **CANC ANNUL** key.

The terminal prints the Merchant Copy of the receipt with TRANS CANCELLED on it, if configured, prints the Customer Copy of the receipt with TRANS CANCELLED on it then returns to the transactions menu.

2.3.17 Cancelling a Report

To cancel a report:

1. Press the red **CANC ANNUL** key.

If the report has begun printing, the terminal stops printing the report and returns to the **REPORTS** menu.

Note: The Terminal Stats report continues to print until the report is finished.

2. Press the red **CANC ANNUL** key to return to the transaction menu.

2.3.18 Changing the Manager Password

IMPORTANT: For security purposes, we strongly recommend you change your terminal's temporary Manager Password to a secure password of your own. The password should not be changed until after the terminal's [first initialization](#).

To change the Manager Password:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The [transactions menu](#) appears.
 2. Press the green **OK** key to access the **CONFIGURATION** menu.
 3. Select **Setup**, key in the current manager password or the temporary password, and press the green **OK** key.
 4. Select **Terminal**.
 5. Select **Next** until "Manager Pwd" appears.
 6. Select **Edit**, key in your new password and press the green **OK** key.
- Note:** The password must be 5-10 digits long and must consist of numbers only.
7. Select **Exit** then select the green **OK** key to save changes.
 8. Press the red **CANC ANNUL** key then press the * (**ASTERISK**) key to return to the applications menu.

See [The Manager Password](#).

2.3.19 Requesting a Code 10 Authorization

During a transaction, if you feel that a customer, card or transaction is suspicious and needs investigating, call the [Moneris Merchant Service Centre](#) and state that the call is a Code 10. This will alert the Moneris agent without alarming your customer. The operator will ask you some "Yes/No" questions and then provide instructions.

Reasons for calling in a Code 10 include:

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

2.3.20 Dealing With Disputed Debit Transactions

Do not attempt to resolve or compensate a cardholder for a disputed Debit transaction. Refer the Cardholder to their Financial Institution.

3. The Moneris Mobile 8300 Hardware

3.1 The Hardware

3.1.1 The Moneris Mobile 8300 Duet Terminal



The terminal consists of:

- a hand-held wireless terminal with:
 - an integrated PINpad
 - an LED [status light](#)
 - a backlit [display](#)
 - a backlit [keypad](#)
 - an integrated [printer](#)
 - a [magnetic stripe reader](#)
 - a [chip card reader](#)
 - a removable, rechargeable [battery](#).
- a [charging base](#)

3. The Moneris Mobile 8300 Hardware

3.1.2 Backlight

Both the screen and the keypad light up to make it easier to read the screen and locate the keys in low-light locations such as restaurants.

The backlight will turn off automatically when the terminal has remained at the [application menu](#) or one of the [transaction menus](#) for 6 minutes and it is not on a charging base. When the backlight turns off, the screen displays ****SLEEP MODE**** above the application menu.

To turn the backlight back on and exit [sleep mode](#), press the green **OK** key on the terminal.



8300 Handheld with the backlight on

3.2 Setting up the Terminal

Follow these three steps to set up the terminal hardware:

1. [Charge the battery.](#)

IMPORTANT: When charging a battery for the first time, it must be charged for a minimum of 3 hours.

2. [Insert the SIM card.](#)

3. Check the printer for paper:

- a. From the applications menu, select **DEBIT & CREDIT**.
- b. Press the **3** key to see if paper appears.

Note: If no paper appears, [load a paper roll in the printer.](#)



When the terminal is not performing any transactions or functions, and has been idle for a pre-set period of time, the terminal will display [the applications menu](#).

3.3 Wireless Signal Status Icons

The terminal must be within the coverage area of the wireless service provider in order to process transactions. If either the wireless signal status icon or the antenna icon does not appear, the terminal cannot process transactions.





3.3.1 The Antenna Icon

The antenna icon appears in the lower left side of the display whenever a menu is displayed.

Icon	Description
	The terminal is connected to the wireless network and can process transactions.
	The terminal is NOT connected to the wireless network and can NOT process transactions.

3.3.2 The Wireless Signal Strength Icon

The wireless signal status icon appears in the bottom left corner of the terminal display on all menus except the application menu.

Icon	Strength	Description
	4 bars	The terminal is receiving a strong signal from the wireless network and can process transactions.
	3 bars	The terminal is receiving a good signal and can process transactions.
	2 bars	The terminal is receiving a signal and can process transactions but it may take longer to complete a transaction.
	1 bar	The terminal is receiving a weak signal and may not be able to process transactions.
	0 bars	The terminal is not receiving any signal and can NOT process transactions.

3.4 The Terminal Keypad



The Mobile 8300 keypad and purple function keys

The terminal keypad contains alphanumeric keys and function keys.

3.4.1 Alphanumeric Keys

These keys allow you to enter amounts for transactions, text for receipt messages and selection criteria for reports. Some alphanumeric keys also act as function keys (see below).

3.4.2 The Function Keys

NAME	ALLOWS YOU TO...
F0 to F5	select the option displayed on the right-hand side of the display screen beside the function key
Purple keys	select the icon displayed on the bottom of the display screen above the purple key
Arrow Key	scroll down or up (press the yellow CORR key to toggle between scrolling up and down)
Reprint Key	launch the REPRINT menu
Reports Key	launch the REPORTS menu
ALPHA	enter alphabetic characters for personalized receipt text, Clerk IDs, etc. Located in the middle of the row of purple keys.
CANC ANNUL	- cancel a transaction - return to the transaction menu after completing a transaction - return to the previous menu when performing ADMIN functions The red key located at the bottom left of the keypad.

NAME	ALLOWS YOU TO...
CORR	<ul style="list-style-type: none"> - clear the last character or number entered (by the cardholder or the merchant) - return to the previous cardholder prompt if no value is currently displayed for the cardholder prompt - clear the value displayed when a prompt is first displayed - change the direction of the arrow icon above the 1st purple function key. <p>The yellow key located at the bottom centre of the keypad.</p>
OK	<ul style="list-style-type: none"> - confirm the data input is complete - confirm the data displayed is correct - display the CONFIGURATION menu if pressed when the terminal is at the transactions menu. <p>The green key located at the bottom right of the keypad.</p>
3	advance the paper in the printer
6	access the Quick Setup menu
9	print a Cash Receipt
* (asterisk)	return to the applications menu

3.5 The Magnetic Stripe Card Reader

The Magnetic Stripe Reader (MSR) is located in a slot on the right-hand side of the terminal. When a payment card is swiped, the MSR reads the information encoded on the card's magnetic stripe.



To swipe a card, the magnetic stripe must be down and facing towards the terminal.

Cards can be swiped from the back of the terminal forwards or from the front of the terminal backwards.

3.6 The Chip Card Reader

The chip card reader is located in a slot in the front of the terminal. When a chip card is inserted, the chip card reader reads the information on the card's chip (e.g., whether to prompt for PIN or print a signature line on the receipt).

To correctly insert the chip card into the chip card reader:

1. Ensure that:
 - a. the card is facing up

AND

 - b. the chip is closest to chip card reader slot on the terminal.
2. Slide the card into the chip card reader slot until the card stops sliding in.



Inserting a Chip Card in to the Chip Card Reader

IMPORTANT: Leave the chip card in the reader for the entire transaction.

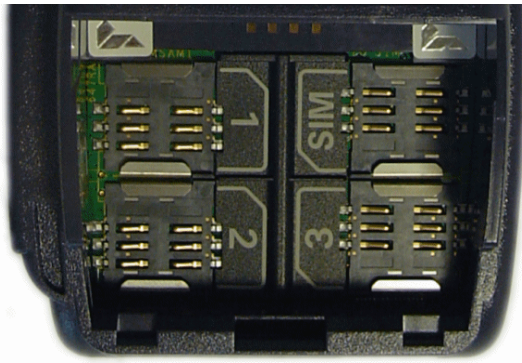
3. When the "Remove Card" prompt appears, pull the card gently out of the chip card reader.

3.7 The Integrated Printer

A thermal printer is integrated into the Moneris Mobile 8300 terminal. It prints black text on white, one-part thermal paper.

To order additional paper rolls, see [Assistance](#). To load a paper roll in the printer, see [Loading Paper in the Printer](#).

3.8 Inserting the SIM Card



SIM Card Slot - No SIM Card



SIM Card Slot with SIM Card

1. [Remove the battery](#) from the terminal.
2. Insert the SIM card in to the top right slot marked SIM.

Make sure that the metal contacts on the SIM card are face-down and the notch on the SIM card is aligned with the notch on the outline of the SIM slot (marked SIM).

IMPORTANT: There are four slots. Make sure you insert the SIM card into the SIM slot.

3. [Re-attach the battery](#) to the terminal.
4. [Power up the terminal](#).

The terminal is ready when the applications menu appears.

4. Battery Management

4.1 The Battery



Top of Battery



Bottom of Battery

The Mobile 8300 is powered by a removable Li-ion battery.

IMPORTANT: You must use only batteries provided by Moneris Solutions. Failure to do so may affect the operability of, or cause damage to the terminal and/or battery and Moneris Solutions shall have no liability whatsoever for a failure to follow these instructions.

To extend the battery life, reduce battery usage. You can [power off](#) the terminal manually when you are not using it or wait for the terminal to go into [Sleep Mode](#) after a set time period.

The battery can only be charged while attached to the terminal. It cannot be charged by itself.

To purchase additional batteries, contact [Moneris Solutions](#).

[To charge the battery](#), refer to [Charging the Battery](#).

[To attach the battery to a terminal](#), refer to [Attaching the Battery](#).

[To remove the battery from a terminal](#), refer to [Removing the Battery](#).

4.2 Attaching the Battery



Battery Attachment

1. Turn the handheld so that the keypad and display are facing to the left, the back of the handheld is facing to the right and the chip card reader is facing up.
2. Hold the battery with the connectors facing downwards and the Verifone logo facing the battery well.

IMPORTANT: Do not touch the contacts on the battery or the handheld.

3. Insert the two plastic teeth at the bottom of the battery into the slots at the bottom of the battery well.
4. Tilt the battery towards the terminal into the battery well.
5. Press the top of the battery towards the terminal until you hear a click.

4.3 Removing the Battery



Battery Removal

IMPORTANT: The handheld must be powered off before removing the battery.

1. Power off the handheld.
2. Turn the handheld so that the keypad and display are facing to the left, the back of the handheld is facing to the right and the chip card reader is facing up.
3. Press down on the latch on the battery.
4. Pull the latch to the right.
The top of the battery lifts off the back of the handheld.
5. Holding onto the sides of the battery, lift the battery up to disengage the two plastic teeth at the bottom of the battery.

IMPORTANT: Do not touch the contacts on the battery or the handheld.

4.4 Charging the Battery

To recharge the battery, there are two options:

- a [car-charger cable](#) that connects to a vehicle's cigarette lighter. This is available for purchase.
- a [charging base](#) with charging cable and power adaptor. This is available for purchase.

IMPORTANT: When charging a battery for the first time, it must be fully charged before it is used. This will take approximately 6 hours.

4. Battery Management

4.4.1 Battery Charging Tips

- The battery must be attached to the terminal for charging-never charge the battery on the charging base by itself.
- Avoid frequent full discharge - it is better to recharge more often.
- Return the device to the charging station whenever possible. Charging a full battery is safe and does not damage the battery.
- The battery will not re-charge while the terminal is printing.
- If the terminal has been inactive for a number of weeks, a full recharge may be necessary.
- Allow a full discharge once a month (or at least once every 3 months)
- It is not recommended that batteries be allowed to fully discharge for extended periods of time as this may cause permanent damage.

4.5 The Charging Cable for Use in Your Vehicle



IMPORTANT: You must use the exact battery charging cable and power adaptor provided with the terminal by Moneris Solutions and use only batteries provided by Moneris Solutions. Failure to do so may affect the operability of, or cause damage to the terminal and/or the battery and Moneris Solutions shall have no liability whatsoever for a failure to follow these instructions.

1. Ensure the battery is attached to the terminal.
2. Plug the charging cable into the port on the terminal and the vehicle's cigarette lighter.

The [LED on the terminal flashes yellow](#) and the [battery charge level icon](#) will appear on the terminal display while the battery is charged.

4.6 The Charging Base



The Moneris Mobile 8300 Charging Base


IMPORTANT: You must use the exact [power cable and power adaptor](#) provided with the terminal by Moneris Solutions and use only batteries provided by Moneris Solutions. Failure to do so may affect the operability of, or cause damage to the terminal, the battery and/or the charging base and Moneris Solutions shall have no liability whatsoever for a failure to follow these instructions.


The base consists of the terminal cradle (see above) and the [two-piece power cable](#).

4.6.1 LED Status Light on the Charging Base



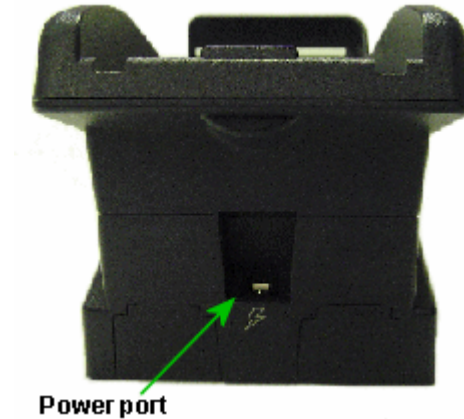
The LED Status Light on the front of the Charging Base

When the right-hand LED (above the  symbol) is glowing solid green, the power cable is plugged into base and providing power to the base.

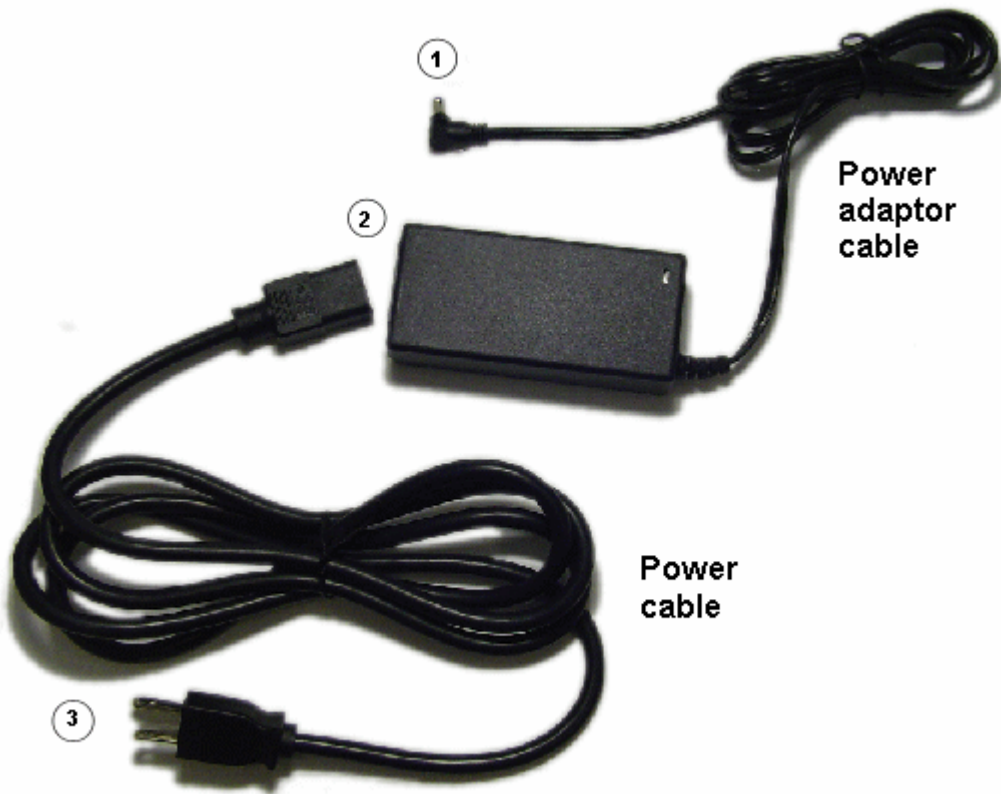
Please note that the left-hand LED (above the  symbol) is not used on the charging base available from Moneris Solutions.

4. Battery Management

4.6.2 Power Port on the Charging Base



4.7 The Power Cable for the Charging Base



IMPORTANT: You must use the exact battery charging cable and power adaptor provided with the terminal by Moneris Solutions and use only batteries provided by Moneris Solutions. Failure to do so may affect the operability of, or cause damage to the terminal and/or the battery and Moneris Solutions shall have no liability whatsoever for a failure to follow these instructions.

Before you begin, ensure the battery is attached to the terminal.







1. Plug the power adaptor cable into the power port on the charging base (P).
2. Plug the power cable into the power adaptor.
3. Plug the other end of the power cable into a power outlet.
4. Place the terminal on the charge base.

The [LED flashes yellow](#) and the [battery charge level icon](#) will appear on the terminal display while the battery is charged.

IMPORTANT: When charging a battery for the first time, it must be fully charged before it is used. This will take approximately 6 hours.

4.8 Battery Charge Level

The battery charge level icon appears in the bottom left corner of the terminal display on all menu screens except the applications menu..

Icon	% Charge	Description
	100%	Fully-charged battery
	75%	Battery almost fully charged
	50%	Half-charged battery
	25%	Battery almost empty Printing slows down, and the green backlight goes off and can not be turned on again until a charged battery is attached to the terminal or the terminal is placed on a charging base.
	10%	Battery is virtually empty. The terminal cannot print receipts or reports. The terminal will not process transactions until a charged battery is attached to the terminal or the terminal is placed on a charging base.
	0%	Battery is empty. The terminal will power off unless a charged battery is attached to the terminal or the terminal is placed on a charging base.

4.9 LED Status Light on the 8300

- **Green - Solid:** Terminal is charged and ready to use.
- Red - Flashing Slowly: Out of paper.
- Red - Flashing Quickly: Very low battery
- **Amber - Flashing Slowly while terminal is on the [charging base](#):** Battery is charging.
- **Off:** The terminal is off.

4.10 Sleep Mode

The terminal automatically goes into sleep mode when it has remained at the [application menu](#) or one of the [transactions menus](#) for 6 minutes and the terminal is not sitting on a charging base.

In sleep mode, the backlight is off and the screen displays ****SLEEP MODE**** above the application menu.

To exit sleep mode, press any key on the terminal.

Note: The terminal will not go into sleep mode when it is seated on the [charging base](#).

5. Configuring Your Terminal

Your Mobile 8300 terminal can be set up to accept and process a variety of cards including debit cards, credit cards, Private Label credit cards, and corporate (a.k.a. purchasing) credit cards. The terminal can also be set up to support gift card programs and loyalty programs.

Before you begin using your terminal to process transactions, you must configure it, inputting any special values and parameters needed for the options you want to use. Before you start, ensure you have the following information available:

- your Merchant ID
 - your Terminal ID
1. Configure the communications parameters.
 2. Configure your [Merchant ID and Terminal ID](#).
 3. Select the [standard features](#) and the [optional features](#) you intend to use on the terminal.
 4. Configure the selected features:
 - [Receipt printing](#)
 - [Tip Processing](#)
 - [Cashback](#)
 - [Clerk IDs and Clerk Sub-Totalling](#)
 - [Invoice Prompting](#)
 - [Multi-Terminal Reporting](#)
 - [Private Label Cards](#)
 - [Corporate Cards](#)
 5. [Initialize your terminal](#).
 6. [Print a Terminal Parameters Report](#).

Note: Some terminal parameters can be edited using the [Quick Setup menu](#).

5.1 Using Quick Setup

The Quick Setup menu provides quick access to a number of popular terminal configuration parameters. See the list of parameters below.

To access Quick Setup:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.
2. From the transactions menu, press **6**.
The "Password:" prompt appears.
3. Key in the [manager password](#) and press the green **OK** key.
The first Quick Setup menu appears.

5.1.1 Options for Each Parameter

- View (display and edit parameters)
- Print (print a list of parameters in the sub-menu and their current values)

5. Configuring Your Terminal

5.1.2 Parameters

These parameters can also be found on other menus. For instructions on editing the parameters, refer to the section for the menu indicated in parentheses beside the parameter.

Phone

Do Not Use

Terminal

- MONC Term Id (also found in the [Edit Format menu](#))
- MONC Merch Num (also found in the [Edit Format menu](#))
- Tip Processing (also found in the [Edit Terminal menu](#))
- Clrk/Srvr Mode (also found in the [Edit Terminal menu](#))
- Customer Copy (also found in the [Receipt Parameters menu](#))
- Header Line 1 to 6 (also found in the [Receipt Parameters menu](#) and the [Edit MIT menu](#))
- Terminal Beep (also found in the [Edit Terminal menu](#))

Communications

Do Not Use

IP Hosts

Do Not Use

5.2 Configuring Your Merchant ID and Terminal ID

To configure your Merchant ID and Terminal ID:

1. On the [applications](#) menu, select **DEBIT & CREDIT**.
"Activating App" appears followed by the transactions menu.
2. Press the green **OK** key to access the CONFIGURATION menu.
3. Select **Setup**, key in the temporary password and press the green **OK** key.
4. Scroll down and select **Merchant**.
"Term Id" appears.
5. Select **Edit**, key in the Terminal ID (the eight-digit number starting with 05 found on the back of the terminal, e.g. 05123456) and press the green **OK** key.
6. Select **Next** until "Merch Num" appears.
7. Select **Edit**, key in your 13-digit Moneris Merchant ID (e.g. 0030212345678) and press the green **OK** key.

Note: Your Moneris Merchant ID was provided to you when Moneris contacted you to confirm your terminal order. If you currently have a 9-digit merchant number beginning with a 1, 2 or 4, simply add 0030 to the beginning (i.e., 123456789 becomes 0030123456789).

8. Select **Exit** then select **OK** to save changes.
9. Press the red **CANC ANNUL** key then press the * (**ASTERISK**) key to return to the applications menu.

5.3 Configuring Receipt Printing

There are several parameters you can edit to configure what your receipts will look like and how they will print.

5.3.1 Enable the Printer

Use the [Enable Printer](#) parameter to enable/disable the integrated printer. The printer is enabled by default.

5.3.2 Configure Receipt Headers and Footers

Use these parameters to configure the lines of text you want to appear at the top of your receipts: [Header Line 1](#), [Header Line 2 to 5](#), [Header Line 6](#).

Use these parameters to configure the lines of text you want to appear at the bottom of your receipts: [Footer 1 to 3](#), [Footer 4](#).

All the parameters are blank by default.

5.3.3 Enable Large Amount Printing

Use the [Large Amt Print](#) parameter to enable/disable printing of double-wide characters for amount lines and the Sequence number and Approval Code lines (see [Finding Sequence and Orig Auth Numbers](#)). The feature is enabled by default.

5.3.4 Enable Printing of Customer Copies

Use the [Customer Copy](#) parameter to enable/disable and configure printing of Customer copies of receipts from non-chip transactions. By default, the terminal is configured to print Customer copies automatically.

5.3.5 Enable Re-Printing of Merchant Copies

Use the [Reprint Merch Copy](#) parameter to enable/disable and configure re-printing of Merchant copies of receipts in addition to Customer copies. Re-printing of Merchant copies is disabled by default.

5.3.6 Configure the Print Prompt Beep Delay

Use the [Prompt Beep Delay](#) parameter to configure the number of seconds you want the terminal to wait before printing the Customer copy after beeping and displaying the "Tear Receipt; Press OK key" prompt.

For receipt-related procedures, see [Finding Sequence and Orig Auth Numbers](#), [Signing Credit Card Receipts](#), [Reprinting Receipts](#) and [Printing a Cash Receipt](#).

5.4 Configuring Tip Processing

5.4.1 Basic Tip Processing

To enable Basic Tip Processing:

1. Set the [Tip Processing](#) parameter to **On - Prompt**.
2. Set the [Tip % nn.nn](#) parameter to **0**.

Note: Tip Processing is skipped on [Signatureless Transactions](#).

5.4.2 Enhanced Tip Processing

Note: On Pre-Authorizations and Pre-Authorization Completions, Enhanced Tip Processing works the same way as Basic Tip Processing.

To enable Enhanced Tip Processing:

1. Set the [EnhancedTipProc](#) parameter to **On**.
2. Set the [Tip Processing](#) parameter to **On - Prompt**.

IMPORTANT: Basic Tip Processing must be enabled in order for Enhanced Tip Processing to work.

To enable the No Tip option:

1. Make sure Enhanced Tip Processing is enabled.
2. Set the [TipNone](#) parameter to **On**.

To configure the suggested tip percentage amounts:

1. Make sure Enhanced Tip Processing is enabled.
2. Set any of the [Sug Tip% 1 nn](#), [Sug Tip% 2 nn](#) and [Sug Tip% 3 nn](#) parameters to the desired percentage amount (e.g., for 15%, key in **15**).

Note: If all three parameters are set to **0**, the customer is prompted to enter a percentage amount if he/she selects the percentage option on tip prompting.

5.4.3 Gratuity Guidelines Printing on Pre-Authorization Receipts

To enable printing of Gratuity Guidelines:

1. Set the [Gratuity Guide?](#) parameter to **On**.
2. Set all of the [Sug Tip% 1 nn](#), [Sug Tip% 2 nn](#) and [Sug Tip% 3 nn](#) parameters to a value greater than 0 (e.g., for 15%, 20% and 30%, key in **15**, **20** and **30**).
3. Set the [Tip Processing](#) parameter to **On - Prompt**.

Note: Both the Enhanced Tip Processing feature and the Gratuity Guidelines feature make use of the Sug Tip% parameters when enabled. However, these features operate independently of each other, and you do not need to enable Gratuity Guidelines to use Enhanced Tip Processing.

5.4.4 Tip Percentage on Purchases

To configure Tip Percentage:

1. Set the [Tip % nn.nn](#) parameter to a value greater than 0 (e.g., for 15%, key in **1500**).
2. Set the [Tip Processing](#) parameter to **On - Prompt**.

Note: Tip Percentage is skipped on [Signatureless Transactions](#).

For Tip Processing customer entry procedures, see [Entering a Tip Amount](#).

5.5 Configuring the Cashback Feature

5.5.1 Cashback Amount Prompting on Debit Transactions

To enable Cashback prompting:

1. Set the [CashBack Option](#) parameter to **On**.
2. Make sure the [Show CB Choices](#) parameter is set to **On**.

5.5.2 Changing Cashback Amounts

To change the pre-set Cashback amounts:

1. Set any of the [Amt 1](#), [Amt 2](#) and [Amt 3](#) parameters to new amounts of your choice.
2. Make sure the [CashBack Option](#) parameter is set to **On**.

Note: When an external PINpad is connected to your terminal, the customer is offered the pre-set Cashback limit ([Amt Limit](#)) as a fourth selectable amount.

5.5.3 Setting the Cashback Limit

To change the pre-set Cashback limit:

Set the [Amt Limit](#) parameter to a new amount of your choice.

For Cashback customer entry procedures, see [Entering a Cashback Amount](#).

5.6 Configuring Clerk ID Prompting and Clerk Sub-Totalling

5.6.1 Clerk ID Prompting

To enable the Clerk ID prompt:

Set the [Clrk/Srvr Mode](#) parameter to **Prompt**.

For the Clerk ID prompting procedure, see [Entering the Clerk ID](#).

5. Configuring Your Terminal

5.6.2 Using a Default Clerk ID

To automatically use the same Clerk ID for all transactions (no ID prompting):

1. Set the [Clrk/ Srvr Mode](#) parameter to **None**.
2. [Add the Clerk ID](#) to your terminal.
3. Set the [Use Def. Clrk?](#) parameter to **On**.
4. Set the [Default Clerk](#) parameter to the Clerk ID added in step 2.

Note: Clerk ID prompting must be disabled in order to use a default Clerk ID. Before setting a Clerk ID as the default, you must [add it](#) to your terminal.

IMPORTANT: If you have more than one terminal, use must configure the Default Clerk ID on each terminal individually.

5.6.3 Clerk Sub-Totalling

To enable Clerk Sub-Totalling on your terminal to produce [Clerk Sub-Total Reports](#):

1. Set the [Clrk/ Srvr Mode](#) parameter to **Prompt**.
2. [Add Clerk IDs](#) as needed.

To delete Clerk IDs added to your terminal:

See [Deleting Clerk IDs](#).

5.7 Adding Clerk IDs (including the Default Clerk ID)

Use this function to add the Clerk IDs to be associated with your Merchant ID. The terminal must communicate with the Moneris Host in order to complete this function.

The Clerk IDs you enter here can be entered at the "Clerk Id" prompt during transactions and will be used in Clerk Subtotals Reporting.

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the green **OK** key to display the CONFIGURATION menu.

3. Select **Servers**.

If the "Password:" entry screen appears, key in the [manager password](#) and press the green **OK** key.

The CONFIGURE SERVER menu appears.

4. Select **Add Server** to add a clerk ID.

The "Clerk ID:" prompt appears.

5. Key in the Clerk ID to be added and press the green **OK** key. For help, see [Entering Alpha Characters and Punctuation](#).

The "Clerk ID:" prompt re-appears.

To continue adding Clerk IDs, repeat step 5. You can add a maximum of 20 Clerk IDs at one time.

Once 20 Clerk IDs have been entered for addition, the terminal communicates with the Moneris Host to add the Clerk IDs to the Host.

6. When all the Clerk IDs have been entered for addition, press the red **CANC ANNUL** key.
The "Send to Host?" prompt appears.

7. Select **Yes** to send the Clerk IDs to the Moneris host for addition.

The terminal communicates with the Moneris Host then displays "APPROVED" and beeps.

8. Press the green **OK** key to return to the CONFIGURE SERVER menu.
9. Press the red **CANC ANNUL** key twice to return to the transaction menu.

Note: [Clerk IDs](#) can also be [deleted](#).

5.8 Deleting Clerk IDs

Use this function to remove Clerk IDs associated with your Merchant ID. The terminal must communicate with the Moneris Host in order to complete this function.

The Clerk IDs you remove here can no longer be entered at the "Clerk Id" prompt during transactions and cannot be used in [Clerk Subtotal Reports](#).

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.
2. Press the green **OK** key to display the CONFIGURATION menu.
3. Select **Servers**.
If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.

The CONFIGURE SERVER menu appears.

4. Select **Delete Server** to delete a Clerk ID.
The "Clerk ID:" prompt appears.

5. Key in the Clerk ID to be removed and press the green **OK** key. For help, see [Entering Alpha Characters and Punctuation](#).
The "Clerk ID:" prompt re-appears.

To continue removing Clerk IDs, repeat step 5. You can remove a maximum of 20 Clerk IDs at one time.

Once 20 Clerk IDs have been entered for removal, the terminal communicates with the Moneris Host to remove the Clerk IDs from the Host.

6. When all the Clerk IDs have been entered for removal, press the red **CANC ANNUL** key.
The "Send to Host?" prompt appears.
7. Select **Yes** to send the Clerk IDs to the Moneris host for removal.
The terminal communicates with the Moneris Host then displays "APPROVED" and beeps.
8. Press the green **OK** key to return to the CONFIGURE SERVER menu.
9. Press the red **CANC ANNUL** key twice to return to the transaction menu.

Note: Clerk IDs can also be [added](#) on the terminal.

5.9 Configuring Invoice Number Prompting

When [Invoice Number Prompting](#) is enabled, your terminal prompts you for an Invoice Number during Credit Card and Debit transactions ("Invoice Id:").

To enable Invoice Number Prompting:

Set the [Ask Inv Num?](#) parameter to **On**.

For Invoice Number Prompting procedures, see [Entering an Invoice Number](#).

5.10 Configuring Multi-Terminal Reporting

To use Multi-Terminal Reporting, you must set up a Terminal Name on each terminal you want to include in the multi-terminal Batch Close and reporting process (see [Processing a Batch Close](#) and [Multi-Terminal Deposit Totals Report](#)). You can delete a Terminal Name at any time.

5.11 Adding a Terminal Name

Use this function to set up a Terminal Name associated with your Merchant Number on a terminal you want to include in [Multi-Terminal Reporting](#). The terminal must communicate with the Moneris Host in order to complete this function.

1. On the [applications menu](#) of the terminal for which you want to add a name, select **DEBIT & CREDIT**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Press the green **OK** key to display the CONFIGURATION menu.

3. Select **Terminal Name**.

If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.

The Term Name Config menu appears.

4. Select **Add Terminal** to add the terminal name.

The "Terminal Name:" prompt appears.

5. Key in the terminal name for this terminal and press the green **OK** key. For help, see [Entering Alpha Characters and Punctuation](#).

The "Send to Host?" prompt appears.

6. Select **Yes** to send the terminal name to the Moneris Host to be added to and associated with your Merchant Number.

The terminal communicates with the Moneris Host then displays "APPROVED" and beeps.

8. Press the green **OK** key to return to the Term Name Config menu.

9. Press the red **CANC ANNUL** key twice to return to the transactions menu.

Note: See [Deleting a Terminal Name](#).

5.12 Deleting a Terminal Name

Use this function to delete a terminal's Terminal Name, disassociate the name from your Merchant Number and make the terminal no longer available for Multi-Terminal Reporting. The terminal must communicate with the Moneris Host in order to complete this function.

1. On the [applications menu](#) of the terminal whose name you want to delete, select **DEBIT & CREDIT**. The message "Activating App..." is displayed then the transactions menu appears.

2. Press the green **OK** key to display the CONFIGURATION menu.

3. Select **Terminal Name**.

If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.

The Term Name Config menu appears.

4. Select **Del Terminal** to delete the terminal name.

The "Delete Now?" prompt appears.

5. Select **Yes** to send the terminal name to the Moneris Host to be deleted from and disassociated with your Merchant Number.

The terminal communicates with the Moneris Host then displays "APPROVED" and beeps.

6. Press the green **OK** key to return to the Term Name Config menu.

7. Press the red **CANC ANNUL** key twice to return to the transaction menu.

Note: See [Adding a Terminal Name](#).

5.13 Configuring Private Label Cards

The terminal does not require additional configuration in order to process Private Label credit cards. However, before using Private Label cards you must:

- Contact Moneris to obtain a list of Private Label card Issuers.
- Contact the Private Label card Issuer and arrange for service from them.
- Notify Moneris that you will be using this service to ensure that your terminal's initialization parameters are updated on the Moneris Host.
- [Re-Initialize](#) your terminal.

5.14 Configuring Corporate Cards

5.14.1 Enabling the Corporate Card Feature

To enable the terminal to accept [Corporate Cards](#):

Set the [Commercial On?](#) parameter to **On**.

5.14.2 Enabling Tax Amount Prompting

To enable the terminal to prompt for a tax amount on Corporate Card transactions:

1. Set the [Commercial On?](#) parameter to **On**.
2. Set the [Process Tax](#) parameter to **On**.
3. Configure the applicable tax type and tax registration number as shown below.

5.14.3 Configuring Tax Type and Tax Registration Numbers

When you enable the terminal to prompt for a tax amount on Corporate Card transactions, you need to configure the type of tax you are required to charge (based on your geographic location) and the related Tax Registration Number(s). This configuration determines the type of tax the terminal prompts for and the number that appears on customer monthly statements.

To configure Tax Type and Tax Registration Numbers:

1. Set the [Commercial On?](#) parameter to **On**.
2. Set the [Process Tax](#) parameter to **On**.
3. Set the [Tax Type](#) parameter to the applicable tax type.
4. In one or more of the [Tax Type](#) parameters, key in the tax registration number as appropriate.

To process a Purchase on a Corporate Card, see [Transacting a Purchase on a Corporate Card](#).

5.15 Initializing Your Terminal

This function sends information about the terminal to the Moneris Host and receives additional parameters and information from the Host. The instructions below are for initializing your terminal the FIRST time. For instructions on performing subsequent initializations, see [Re-Initializing Your Terminal](#).

Note: Before attempting this function, ensure that the [SIM card](#) has been inserted.

To initialize your terminal:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the transactions menu appears.
2. Configure the [Terminal ID](#) and your [Merchant ID](#) in the terminal (see [Configuring Your Merchant and Terminal IDs](#)).
3. Initialize the terminal:
 - a. On the applications menu, select **DEBIT & CREDIT**.
 - b. Press the green **OK** key to access the CONFIGURATION menu.
 - c. Scroll down and select **Initialize**.
 - d. When "Retain IDs?" appears, select **Yes**.
 - e. When "Transmitting...", "Receiving..." and "Please wait" appear on the terminal, please wait while the terminal communicates with Moneris. When the initialization is finished, "Init Successful" appears then the transactions menu appears.
4. Do a Host Logon:
 - a. On the transactions menu, press the green **OK** key to access the CONFIGURATION menu.
 - b. Scroll down and select **Host Logon**.
 - c. Key in the [manager password](#) and press the green **OK** key.
"Logon Success" appears then the transactions menu appears.
5. Press the * (**ASTERISK**) key to return to the applications menu.

Your terminal is now ready to process transactions.

6. Financial Transactions

6.1 Card and Transaction Types

A financial transaction involves the transfer of funds between a cardholder's account and your own business account. For example, a credit card Purchase transaction moves funds from the credit cardholder's account to your business account, and a debit card Refund moves funds from your business account to the debit cardholder's chequing or savings account.

The Moneris Mobile 8300 Point of Sale terminal can process various financial transactions on a number of card types. The matrix below displays the supported card types and the transactions each card type supports.

Transaction / Card Type	Magnetic Stripe Cards		Chip Cards		Private Label Cards
	Debit	Credit	Debit	Credit	Credit
Purchase	Y	Y	Y	Y	Y
Refund	Y	Y	Y	Y	Y
Correction (Void)	Y	Y	Y	Y	Y
Pre-Authorization	N	Y	N	Y	Y
Pre-Authorization Completion	N	Y	N	Y	Y
Pre-Authorization Deletion	N	Y	N	Y	Y
Advice	N	Y	N	Y	N
Payment	N	N	N	N	Y

IMPORTANT: It is the merchant's responsibility to ensure that proper card processing procedures are followed at all times. Please refer to your Merchant manuals and the Terms & Conditions of your Merchant Agreement for details.

The Moneris Merchant Operating Manual, covering credit card procedures, is available for free download at www.moneris.net/en/Support/Downloads/MerchantManuals.aspx. Scroll down to the 'Other' section and select "Merchant Operating Manual".

6.2 Transaction General Guidelines

When performing financial transactions, follow these general guidelines:

1. Determine the transaction to be processed (i.e., Purchase, Refund, etc.).
2. Establish the means of payment (i.e., debit or credit).
3. Identify the card entry method and enter the card data on the POS device accordingly (see [Card Entry Options](#)).
4. Follow the terminal prompts (see [Transaction Procedures](#)).
5. Process receipts (see [Signing Credit Card Receipts](#)).

Note: Terminal prompts may vary depending on variables such as terminal setup, merchant setup and card type.

6.3 Card Entry Options

6.3.1 Magnetic Stripe Cards - Swipe

- Look for the magnetic stripe on the back of the card.
- When "Swipe Card:" or "Insert or Swipe Card:" appears on the terminal, swipe the card on the magnetic stripe reader and follow the prompts.

6.3.2 Chip Cards - Insert

- Look for the chip on the card.
- When "Swipe Card:" or "Insert or Swipe Card:" appears on the terminal, you or the customer inserts the card in the chip card reader.
- When prompted, the customer keys in his/her PIN.
- The chip card must remain inserted in the reader until the "Remove Card" prompt appears on the display.

Note: Unless the device prompts otherwise, do not swipe a chip card even if it has a magnetic stripe.

6.3.3 Manual Entry

See [Manually Processing Credit Card Transactions](#).

6.4 Transaction Procedures

Follow the procedures in this section to process these transactions:

- [Purchase](#)
- [Refund](#)
- [Correction](#)
- [Pre-Authorization](#)
- [Pre-Authorization Completion](#)
- [Pre-Authorization Deletion](#)
- [Advice](#)
- [Purchase on a Corporate Card](#)
- [Payment on a Private Label \(Purchasing\) Card](#)
- [Manual Credit Transactions](#)

6.5 Processing a Purchase

Follow the procedure below to process the sale of goods using a debit or credit card.

To process a Purchase:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." appears followed by the [transactions menu](#).
2. To begin the transaction, select **Purchase**.
If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.
3. Key in the Purchase amount and press the green **OK** key.

4. Follow the prompts on the terminal.

If prompted for a Clerk ID ("Clerk Id:"), see [Entering the Clerk ID](#).

If prompted for an Invoice Number ("Invoice Id:"), see [Entering an Invoice Number](#).

If prompted for Tip Entry, see [Entering a Tip Amount](#).

If prompted for a Cashback amount ("Cashback?"), see [Entering a Cashback Amount](#).

5. Process receipts (see [Personalized Receipts](#) and [Signing Credit Card Receipts](#)).

Note: If processing the Purchase on a Private Label Card, you may be prompted for a Promo Code. To process a Purchase on a Corporate Card, see [Processing a Purchase on a Corporate Card](#).

For details on basic prompts, see [Responding to Basic Transaction Prompts](#).

6.6 Processing a Refund

Follow the procedure below to credit a customer's account for a previous debit or credit Purchase.

To process a Refund:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." appears followed by the [transactions menu](#).

2. To begin the transaction, select **Refund**.

If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.

3. Key in the Refund amount and press the green **OK** key.

4. When the "Orig Auth #:" prompt appears, key in the 6-digit Appr Code printed on the original receipt and press the green **OK** key (see [Finding Sequence and Orig Auth Numbers](#)).

Note: If you do not have the Appr Code, press the green **OK** key to bypass the prompt.

5. Follow the remaining prompts on the terminal.

If prompted for a Clerk ID ("Clerk Id:"), see [Entering the Clerk ID](#).

If prompted for an Invoice Number ("Invoice Id:"), see [Entering an Invoice Number](#).

6. Process receipts (see [Personalized Receipts](#) and [Signing Credit Card Receipts](#)).

Note: If processing the Refund on a Private Label Card, you may be prompted for a Promo Code.

For details on basic prompts, see [Responding to Basic Transaction Prompts](#).

6.7 Processing a Correction (Void)

Follow the procedure below to correct (void) a previous Purchase or Refund transaction processed on a debit or credit card.

Note: The correction **MUST** be performed in the same batch as the original transaction.

To process a Correction:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." appears followed by the [transactions menu](#).

2. To begin the transaction, select **Correction**.

If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.

If prompted for a Clerk ID ("Clerk Id:"), see [Entering the Clerk ID](#).

3a. To correct the *last* transaction performed on the terminal:

A. Select **Yes**.

6. Financial Transactions

B. Select **Yes** again to confirm the displayed transaction is the one you want to correct.

OR

3b. To correct a *different* transaction:

A. Select **No**.

B1. To retrieve the transaction by Sequence Number, select **Seq#**, key in the 6-digit Sequence Number printed on the original receipt and press the green **OK** key (see [Finding Sequence and Orig Auth Numbers](#)).

OR

B2. To retrieve the transaction by card number, select **Acct#**, key in the last 4 digits of the card number and press the green **OK** key.

C. Select **Yes** to confirm the displayed transaction is the one you want to correct.

4. Follow the remaining prompts on the terminal.

If prompted for an Invoice Number ("Invoice Id:"), see [Entering an Invoice Number](#).

5. Process receipts (see [Personalized Receipts](#) and [Signing Credit Card Receipts](#)).

Note: If processing the Correction on a Private Label Card, you may be prompted for a Promo Code.

For details on basic prompts, see [Responding to Basic Transaction Prompts](#).

6.8 Processing a Pre-Authorization

Follow the procedure below to authorize a temporary amount when the final amount of a credit card Purchase is not known.

To process a Pre-Authorization:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." appears followed by the [transactions menu](#).

2. To begin the transaction, select **Pre Auth**.

If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.

3. On the Pre Auth menu, select **Pre Auth** again.

4. Key in the Pre-Authorization amount and press the green **OK** key.

5. Follow the prompts on the terminal.

If prompted for a Clerk ID ("Clerk Id:"), see [Entering the Clerk ID](#).

If prompted for an Invoice Number ("Invoice Id:"), see [Entering an Invoice Number](#).

6. Process receipts (see [Personalized Receipts](#) and [Signing Credit Card Receipts](#)).

Note: If [Tip Processing](#) is enabled, a blank Tip line is printed on the receipt below the base amount. If a signature line is printed on the Pre-Authorization receipt, the cardholder **MUST** sign the receipt.

7. When the final amount of the purchase is known, process a [Pre-Authorization Completion](#) for the final amount using the same card number.

Note: If processing the Pre-Authorization on a Private Label Card, you may be prompted for a Promo Code.

For details on basic prompts, see [Responding to Basic Transaction Prompts](#).

6.9 Processing a Pre-Authorization Completion

Follow the procedure below to complete a [Pre-Authorization](#) once the final amount is known.

Note: A Completion must be performed on the same terminal using the same card number. The card does not need to be present.

To process a Pre-Authorization Completion:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." appears followed by the [transactions menu](#).

2. To begin the transaction, select **Pre Auth**.

3. On the Pre Auth menu, select **Completion**.

If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.

4. Key in the 6-digit Sequence Number printed on the Pre-Authorization transaction's receipt and press the green **OK** key (see [Finding Sequence and Orig Auth Numbers](#)).

If the message "No Record Found" appears, repeat step 2.

The terminal displays the following information about the Pre-Authorization:

```
Seq#:  
Card Name  
Transaction Type  
Card Number  
Amount
```

5. Compare the displayed information to the Pre-Authorization's receipt. If the information matches, select **Yes** to proceed. To cancel the Completion, select **No**.

Note: If the displayed Pre-Authorization is not the one you want, select **Next** to display the next Pre-Authorization in the terminal memory. Repeat until the transaction you want is displayed.

If prompted for a Clerk ID ("Clerk Id:"), see [Entering the Clerk ID](#).

If prompted for an Invoice Number ("Invoice Id:"), see [Entering an Invoice Number](#).

6. When the Pre-Authorization amount and the "New Amt:" prompt appear:

a. To change the Pre-Authorization amount, key in the amount and press the green **OK** key.

OR

b. To continue the transaction with the original amount, press the green **OK** key.

OR

c. To release the funds, key in an amount of \$0.00 and press the green **OK** key.

Note: If Tip Processing is enabled and the cardholder has entered a tip amount on the Pre-Authorization receipt's Tip line and you want the Tip amount printed on a separate line on the Completion's receipt, press the green **OK** key to key in the amount at the Tip prompt, as shown below.

7. Follow the remaining prompts on the terminal.

If prompted for Tip Entry, see [Entering a Tip Amount](#). If you chose to print the Tip amount on a separate line (step 4) above, key in this amount at the Tip prompt.

8. Process receipts (see [Personalized Receipts](#) and [Signing Credit Card Receipts](#)).

Note: If processing the Pre-Authorization Completion on a Private Label Card, you may be prompted for a Promo Code.

For details on basic prompts, see [Responding to Basic Transaction Prompts](#).

6.10 Processing a Pre-Authorization Deletion

Follow the procedure below to delete a Pre-Authorization in the terminal memory before it is completed.

To process a Pre-Authorization Deletion:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." appears followed by the [transactions menu](#).
2. To begin the transaction, select **Pre Auth**.
3. On the Pre Auth menu, select **Del PreAuth**.
If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.
4. Select the method to retrieve the Pre-Authorization you want to delete:
 - a. To retrieve by Sequence Number:
 - A. Select **Seq #**.
 - B. Key in the 6-digit Sequence Number printed on the Pre-Authorization transaction's receipt and press the green **OK** key (see [Finding Sequence and Orig Auth Numbers](#)). If the message "No Record Found" appears, repeat step 3.

OR

- b. To retrieve by Account Number:
 - A. Select **Acct**.
 - B. Key in the last 4 digits of the credit card number and press the green **OK** key.

The terminal displays the following information about the Pre-Authorization:

Seq#:
Card Name
Transaction Type
Card Number
Amount

5. Compare the displayed information to the Pre-Authorization's receipt. If the information matches, select **Yes** to proceed. To cancel the Deletion, select **No**.

Note: If the displayed Pre-Authorization is not the one you want, select **Next** to display the next Pre-Authorization in the terminal memory. Repeat until the transaction you want is displayed.

6. Follow any remaining prompts.
7. Process receipts (see [Personalized Receipts](#) and [Signing Credit Card Receipts](#)).

Note: If processing the Pre-Authorization Deletion on a Private Label Card, you may be prompted for a Promo Code.

For details on basic prompts, see [Responding to Basic Transaction Prompts](#).

6.11 Processing an Advice

Follow the procedure below to complete a voice-authorized Purchase on a credit card.

To process an Advice:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." appears followed by the [transactions menu](#).
2. To begin the transaction, select **Advice**.
If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.

3. At the "Amount:" prompt, key in the transaction amount and press the green **OK** key.
If prompted for a Clerk ID ("Clerk Id:"), see [Entering the Clerk ID](#).
If prompted for an Invoice Number ("Invoice Id:"), see [Entering an Invoice Number](#).
4. Follow the terminal prompts below:
 - a. At the "Auth #:" prompt, key in the Voice Authorization Number that you wrote on the paper sales draft when you called the Moneris Merchant Service Centre for Voice Authorization and press the green **OK** key.
 - b. At the "Account #:" prompt, key in the card number and press the green **OK** key.
 - c. At the "Exp Date (MMYY):" prompt, key in the card's expiry date and press the green **OK** key.
5. Follow the remaining terminal prompts.
If prompted for Tip Entry, see [Entering a Tip Amount](#).
6. Process receipts (see [Personalized Receipts](#) and [Signing Credit Card Receipts](#)).

For details on basic prompts, see [Responding to Basic Transaction Prompts](#).

6.12 Transacting a Purchase on a Corporate Card

Follow the procedure below to transact a Purchase on a Corporate Card. Corporate Cards are also referred to as Purchasing Cards.

Note: If [Tip Entry has been enabled](#) for credit cards, the cardholder must perform some of the steps. The **bold text** below indicates the additional steps required for a Corporate card transaction.

To transact a purchase on a Corporate Card:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." appears followed by the [transactions menu](#).
2. Select **Purchase**.
If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.
The "Amount: \$ 0.00" prompt appears.
3. Key in the amount of the purchase and press the green **OK** key.
If prompted for a Clerk ID, ("Clerk Id:"), key in your [Clerk ID](#) and press the green **OK** key.
If prompted for an Invoice Number ("Invoice #:"), key in the [Invoice Number](#) (max. 7 alphanumeric characters) and press the green **OK** key, or simply press the green **OK** key to leave this blank.

The "Swipe or Insert Card:" prompt appears.

- 4a. Swipe the credit card on the terminal.

If the "Last 4 Digits:" prompt appears, key in the last 4 digits of the card number and press the green **OK** key.

OR

- 4b. Manually process the transaction:

- A. Key in the card number.
The "Exp Date (MMYY):" prompt appears.

- B. Key in the card's expiry date and press the green **OK** key.
The "Validation Code:" prompt appears.

If the "Imprint Card Press OK Key" prompt appears, you must take a manual imprint of the credit card. For help, see [Taking a Manual Imprint of a Credit Card](#).

6. Financial Transactions

C. Key in the validation code found on the back of the card and press the green **OK** key.

If you do not have the validation code, press the green **OK** key and, when the "Code present?" prompt appears, select **No**.

If the "Customer Press OK To Continue" prompt appears, the cardholder must respond to the cardholder prompts. For help, see [Entering a Tip Amount](#).

If the "Select Language" prompt appears, select **ENGL** for English or select **FREN** for French. The cardholder receipt will be printed in the selected language.

The xST Amt: entry screen appears.

5. Key in the tax amount and press the green OK key, or simply press the green OK key to leave this blank.

The "Reference #:" entry screen appears.

6. Key in the customer reference number (max. 16 alphanumeric characters) and press the green OK key, or simply press the green OK key to leave this blank.

If the "Promo Code:" prompt appears, key in the [promotion code](#) (max. 6 alphanumeric characters) supplied to you by the Private Label card provider and press the green **OK** key, or simply press the green **OK** key to leave this blank.

The terminal communicates with the Moneris Host.

7. Please wait while the terminal processes the transaction.

The "APPROVED" message appears.

The "Tear Receipt Press OK Key" message is displayed while the merchant receipt is printed then terminal begins beeping.

8. Tear off the merchant copy of the receipt and give it to the cardholder to sign.

9. Press the green **OK** key to stop the beeping and print the cardholder copy of the receipt, or simply press the red **CANC ANNUL** key to stop the beeping and return to the transaction menu.

If the cardholder copy of the receipt is printed, give the cardholder copy of the receipt to the cardholder then press the green **OK** key to return to the transactions menu.

6.13 Transacting a Payment on a Private Label Card

This transaction allows a cardholder to make a payment towards the balance on their Private Label credit card.

To transact a payment on a Private Label card:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." appears followed by the [transactions menu](#).

2. Select **Payment**.

If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.

The "Amount: \$0.00" prompt appears.

3. Key in the amount of the payment and press the green **OK** key.

If prompted for a Clerk ID, ("Clerk Id:"), key in your [Clerk ID](#) and press the green **OK** key.

If prompted for an Invoice Number ("Invoice #:"), key in the [Invoice Number](#) (max. 7 alphanumeric characters) and press the green **OK** key, or simply press the green **OK** key to leave this blank.

The "Swipe or Insert Card:" prompt appears.

4a. Swipe the private label credit card on the terminal.

If the "Last 4 Digits:" prompt appears, key in the last 4 digits of the card number and press the green **OK** key.

OR

4b. Manually process the transaction:

A. Key in the card number.

The "Exp Date (MMYY) :" prompt appears.

B. Key in the card's expiry date and press the green **OK** key.

The "Validation Code:" prompt appears.

If the "Imprint Card Press OK Key" prompt appears, you must take a manual imprint of the credit card. For help, see [Taking a Manual Imprint of a Credit Card](#).

C. Key in the validation code found on the back of the card and press the green **OK** key.

If you do not have the validation code, press the green **OK** key and, when the "Code present?" prompt appears, select **No**.

If the "Select Language" prompt appears, select **ENGL** for English or select **FREN** for French. The cardholder receipt will be printed in the selected language.

If the "Promo Code:" entry screen appears, key in the [promotion code](#) (max. 6 alphanumeric characters) supplied to you by the Private Label card provider and press the green **OK** key, or simply press the green **OK** key to leave this blank.

The terminal communicates with the Moneris Host.

5. Please wait while the terminal processes the transaction.

The APPROVED message appears.

The "Tear Receipt Press OK Key" message is displayed while the merchant receipt is printed then terminal begins beeping.

6. Tear off the merchant copy of the receipt and give it to the cardholder to sign.

7. Press the green **OK** key to stop the beeping and print the cardholder copy of the receipt, or simply press the red **CANC ANNUL** key to stop the beeping and return to the transaction menu.

If the cardholder copy of the receipt is printed, give the cardholder copy of the receipt to the cardholder then press the green **OK** key to return to the transactions menu.

6.14 Manually Processing Credit Transactions

In order to process Credit Purchases and Refunds manually you must have a paper sales draft for the card type (e.g. a VISA sales draft for a purchase on a VISA card) and an imprinter. Contact the [Moneris Merchant Service Centre](#) to obtain these supplies if you do not have them.

IMPORTANT: Debit transactions CANNOT be processed manually.

To manually process a credit card transaction:

Use one of the following procedures to complete a Credit Purchase or Refund transaction when the terminal is down:

- If the transaction amount is *less* than your floor limit, see [Manual Credit Transaction Under Floor Limit](#).
- If the transaction amount is *higher* than your floor limit, [Manual Credit Transaction Over Floor Limit](#).

Note: Floor limits are established by Moneris. Contact your Moneris account manager for more information.

6.15 Manually Processing Credit Transactions UNDER the Floor Limit

If the terminal is down, report the problem to the [Moneris Merchant Service Centre](#) then follow these instructions to process the transaction manually.

Note: In order to process Credit Purchases and Refunds manually you must have a paper sales draft for the card type (e.g. a VISA sales draft for a purchase on a VISA card) and an imprinter. Contact the [Moneris Merchant Service Centre](#) to obtain these supplies if you do not have them.

While the terminal is down:

[Take an imprint](#) of the customer's Credit Card.

When the terminal is functioning properly again:

1. Process a [Purchase](#) or [Refund](#) transaction on the terminal for the amount on the sales draft. You will need to key in the card number, expiry date and validation code (3 or 4 digit V-code on the back of the credit card).
2. Attach the Merchant Copy of the terminal's receipt to the Merchant Copy of the Sales Draft and retain the two copies for your records.

6.16 Manually Processing Credit Transactions OVER Floor Limit

If the terminal is down, report the problem to the [Moneris Merchant Service Centre](#) then follow these instructions to process the transaction manually.

Note: In order to process Credit Purchases manually you must have a paper sales draft for the card type (e.g. a VISA sales draft for a purchase on a VISA card) and an imprinter. Contact the [Moneris Merchant Service Centre](#) to obtain these supplies if you do not have them.

While the terminal is down:

1. [Take an imprint](#) of the customer's credit card.
2. Call the [Moneris Merchant Service Centre](#) to obtain a Voice Authorization Number for the transaction and record the Voice Authorization Number on the paper sales draft.

When the terminal is functioning properly again:

1. Process an [Advice](#) transaction on the terminal for the amount on the sales draft. You will need to key in the card number, expiry date, validation code (3 or 4 digit V-code on the back of the credit card) and Voice Authorization Number.
2. Attach the Merchant Copy of the terminal's receipt to the Merchant Copy of the Sales Draft and retain the two copies for your records.

7. Admin Transactions

The following Admin Transactions are available:

- [Logging On](#)
- [Logging Off](#)
- [Re-Initializing the Terminal](#)
- **Demo Mode**
 - [Demo Mode Transactions](#)
 - [Entering Demo Mode](#)
 - [Exiting Demo Mode](#)

7.1 Logging On

If the "Host Logon Required" prompt appears, you must log on before you can perform transactions on the terminal.

To log on to the terminal:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The [transactions menu](#) appears.
2. Press the green **OK** key to access the CONFIGURATION menu.
3. Scroll down and select **Host Logon**.
4. At the "Password:" prompt, key in the Manager Password and press the green **OK** key.
The terminal communicates with the Moneris host, displays "Logon Success" and then returns to the transactions menu.

The terminal is now ready to process transactions. If this is your first time using the terminal, use the [Demo Mode](#) to practice performing transactions.

Note: To ensure unauthorized transactions cannot be processed, the terminal should be [logged off](#) at the end of the business day.

7.2 Logging Off

To ensure unauthorized transactions cannot be processed, your terminal should be logged off at the end of the business day.

To log off the terminal:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The [transactions menu](#) appears.
2. Press the green **OK** key to access the CONFIGURATION menu.
3. Scroll down and select **Host Logoff**.
The terminal communicates with the Moneris host, displays "Logoff Success" then returns to the transactions menu.

Note: To process transactions again, the terminal must be [logged on](#).

7.3 Re-Initializing the Terminal

This function sends information about the terminal to the Moneris Host and receives additional parameters and information from the Host.

If changes have been made to your terminal configuration or your merchant account, the terminal may display 'Init Required' or the Service Centre may call and ask you to re-initialize your terminal.

To re-initialize the terminal:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." is displayed then the [transactions menu](#) appears.

2. Press the green **OK** key to display the CONFIGURATION menu.

3. Scroll down and select **Initialize**.

If the "Password:" prompt appears, key in the Manager Password and press the green **OK** key.

4. At the "Retain Settings?" prompt, select **Yes**.

The terminal communicates with the Moneris Host (this may take a few minutes). When the initialization is complete, the transactions menu re-appears.

5. If the "Host Logon Required" prompt appears, [log on](#) to the terminal.

Note: For instructions on initializing your terminal the first time, see [Initializing Your Terminal](#).

7.4 Demo Mode Transactions

Most transactions can be practiced in [Demo Mode](#) on the terminal (see [Entering Demo Mode](#) and [Exiting Demo Mode](#)).

- [Financial Transactions by Card Type](#)
- [Reporting Functions](#)
- [Administrative Functions](#)
- [Shortcuts](#)

Transactions that cannot be performed do not appear on the terminal screen while in Demo Mode.

The terminal CANNOT perform a Batch Close in Demo mode. You can clear transactions from the Demo batch by using the Batch Clear function while in Demo mode or by selecting **Yes** at the "Clear Batch" prompt when you exit Demo Mode.

Note: Demo transactions are limited to a maximum amount of \$1.00.

If [Tip Processing](#) is enabled, the maximum tip amount in Demo Mode is \$1.00.

If [Cashback](#) is enabled, the maximum Cashback amount in Demo Mode is \$1.00.

The maximum final total amount (purchase + tip + cashback) is \$3.00.

7.4.1 Financial Transactions

Most financial transactions are available regardless of the type of card used, however Purchasing Cards (i.e., Corporate Cards) cannot be used while in Demo Mode.

- Purchase
- Refund
- Correction
- Pre-Authorization
- Pre-Authorization Completion
- Pre-Authorization Deletion
- Advice

7.4.2 Functions

Reporting Functions

[Stored Tran Rpt](#)

[Deposit Totals](#)

[Clerk SubTotals](#)

[Multi Terminal](#)

[Merch SubTotals](#)

[Terminal Parm](#)s

Terminal Stats

[EMV Param Rpt](#)

EMV Diagnostics

[Pre-Auth Rpt](#)

Admin Functions

[Reprint](#)

[Demo](#)

[Batch Review](#)

[Batch Clear](#)

Shortcuts

3 = Paper feed

6 = [Quick Setup](#)

9 = [Cash Receipt](#)

Green OK Key =
[Configuration menu](#)

***** = [Applications menu](#)

The following Setup functions should NOT be used in Demo Mode although they are available:

- Printer
- Comm
- Host
- Merchant IDs
- IP Hosts
- Date/Time

7.5 Entering Demo Mode

Note: [Demo Mode](#) can be activated only on terminals that have been configured, initialized and logged on.

IMPORTANT: You must [close the current batch](#) before you can enter Demo Mode. Do NOT clear the batch.

IMPORTANT: Ensure that you [exit Demo Mode](#) before processing actual financial transactions. Transactions processed in Demo Mode will NOT affect your terminal totals, financial accounts or customer accounts.


To enter Demo Mode:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the [transactions](#) menu appears.
2. Press the green **OK** key to display the CONFIGURATION menu.
3. Select **Setup**.
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.
4. On the Setup menu, select **Demo**.
5. At the "Demo Mode" prompt, select **On**.

If the "Batch Not Empty Clear Batch" message appears, the terminal has transactions in terminal memory and you must follow the steps below:

- a. Select **No**. The "TRANS CANCELLED" message appears.
- b. Press the green **OK** key to return to the Setup menu then press the red **CANC ANNUL** key two times to return to the transactions menu.
- c. Perform a [Batch Close](#) then try entering Demo Mode again.

IMPORTANT: Do NOT select Yes. If you do, the batch will be deleted and you will lose all transactions in the batch in the terminal memory. You will be unable to close that batch and will be out of balance with the Moneris Host.

The terminal displays "DEMO MODE ON" then the Setup menu re-appears with the DEMO icon () displayed on the left side of the screen.

6. Press the red **CANC ANNUL** key two times to return to the transactions menu.

IMPORTANT: Ensure that you [exit Demo Mode](#) before processing actual financial transactions. Transactions processed in Demo Mode will not affect your terminal totals, financial accounts and customers' accounts.

7.6 Exiting Demo Mode

IMPORTANT: Ensure that you exit Demo Mode before processing actual financial transactions. Transactions processed in Demo Mode will NOT affect your terminal totals, financial accounts and customers' accounts.

To exit Demo Mode:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the [transactions](#) menu appears.
2. Press the green **OK** key to display the CONFIGURATION menu.
3. Select **Setup**.
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.
4. On the Setup menu, select **Demo**.
5. At the "Demo Mode" prompt, select **Off**.

If the "Batch Not Empty Clear Batch" message appears, the terminal has Demo transactions in terminal memory and you must do the following:

Select **Yes**.

The terminal displays "BATCH DELETED" and all Demo transactions in the terminal memory are deleted.

The "DEMO MODE OFF" message is displayed then the Setup menu re-appears WITHOUT the DEMO icon displayed on the left side of the screen.

6. Press the red **CANC ANNUL** key two times to return to the transactions menu.

IMPORTANT: All transactions performed on the terminal as of this point will be in normal mode and WILL affect your terminal totals, your financial accounts and your customers' accounts.

7. Admin Transactions

8. Reports

The following reports are available:

- [Stored Transactions](#)
- [Merchant Sub-Totals](#)
- [Clerk Sub-Totals](#) (one or more clerks OR all clerks)
- [Deposit Totals](#)
- [Multi-Terminal Deposit Totals](#)
- [Pre-Auth Transactions](#)
- [Tip](#)
- [Batch Totals](#)
- [Terminal Parameters](#)
- [EMV Parameters](#)
- [Private Label Card Transactions on Reports](#)

8.1 Stored Transactions Report


This report prints a detailed list of all transactions for the current batch in the terminal's memory, sorted by date. The report also prints transaction type totals sorted by card type and grand totals sorted by transaction type.

Note: This report does not include Pre-Authorization transactions. These transactions are listed in [The Pre-Auth Transactions Report](#).

To print the Stored Transactions Report:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." is displayed then the [transactions menu](#) appears.

2. Press the **REPORTS** key (first purple key on the right, below the  icon on the screen). If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.

3. Select **Stored Tran.**

The "Rpt Period:" prompt appears.

4. To print transactions and totals for a specific date:

- a. Select **Date**.

- b. At the "Date (YYYYMMDD):" prompt, key in the date and press the green **OK** key.

To print all transactions and totals:

- a. Select **All**.


The terminal prints the Stored Transactions report and returns to the REPORTS menu.

5. Press the red **CANC ANNUL** key to return to the transactions menu.

8.2 Merchant Sub-Totals Report

This report prints totals of all transaction types in the current batch on the Moneris host. Transaction type totals are sorted by card type and grand totals are sorted by transaction type. The report does NOT close the batch.

To print the Merchant Sub-Totals Report:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the [transactions menu](#) appears.
2. Press the **REPORTS** key (first purple key on the right, below the  icon on the screen).
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.
3. Scroll down and select **Merch SubTotals**.
The terminal communicates with the Moneris Host.
4. If the terminal displays "APPROVED", press the green **OK** key.
The terminal prints the report and returns to the REPORTS menu.
5. Press the red **CANC ANNUL** key to return to the transactions menu.


8.3 Clerk Sub-Totals Report

This report prints totals for all gift and loyalty card transactions for one or more Clerk IDs. Clerk sub-totals remain in memory, even when a batch is closed and deleted. The steps below include the option of resetting the clerk sub-totals to zero. Transaction type totals are sorted by card type and grand totals are sorted by transaction type, by Clerk ID.

IMPORTANT: Clerk IDs must be set up for your merchant account on the Moneris host before this report can be used (see [Clerk Mode](#)).

8.3.1 For One or More Clerks

To print the Clerk Sub-Totals Report for one or more Clerks:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the [transactions menu](#) appears.
2. Press the **REPORTS** key (first purple key on the right, below the  icon on the screen).
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.
3. Select **Clerk SubTotals**.
4. At the "Clerk Id:" prompt, key in the Clerk ID and press the green **OK** key.

Note: You must enter a Clerk ID.

The "Add Another Clerk?" prompt appears.

- 5a. To print sub-totals only for the keyed-in Clerk ID, select **No**.

OR

- 5b. To print sub-totals for more Clerk IDs, select **Yes** then repeat steps 4 and 5 for each additional Clerk ID.

6. At the "Clear Totals?" prompt, select **No**.
The terminal communicates with the Moneris host then prints the report and returns to the first REPORTS menu screen.

7. Press the red **CANC ANNUL** key to return to the transactions menu.


IMPORTANT: Clerk Subtotals must be cleared on a regular basis (weekly is recommended). If not, the Moneris Host will automatically clear the totals when the number of transactions for a card type within a Clerk ID reaches 10,000.

8.3.2 For All Clerks

To print the Clerk Sub-Totals Report for all Clerks:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." is displayed then the [transactions menu](#) appears.

2. Press the **REPORTS** key (first purple key on the right, below the  icon on the screen).
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.

3. Select **Clerk SubTotals**.

4. At the "Clerk Id:" prompt, press the (*) **ASTERISK** key then press the green **OK** key.
The "Add Another Clerk?" selection screen appears.

5. When the "Add Another Clerk?" prompt appears, select **No**.

6. At the "Clear Totals?" prompt, select **No**.

The terminal communicates with the Moneris host then prints the report and returns to the first **REPORTS** menu screen.

7. Press the red **CANC ANNUL** key to return to the transactions menu.

IMPORTANT: Clerk Subtotals must be cleared on a regular basis (weekly is recommended). If not, the Moneris Host will automatically clear the totals when the number of transactions for a card type within a Clerk ID reaches 10,000.


8.4 Deposit Totals Report

This report prints totals for all transactions in closed batches on the Moneris Host. Transaction type totals are sorted by card type and grand totals are sorted by transaction type.

To print the Deposit Totals Report:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." is displayed then the [transactions menu](#) appears.

2. Press the **REPORTS** key (first purple key on the right, below the  icon on the screen).
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.

3. On the **REPORTS** menu, select **Deposit Totals**.
The terminal communicates with the Moneris host.

4. If the terminal displays "APPROVED", press the green **OK** key.
The terminal prints the report and returns to the **REPORTS** menu.

5. Press the red **CANC ANNUL** key to return to the transactions menu.

8.5 Multi-Terminal Deposit Totals Report


This report prints totals for all transactions in closed batches on the Moneris Host, for all terminals. Transaction type totals are sorted by Terminal Name then by card type; overall transaction type totals are sorted by card type; grand totals are sorted by transaction type.

IMPORTANT: Terminal Names must be set up for your merchant account on the Moneris Host before this report can be used (see [Configuring Multi-Terminal Reporting](#)).

To print the Multi-Terminal Deposit Totals Report:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." is displayed then the [transactions menu](#) appears.

2. Press the **REPORTS** key (first purple key on the right, below the  icon on the screen).
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.

3. Select **Multi Terminal**.

The "Terminal Name:" prompt appears.

4a. To print the report for a specific terminal, key in the Terminal Name, press the green **OK** key and proceed to step 5.

OR

4b. To print the report for all terminals, press the (*) **ASTERISK** key, press the green **OK** key and proceed to step 6.

5. At the "Add Another Terminal?" prompt, select **Yes**, repeat step 4 until you have added all the desired terminals (maximum 20) then press **No**.

6. At the "Deposit Ttls" prompt, select **Yes**.

The terminal prints the report and returns to the REPORTS menu.

7. Press the red **CANC ANNUL** key to return to the transactions menu.

8.6 Pre Auth Transactions Report

This report prints details of all open Pre-Authorization transactions in the terminal memory (i.e., Pre-Authorizations that have not been completed).

To print the Pre Auth Transactions Report:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." is displayed then the [transactions menu](#) appears.

2. Select **Pre Auth**.

3. At the [Pre Auth menu](#), select **Pre-Auth Rpt**.

If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.

The terminal prints the report and returns to Pre Auth menu.


4. Press the red **CANC ANNUL** key to return to the transactions menu.

8.7 Tip Report

This report prints tip activity for a given Clerk or for all Clerks, for a given date or for the current batch. Clerk totals are sorted by card type and totalled for all cards; overall totals for all Clerks are sorted by card type and totalled for all cards.

IMPORTANT: Tip Processing must be enabled and Clerk IDs must be set up for your merchant account on the Moneris host before this report can be used (see [Tip Processing and Clerk Mode](#)).

To print the Tip Report:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the [transactions menu](#) appears.
 2. Press the **REPORTS** key (first purple key on the right, below the  icon on the screen).
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.
 3. On the REPORTS menu, select **Tip Report**.
The "Clrk Rpt Opt" prompt appears.
 4. At the "Clrk Rpt Opt" prompt:
 - a. To print the report for a specific Clerk, select **One** and proceed to step 5.

OR

 - b. To print the report for all Clerks, select **All** and proceed to step 6.
 5. At the "Clerk Id:" prompt, key in the Clerk ID and press the green **OK** key.
 6. At the "Rpt Period:" prompt:
 - a. To print the report for a specific date, select **Date** and, at the "Date (YYYYMMDD):" prompt, key in the date and press the green **OK** key.

OR

 - b. To print the report for all tip activity in the current batch, select **All**.
- The terminal prints the report and returns to the REPORTS menu.
7. Press the red **CANC ANNUL** key to return to the transactions menu.

8.8 Batch Totals Report

This report is printed as part of the Merchant [Batch Close](#) process but can be printed WITHOUT closing the batch.

To print the Batch Totals Report:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the [transactions menu](#) appears.
2. Scroll down and select **Batch Close**.
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.
3. At the "Close Type?" prompt, select **Sngl**.
The terminal communicates with the Moneris Host and prints the Batch Totals section of the Batch Close Report.
4. At the "Prt Stored Trans?" prompt, select **No**.
5. At the "Close Batch?" prompt, select **No**.
The terminal displays a "Batch Close Failed" message, finishes printing the report with the message on it and returns to the transactions menu.


8.9 The Terminal Parameters Report

This report provides a printout of the current parameter configuration on the terminal. Included in the printout are:

- software revision number (Application ID),
 - terminal identification information (Terminal Serial #:),
 - features enabled from the CONFIGURATION menu, including Terminal Parameters, Debit Parameters and Tip Parameters,
 - tip processing setup (Tip Parameters),
 - receipt setup (Receipt Parameters) and
 - communications parameters (Dial Parameters and Ethernet Parameters).
- To print the Terminal Parameters Report:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." is displayed then the [transactions menu](#) appears.

2. Press the **REPORTS** key (first purple key on the right, below the  icon on the screen).
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.

3. On the REPORTS menu, select **Terminal Parm.s**.

The terminal prints the report and returns to the REPORTS menu.

4. Press the red **CANC ANNUL** key to return to the transactions menu.


8.10 The EMV Parameters Report

This report prints a list of EMV parameters and their values by EMV card record number.

To print the EMV Parameters Report:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." is displayed then the [transactions menu](#) appears.

2. Press the **REPORTS** key (first purple key on the right, below the  icon on the screen).
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.

3. On the REPORTS menu, scroll down and select **EMV Param Rpt.**

The terminal prints the report and returns to the REPORTS menu.

4. Press the red **CANC ANNUL** key to return to the transactions menu.

8.11 Private Label Card Transactions on Reports

Private Label Card transactions appear as a separate card type on all reports that include credit card transactions including:

- [Stored Transactions](#)
- [Merchant Sub-Totals](#)
- [Clerk Sub-Totals](#)
- [Deposit Total](#)
- [Multi-Terminal Deposit Totals](#)
- [Batch Review](#)

9. The Moneris Gift & Loyalty Programs

The Moneris Gift & Loyalty programs allow you to offer your customers an electronic card-based program that is activated and processed through the Moneris Mobile 8300 terminal. There are two programs available:

- **Gift Cards:** allows you to offer your customers stored-value gift cards for pre-defined dollar values as well as variable-value cards and rechargeable cards. This is available for small businesses as the Moneris Gift Card program and as a customized program for national chains.
- **Loyalty Points:** allows you to reward customer loyalty by awarding points based on the dollar value of purchases a cardholder makes. This is available for small businesses as the Moneris Loyalty Card program and as a customized program for national chains.

All transactions, administrative and configuration functions begin at the [GIFT & LOYALTY transactions menu](#).

9.1 Enabling Gift & Loyalty Programs

To enable a Gift & Loyalty program on your terminal:

1. Contact Moneris Solutions.

Note: If you wish to have a gift or loyalty program set up for a national chain, you will also need to contact Moneris.

2. [Initialize the terminal](#) to the Moneris host.
3. Key in the Gift & Loyalty parameter values:
 - a. Key in the [Moneris merchant ID](#), [Moneris terminal ID](#) and [Ernex terminal ID](#).
 - b. Key in the [Moneris device type](#).
4. [Initialize the terminal](#) to the Moneris/Ernex host.

9.2 Gift Card Transactions

9.2.1 Processing a Purchase with a Gift Card

Follow the procedure below to process the sale of goods or services using a Moneris gift card.

To process a Purchase with a gift card:

1. On the [applications menu](#), select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.
 2. Select **Purchase**.
The "Total Amount" prompt appears.
 3. Key in the total amount and press the green **OK** key.
The "Accept amount?" prompt appears.
 - 4a. Select **Yes** to proceed.
The "Swipe or Enter Card" prompt appears. Proceed to step 5.
- OR**
- 4b. Select **No**.
The "Total Amount" prompt appears. Repeat step 3.

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5. Swipe the gift card OR key in the gift card number and press the green **OK** key.
If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.

The "Enter CVC" prompt appears.

6. Key in the CVC number and press the green **OK** key.

If the "Clerk ID" prompt appears, key in the clerk ID and press the green **OK** key.

If the "Info" prompt appears, key in the additional transaction information (optional) and press the green **OK** key.

If prompted for Tip Entry, see Entering a Tip Amount on a Gift Card Purchase to complete the purchase.

If the "Invoice Number" prompt appears, key in the invoice number and press the green **OK** key.

The terminal displays "Approved" for 20 seconds, or until you press the green **OK** key, and then prints the customer copy of the receipt.

7. If the terminal displays "Balance Due \$###.##", follow the [Gift or Loyalty Card Transaction With a Balance Due](#) instructions to complete the transaction.

The "Press OK key" prompt appears.

8. Press the green **OK** key to print the merchant copy of the receipt and return to the GIFT & LOYALTY transactions menu.

9.2.2 Entering a Tip Amount on a Gift Card Purchase

Note: To configure Gift & Loyalty gift card Tip Processing, see [Configuring Tip Processing for Moneris Gift Cards](#).

Note: When tipping is enabled for Gift & Loyalty and the Gift & Loyalty application starts the Debit & Credit application to pay a balance due, the tip prompt will not reappear for the debit/credit transaction.

Basic Tip Processing

If [Basic Tip Processing](#) is enabled on the terminal, the customer is prompted as shown below to add a tip amount on gift card purchases.

To enter a tip on a gift card purchase with Basic Tip Processing enabled:

1. The "Tip: \$0.00" prompt appears on the terminal.
2. Pass the terminal to the customer, who will follow the prompts.
- 3a. The customer keys in a tip amount to add to the transaction and presses the green **OK** key to continue the transaction with the tip added.

If "Excess Tip" appears, the tip percentage added exceeds the maximum allowed. Use the yellow **CORR** key to remove the value, and then re-enter a lower percentage.

If the "Invoice Number" prompt appears, you must key in the invoice number, press the green **OK** key, and then return the terminal to the customer.

The "Accept Total?" prompt appears.

OR

- 3b. The customer presses the green **OK** key without keying in a tip amount and the transaction continues with no tip added.

If the "Invoice Number" prompt appears, you must key in the invoice number, press the green **OK** key, and then return the terminal to the customer.

The "Accept Total?" prompt appears.

4. Click **Yes** to accept the total.

The terminal displays "Approved" for 20 seconds, or until you press the green **OK** key, and then prints the customer copy of the receipt.

5. If the terminal displays "Balance Due \$###.##", follow the [Gift or Loyalty Card Transaction With a Balance Due](#) instructions to complete the transaction.

The "Press OK key" prompt appears.

6. Press the green **OK** key to print the merchant copy of the receipt and return to the GIFT & LOYALTY transactions menu.

Enhanced Tip Processing

If [Enhanced Tip Processing](#) is enabled on the terminal, the customer is prompted as shown below to add a tip amount on gift card purchases.

To enter a tip on a gift card purchase with Enhanced Tipping enabled:

1. The "Tip Type:" prompt appears on the terminal.
2. Pass the terminal to the customer, who will follow the prompts.
- 3a. The customer selects %.

If [suggested percentages](#) appear (up to three) with an **Other** selection, the customer selects the desired tip percentage OR selects **Other**, keys in a tip percentage and then presses the green **OK** key to continue the transaction with the tip added accordingly.

If no tip percentages have been configured on the terminal, the "Tip %:" prompt appears, and the customer keys in a tip percentage and then presses the green **OK** key to continue the transaction with the tip added.

If "Excess Tip" appears, the tip percentage added exceeds the maximum allowed. Use the yellow **CORR** key to remove the value, and then re-enter a lower percentage.

If the "Invoice Number" prompt appears, you must key in the invoice number, press the green **OK** key, and then return the terminal to the customer.

The "Accept Total?" prompt appears.

OR

- 3b. The customer selects \$.

At the "Tip:" prompt, the customer keys in a tip amount and then presses the green **OK** key to continue the transaction with the tip added.

If "Excess Tip" appears, the tip amount added exceeds the maximum allowed value. Use the yellow **CORR** key to remove the amount, and then re-enter a lower tip.

If the "Invoice Number" prompt appears, you must key in the invoice number, press the green **OK** key, and then return the terminal to the customer.

The "Accept Total?" prompt appears.

OR

- 3c. The customer selects **No Tip** (selection is available only if the [No Tip option](#) is enabled on the terminal) and the transaction continues with no tip added.

The "Accept Total?" prompt appears.

4. Click **Yes** to accept the total.

The terminal displays "Approved" for 20 seconds, or until you press the green **OK** key, and then prints the customer copy of the receipt.

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5. If the terminal displays "Balance Due \$###.##", follow the [Gift or Loyalty Card Transaction With a Balance Due](#) instructions to complete the transaction.

The "Press OK key" prompt appears.

6. Press the green **OK** key to print the merchant copy of the receipt and return to the GIFT & LOYALTY transactions menu.

9.2.3 Deactivate a Moneris Gift Card

Follow the procedure below to deactivate a Moneris gift card.

IMPORTANT: Once the gift card is deactivated, it can never be used again.

To deactivate a Moneris gift card:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Deactivate**.

The "Swipe or Enter Card" prompt appears.

3. Swipe the gift card OR key in the gift card number.

The terminal displays the last four digits of the card number then the "Enter CVC" prompt appears.

4. Key in the CVC number and press the green **OK** key.

If the "Clerk ID" prompt appears, key in the clerk ID and press the green **OK** key.

If prompted, key in the additional transaction information and press the green **OK** key.

If the "Invoice Number" prompt appears, key in the Invoice number and press the green **OK** key.

The terminal displays "Approved" and prints the customer copy of the receipt then displays "Press OK key".

5. Press the green **OK** key to print the merchant copy of the receipt.

The "Transfer Balance to New Card?" prompt appears.

6a. To move the remaining balance to a new gift card:

A. Select **Yes**.

B. Proceed with step 3 in the [Activation](#) instructions using the new gift card.

IMPORTANT: The balance can be transferred to an existing variable-value, reloadable gift card or applied when activating a new variable-value, reloadable or non-reloadable gift card. The balance cannot be transferred to fixed-value cards or active, non-reloadable gift cards.

OR

6b. To deactivate the card and delete the balance:

A. Select **No**.

The gift card can no longer be used.

The terminal returns to the GIFT & LOYALTY transactions menu.

9.2.4 Processing a Refund with a Gift Card

Follow the procedure below to refund a gift card transaction. This credits a cardholder's gift card for a previous gift card transaction.

To process a Refund with a gift card:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Refund**.

The "Total Amount" prompt appears.

3. Key in the refund amount and press the green **OK** key.

The "Swipe or Enter Card" prompt appears.

4. Swipe the gift card.

The "Enter CVC" prompt appears.

5. Key in the CVC number and press the green **OK** key.

If the "Clerk ID" prompt appears, key in the clerk ID and press the green **OK** key.

If prompted, key in the additional transaction information and press the green **OK** key.

The "Ernex Ref Number" prompt appears.

6a. Key in the original reference number from the Gift Card transaction receipt and press the green **OK** key.

OR

6b. Press the green **OK** key to leave this blank.

If the "Invoice Number" prompt appears, key in the invoice number and press the green **OK** key.

The terminal displays "Approved" and prints the customer copy of the receipt then displays the "Press OK key" prompt.

7. Press the green **OK** key to print the merchant copy of the receipt and return to the GIFT & LOYALTY transactions menu.

9.3 Loyalty Card Transactions

9.3.1 Processing a Purchase with a Loyalty Card (Point Accumulation)

Follow the procedure below to process an accumulation of loyalty points with a [purchase](#) by credit card, debit card or cash; or with a credit [pre-auth](#), [completion](#) or [advice](#).

IMPORTANT: When to awards points for a Pre Auth transaction:

- Award points when you perform a [PRE AUTH](#) if you know that you will NOT have the loyalty card available later when you perform the pre-auth completion.

- Award points when you perform the [PRE AUTH COMPLETION](#) if you know that you WILL have the loyalty card available at that time.

To process a purchase with a loyalty card:

1. Complete the purchase, pre-auth, completion or advice transaction that will accumulate points.

2. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

3. Select **Purchase**.

The "Total Amount" prompt appears.

4. Key in the total amount and press the green **OK** key.

The "Accept amount?" prompt appears.

Note: Consult your manager to determine the dollar amount to be entered (e.g., before taxes or including tip amount) to award points.

5a. Select **Yes** to proceed.

The "Swipe or Enter Card" prompt appears. Proceed to step 6.

OR

5b. Select **No**.

The "Total Amount" prompt appears. Repeat step 4.

6. Swipe the loyalty card.

OR

Key in the card number and press the green **OK** key.

If the "Clerk ID" prompt appears, key in the clerk ID and press the green **OK** key.

If prompted, key in the additional transaction information and press the green **OK** key.

If the "Benefit Amount" prompt appears, press the green **OK** key to confirm the amount displayed **OR** key in the benefit amount to be rewarded and then press the green **OK** key.

Note: Depending on the Loyalty Program configuration, the benefit amount prompt can differ.

Note: The benefit amount must be equal to or less than the Total Amount value.

If the "Invoice Number" prompt appears, key in the invoice number and press the green **OK** key.

The terminal displays "Approved" for 20 seconds, or until you press the green **OK** key, and then prints the customer copy of the receipt.

The "Press OK key" prompt appears.

7. Press the green **OK** key to print the merchant copy of the receipt and return to the GIFT & LOYALTY transactions menu.

9.3.2 Deactivate a Moneris Loyalty Card

Follow the procedure below to deactivate a Moneris loyalty card.

IMPORTANT: Once the loyalty card is deactivated, it can never be used again.

To deactivate a loyalty card:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Deactivate**.

The "Swipe or Enter Card" prompt appears.

3. Swipe the loyalty card.

OR

Key in the loyalty card number and press the green **OK** key.

The terminal displays the last four digits of the card number.

If the "Clerk ID" prompt appears, key in the clerk ID and press the green **OK** key.

If prompted, key in the additional transaction information and press the green **OK** key.

If the "Invoice Number" prompt appears, key in the Invoice number and press the green **OK** key.

The terminal displays "Approved" and prints the customer copy of the receipt then displays "Press OK key".

4. Press the green **OK** key to print the merchant copy of the receipt and returns to the GIFT & LOYALTY transactions menu.

9.3.3 Processing a Refund with a Loyalty Card

Follow this procedure to remove points from a cardholder's account when a purchase that qualified for points is refunded.

To process a Refund with a loyalty card:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Refund**.

The "Total Amount" prompt appears.

3. Key in the refund amount and press the green **OK** key.

The "Swipe or Enter Card" prompt appears.

4. Swipe the loyalty card.

OR

Key in the card number and press the green **OK** key.

If the "Clerk ID" prompt appears, key in the clerk ID and press the green **OK** key.

If prompted, key in the additional transaction information and press the green **OK** key.

If the "Benefit Amt" prompt appears, key in the benefit amount from the original loyalty card transaction receipt and press the green **OK** key.

If the "Benefit Amt" prompt appears, key in the benefit amount to be refunded from the original loyalty card transaction receipt and press the green **OK** key. (**Note:** The refund benefit amount cannot exceed the benefit amount from the original loyalty card transaction receipt.)

The "Ernex Ref Number" prompt appears.

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5. Key in the original reference number from the loyalty card transaction receipt and press the green **OK** key.

OR

Press the green **OK** key to leave this blank.

If the "Invoice Number" prompt appears, key in the invoice number and press the green **OK** key.

The terminal displays "Approved" and prints the customer copy of the receipt, then the "Press OK key" prompt appears.

6. Press the green **OK** key to print the merchant copy of the receipt and return to the GIFT & LOYALTY transactions menu.

9.3.4 Processing a Redemption with a Loyalty Card

Follow the procedure below to process a payment for goods and services using a Moneris loyalty card.

To process a Redemption with a loyalty card:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Redemption**.

The "Swipe or Enter Card" prompt appears.

3. Swipe the loyalty card.

OR

Key in the card number and press the green **OK** key.

If the "Clerk ID" prompt appears, key in the clerk ID and press the green **OK** key.

If prompted, key in the additional transaction information and press the green **OK** key.

For a Redemption by Dollars transaction, the "Enter Amount" prompt appears. For a Redemption by Points transaction, the "Number of Points" prompt appears.

4a. For a Redemption by Dollars transaction, key in the total dollar amount and press the green **OK** key.

If the "Invoice Number" prompt appears, key in the invoice number and press the green **OK** key.

The terminal displays "Approved" and prints the customer copy of the receipt, then the "Press OK key" prompt appears.

Note: If the terminal displays a "Balance Due" message, follow the steps in [Gift or Loyalty Card Transaction With a Balance Due](#).

OR

4b. For a Redemption by Points, key in the number of points to be redeemed and press the green **OK** key.

If the "Invoice Number" prompt appears, key in the invoice number and press the green **OK** key.

The terminal displays "Approved" and prints the customer copy of the receipt, then the "Press OK key" prompt appears.

5. Press the green **OK** key to print the merchant copy of the receipt and return to the GIFT & LOYALTY transactions menu.

9.4 Gift & Loyalty Transactions

9.4.1 Activating Gift or Loyalty Cards and Loading Value on Gift Cards

Follow the procedure below to activate a new Moneris gift or loyalty card.

For gift cards, the procedure is also used to load an initial balance on a new gift card or increase the balance on an existing gift card.

To activate or load additional value on a Moneris gift or loyalty card:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Activate/Load**.

The "Swipe or Enter Card" prompt appears.

3. Swipe the gift or loyalty card OR key in the loyalty card number and press the green **OK** key.

The terminal displays the last four digits of the card number.

If the "Enter CVC" prompt appears, key in the CVC number and press the green **OK** key.

If the "Clerk ID" prompt appears, key in the clerk ID and press the green **OK** key.

If prompted, key in the additional transaction information and press the green **OK** key.

If the "Enter Amount" prompt appears, key in the dollar amount to be loaded on the card and press the green **OK** key.

If the "Invoice Number" prompt appears, key in the Invoice number and press the green **OK** key.

The terminal displays first displays "Approved" and then the "Activate/Load another card?" prompt appears.

4. Do one of the following:

a. Select **Yes** to activate or load additional cards.

Repeat step 3 for the next card.

b. Select **No** to proceed.

For loyalty cards, the card is activated and the procedure is complete.

For gift cards, the terminal displays "Balance Due" and then the "Press OK Key" prompt appears.

5. For gift cards, follow the [Gift or Loyalty Transaction With a Balance Due](#) instructions to complete the transaction.

9.4.2 Gift or Loyalty Card Transaction With a Balance Due

Gift card purchases, activations, and reloads can be paid for with more than one payment type to cover transactions where there is a balance due. For example, if the total amount due is \$50 and a gift card has only \$30 remaining on it, the balance due of \$20 can be paid for with cash.

Note: When tipping is enabled for Gift & Loyalty and the Gift & Loyalty application starts the Debit & Credit application to pay a balance due, the tip prompt will not reappear for the debit/credit transaction.

When the terminal displays the "Balance Due ####.##" message followed by the "Press OK key" prompt:

1. Press the green **OK** key.

The "Select Payment For Balance Due" prompt appears.

2. Use the function keys to select the payment type:

For payment by debit or credit card, select **DbCr**.

For payment by gift card, select **Gift**.

For payment by cash, select **Cash**.

For payment by split tender, select **Splt**.

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The terminal displays "Approved" or "Tear Receipt" and prints the customer copy of the receipt then displays the "Press OK key" prompt.

3. Press the green **OK** key to print the merchant copy of the receipt.

4. If you selected:

DbCr: The terminal begins a [purchase transaction](#) (debit or credit) beginning at the "Swipe or Enter Card" prompt.

Gift: The terminal begins a [gift card purchase](#) transaction beginning at the "Swipe or Enter Card" prompt.

Cash: The transaction is complete.

Splt: The terminal begins a [purchase transaction](#) (debit or credit) beginning at the "Swipe or Enter Card" prompt.

The transaction is completed when the balance due is \$0.

9.4.3 Voiding a Gift or Loyalty Transaction

Follow the procedure below to void a gift or loyalty card transaction.

IMPORTANT: This transaction must be performed in the same batch and for the same amount as the original transaction.

To void a Gift & Loyalty transaction:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Void**.

The "Password:" prompt appears.

3. Key in the manager password and press the green **OK** key.

The "Swipe or Enter Card" prompt appears.

4. Swipe the gift or loyalty card.

If the "Enter CVC" prompt appears, key in the CVC number and press the green **OK** key.

If the "Clerk ID" prompt appears, key the clerk ID and press the green **OK** key.

The "Ernex Ref Number" prompt appears.

5. Key in the original reference number from the gift card or loyalty card transaction receipt and press the green **OK** key.

If the "Invoice Number" prompt appears, key in the invoice number and press the green **OK** key.

The terminal displays "Approved" and prints the customer copy of the receipt, then the "Press OK key" prompt appears.

6. Press the green **OK** key to print the merchant copy of the receipt and return to the GIFT & LOYALTY transactions menu.

9.4.4 Gift or Loyalty Card Inquiry

Display or print a Moneris gift card or loyalty card balance and card status.

To process a gift or loyalty card inquiry:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Card Inquiry**.

The "Swipe or Enter Card" prompt appears.

3. Swipe the gift card or loyalty card.

OR

Key in the gift card number or the loyalty card number and press the green **OK** key.

The terminal displays the last four digits of the card number.

If the "Enter CVC" prompt appears, key in the CVC number and press the green **OK** key.

If the "Clerk ID" prompt appears, key in the Clerk ID and press the green **OK** key.

The "Card Inquiry 000 Inquiry Complete" prompt appears.

4. Press the green **OK** key.

The terminal displays the Card Balance and Card Status then the "Press OK key" prompt.

5. Press the green **OK** key.

The "Print Receipt?" prompt appears.

6. To print the receipt, select **Yes**.

OR

To skip printing the receipt, select **No**.

The terminal returns to the GIFT & LOYALTY transactions menu.


9.4.5 Reprinting a Gift or Loyalty Receipt

This function prints a duplicate of a gift or loyalty receipt.

To reprint a Gift or Loyalty receipt:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Press the reprint key (second purple key from the right, under the  icon).

3. Select the receipt you wish to print:

a. To print the most recent receipt:

i. Select **Last Receipt**.

b. To print an earlier receipt:

i. Select **Any Receipt**.

The "Ernex Ref Number" prompt appears.

ii. Key in the reference number and press the green **OK** key.

The terminal reprints the customer copy of the receipt.

Note: The card number on the reprinted receipt will be [masked](#), i.e., only the last four digits will be printed. For example, *****1234. Each Moneris Gift & Loyalty program can have its own card masking rules that are configured on the Moneris/Ernex host.

9.5 The Gift & Loyalty Menu Feature

9.5.1 The Gift & Loyalty Transactions Menu

This menu allows you to select the type of Gift & Loyalty transaction you wish to process. The transactions are listed here in the order they appear on the menu. Some items may not appear on the terminal until a specific feature is enabled.

Click on the links in the table below to go to the appropriate instructions.

MM/DD/YY	HH:MM	Use this transaction to:
	Purchase	perform a gift card purchase or a loyalty card purchase
	Refund	perform a gift card refund or a loyalty card refund
	Redemption	perform a loyalty card redemption
	Activate/Load	activate a gift card OR load additional value on a gift card
	Deactivate	deactivate a gift card or loyalty card , OR transfer a balance from one gift card to another
	Card Inquiry	display or print the balance and status of a gift card or a loyalty card
	Void	void any gift card or loyalty card transaction
	Clerk Admin	add and delete Clerk IDs to your gift or loyalty program
	Setup	configure gift & loyalty program parameters

Gift & Loyalty Transactions Menu

To access the Gift & Loyalty transactions menu:

1. On the [applications menu](#), select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

Note: For instructions on navigating through the menus and editing parameters, see [The Menu Feature](#).

9.5.2 The Gift & Loyalty Reports Menu

This menu allows you to print a number of Gift & Loyalty reports.


Click on a report name in the table below to go to the appropriate instructions.

MM/DD/YY HH:MM	Select this menu item to:
Trans List	print a list of all Gift & Loyalty transactions in the terminal memory
Trans Inquiry	print the Transaction Inquiry report
Clerk Subtotals	print a list of totals for one or more clerks (only active if clerk IDs are configured)
Batch Close	close the Gift & Loyalty Batch
Config List	print a list of the current settings for each parameter
Tip Totals	print a list of the current tip totals for one or more clerks

Gift & Loyalty Reports Menu

To access the Gift & Loyalty Reports menu:

1. On the [applications menu](#), select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Press the Reports key (first purple key on the right, below the  icon on the screen).

Note: For instructions on navigating through the menus and editing parameters, see [The Menu Feature](#).

9.5.3 The Gift & Loyalty Setup Menu

This menu allows you to set values for a number of Gift & Loyalty parameters on your terminal. The parameters are listed in the order they appear on the menu. Some items may not appear on the terminal until a specific feature is enabled.

Click on a setup option type in the table below to go to the appropriate instructions.

MM/DD/YY HH:MM	Select this menu item to:
Printer	configure the Gift & Loyalty receipt format
Merchant	configure a variety of Gift & Loyalty features
Comm	Do Not Use
IP Hosts	Do Not Use
Terminal	configure a variety of Gift & Loyalty features
Initialization	initialize the terminal to the Moneris/Ernex host
About	displays Gift & Loyalty application version information (press the green OK key to exit)
Date/Time	Do Not Use
Demo	enter and exit Gift & Loyalty Demo Mode

Gift & Loyalty Setup Menu

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To access the Gift & Loyalty Setup menu:

1. On the [applications menu](#), select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Setup**.

If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.

Note: For instructions on navigating through the menus and editing parameters, see [The Menu Feature](#).

9.6 Gift & Loyalty Admin Transactions


9.6.1 Gift & Loyalty Batch Close

This function closes a Moneris gift and/or loyalty card batch on the terminal and the Moneris/Ernex host and prints a detailed transaction report.

To close a Gift & Loyalty batch:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Press the **Reports** key (first purple key on the right, below the  icon on the screen).
The Reports menu appears.

3. Select **Batch Close**.

If the "Clerk ID" prompt appears, key in the Clerk ID and press the green **OK** key.

The terminal communicates with the Moneris/Ernex host then the "Print Details Report?" prompt appears.

4. To include details for each transaction in the batch summary report, select **Yes**. This produces the same report as a [Transaction Inquiry](#) performed for all transactions in the current batch.

OR

To print only totals in the batch summary report, select **No**.

The terminal prints the batch summary report, communicates with the Moneris/Ernex host then returns to the Reports main menu.

5. Press the red **CANC ANNUL** key to return to the GIFT & LOYALTY main menu.

9.6.2 Initialization to the Moneris/Ernex Host

This function sends information about the terminal to the Moneris/Ernex Host and receives additional parameters and information from the Host. If you are setting up your terminal for the first time, follow the [First Initialization](#) instructions below.

If changes have been made to your Gift & Loyalty configuration or your Gift & Loyalty account, the terminal may display "Initialization Required" or the Service Centre may call and ask you to re-initialize your terminal. Follow the [Re-Initialization](#) instructions below.

First Initialization

This function **MUST** be performed once, after completing configuration, in order to use your terminal to process gift card or loyalty card transactions.

Note: Before attempting this function, ensure that the [SIM card](#) has been inserted.

To perform the first Gift & Loyalty initialization on your terminal:

1. On the [applications menu](#), select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.
2. Select **Setup**.
The "Password:" prompt appears.
3. Key in the [manager password](#) and press the green **OK** key.
4. On the Setup menu, select **Initialization**.
The "Ernex Term ID" prompt appears.
5. Key in the Ernex Terminal ID and press the green **OK** key.
The terminal completes the initialization and returns to the Setup menu.
6. Press the red **CANC ANNUL** key to return to the GIFT & LOYALTY menu.

Re-Initialization

If changes have been made to your Gift & Loyalty configuration or your Gift & Loyalty account, the terminal may display 'Initialization Required' or the Service Centre may call and ask you to re-initialize your terminal.

To re-initialize your terminal:

1. On the [applications menu](#), select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.
2. Select **Setup**.
The "Password:" prompt appears.
3. Key in the [manager password](#) and press the green **OK** key.
4. Select **Initialization**.
5. If the "Batch Not Empty Close Batch?" prompt appears:
Select **Yes** to close the Gift & Loyalty batch.
OR
Select **No** to leave the Gift & Loyalty batch open.
The "Ernex Term ID" prompt appears.
6. Press the green **OK** key to continue.
The terminal completes the initialization and returns to the Setup menu.
7. Press the red **CANC ANNUL** key to return to the GIFT & LOYALTY transactions menu.

9.7 Gift & Loyalty Reports


9.7.1 Gift & Loyalty Transaction List

This report displays or prints Moneris gift and/or loyalty card transactions stored on the terminal in the current batch without closing the batch.

To display a list of Gift & Loyalty transactions:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Press the Reports key (first purple key on the right, below the  icon on the screen).
The Reports menu appears.

3. Select **Trans List**.

If the "Clerk ID" prompt appears, key in the Clerk ID and press the green **OK** key.

The "Print by Date or Batch?" prompt appears.

4. Choose the selection method:

By Date:

a. Select **Date**.

The "Date" prompt appears.

b. Key in the date and press the green **OK** key.

OR

Press the green **OK** key for all dates.

By Batch Number:

a. Select **Batch Number**.

The "Batch Num" prompt appears.

b. Key in the batch number (5 numeric digits) and press the green **OK** key.

OR

Press the green **OK** key for all batches

If the "Print Totals Only" prompt appears:

Select **Yes** to print just the terminal batch totals.

OR

Select **No** to print the transaction details as well as the terminal batch totals.

The terminal prints the list of Gift & Loyalty transactions.

5. Press the red **CANC ANNUL** key to return to the GIFT & LOYALTY main menu.


9.7.2 Gift & Loyalty Transaction Inquiry

This report displays or prints details of Moneris gift and/or loyalty card transactions in the current batch WITHOUT closing the batch.

To print a Transaction Inquiry for Gift & Loyalty transactions:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Press the Reports key (first purple key on the right, below the  icon on the screen).
The Reports menu appears.

3. Select **Trans Inquiry**.

If the "Clerk ID" prompt appears, key in the Clerk ID and press the green **OK** key.

The "All" prompt appears.

Note: If the [manager password](#) is entered, the gift and loyalty card numbers in the report are displayed in full. If the password is bypassed (press the red CANCEL key), the card numbers will be [masked](#), i.e., only the last four digits will be printed. For example, *****1234.

4. Do one of the following:

a. To retrieve all transactions for all gift and loyalty cards.

i. With the **All** prompt displayed, press the green **OK** key.
The "Card #:" prompt appears.

ii. Press the green **OK** key for all cards.
The "Enter Amount:" prompt appears. Proceed to step 5.

b. To retrieve information for a specific card type.

i. Scroll through the list of card type descriptions.

To scroll forwards, select **Next**.
To scroll backwards, select **Prev**.

ii. When the correct card type description is displayed, press the green **OK** key.
The "Enter Amount:" prompt appears. Proceed to step 5.

c. To retrieve information about a specific card number.

i. Select **Slt**.
The "Card #" prompt appears.

ii. Key in the gift or loyalty card number and press the green **OK** key.
The "Enter Amount:" prompt appears. Proceed to step 5.

d. To return to the Reports menu.

i. Select **Exit**.
The Reports menu appears.

5. Key in a dollar amount and press the green **OK** key.

OR

Press the green **OK** key for all amounts.

The "Date:" prompt appears.

6. Key in the date and press the green **OK** key.

OR

Press the green **OK** key for all dates.

The "Select option" prompt appears.

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7a. To view information on the terminal, select **View** and scroll through the information.

To scroll forwards, select **Next**.

To scroll backwards, select **Prev**.

7b. To print the transaction information, select **Print**.

The terminal prints the report and returns to the Reports menu.

To return to the Reports menu, select **Cncl**.

8. Press the red **CANC ANNUL** key to return to the GIFT & LOYALTY menu.


9.7.3 Clerk Subtotals Report for Gift & Loyalty Transactions

This report displays or prints the totals of all Moneris gift and/or loyalty transaction types for one or more clerk IDs in the current batch without closing the batch.

To print the Clerk Subtotals report for transactions:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Press the Reports key (first purple key on the right, below the  icon on the screen).
The Reports menu appears.

3. Select **Clerk Subtotals**.

If the "Clerk ID" prompt appears, key in the Clerk ID and press the green **OK** key.

The "Zero Clerk totals" prompt appears.

4. To reset clerk totals to zero (0) upon completion of the report, select **Yes**.

OR

To continue accumulating clerk totals upon completion of the report, select **No**.

The "Select Clerks" prompt appears.

5. To print subtotals for one clerk:

a. Select **One**.

b. Key in the Clerk ID and press the green **OK** key.

To print subtotals for a group of clerks:

a. Select **Grp**.

b. Key in the group ID and press the green **OK** key.

To print subtotals for more than one clerk:

a. Select **List**.

b. Key in the clerk ID and press the green **OK** key.

The "Add more?" prompt appears.

c. Select **Yes** to add more clerks to the list.

OR

Select **No** to finish the list and print the report.

To print subtotals for all clerks:

a. Select **All**.


6. The terminal prints the report and returns to the Reports menu.

7. Press the red **CANC ANNUL** key to return to the GIFT & LOYALTY menu.

9.7.4 Configuration List for Gift & Loyalty

When you have finished configuring the gift and/or loyalty program on your terminal, print the Gift & Loyalty Configuration List to have a printed record of the terminal's Gift & Loyalty parameters.

To print the Gift & Loyalty Configuration list:

1. On the [applications menu](#), select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.
2. Press the Reports key (first purple key on the right, below the  icon on the screen).
The Reports menu appears.
3. Select **Config List**.
The terminal prints the report and returns to the Reports menu.
4. Press the red **CANC ANNUL** key to return to the GIFT & LOYALTY menu.

9.7.5 Gift and Loyalty Tip Totals Report


This report prints Moneris gift and/or loyalty tip activity for a selected Clerk or for all Clerks, for a given date or for the current batch.

IMPORTANT: [Tip Processing must be enabled and the Tip Total Report parameter set to "On"](#) before this report can be generated.

If you use Clerk IDs, the report shows the individual clerk totals, grouped by Gift Program card types and then followed by the clerk's totals across all gift card types. When there are multiple clerks, the final section of the report shows the Overall Clerk Totals.

If you are not using Clerk IDs, the report shows the totals grouped by Gift Program card types followed by the Overall Totals, and the Clerk ID related prompts do not appear in the following procedure.

To print the Tip Totals report for transactions:

1. On the [applications menu](#), select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.
 2. Press the Reports key (first purple key on the right, below the  icon on the screen).
The Reports menu appears.
 3. Select **Tip Totals**.
If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.
- Note:** If you are not using Clerk IDs, the terminal prints the report showing all tip activity in the current batch and returns to the REPORTS menu. Proceed to step 7.
4. If The "Clrk Rpt Opt" prompt appears, do one of the following.
 - a. To print the report for a specific Clerk, select **One** and proceed to step 5.

OR

 - b. To print the report for all Clerks, select **All** and proceed to step 6.
 5. At the "Clerk Id:" prompt, key in the Clerk ID and press the green **OK** key.
 6. At the "Rpt Period:" prompt:
 - a. To print the report for a specific date, select **Date** and, at the "Date (MMDDYYYY):" prompt, key in the date and press the green **OK** key.

OR

 - b. To print the report for all tip activity in the current batch, select **All**.The terminal prints the report and returns to the REPORTS menu.
 7. Press the red **CANC ANNUL** key to return to the transactions menu.

9.8 Gift & Loyalty Configuration

9.8.1 Gift & Loyalty Printer and Receipt Parameters

Use the **Printer** selection on the Gift & Loyalty Setup menu to configure Gift & Loyalty printer and receipt parameters.

Transactions menu (GIFT & LOYALTY) > Setup menu > Printer

Note: For instructions on navigating through the menus, see [The Menu Feature](#).

Prmpt Beep Delay

Number of seconds to wait after beeping and displaying the "Tear Receipt; Press OK key" message before printing the customer receipt.

Key in number of seconds and press the green **OK** key (120 = default).

Pre-print

Sets the terminal to begin printing the receipt header before the transaction is complete.

Off

On = Default

Enable Printer

Turns the printer on or off.

On = Default

Off (results in the "Printer Disabled" message any time a report should be printed or the "Printer Error" message any time a financial transaction is attempted)

Number of Copies

Sets the number of receipts printed for each transaction.

0 COPY - no receipts are printed

1 COPY - prints the customer copy

2 COPIES - prints the customer copy and the merchant copy = Default

2 COPIES OPTN - prints the customer copy and prompts for confirmation to print the merchant copy

3 COPIES - prints the customer copy, the merchant copy and a duplicate of the merchant copy

3 COPIES OPTN - prints the customer copy and the merchant copy and prompts for confirmation to print a duplicate of the merchant copy

9.8.2 Gift & Loyalty Merchant Parameters

Use the **Merchant** selection on the Gift & Loyalty Setup menu to configure Gift & Loyalty Merchant parameters.

Transactions menu (GIFT & LOYALTY) > Setup menu > Merchant

Note: For instructions on navigating through the menus, see [The Menu Feature](#).

Merchant ID

Your Moneris Merchant ID.

Key in the numeric Merchant ID assigned to you by Moneris and press the green **OK** key.

Moneris Term ID

Your Moneris Terminal ID (the eight-digit number starting with 05 found on the back of the terminal, e.g. 05123456).

Key in the numeric Terminal ID assigned to you by Moneris and press the green **OK** key.

Ernex Term ID

Your Ernex Terminal ID.

Key in the Ernex Terminal ID (maximum 8-digits) assigned to you by Moneris and press the green **OK** key.

Rct Hdr 1 to 7

The seven lines of text that appear at the top of receipts.

Key in [alphanumeric text](#) (max. 40 characters) and press the green **OK** key.

Footer 1 to 6

The six lines of text that appear at the bottom of receipts.

Key in [alphanumeric text](#) (max. 40 characters) and press the green **OK** key.

Seq #

Cannot be edited.

AutoClos Time

This parameter is updated to match the host each time the GIFT & LOYALTY application is [initialized](#).

HHMMSS (230000 = default)

Auto Close Tries

The number of times the terminal tries to perform an automatic batch close.

Key in a 2-digit numeric value (displayed in seconds, e.g. 60 = 60 seconds) and press the green **OK** key (3 = default).

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Auto Close Delay

The amount of time the terminal waits between attempts to perform an automatic batch close.

Key in a 2-digit numeric value and press the green **OK** key (10 = default).

Auto Close Opt

Determines whether the terminal will attempt an automatic batch close each day or the batch must be closed manually.

No - you must perform a [batch close](#) manually (default).

Yes - the terminal will automatically attempt to close each day.

Benefit Amt Prmpt

Cannot be edited.

Coupon Validation

Enables or disables coupon validation.

No (default)

Yes

Amt Verification

Enables or disables the verification prompt for the amount entered during a gift and/or loyalty transaction.

No (default)

Yes

9.8.3 Gift & Loyalty Communications Parameters

Use the **Comm** selection on the Gift & Loyalty Setup menu to configure Gift & Loyalty communications parameters.

Transactions menu (GIFT & LOYALTY) > Setup menu > Comm

Note: For instructions on navigating through the menus, see [The Menu Feature](#).

Pri Auth Phone

Do Not Use

Sec Auth Phone

Do Not Use

Baud Rate

Do Not Use

Blind Dial

Do Not Use

Device Type

The Moneris device type

Key in the 2-digit alphanumeric device type assigned by Moneris and press the green **OK** key.

Note: For help on keying in alphabetic characters, see [Entering Alpha Characters and Punctuation](#).

Dial Type

Do Not Use

Backup Support

Do Not Use

Num Retries

Do Not Use

Reversal Retries

Do Not Use

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9.8.4 Gift & Loyalty Terminal Parameters

Use the **Terminal** selection on the Gift & Loyalty Setup menu to configure Gift & Loyalty terminal parameters.

Transactions menu (GIFT & LOYALTY) > Setup menu > Terminal

Note: For instructions on navigating through the menus, see [The Menu Feature](#).

Clrk/ Srvr Mode

Enables or disables the "Clerk ID:" prompt. If Clerk Totals and Clerk ID input are supported, select **Prompt**.

None (default)

Prompt

Terminal Beep

Turns the key beep on or off.

Off

On (default)

PABX Code

Do Not Use

Demo Mode

Turns Gift & Loyalty [Demo Mode](#) on or off.

Off (default)

On

Man Inv Prompt

Enables or disables the "Invoice Number" prompt during gift and/or loyalty transactions. Entry at the prompt is not required and can be bypassed by pressing the green **OK** key. The Invoice Number can be a maximum of 9 digits.

Off (default)

On

Ernex Route Code

Do Not Use.

Language

Sets the terminal display language.

English (default)

French

Tip Processing

Enables or disables the "Tip Processing" prompt.

None (default)

Basic Tip (The customer can enter a dollar tip amount)

Enhanced Tip Processing (Allows the customer to choose between entering the tip as a dollar amount or a percentage)

Note: For information on configuring Basic or Enhanced tip processing, see [Configuring Tip Processing for Moneris Gift Cards](#).

Sug Tip% 1 nn

Suggested tip % amount #1 if Enhanced Tip Processing is enabled (see [Tip Processing](#) above). To set 10%, enter **10**. This parameter applies to Enhanced Tip Processing only (see [Tip Processing](#) above).

Default = **0** (no % amount set and the option does not appear on the terminal screen)

Note: Suggested tip options appear on the terminal screen only if their associated parameter has a value set.

Sug Tip% 2 nn

Suggested tip % amount #2 if Enhanced Tip Processing is enabled (see [Tip Processing](#) above). To set 15%, enter **15**.

Default = **0** (no % amount set and the option does not appear on the terminal screen)

Sug Tip% 3 nn

Suggested tip % amount #3 if Enhanced Tip Processing is enabled (see [Tip Processing](#) above). To set 20%, enter **20**.

Default = **0** (no % amount set and the option does not appear on the terminal screen)

TipNone

Indicates if the "No Tip" option appears if Enhanced Tip Processing is enabled (see [Tip Processing](#) above).

Off (default)

On

Note: This parameter can only be changed when the Batch is empty.

Excess Tip nn%

Sets the maximum tip percentage that a customer can enter. This parameter applies to Enhanced Tip Processing only (see [Tip Processing](#) above).

Default = **30** (30%)

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Tip Total Report

Enables or disables the Tip Totals report.

Off (default)

On

Note: This parameter can only be changed when the Batch is empty.

MaxTipAmt

Sets the maximum dollar amount when a \$ tip amount is entered for Basic Tip or Enhanced Tip Processing (see [Tip Processing](#) above). To set a maximum tip amount of \$50.50, enter 5050. The last two digits represent the cents.

Default = **0** (no upper limit)

9.8.5 Adding Clerk IDs to the Moneris Gift & Loyalty Application

Follow the procedure below to add Clerk IDs to be used when processing gift and loyalty transactions.

To add a Clerk ID:

1. On the [applications menu](#), select **GIFT & LOYALTY**.

The message "Activating App..." is displayed then the transactions menu appears.

2. Select **Clerk Admin**.

If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.

The CLERK ADMIN menu appears.

3. Select **Add Clerk** to add a clerk ID.

The "Clerk ID:" prompt appears.

4. Key in the Clerk ID to be added and press the green **OK** key. For help, see [Entering Alpha Characters and Punctuation](#).

The "Clerk Added" message appears then the "Clerk ID:" prompt re-appears.

To continue adding Clerk IDs, repeat step 5 as needed. You can add a maximum of 20 Clerk IDs at one time.

Note: Once 20 Clerk IDs have been entered for addition, the terminal returns to the CLERK ADMIN menu.

5. When all the Clerk IDs have been entered for addition, press the red **CANC ANNUL** key. The terminal returns to the CLERK ADMIN menu.

6. Press the red **CANC ANNUL** key to return to the GIFT & LOYALTY transactions menu.

Note: [Clerk IDs](#) can also be [deleted](#).

9.8.6 Deleting Clerk IDs From the Moneris Gift & Loyalty Application

Use this function to remove Clerk IDs so they can no longer be used when processing gift and loyalty transactions.

To delete a Clerk ID:

1. On the [applications menu](#), select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.
2. Select **Clerk Admin**.
If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.
The CLERK ADMIN menu appears.
3. Select **Delete Clerk** to delete a clerk ID.
The "Clerk ID:" prompt appears.
4. Key in the Clerk ID to be removed and press the green **OK** key. For help, see [Entering Alpha Characters and Punctuation](#).
The "Clerk Deleted" message appears then "Clerk ID:" entry screen re-appears.
To continue deleting Clerk IDs, repeat step 4 as needed.
5. When all the desired Clerk IDs have been deleted, press the red **CANC ANNUL** key.
The terminal returns to the CLERK ADMIN menu.
6. Press the red **CANC ANNUL** key to return to the GIFT & LOYALTY transactions menu.

Note: [Clerk IDs](#) can also be [added](#).

9.8.7 Configuring Tip Processing for Moneris Gift Cards

Follow the appropriate procedure below to configure Basic or Enhanced tip processing for Moneris gift cards.

Basic Tip Processing

Basic Tipping allows the customer to enter a tip as a dollar amount.

To enable Basic Tip Processing:

1. Set the [Tip Processing](#) parameter to **Basic Tip**.
2. If required, set the [MaxTipAmt](#) parameter to the maximum dollar amount allowed for a tip. The default is **0** (no upper limit).

Enhanced Tip Processing

Enhanced Tipping allows the customer to choose between entering the tip as a dollar amount or a percentage.

To enable and configure Enhanced Tip Processing:

1. Set the [Tip Processing](#) parameter to **Enhanced Tip**.
2. To enable the No Tip option, set the [TipNone](#) parameter to **On**.
3. To configure up to three suggested tip percentage amounts, set the [Sug.Tip%.1.nn](#), [Sug.Tip%.2.nn](#) and [Sug.Tip%.3.nn](#) parameters to the desired percentage amounts (e.g., for 15%, key in **15**).

Note: If all three parameters are set to **0** (no % amount set), the suggested tip amount options do not appear on the terminal screen and the customer must manually enter the percentage amount.

4. To set the maximum dollar amount allowed for a tip, configure the [MaxTipAmt](#) parameter. The default is **0** (no upper limit).

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5. To set the maximum tip percentage a customer can enter, configure the [Excess Tip nn%](#) parameter. The default is **30** (30%).

9.9 Gift & Loyalty Demo Mode

Demo Mode allows you and your employees to practice performing gift and loyalty transactions on your Moneris terminal **WITHOUT** affecting your terminal total amounts, your financial accounts and your customers' accounts.

Note: Demo Mode is only available if you close your terminal batches on the terminal. If your terminal uses system close, you cannot use Demo mode.

While the terminal is in Demo mode:

- DEMO is printed at the top of each receipt and report
- There is no transaction maximum, however, demo transactions for more than \$10 produce a decline message.
- Transaction amounts equal to or greater than \$1.00 produce a "Balance Due" message with an amount due of \$1.00.
- All gift and loyalty transactions are supported

Note: To use Demo Mode, see [Entering Gift & Loyalty Demo Mode](#) and [Exiting Gift & Loyalty Demo Mode](#).

9.9.1 Entering Gift & Loyalty Demo Mode


Note: [Demo mode](#) can only be activated on terminals that have been configured and initialized to the Moneris/Ernex host.

IMPORTANT: You must [close the current Gift & Loyalty batch](#) before you can enter Demo mode. Do NOT clear the batch.

IMPORTANT: Ensure that you [exit Demo Mode](#) before processing actual gift or loyalty transactions. Transactions processed in Demo Mode will NOT affect your terminal totals, Gift & Loyalty accounts or customers' accounts.

To enter Gift & Loyalty Demo Mode:

1. On the [applications menu](#), select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.
2. Select **Setup**.
If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.
The Setup menu appears.
3. Select **Demo**.
The "Demo Mode" prompt appears.
4. Select **On**.

The terminal displays "DEMO MODE ON" then the Setup menu re-appears with the DEMO icon () displayed on the left side of the screen.

5. Press the red **CANC ANNUL** key two times to return to the GIFT & LOYALTY transactions menu.


IMPORTANT: Ensure that you [exit Demo Mode](#) before processing actual gift or loyalty transactions. Transactions processed in Demo Mode will not affect your terminal totals, Gift & Loyalty accounts or customers' accounts.

9.9.2 Exiting Gift & Loyalty Demo Mode

IMPORTANT: Ensure that you exit Demo Mode before processing actual gift or loyalty transactions. Transactions processed in Demo Mode will NOT affect your terminal totals, Gift & Loyalty accounts or customers' accounts.

To exit Gift & Loyalty Demo Mode:

1. On the [applications menu](#), select **GIFT & LOYALTY**.
The message "Activating App..." is displayed then the transactions menu appears.
2. Select **Setup**.
If the "Password:" prompt appears, key in the [manager password](#) and press the green **OK** key.
The Setup menu appears.
3. Select **Demo**.
The "Demo Mode" prompt appears.
4. Select **Off**.
The "Batch Not Empty Clear Batch" message appears.
5. Select **Yes** to clear the demo batch so it does not affect totals of real Gift & Loyalty transactions.

The terminal displays "DEMO MODE OFF" then the Setup menu re-appears. The DEMO icon () is no longer displayed on the screen.

6. Press the red **CANC ANNUL** key two times to return to the GIFT & LOYALTY transactions menu.

IMPORTANT: Ensure that you exit Demo Mode before processing actual gift or loyalty transactions. Transactions processed in Demo Mode will NOT affect your terminal totals, Gift & Loyalty accounts or customers' accounts.

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10. End-of-Day Procedure

The end-of-day process comprises a number of procedures:

- [Batch Close](#)
- [Batch Clear](#)
- [Batch Review](#)
- [Multi-Terminal Batch Close](#)

10.1 Processing a Batch Close

Moneris has two types of settlement:

- [Merchant Close](#) - You are responsible for settlement/Batch Close at the end of each day.
- [System Close](#) - Moneris automatically settles your transactions at the end of the day.

Note: To close multiple terminals at once, see [Multi-Terminal Batch Close](#).

Note: To print the Batch Totals report without closing the batch, see [The Batch Totals Report](#).

10.1.1 Merchant Close

If your merchant account is set up for Merchant Close settlement, you must process a Batch Close transaction in order to have the funds from your POS transactions deposited to your business account. Here's how:

Step 1: Process a Batch Close Transaction

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the [transactions menu](#) appears.
2. Scroll down and select **Batch Close**.
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.
3. At the "Close Type?" prompt, select **Sngl**.
The terminal communicates with the Moneris Host then prints the Batch Totals section of the Batch Close Report.
4. At the "Prt Stored Trans?" prompt, select **Yes** to print the [Stored Transactions Report](#).
5. At the "Rpt Period:" prompt:
 - a. To print the transactions for a specific date, select **Date**, key in the date at the Date "YYYYMMDD:" prompt then press the green **OK** key.

OR

- b. To print all transactions in the batch, select **All**.

The terminal prints the Stored Transactions Report and the "Close Batch?" prompt appears.

10. End-of-Day Procedure

Step 2: Confirmation

1. When the "Close Batch?" prompt appears, check that the totals on the [Batch Totals Report](#) match the totals on the printed Stored Transactions Report.

If they match, select **Yes** to close the batch. The terminal finishes printing the Batch Close Report and returns to the transactions menu.

If they do NOT match, select **No** to cancel the Batch Close process and call Moneris the next business day for reconciliation assistance.

Note: If you don't make a selection at the "Close Batch?" prompt within two minutes, the terminal will beep three times then return to the transactions menu without closing the batch.

10.1.2 System Close

If your account is set up for System Close settlement, Morris automatically settles your transactions for you at the end of each day. You must verify transaction totals on a daily basis. Here's how:

Step 1: Print a [Stored Transactions Report](#).

Step 2: Print a [Merchant Sub-Totals Report](#).

IMPORTANT: The Merchant Sub-Totals Report must be printed before 11:00 p.m. local time.

Step 3: Confirmation

Confirm that the totals on the Merchant Sub-Totals Report match the totals on the Stored Transactions Report. If they do not match, contact Moneris within 30 days for reconciliation assistance.

10.2 Processing a Batch Clear

This function is primarily used by System Close merchants to clear the batch in the terminal memory. A system close is initiated by the Moneris Host and clears the batch on the host but not on the terminal. If the batch on the terminal is never cleared, any totals reports that rely on the terminal batch will continue to increment each day.

To process a Batch Clear:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." is displayed then the [transactions menu](#) appears.

2. Scroll down and select **Batch Clear**.

If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.

3. At the "Clear Batch?" prompt, select **Yes**.

The terminal clears the batch and returns to the transactions menu.

Note: If you select **No**, the terminal returns to the transactions menu without clearing the batch.

10.3 Processing a Batch Review

The Batch Review process retrieves transactions in the current batch by using the following retrieval methods:

- Clerk ID (Clrk)
- Transaction Amount (Amt)
- Last 4 Digits of the Card Number (Acct)
- Sequence Number (Seq#)
- Once the transaction is retrieved, you can print a Transaction Inquiry, reprint the Merchant copy of the receipt, or correct (void) the transaction.

Note: To use the Clerk ID retrieval method, you must enable [Clerk ID Prompting](#). The method is not available if the [Default Clerk ID](#) option is enabled.

Note: This function does NOT include Pre-Authorization transactions. To review these transactions, you must print a [Pre-Auth Transactions Report](#).

To process a Batch Review:

1. On the [applications menu](#), select **DEBIT & CREDIT**.

The message "Activating App..." is displayed then the [transactions menu](#) appears.

2. Scroll down and select **Batch Review**.

If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.

3. At the "Retrieve By" prompt, select the method you want to use to retrieve transactions:

Clrk => key in the transaction Clerk ID and press the green **OK** key.

Amt => key in the transaction amount press the green **OK** key.

Acct => key in the last 4 digits of the transaction card number and press the green **OK** key.

Seq# => key in the transaction Sequence Number and press the green **OK** key. To review the first transaction in the batch, press the green **OK** key.

The terminal displays the following information for the first transaction that matches the criteria:

```
Seq#:  
Card Name  
Transaction Type  
Card Number  
Amount
```

4a. Select the action you want to perform:

Corr => perform a Correction on that transaction

Prev => move back to the previous transaction that matches the criteria

Next => move forward to the next transaction that matches the criteria

Prnt => print the details displayed on the screen in the Transaction Inquiry report format

OR

4b. Press the **REPRINT** key (2nd purple key from the right) to reprint the Merchant copy of the displayed transaction's receipt.

5. Press the red **CANC ANNUL** key twice to return to the applications menu.

10.4 Processing a Multi-Terminal Batch Close

This feature allows you to close batches by Terminal Name (i.e., on one or more terminals) or on all terminals from another terminal.

This function does NOT compare totals stored in the terminal memory to totals stored on the Moneris Host. Therefore, you should check that your receipts balance with the Batch Totals printed on the Multi-Terminal Batch Close Report. You can also check the balance by printing a [Stored Transactions Report](#) on each terminal included in the Batch Close.

IMPORTANT: A Multi-Terminal Batch Close can be performed only for terminals that are added to and associated with your Merchant Number on the Moneris Host (see [Adding a Terminal Name](#)).

10.4.1 By Terminal Name

You can process a Batch Close on one or more terminals by selecting the appropriate Terminal Name(s). You must therefore know the Terminal Name of the terminal whose batch you want to close.

To process a Batch Close on one or more terminals by Terminal Name:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the [transactions menu](#) appears.
2. Scroll down and select **Batch Close**.
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.
3. At the "Close Type?" prompt, select **Mult**.
4. At the "Terminal Name:" prompt, key in the name of the terminal and press the green **OK** key.
The "Add Another Terminal?" prompt appears.
- 5a. To include more terminals in the Batch Close, select **Yes** then repeat steps 4 and 5 for each additional terminal to create the Batch Close process list. After you finish adding terminals, select **No**.

OR

- 5b. To include only the terminal selected in step 4, select **No**.

IMPORTANT: To close the batch for the terminal in use, you must add its Terminal Name to the Batch Close process list.

Note: You can include up to 20 terminals in a Batch Close. When you enter the 20th Terminal Name, the terminal automatically processes the Batch Close on them and returns to the "Add Another Terminal?" prompt. You can then add more terminals as above or select No to complete the Batch Close.

The terminal communicates with the Moneris Host then prints the Batch Totals section of the Multi-Terminal Batch Close Report.

6. At the "Batch Close?" prompt, select **Yes**.
The terminal communicates with the Moneris Host to close the batch, finishes printing the report with the Batch Close section and returns to the REPORTS menu.
7. Press the red **CANC ANNUL** key to return to the transactions menu.

10.4.2 For All Terminals

You can process a Batch Close on all terminals associated with your Merchant Number on the Moneris Host.

To process a Batch Close on all terminals:

1. On the [applications menu](#), select **DEBIT & CREDIT**.
The message "Activating App..." is displayed then the [transactions menu](#) appears.
2. Scroll down and select **Batch Close**.
If the "Password:" prompt appears, key in the [Manager Password](#) and press the green **OK** key.
3. At the "Close Type?" prompt, select **Mult**.
4. At the "Terminal Name:" prompt, press the (*) **ASTERISK** key and then press the green **OK** key.
5. At the "Add Another Terminal?" prompt, select **No**.
6. At the "Batch Close?" prompt, select **Yes**.
The terminal communicates with the Moneris host to close the batch, finishes printing the report with the Batch Close section and returns to the REPORTS menu.
7. Press the red **CANC ANNUL** key to return to the transactions menu.

10. End-of-Day Procedure

11. Troubleshooting

If your terminal is not working properly and an error message appears on the screen, go to the list of [Error Messages](#) and locate the message you see on the terminal. If the problem appears to be with the hardware, go to the list of [Hardware Problems](#) and locate the symptom. Then, review the possible problems and try the suggested solution.

Note: Please keep any receipts printed during problem transactions. The Service Centre representative may require information that appears on the receipts.

IMPORTANT: You may need to contact your wireless service provider for assistance before contacting Moneris. Check the Error Message or Hardware Problem resolution to determine if this is the case.

If this does not resolve the problem, contact the Moneris Merchant Service Centre for assistance.

11.1 Additional Documentation

Additional documentation for the Mobile8300 can be accessed in a number of ways:

- On performing transactions and end-of-day procedures, please refer to the *Moneris Mobile 8300 Using Your Terminal* guide shipped with your hardware
- On setting up your terminal, please refer to the *Moneris Mobile 8300 Setting up Your Terminal* guide also shipped with your hardware.
- For complete instructions, please refer to the *Moneris Mobile 8300 Operating Manual*. To download a printable PDF of this manual, go to www.moneris.com/8300.
- For a copy of the *Moneris Merchant Operating Manual*, go to www.moneris.com/Support/Downloads/MerchantManuals.aspx.

To download other documentation, visit the Support - Downloads pages on our website www.moneris.com.

11.2 Telephone Assistance

When you need:

- to order POS stationary supplies including printer rolls and additional batteries
- to resolve balancing issues
- to solve problems with your terminal
- to report a [Code 10 situation](#)
- assistance [changing your terminal configuration](#)
- [Credit Voice Authorizations](#)

Please Contact the Moneris Merchant Service Centre

Toll free **1-866-319-7450**

24 hours a day, 7 days a week

11.3 Merchant Direct Secure Message Centre

Log in to Merchant Direct and use the Message Centre to send a secure message directly to the Moneris Merchant Service Centre.


11.4 Error Messages on the Moneris Mobile 8300 Terminal

A message will appear on the display if an error occurs. In the table below, find the error message that appears on the terminal and try the solution. If the error message re-appears, contact the Moneris Merchant Service Centre for assistance.

IMPORTANT: You may need to contact your wireless service provider for assistance before contacting Moneris. Check the Error Message resolution to determine if this is the case.

All error messages are listed in alphabetical order (regardless of their cause).

ERROR MESSAGE	PROBLEM & SOLUTION
Batch Almost Full	The GIFT & LOYALTY Batch Limit on the terminal has almost been reached. Perform and a GIFT & LOYALTY batch close (see Gift & Loyalty Batch Close) and a DEBIT & CREDIT batch close if applicable (see Processing a Batch Close).
Batch Full	The terminal has run out of memory to store additional transactions OR the DEBIT & CREDIT or GIFT & LOYALTY Batch Limit has been reached. Perform a DEBIT & CREDIT batch close (see Processing a Batch Close) and a GIFT & LOYALTY batch close if applicable (see Gift & Loyalty Batch Close).
CARD NOT SUPPORTED	The type of card swiped on the terminal does not match the card type selected at the READY screen. For example, a Debit card was swiped during a Credit Pre-Authoirzation transaction or an Ernex Gift Card was swiped for an Ernex Loyalty Card transaction. Try swiping the card again. If this message reappears, press the red CANC ANNUL key to cancel the transaction and retry the transaction. -OR- Your merchant account with Moneris is not set up to accept the card type that was swiped. Request another form of payment. If desired, contact the Moneris Merchant Service Centre to discuss how to add the card type to your merchant account.
CARD REMOVED - 991	The chip card was removed before the end of the transaction. Retry the transaction.

ERROR MESSAGE	PROBLEM & SOLUTION
CARD SWIPE ERROR	<p>There is a problem with the magnetic stripe on the card that was swiped.</p> <p>Try swiping the card again, this time more slowly or quickly, or from front of the terminal to the back.</p> <p>If the message reappears:</p> <ul style="list-style-type: none"> - for credit card with stripe – key in the card number. - for debit card with stripe or chip – request another form of payment.
CARRIER TIME-OUT	<p>The terminal was not able to connect to the wireless Ethernet provider.</p> <p>Press the green OK key to return to the transactions menu and try the transaction again.</p>
CHIP CARD MALFUNCTION	<p>There was an error reading the chip card.</p> <p>Remove the card and retry the transaction. If the message reappears, swipe the card.</p>
CHIP CARD SWIPED	<p>A chip-enabled card was swiped.</p> <p>Insert the card in the chip card reader and resume the transaction.</p>
CONNECT FAILED	<p>The terminal could not connect via wireless Ethernet.</p> <ol style="list-style-type: none"> 1. Press the green OK key to return to the transactions menu. 2. Ensure the SIM card is in the SIM card slot and is inserted correctly then retry the transaction.
	<p>This symbol appears when the terminal is in Demo Mode.</p> <p>Exit Demo Mode to remove the symbol from the display.</p>
Edit Config About UTILITIES>	<p>The "8" key was pressed when the terminal was at the applications menu (e.g. attempting to key in a dollar value of \$8.00 or another value that includes an 8).</p> <p>Press the * (asterisk) key to return to the applications menu.</p>
EMPTY BATCH	<p>If you attempt a Pre Auth Completion but there are no uncompleted pre auths in the terminal memory, the Empty Batch message appears.</p> <p>Press the green OK key to return to the Pre Auth menu.</p>
ERR READ CARD NO.	<p>There is a problem with the magnetic stripe on the card that was swiped.</p> <p>Try swiping the card again, this time more slowly or quickly, or from front of the terminal to the back.</p> <p>If the message reappears:</p> <ul style="list-style-type: none"> - for credit card with stripe – key in the card number. - for credit card with chip – swipe the card - for debit card with stripe or chip – request another form of payment.
EXCEEDS REFUND LIMIT	<p>The total value of refunds performed today is greater than your daily refund limit.</p> <p>Call the Moneris Merchant Service Centre for a temporary increase. Please have the original purchase receipt available for reference.</p>

11. Troubleshooting

ERROR MESSAGE	PROBLEM & SOLUTION
Exc Refund Limit	<p>The total value of refunds performed today is greater than your daily refund limit.</p> <p>Call the Moneris Merchant Service Centre for a temporary increase. Please have the original purchase receipt available for reference.</p>
EXPIRED CARD	<p>The expiry date on the card that was swiped has passed.</p> <p>Request another form of payment.</p>
HOST LOGON REQUIRED	<p>The terminal has been logged off to protect it from attempts to perform unauthorized transactions.</p> <p>Perform a Logon transaction.</p>
INIT REQUIRED	<p>When this message is displayed at the top of the screen (alternating with the date and time), the Moneris host is requesting a re-initialization of the terminal.</p>
INVALID	<p>The password entered does not match the manager's password.</p> <p>Press the red CANC ANNUL key then re-enter the manager password and press the green OK key.</p>
INVALID ACCNT NO.	<p>During a swiped credit card transaction, the digits entered as the last four of the credit card do not match the last four digits of the card number encoded on the card's magnetic stripe.</p> <p>Check the card number and re-enter the last four digits when the "Last 4 digits:" prompt re-appears.</p> <p>If the prompt reappears, contact the Moneris Merchant Service Centre for assistance.</p>
INVALID CARD	<p>An invalid card type was used.</p> <p>Use another card or request another form of payment.</p>
INVALID DATE	<p>The date entered is not a valid date.</p> <p>The date must be entered in the MMY format and must be a valid calendar date, e.g. 1409 is not a valid date.</p> <p>Check the date and re-enter it when the prompt re-appears.</p>
Inv# is 7 char max Press OK key	<p>The Private Label card or Purchasing card used for this transaction only supports invoice numbers with a maximum of 7 characters. The invoice number keyed in earlier in the transaction was longer than 7 characters.</p> <p>Press the green OK key. The "Invoice #:" entry screen appears.</p> <p>Check the invoice number, enter the correct number of characters and press the green OK key to continue the transaction.</p>
IP CONNECTION FAILED	<p>The terminal could not connect via wireless Ethernet.</p> <ol style="list-style-type: none"> 1. Press the green OK key to return to the transactions menu. 2. Ensure the SIM card is in the SIM card slot and is inserted correctly then retry the transaction.

ERROR MESSAGE	PROBLEM & SOLUTION
LINE BUSY	<p>Check if the phone line is shared with another piece of equipment, e.g. a fax machine.</p> <p>If it is, disconnect the other piece of equipment to leave the line free for the terminal and try the transaction again.</p> <p>OR</p> <p>Check if a prefix is required to dial out.</p> <p>If it is, set the PABX code to the required prefix then try the transaction again.</p>
NO ACTIVITY	<p>There are no transactions associated with that clerk ID.</p> <p>OR</p> <p>That Clerk ID does not exist.</p> <p>Check the Clerk ID and try the Clerk Subtotals report again.</p>
No Chip CD On Pre Auth Please Remove Card	<p>Your terminal is not configured to process Pre Auth transactions using a chip card and a chip card has been inserted during a Pre Auth transaction.</p> <p>Remove the chip card, press the red CANC ANNUL key to return to the transaction menu and perform a Purchase transaction with the chip card.</p>
NO LINE	<p>The terminal cannot detect a dial communications line.</p> <p>Check that all communications cables are connected to the base and the wall jack correctly. If they are, check the phone line for dial tone.</p> <p>Check that the phone line is an analog dial line. The terminal will not work on a digital phone line or on VoIP.</p> <p>Try the transaction again. If the message reappears, unplug and replug the power cable at the power source.</p>
NO MATCH	<p>The information you have used to find a transaction in memory can not be found.</p> <p>Check the information and try again.</p>
OUT OF RANGE	<p>The Cashback amount requested exceeds the maximum cashback value set on the terminal.</p> <p>Ask the cardholder to key in an amount lower than the maximum amount when the "Cash:" prompt re-appears.</p> <p>If this error message appears on a regular basis, consider increasing the cashback limit set on the terminal.</p> <p>OR</p> <p>The total amount of the transaction, including the amount, tip and Cashback, exceeds \$999,999.99.</p> <p>Ask the cardholder to key in lower amounts when prompted.</p> <p>OR</p> <p>If this message appears while the terminal is in Demo mode, ensure the amount of the transaction plus Cashback is \$1.00 or less, and the tip is \$1.00 or less.</p>

11. Troubleshooting

ERROR MESSAGE	PROBLEM & SOLUTION
PAPER OUT	<p>A problem has been detected with the printer.</p> <p>Open the printer and check that:</p> <ul style="list-style-type: none"> - there is paper in the printer - the paper feed is clear. - the paper roll is seated correctly. <p>Close the printer lid and ensure that it is closed completely.</p> <p>If the problem is fixed: The printer will finish printing the receipt or report that was in progress and complete the transaction.</p> <p>If the problem is not fixed: Press the green OK key. The terminal will complete the transaction. Fix the problem then reprint the transaction.</p> <p>Note: Transactions should not be performed until the printer problem is fixed.</p>
PHONE NUM FLDS EMPTY	<p>The terminal has attempted to dial out but the phone number parameters are empty. If this message occurs during:</p> <ul style="list-style-type: none"> - a financial transaction, call the Moneris Merchant Service Centre for assistance. - a Batch Close transaction, perform a Re-initialization then try the transaction again.
PRINTER ERR	<p>Open the printer, check that there is a paper roll and that the roll is loaded properly then close the printer.</p> <p>Note: If the battery charge level is at less than 20%, the terminal cannot print receipts however transactions can still be processed. Please the terminal on the charging base to print receipts.</p>
READ CARD ERR	<p>There is a problem with the magnetic stripe on the card that was swiped.</p> <p>Try swiping the card again, this time more slowly or quickly, or from front of the terminal to the back.</p> <p>If the message reappears:</p> <ul style="list-style-type: none"> - for credit card with stripe – key in the card number. - for credit card with chip – swipe the card. - for debit card with stripe or chip – request another form of payment.
RECORD NOT FOUND	<p>The information you have used to find a transaction in memory can not be found.</p> <p>Check the information and try again.</p>
REFUND LIMIT EXCEEDED	<p>The total value of refunds performed today is greater than your daily refund limit.</p> <p>Call the Moneris Merchant Service Centre for a temporary increase. Please have the original purchase receipt available for reference.</p>
RETRY TRAN?	<p>Select YES to retry the transaction. The terminal will try to send the transaction to the Moneris Host using the card data already entered.</p> <p>Select NO to return to the transactions menu.</p>

ERROR MESSAGE	PROBLEM & SOLUTION
SETTLE FAILED	<p>The connection with the Moneris host was lost during the batch close function and the settlement was not completed.</p> <p>Try the Batch Close again. If the batch totals are \$0, print a Deposit Totals report and a Stored Transactions report then call the Moneris Merchant Service Centre.</p>
SYSTEM PROBLEM	<p>This message will be followed by one of the three following messages:</p> <ul style="list-style-type: none"> - TCP INIT ERR: ##### - TCP RECV ERR: ##### - TCP SEND ERR: ##### <p>A communication error has occurred.</p> <p>Call the Moneris Merchant Service Centre and give the agent the four-digit number.</p>
TABLE FULL	<p>You have tried to add too many Clerk IDs or Terminal Names.</p> <p>You can add a maximum of 255 different Clerk IDs and 100 different Terminal Names.</p>
TCP INIT ERR: #####	Refer to the SYSTEM PROBLEM error message.
TCP RECV ERR: #####	Refer to the SYSTEM PROBLEM error message.
TCP SEND ERR: #####	Refer to the SYSTEM PROBLEM error message.
TIP ERROR	<p>The cardholder has keyed in a tip amount that is greater than the standard percentage or a tip percentage that is not defined in the terminal.</p>
TRANS CANCELLED	<p>The red CANC ANNUL key was pressed during the transaction.</p> <ul style="list-style-type: none"> - If the cardholder pressed the CANC ANNUL key, ask the cardholder to return the terminal. - Press the green OK key to display the merchant prompts and print the merchant copy of the cancelled receipt. - Retry the transaction.

11.5 Gift & Loyalty Error Messages on the Moneris Mobile 8300

A message will appear on the display if an error occurs in the GIFT & LOYALTY application. In the table below, find the error message that appears on the terminal and try the solution. If the error message re-appears, [contact the Moneris Merchant Service Centre](#) for assistance.

Additional error messages can be found in [Error Messages on the Moneris Mobile 8300](#).


IMPORTANT: You may need to contact your wireless service provider for assistance before contacting Moneris. Check the Error Message resolution to determine if this is the case.

ERROR MESSAGE	PROBLEM & SOLUTION
811 SYSTEM ERROR PLEASE TRY LATER	The connection with the host was lost during the transaction processing and the transaction was not completed. Call the Moneris Merchant Service Centre.
Batch Balance – NO	If this message is printed on the batch summary report during an Gift & Loyalty Batch Close , contact the Moneris Merchant Service Centre the next business day for reconciliation assistance.
CARD NOT IN BIN RANGE	The card type you swiped cannot be used for that transaction type. OR Your merchant account is not set up to accept the card type that was swiped. Request another form of payment.
CARD READ ERROR	There is a problem with the magnetic stripe on the card that was swiped. Try swiping the card again, this time more slowly or quickly, or from front of the terminal to the back. If the message reappears request another form of payment.
ERROR IN PRINTING	Open the printer, check that there is a paper roll and that the roll is loaded properly then close the printer.
NO MATCH FOUND	The information you have used to find a transaction in memory can not be found. Check the information and try again
NOT A LOYALTY CARD	The card swiped (or card number entered) during a Redemption transaction is not a loyalty card. Check the card and try again.

11.6 Solving Hardware Problems

If terminal does not display an error message but is not functioning correctly, review this list of hardware problems to find suggested solutions.

IMPORTANT: You may need to contact your wireless service provider for assistance before contacting Moneris. Check the Hardware Problem resolution to determine if this is the case.

HARDWARE PROBLEM	SOLUTION
 appears on the left side of the display.	The battery is almost empty. Swap the battery for a fully charged battery or place the terminal on a charging base to charge the battery and continue performing transactions.
Battery is not charging.	Ensure the LED is blinking amber. If not, move the terminal on the charging base , until the battery contacts touch the base contacts and the LED slowly flashes amber.
Communication problems are happening intermittently.	Contact the Moneris Merchant Service Centre for assistance.
Chip cards can not be processed.	If the card entry prompt is "Swipe Card" and the terminal won't accept inserted chip cards (i.e. it beeps and remains at "Swipe Card" when a chip card is inserted), contact the Moneris Merchant Service Centre for assistance.
Display screen is blank	The terminal has powered off or the battery has drained completely. Turn the terminal on by pressing and holding the green OK key. If the applications menu does not appear, check that the battery is properly attached to the terminal . If it is, and the display is still blank, the battery needs to be charged. Swap the battery for a fully charged battery or place the terminal on a charging base to charge the battery. If the display screen is still blank, ensure that the power cable is firmly connected to the power port on the charging base and the wall jack. If the display is still blank, contact the Moneris Merchant Service Centre for assistance.
Display lighting is too bright or too dark	The contrast setting is too high or too low. Check the contrast setting and increase or decrease it to work with the lighting at the terminal location.
Magnetic Stripe Card reader won't read cards.	Try swiping the card more quickly or more slowly or from the front of the reader towards the back. Try swiping a different card. If this card can be read, the problem is with the first card. Request another form of payment. Use a Head Cleaning Card to clean the card reader (a.k.a. the magnetic stripe reader or MSR). Contact the Moneris Merchant Service Centre if you need Head Cleaning Cards. If the card reader still won't read cards, contact the Moneris Merchant Service Centre for assistance.

