



Basic Loyalty Program
Using Your Terminal
for Loyalty

For Moneris® HiSpeed 6200 and
Moneris® Mobile 8200



Contents



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Basic Loyalty	2
Loyalty card entry options	3
Administrative transactions	4
Transactions	6
Receipts	11
Reporting	12
End-of-day process	15
Troubleshooting	16

Record your Moneris merchant number here:

How your Loyalty program works:

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

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

There are two ways to perform transactions with a Loyalty card using the terminal:

Swipe

1. Wait for the "SWIPE OR ENTER CARD" prompt to appear on the terminal display.
2. **Swipe the card** on the terminal's magnetic stripe reader.



Manual entry

If the magnetic stripe reader fails to read the Loyalty card, you may manually enter the card number.

1. Wait for the "SWIPE OR ENTER CARD" prompt to appear on the terminal display.
2. **Key in the card number** and press **OK**.

To navigate through the menus:

- Press **F1** to scroll down and highlight menu items.
- Press **F3** to scroll up and highlight menu items.
- Press **OK** to select the highlighted menu item.

Administrative transactions

Initializing the terminal

You must initialize your terminal when you first configure it for the Loyalty program and when prompted by the terminal after a program change request has been processed.

1. At the terminal's idle prompt, press the **Admin** key.
2. On the MAIN MENU, select **ERNEX** and press **OK**.
3. On the ERNEX menu, select **SETUP** and press **OK**.
4. On the SETUP menu, press **OK** to select **INITIALIZATION**.

The "ENTER ERNEX TERMINAL ID" prompt appears.

5. Press **OK** to accept the displayed Terminal ID.
OR
Key in the **Ernex Terminal ID** and press **OK**.

The terminal communicates with the Moneris/Ernex Host, then the "CLEAR TERMINAL STORAGE?" prompt appears.

6. Select **YES** to clear all Loyalty card records from the terminal memory.
OR
Select **NO** to keep records in memory.
The terminal returns to the ERNEX menu.
7. Press **Can/Ann** to return to the terminal's idle prompt.

Activating a card

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

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

Looking up a card balance (Card Inquiry)

Follow the steps below to display and print the points balance on a Loyalty card.

1. At the terminal's idle prompt, press the **Admin** key.
2. On the MAIN MENU, select **ERNEX** and press **OK**.

3. On the ERNEX menu, select **CARD INQUIRY** and press **OK**.

The "SWIPE OR ENTER CARD" prompt appears.

4. Swipe the Loyalty card or key in the **card number** and press **OK**.

If "ENTER CLERK ID" appears, key in the **Clerk ID** and press **OK**.

5. At the "INQUIRY COMPLETE" prompt, press **OK**.
The card's points balance is displayed on the terminal display.

6. Press **OK**.

The "PRINT RECEIPT?" prompt appears.

7. Select **YES** to print a receipt with the points balance.
OR
Select **NO** to return to the ERNEX menu.

8. Press **Can/Ann** to return to the terminal's idle prompt.

Deactivating a card

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

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

1. At the terminal's idle prompt, press the **Admin** key.
2. On the MAIN MENU, select **ERNEX** and press **OK**.
3. On the ERNEX menu, select **DEACTIVATION** and press **OK**.

The "SWIPE OR ENTER CARD" prompt appears.

4. Swipe the Loyalty card or key in the **card number** and press **OK**.

If "ENTER CLERK ID" appears, key in the **Clerk ID** and press **OK**.

The "Approved" prompt appears and the Merchant copy of the receipt prints.

5. Press **OK** to print the Cardholder copy of the receipt.
6. Press **OK** to return to the ERNEX menu or **Can/Ann** to return to the terminal's idle prompt.

Transactions

Awarding points for a cash Purchase

Follow the steps below to award points to a Loyalty card when the cardholder makes a cash Purchase.

1. At the terminal's idle prompt, press the **Admin** key.
2. On the MAIN MENU, select **ERNEX** and press **OK**.
3. On the ERNEX menu, press **OK** to select **PURCHASE**.
The "SWIPE OR ENTER CARD" prompt appears.
4. Swipe the Loyalty card or key in the **card number** and press **OK**.
If "ENTER CLERK ID" appears, key in the **Clerk ID** and press **OK**.
The "ENTER TOTAL AMOUNT" prompt appears.
5. Key in the **total transaction dollar amount** (including tax and gratuity) and press **OK**.
The "Approved" prompt appears and the Merchant copy of the receipt prints.
6. Press **OK** to print the Cardholder copy of the receipt.
7. Press **OK** to return to the ERNEX menu or **Can/Ann** to return to the terminal's idle prompt.

Awarding points for a credit or debit card Purchase

Follow the steps below to award points to a Loyalty card when the cardholder makes a credit or debit card Purchase.

1. Process the credit or debit Purchase transaction on your terminal.
The "UPDATE POINTS TO ANOTHER CARD?" prompt appears.
2. Select **YES**.
The "SWIPE OR ENTER CARD" prompt appears.
3. Swipe the Loyalty card or key in the **card number** and press **OK**.
If "ENTER CLERK ID" appears, key in the **Clerk ID** and press **OK**.
The "ENTER TOTAL AMOUNT" prompt appears.

4. Key in the **total transaction dollar amount** (including tax and gratuity) and press **OK**.

The "Approved" prompt appears and the Merchant copy of the receipt prints.

5. Press **OK** to print the Cardholder copy of the receipt.
6. Press **Can/Ann** or **OK** to return to the terminal's idle prompt.

Allocating points for a Pre-Authorization

Follow the steps below to allocate points to a Loyalty card when a credit card Pre-Authorization is performed for the cardholder.

Important: Points are not awarded to the card until the Pre-Authorization is completed (see "Pre-Authorization Completion" on p. 8). If a Pre-Authorization is deleted before it is completed, the points allocation is voided.

1. Process the Pre-Authorization transaction on your terminal.

The "UPDATE POINTS TO ANOTHER CARD?" prompt appears.

2. Select **YES**.

The "SWIPE OR ENTER CARD" prompt appears.

3. Swipe the Loyalty card or key in the **card number** and press **OK**.

The "Approved" prompt appears and the Merchant copy of the receipt prints.

4. Press **OK** to print the Cardholder copy of the receipt.
5. Press **Can/Ann** or **OK** to return to the terminal's idle prompt.

Awarding points during a Pre-Authorization Completion

Follow the steps below during a Pre-Authorization Completion to award points that were allocated to a Loyalty card during the Pre-Authorization.

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

1. Process the Pre-Authorization Advice on your terminal.
The “USE LOYALTY INFO FROM PRE-AUTH?” prompt appears.
2. Select **YES**.
3. When the “APPLY TO #####” prompt appears, confirm the Loyalty card number and press **OK**.
The “Approved” prompt appears and the Merchant copy of the receipt prints.
4. Press **OK** to print the Cardholder copy of the receipt.
5. Press **Can/Ann** or **OK** to return to the terminal’s idle prompt.

Redeeming points automatically

If your Loyalty program has been set up for Automatic Redemption, points are automatically redeemed when a cardholder reaches the configured Reward Threshold Level, and a Reward Coupon prints from the terminal.

***Note:** If a cardholder’s points balance surpasses the Reward Threshold Level multiple times in one transaction (e.g. the Reward Threshold Level is 200 and the cardholder makes a \$600 purchase with a Points Earning Rate of \$1 = 1 point, meaning they have earned 600 points), the terminal will redeem points for only one Reward and print only one Reward Coupon. In the above example, the remaining coupons will be generated in increments of the Reward Threshold Level during subsequent transactions with the same card.*

Processing a cash Refund

Follow the steps below to remove points from a Loyalty card when the cardholder receives a cash Refund on a Purchase transaction that awarded points.

1. At the terminal’s idle prompt, press **ADMIN**.
2. On the MAIN MENU, select **ERNEX** and press **OK**.
3. On the ERNEX menu, select **REFUND** and press **OK**.
The “SWIPE OR ENTER CARD” prompt appears.

4. Swipe the Loyalty card or key in the **card number** and press **OK**.

If “ENTER CLERK ID” appears, key in the **Clerk ID** and press **OK**.

The “ENTER TOTAL AMOUNT” prompt appears.

5. Key in the **total dollar amount to be refunded** and press **OK**.

***Note:** The amount can be a partial amount of the original Purchase.*

The “ERNEX REFERENCE NUMBER” prompt appears.

6. Key in the **Loyalty reference number** printed on the Loyalty card Purchase receipt and press **OK**.

The “Approved” prompt appears and the Merchant copy of the receipt prints.

7. Press **OK** to print the Cardholder copy of the receipt.
8. Press **OK** to return to the ERNEX menu or **Can/Ann** to return to the terminal’s idle prompt.

Processing a credit or debit Refund

Follow the steps below to remove points from a Loyalty card when the cardholder receives a credit or debit card Refund on a Purchase transaction that awarded points.

1. Process the credit or debit card Refund transaction on your terminal.
The “UPDATE POINTS TO ANOTHER CARD?” prompt appears.
2. Select **YES**.
The “SWIPE OR ENTER CARD” prompt appears.
3. Swipe the Loyalty card or key in the **card number** and press **OK**.
The “ERNEX REFERENCE NUMBER” prompt appears.
4. Key in the **Loyalty reference number** printed on the Loyalty card Purchase receipt and press **OK**.
The “Approved” prompt appears and the Merchant copy of the receipt prints.
5. Press **OK** to print the Cardholder copy of the receipt.
6. Press **Can/Ann** or **OK** to return to the terminal’s idle prompt.

Receipts

Voiding a Loyalty transaction

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

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

1. At the terminal's idle prompt, press **ADMIN**.
2. On the MAIN MENU, select **ERNEX** and press **OK**.
3. On the ERNEX menu, select **VOID** press **OK**.

The "SWIPE OR ENTER CARD" prompt appears.

4. Swipe the Loyalty card or key in the **card number** and press **OK**.

If "ENTER CLERK ID" appears, key in the **Clerk ID** and press **OK**.

The "ERNEX REFERENCE NUMBER" prompt appears.

5. Key in the **Loyalty reference number** printed on the Loyalty card transaction receipt.

The "Approved" prompt appears and the Merchant copy of the receipt prints.

Note: If "TRANSACTION NOT FOUND" appears, the Loyalty card transaction you are trying to void is not in the open batch. Cancel the void and perform a Refund instead.

6. Press **OK** to print the Cardholder copy of the receipt.
7. Press **OK** to return to the ERNEX menu or **Can/Ann** to return to the terminal's idle prompt.

Loyalty reference number

A Loyalty card transaction's reference number is printed at the bottom of receipts (**REF #**). You will be prompted to key in this number when transacting Loyalty card Refunds, Voids and Pre-Authorization Completions.

MERCHANT NAME MERCHANT ADDRESS MERCHANT CITY & PROVINCE		
CARD DESCRIPTION	Rewards	Program name
CARD	1234567890123456789	
DATE	YYYY/MM/DD	
TIME	0000 HH MM.SS	
CLERK ID	1	
RECEIPT #	S12345-67890	Original Loyalty TRX Ref # (Refunds, Voids, and Pre-Auth Completions only)
[ORIG REF #	12345678]	
TRX type	PURCHASE	TRX total \$ amt
	AMOUNT	\$000,000.00
Current pts. balance on card (incl. EARNED)	Points	Pts. awarded (+/-) this TRX
	EARNED	0000
	NEW TOTAL	0000
	Lifetime Points	0000
	Ttd. pts. earned on card	

	000 APPROVED	
Loyalty TRX Reference #	REF # 12345678	
	Thank you for your purchase. Always read the receipts for your rewards!	
	MERCHANT COPY	

Reprinting a receipt

This function reprints a Merchant copy or a Cardholder copy of the last Loyalty card transaction.

1. At the terminal's idle prompt, press **ADMIN**.
2. On the MAIN MENU, select **ERNEX** and press **OK**.
3. On the ERNEX menu, select **REPRINT** and press **OK**.
4. At the "REPRINT COPY" prompt:
Select **MERCHANT** to print a Merchant copy.
OR
Select **CARDHOLDER** to print a Cardholder copy.
5. Press **Can/Ann** to return to the terminal's idle prompt.

Reporting

Stored Loyalty transactions

This report lists approved Loyalty transactions by date or batch. You can choose to print batch totals only or batch totals and transaction details.

1. At the terminal's idle prompt, press **ADMIN**.
2. On the MAIN MENU, select **ERNEX** and press **OK**.
3. On the ERNEX menu, select **REPORT FUNCS** and press **OK**.
4. On the **REPORT FUNCS** menu, select **TRANS LIST** and press **OK**.

If "SWIPE ADMIN CARD" appears, swipe the Admin Card.

If "ENTER CLERK ID" appears, key in the **Clerk ID** and press **OK**.

The "PRINT DATE OR BATCH?" prompt appears.

5. Select the transactions you want to print:
 - a. By date:
 - Select **DATE**.
 - At the "(YY)MMDD" prompt, key in the desired date and press **OK**.
 - b. By batch:
 - Select **BATCH**.
 - At the "BATCH NUMBER" prompt, key in the desired batch number OR press **OK** for the current batch.
6. At the "PRINT TOTALS ONLY?" prompt:
 - Select **YES** to print batch totals only.
 - OR
 - Select **NO** to print batch totals and transaction details.

The report prints and the terminal returns to the ERNEX menu.

7. Print **Can/Ann** to return to the terminal's idle prompt.

Transaction Inquiry

This report lists Loyalty transactions by card type, card number, transaction amount and/or transaction date. You can choose to display or print results.

1. At the terminal's idle prompt, press **ADMIN**.
2. On the MAIN MENU, select **ERNEX** and press **OK**.
3. On the ERNEX menu, select **REPORT FUNCS** and press **OK**.
4. On the REPORT FUNCS menu, select **TRANS INQUIRY** and press **OK**.

If "SWIPE ADMIN CARD" appears, swipe the Admin Card.

If "ENTER CLERK ID" appears, key in the **Clerk ID** and press **OK**.

5. On the CARD TO SEARCH menu, scroll down until the desired card type is selected then press **OK**. To include all card types, select **ALL CARDS**.
6. At the "CARD NUMBER" prompt:
 - Key in the desired **card number** and press **OK**.
 - OR
 - Press **OK** to include all card numbers.
7. At the "ENTER AMOUNT" prompt:
 - Key in the desired **transaction amount** and press **OK**.
 - OR
 - Press **OK** to include all amounts.
8. At the "DATE (YY)MMDD" prompt:
 - Key in the desired **date** and press **OK**.
 - OR
 - Press **OK** to include all dates.

The "PRINT OR DISPLAY?" prompt appears.

9. Select how you want to view results:
 - a. Print:
 - Select **PRINT** to print the transaction list and return to the ERNEX menu.
 - b. Display:
 - Select **DISPLAY**.
 - Scroll up and down through results and select individual transactions.
 - Press **OK** to display details of the selected transaction.

End-of-day process

- When a transaction is displayed, select **NEXT** to return to the transaction list and select the next transaction OR select **REPRINT** to print a duplicate Merchant copy of the transaction's receipt and return to the transaction list.
 - Press **Can/Ann** to return to the "PRINT OR DISPLAY?" prompt.
 - Press **Can/Ann** again to return to the REPORT FUNCS menu.
 - Press **Can/Ann** again to return to the ERNEX menu.
10. Press **Can/Ann** to return to the terminal's idle prompt.

Printing a Batch Totals Report

This report prints totals of Loyalty card transactions stored in terminal memory, for the current batch, **without** closing the current batch.

1. At the terminal's idle prompt, press the **Admin** key.
2. On the MAIN MENU, select **ERNEX** and press **OK**.
3. On the ERNEX menu, select **REPORT FUNCS** and press **OK**.
4. On the REPORT FUNCS menu, select **OPEN BATCH TOT** and press **OK**.

If "ENTER CLERK ID" appears, key in the **Clerk ID** and press **OK**.

The terminal prints the report and returns to the ERNEX menu.

5. Press **Can/Ann** to return to the terminal's idle prompt.

Closing a batch

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

Important: A Batch Close must be completed daily.

***Note:** We recommend printing a Current Batch Totals Report **before** performing a Batch Close to ensure batch totals are balanced. If totals are not balanced, please contact Merchant Customer Service.*

1. At the terminal's idle prompt, press the **Admin** key.
2. On the MAIN MENU, select **ERNEX** and press **OK**.
3. On the ERNEX menu, select **REPORT FUNCS** and press **OK**.
4. On the REPORT FUNCS menu, select **CLOSE BATCH**.

If "ENTER CLERK ID" appears, key in the **Clerk ID** and press **OK**.

The terminal communicates with the Moneris/Ernex Host, closes the batch, prints a Loyalty Batch Close Totals Report and returns to the ERNEX menu.

5. Press **Can/Ann** to return to the terminal's idle prompt.

Troubleshooting

If an error message appears, first press **OK** or **Can/Ann** to clear the message then retry the transaction. If the error message reappears and is listed in the table below, follow the instructions in the table's Solution column. If the problem is still not resolved, call Merchant Customer Service at **1-866-319-7450**.

Error message	Solution
CARD DISABLED	The Loyalty card you swiped has been deactivated and cannot be used.
CARD NOT SUPPORTED PLEASE RETRY	The card type you swiped cannot be used for Loyalty card transactions. Try again with a different card or cancel the transaction.
CARD READ ERROR	There is a problem with the magnetic stripe on the Loyalty card that was swiped. Try swiping the card again, this time more slowly or quickly, or from front of the terminal to the back.
ERNEX INITIALIZATION FAILED	There has been a terminal, host or communication problem during initialization to the Moneris/Ernex Host. Press OK to return to the ERNEX menu. Try to re-initialize again. If this does not work, contact Merchant Customer Service.
ERNEX INITIALIZATION REQUIRED	Your terminal requires re-initialization to the Moneris/Ernex Host. Re-initialize your terminal to the Moneris/Ernex Host.
INITIALIZE ERNEX	The Moneris/Ernex Host is requesting a re-initialization of the terminal. Re-initialize your terminal to the Moneris/Ernex Host.

Error message	Solution
INVALID ENTRY	The information you have entered in the terminal is not valid. Check the information and retry.
Only one Reward Coupon prints although the Loyalty card has reached the Reward Threshold Level multiple times for Automatic Redemptions	For Automatic Redemptions, a cardholder may redeem only one Reward Coupon per transaction (a Reward is equal to the Reward Threshold Level). Inform the cardholder that he/she can receive the remaining Reward Coupons during subsequent transactions with the same card.
REFUND AMOUNT GREATER THAN ORIGINAL	The \$ dollar amount you have entered for a Loyalty card Refund is greater than the amount in the original Purchase transaction. Press OK and retry the Refund with an appropriate amount.
Terminal does not respond when entering a \$ amount and pressing OK	You have attempted to enter \$0.00 as the Loyalty card total transaction amount. Re-enter the correct amount.
TOTALS NOT AVAILABLE	No Loyalty card transactions have been processed since the last Loyalty Batch Close.
TRANSACTION NOT FOUND	No Loyalty card transaction matching the reference number you entered could be found in terminal memory. Check the number and try again.
SYSTEM ERROR PLEASE TRY LATER	One or more Moneris/Ernex configuration parameters have been set up incorrectly and the terminal is unable to communicate with the Moneris/Ernex Host. Check the parameter configuration and make the necessary corrections. You will need to re-initialize your terminal before processing any transactions.

Need help?

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

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

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

Important: If you are experiencing equipment problems, please refer to the *Moneris HiSpeed 6200* or *Moneris Mobile 8200 Using Your Terminal Guide*.



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