

Basic Loyalty Program  
Using Your Terminal  
for Loyalty

For Moneris® Mobile 8300



# Contents



**Need help?**  
Call 1-866-319-7450

Basic Loyalty .....	2
Loyalty card entry options .....	3
Administrative transactions .....	4
Transactions .....	7
Receipts .....	10
Reporting .....	12
End-of-day process .....	14
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**.

## Helpful hints

- To access reports, press the  key.
- To reprint receipts, press the  key.
- To scroll through menus, use the **Arrow key** (first purple key on the left). Press the **CORR** key to toggle between scrolling up  and down .
- To select a menu item, press the corresponding function key (**F1**, **F2**, etc.).

# 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. On the applications menu, select **GIFT & LOYALTY**.
2. On the Ernex transactions menu (ERNEXGL), scroll down and select **Setup**.

If the “Password:” prompt appears, key in the **manager password** and press **OK**.

3. On the Setup menu, scroll down and select **Initialization**.

***Note:** If there are transactions in the open batch, the “Batch Not Empty Close Batch?” prompt appears. Select **Yes** to close the batch (see “End-of-day process” on p. 14) then re-start the initialization.*

The “Ernex Term ID:” prompt appears.

4. Press **OK** to accept the **displayed ID**.  
OR  
Key in the **Ernex Terminal ID** and press **OK**.  
The terminal communicates with the Moneris/Ernex Host and “ooo Approved” appears after the initialization is completed successfully.
5. Press **OK** to return to the Setup menu.
6. To return to the Ernex transactions menu, press **CANC ANNUL**.
7. To return to the applications menu, press the **\*** (**ASTERISK**) key.

## 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. On the applications menu, select **GIFT & LOYALTY**.
2. On the Ernex transactions menu (ERNEXGL), scroll down and select **Card Inquiry**.

If the “Password:” prompt appears, key in the **manager password** and press **OK**.

The “Swipe or Enter Card:” prompt appears.

3. Swipe the Loyalty card or key in the **card number** and press **OK**.  
If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press **OK**.
4. At the “ooo Inquiry Complete” prompt, press **OK**.  
The card’s point balance appears on the terminal display.
5. Press **OK**.  
The “Print Receipt?” prompt appears.
6. Select **Yes** to print a receipt with the points balance.  
OR  
Select **No** to return to the Ernex transactions menu.
7. To return to the applications menu, press the **\*** (**ASTERISK**) key.

# Transactions

## 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. On the applications menu, select **GIFT & LOYALTY**.
2. On the Ernex transactions menu (ERNEXGL), scroll down and select **Deactivate**.

If the “Password:” prompt appears, key in the **manager password** and press **OK**.

The “Swipe or Enter Card:” prompt appears.

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

If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press **OK**.

“ooo Approved” appears.

4. Press **OK** to print the deactivation receipt.
5. To return to the Ernex transactions menu, press **CANC ANNUL**.
6. To return to the applications menu, press the **\*** (ASTERISK) key.

## Awarding points

Follow the steps below to award points to a Loyalty card when the cardholder makes a Purchase by credit card, debit card or cash; or with a credit Pre-Authorization, Pre-Authorization Completion or Advice.

**Important: When accumulating points with a Pre-Authorization and Pre-Authorization Completion: Award points when you process the Pre-Authorization if you know that you will NOT have the Loyalty card available later for the Completion. Award points when you process the Completion if you know that you WILL have the Loyalty card available at that time.**

1. Process the transaction on your terminal.
2. On the applications menu, select **GIFT & LOYALTY**.
3. On the Ernex transactions menu (ERNEXGL), select **Purchase**.  
If the “Password:” prompt appears, key in the **manager password** and press **OK**.  
The “Total Amount:” prompt appears.
4. Key in the **total transaction dollar amount** and press **OK**.  
The “Swipe or Enter Card:” prompt appears.
5. Swipe the Loyalty card or key in the **card number** and press **OK**.  
If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press **OK**.  
If the “Invoice Number:” prompt appears, key in the **Invoice Number** and press **OK**.  
“ooo Approved” appears.
6. Press **OK** to print the Cardholder copy of the receipt.
7. Press **OK** to print the Merchant copy of the receipt and return to the Ernex transactions menu.
8. To return to the applications menu, press the **\*** (ASTERISK) key.

## Redeeming points automatically

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 Refund

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

1. Process the Refund on your terminal.
2. On the applications menu, select **GIFT & LOYALTY**.
3. On the Ernex transactions menu (ERNEXGL), select **Refund**.

If the "Password:" prompt appears, key in the **manager password** and press **OK**.

The "Total Amount:" prompt appears.

4. Key in the **total dollar amount of the refund for which points are to be deducted** following the guidelines below then press **OK**.

If points were awarded on the **Total Amount** of the Purchase transaction (including tax and gratuity), key in the dollar amount printed on the **Amount** line of the Loyalty card Purchase receipt, or part of the amount if the cardholder wants a partial Refund.

The "Swipe or Enter Card:" prompt appears.

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

If the "Clerk ID:" prompt appears, key in the **Clerk ID** and press **OK**.

The "Ernex Ref Number:" prompt appears.

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

If the "Invoice Number:" prompt, appears, key in the **Invoice Number** and press **OK**.

"ooo Approved" appears.

7. Press **OK** to print the Cardholder copy of the receipt.
8. Press **OK** to print the Merchant copy of the receipt and return to the Ernex transactions menu.
9. To return to the applications menu, press the **\*** (**ASTERISK**) key.

## Voiding a Loyalty transaction

Follow the steps below to void a Loyalty card transaction in the current 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. On the applications menu, select **GIFT & LOYALTY**.
2. On the Ernex transactions menu (ERNEXGL), scroll down and select **Void**.

If the "Password:" prompt appears, key in the **manager password** and press **OK**.

The "Swipe or Enter Card:" prompt appears.

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

If the "Clerk ID:" prompt appears, key in the **Clerk ID** and press **OK**.

The "Ernex Ref Number:" prompt appears.

4. Key in the **Loyalty reference number** printed on the receipt of the Loyalty card transaction you want to void and press **OK**.

If the "Invoice Number:" prompt, appears, key in the **Invoice Number** and press **OK**.

"ooo Approved" appears.

5. Press **OK** to print the Cardholder copy of the receipt.
6. Press **OK** to print the Merchant copy of the receipt and return to the Ernex transactions menu.
7. To return to the applications menu, press the **\*** (**ASTERISK**) key.

# Receipts


## Loyalty reference number

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

	Merchant Name Merchant Address Merchant City & Province	
	Terminal ID 12345 Clerk ID 1	
TRX type	<b>Purchase</b>	
	Card Description    Rewards	Program name
	Card 1234567890123456789	
	Entry Method Swiped	
	[Orig Ref #            12345678]	Original Loyalty TRX Ref # (Refunds and Voids only)
TRX total \$ amt.	■ Amount            \$ 000,000.00	
Pts. awarded (+/-) this TRX	■ Points Earned       0000	Current pts. balance on card (incl. Points Earned)
	■ Points Balance     0000	
Total pts. earned on card	■ Lifetime Points    0000	
	YYYY/MM/DD            HH:MM:SS	
	Inv # 001                Batch # 1	
	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 prints a duplicate Cardholder copy of a transaction receipt.

1. On the applications menu, select **GIFT & LOYALTY**.
2. Press the  key.

The Reprints menu appears.

3. Select the receipt you want to print:
  - a. To print a receipt for the last transaction:
    - Select **Last Receipt**.
  - b. To print another receipt:
    - Select **Any Receipt**.
    - At the “Ernex Ref Number:” prompt, key in the **Loyalty reference number** of the transaction for which you want to print a receipt and press **OK**.

The terminal prints the receipt and returns to the Reprints menu.

4. To return to the Ernex transactions menu, press **CANC ANNUL**.
5. To return to the applications menu, press the **\*** (**ASTERISK**) key.

# Reporting

## Transaction Inquiry

This report lists details of Loyalty transactions in the open batch by card type, card number, amount and date. You can choose to view or print results.

1. On the applications menu, select **GIFT & LOYALTY**.
2. Press the **⏏** key.  
If the “Password:” prompt appears, key in the **manager password** and press **OK**.
3. On the Reports menu, select **Trans Inquiry**.  
If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press **OK**.
4. To select the desired **card type**, press **Next** until the card type appears then press **Slct**. To include all card types, select **All**.
5. At the “Card #:” prompt:
  - Key in the desired **card number** and press **OK**.  
OR
  - Press **OK** to include all card numbers.
6. At the “Enter Amount: \$0.00” prompt:
  - Key in the desired **amount** and press **OK**.  
OR
  - Press **OK** to include all amounts.
7. At the “Date: MMDDYY” prompt:
  - Key in the desired **date** and press **OK**.  
OR
  - Press **OK** to include all dates.

The “Select option” prompt appears.
8. Select how you want to view results:
  - a. View
    - Select **View**.
    - Select **Prev/Next** to scroll up/down through results and view individual transactions.
    - Select **Cncl** to stop viewing results and return to the Reports menu.
  - b. Print
    - Select **Print** to print the transaction list and return to the Reports menu.
9. To return to the Ernex transactions menu, press **CANC ANNUL**.
10. To return to the applications menu, press the **\*** (**ASTERISK**) key.

## Clerk Sub-Totals

This report lists totals for all Loyalty card transactions in the current batch for one or more Clerk IDs **without** closing the batch.

1. On the applications menu, select **GIFT & LOYALTY**.
2. Press the **⏏** key.  
If the “Password:” prompt appears, key in the **manager password** and press **OK**.
3. On the Reports menu, select **Clerk Subtotals**.  
If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press **OK**.  
The “Zero Clerk totals?” prompt appears.
4. To **reset** Clerk totals to zero (o) at the completion of the report, select **Yes**.  
OR  
To **continue accumulating** Clerk totals, select **No**.  
The “Select Clerks” prompt appears.
5. Select the Clerk sub-totals you want to print:
  - a. To print sub-totals for **one Clerk**:
    - Select **One**.
    - At the “Enter Clerk ID:” prompt, key in the desired **Clerk ID** and press **OK**.
  - b. To print sub-totals for a **group of Clerks**:
    - Select **Grp**.
    - At the “Enter Group:” prompt, key in the desired **Group ID** and press **OK**.
  - c. To print sub-totals for a **list of Clerks**:
    - Select **List**.
    - At the “Add Clerk/Group ID:” prompt, key in the desired **Clerk ID** or **Group ID** and press **OK**.

The “Add more?” prompt appears.

    - To include another Clerk’s or Group’s sub-totals in the report, select **Yes** and key in the appropriate ID as above. Continue adding Clerks/Groups as needed.  
OR
    - To print the report now, select **No**.
  - d. To print sub-totals for **all Clerks**:
    - Select **ALL**.

The terminal prints the report and returns to the Reports menu.
6. To return to the Ernex transactions menu, press **CANC ANNUL**.
7. To return to the applications menu, press the **\*** (**ASTERISK**) key.

# End-of-day process

## Printing a Stored Transactions Report

This report prints Loyalty card transactions in terminal memory by date or by batch **without** closing the current batch. The report includes transaction details and batch totals.

1. On the applications menu, select **GIFT & LOYALTY**.
2. Press the **☰** key.

If the “Password:” prompt appears, key in the **manager password** and press **OK**.

3. On the Reports menu, select **Trans List**.

If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press **OK**.

The “Print by Date or Batch?” prompt appears.

4. Select the transactions you want to print:

a. By date:

- Select **Date**.
- At the “Date: MMDDYY:” prompt, key in the desired date and press **OK** OR just press **OK** to include all dates.

b. By batch:

- Select **Batch**.
- At the “Batch Num:” prompt, key in the desired batch number and press **OK** OR just press **OK** to include all batches.

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

5. To return to the Ernex transactions menu, press **CANC ANNUL**.
6. To return to the applications menu, press the **\*** (**ASTERISK**) key.

## 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 Stored Transactions Report (p. 14) **before** performing a Batch Close to ensure batch totals are balanced. If totals are not balanced, please contact Merchant Customer Service.*

1. On the applications menu, select **GIFT & LOYALTY**.
2. Press the **☰** key.

If the “Password:” prompt appears, key in the **manager password** and press **OK**.

3. On the Reports menu, scroll down and select **Batch Close**.

If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press **OK**.

The “Print Details Report?” prompt appears.

4. Select **Yes** to print details of transactions in the batch.

OR

Select **No** to bypass transaction details.

“ooo Approved” appears.

5. Press **OK** to print the report.

The terminal prints the Batch Close report, displays “BATCH DELETED” and returns to the Reports menu.

6. To return to the Ernex transactions menu, press **CANC ANNUL**.

7. To return to the applications menu, press the **\*** (**ASTERISK**) key.

**Important: If “Balanced – NO” is printed at the bottom of the report, contact Merchant Customer Service the next day for reconciliation assistance.**

# Troubleshooting

If an error message appears, first press **OK** or **CANC ANNUL** 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
<b>BATCH EMPTY</b>	No Loyalty transactions have been processed since the last Batch Close.
<b>CARD DISABLED</b>	The Loyalty card you swiped has been deactivated and cannot be used.
<b>CARD NOT SUPPORTED</b>	The card type you swiped cannot be used for Loyalty transactions. Try again with a different card or cancel the transaction.
<b>CARD READ ERROR</b>	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.
<b>ERNEX INITIALIZATION FAILED</b>	There has been a terminal, host or communication problem during initialization to the Moneris/Ernex Host.  Press <b>OK</b> to return to the ERNEX menu.  Try to re-initialize again. If this does not work, contact Merchant Customer Service.
<b>ERNEX INITIALIZATION REQUIRED</b>	Your terminal requires re-initialization to the Moneris/Ernex Host.  Re-initialize your terminal to the Moneris/Ernex Host.
<b>INITIALIZE ERNEX</b>	The Moneris/Ernex Host is requesting a re-initialization of the terminal.  Re-initialize your terminal to the Moneris/Ernex Host.

Error message	Solution
<b>INVALID AMOUNT</b>	The \$ amount you have entered is invalid, e.g. you have entered \$0.00 or the amount you have entered exceeds the maximum.  Re-enter a valid \$ amount.
<b>INVALID ENTRY</b>	The information you have entered in the terminal is not valid.  Check the information and retry.
<b>For Automatic Redemption, only one Reward coupon prints although the Loyalty card has reached the Reward Threshold Level multiple times.</b>	For Automatic Redemption, 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.
<b>NO TOTALS AVAILABLE</b>	If a Batch Close has been sent to the Moneris/Ernex Host but there are no transaction totals at the host, this message appears on the terminal display and is printed on a Batch Close Report.
<b>RECORD NOT FOUND</b>	No transaction matching the reference number you entered could be found in terminal memory.  Check the number and try again.
<b>REFUND AMOUNT GREATER THAN ORIGINAL</b>	The \$ dollar amount you have entered for a Refund is greater than the amount in the original Purchase transaction.  Press <b>OK</b> and retry the Refund with the correct amount.
<b>SYSTEM ERROR PLEASE TRY LATER</b>	One or more 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 Mobile 8300 Using Your Terminal Guide*.**



© Moneris, Moneris Solutions and the Moneris Solutions design are registered trademarks of Moneris Solutions Corporation. All other marks or registered trademarks are the marks or registered trademarks of their respective owners.

© 2011 Moneris Solutions Corporation, 3300 Bloor Street West, Toronto, Ontario, M8X2X2.

All Rights Reserved. This manual shall not wholly or in part, in any form or by any means, including electronic, mechanical, and photocopying, be reproduced or transmitted without the authorized consent of Moneris Solutions Corporation ("Moneris").

For informational purposes only. Neither Moneris nor any of its affiliates shall be liable for any direct, indirect, incidental, consequential or punitive damages arising out of use of any of the information contained in this guide. Neither Moneris nor any of its affiliates nor any of our or their respective licensors, licensees, service providers or suppliers warrant or make any representation regarding the use or the results of the use of the information, content and materials contained in this guide in terms of their correctness, accuracy, reliability or otherwise.

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**.