



Moneris Mobile 8200 OPERATING MANUAL

Software Version 7.53

Documentation v1.2

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1 Introduction

1.1 What's New in v7.53

- [Cancelling Pre-Authorizations](#) (at terminal)
- [Enhanced Tip prompting](#) (debit/credit cards)
- [Tip prompting](#) (gift cards)

See "Optional Features" section for details about these new features, or call the Moneris Merchant Contact Centre to discuss how these features can benefit your business.

1.2 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, practise performing transactions in [Training mode](#) to ensure that any errors made while learning to perform transactions do not affect your business account.

1.3 Learning about the Terminal

The Moneris Mobile 8200 terminal is a short-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:

- [Moneris Mobile 8200 Hardware](#)
- [Features & Procedures](#)
- [READY Screen](#)
- [Training mode](#)
- [MAIN Menu](#)

1.4 Caring for your Moneris Hardware

Proper care of your [terminal](#) , [battery](#) and [base](#) 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.
- The terminal must be [powered off](#) for all cleaning operations.
- 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 Introduction

1.4.1 Caring for the Terminal

- Clean the magnetic stripe reader (MSR) periodically, using the cleaning card provided with your terminal. To obtain additional MSR cleaning cards, [contact the Moneris Merchant Service Centre](#).

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.
- [Load the paper](#) into the printer correctly.
- If the terminal has battery recharging or communication problems, gently clean the golden contact under the terminal with a damp cloth. Do not scratch or scrape the surface of the contacts.

1.4.2 Caring for the Battery

- If a battery is attached to a handheld terminal, do NOT place the handheld on a metal surface. It may damage the contacts on the back of battery (i.e., the contacts that are used when the battery is on a base). Refer to "[Battery Management Tips](#)."

IMPORTANT: Do not interchange batteries with other terminal types.

1.4.3 Caring for the Base

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

- Avoid unnecessary movement of the terminal base to prevent accidental disconnection of any of the cables.

2 Features and Procedures

Your terminal can be set up to accept and process a variety of transactions for a variety of cards including Debit cards, magnetic stripe credit cards, chip cards (credit and debit), private label cards, purchasing cards, and Loyalty programs. The terminal can also be set up to process cheque authorizations and to prompt for entry of a Tip amount by the cardholder on the terminal for both debit and credit transactions as well as many other features.

2.1 Standard Features

These features are available and enabled on all Moneris Mobile 8200 terminals.

- [Backlight](#)
- [Bilingual Displays and Receipts](#)
- [Chip Card Processing](#)
- [Ethernet Communications](#)
- [Menu-driven interface](#)
- [Removal, interchangeable batteries](#)
- [Shortcut Codes](#)
- [Stored Transactions](#)
- [Stand-by Mode](#)
- [Training Mode](#)
- [Wireless terminal-to-base Communications](#)

2.1.1 Backlight

Both the screen and the keypad can be lit up to make reading and responding to the prompts easier in low-light locations such as restaurants. The backlight will turn off automatically after a preset amount of time of no activity. Setting the backlight timer to a short time period can help reduce battery usage and extend battery life. The backlight will turn on again the first time any button is pressed and whenever the handheld terminal is placed on a base.

IMPORTANT: **The buttons on the keypad still function normally even when the backlight is turned off. For example, if you press the Admin key when the backlight is off, the MAIN MENU appears, and the backlight comes on.**

2.1.2 Card Number Masking

To reduce the risk of fraudulent card use, only a portion of the cardholder's Card number is printed. The remainder of the Card number is masked with an '*' (i.e., an asterisk is printed for each of the remaining digits of the number).

IMPORTANT: **Do not disable [Merchant Receipt Card Number Masking](#). If Merchant Receipt Card Number Masking is disabled, the Card number and the Expiry date will be fully displayed on the Merchant copy of the receipt.**

2 Features and Procedures

On Receipts

Card masking is dependent on payment type (i.e., credit or debit) and the card issuer.

For credit (and some debit chip) cards:

[Cardholder copy] The card number will appear masked as *****1234 while no Expiry date appears at all. .

[Merchant copy] The card number will appear as 1234*****1111 while the Expiry date will appear masked as ****.

For most debit cards:

[Cardholder copy] The card number will appear masked as 1234567891*****.

[Merchant copy] The card number will appear masked as 1234*****1111.

For loyalty and gift cards:

[Cardholder copy] The card number will appear masked as *****1234 and no Expiry date appears.

[Merchant copy] The card number will appear masked as 1234*****1111 and no Expiry date appears.

For Air Miles Rewards cards:

An Air Miles Rewards card number will appear fully as 12345678911.

On Reports

If a POS Admin card is swiped at the SWIPE ADMIN CARD prompt during a report transaction, the Card numbers on the printed report will NOT be masked (i.e., the full Card number is printed). The Card numbers displayed on the screen (e.g., in the [Transaction Inquiry](#)) are NOT masked on the terminal display.

If the SWIPE ADMIN CARD prompt is bypassed by pressing **OK**, the card numbers are masked on the report and on the terminal display. In addition, the credit card (including some debit chip cards) Expiry dates are not printed on the report.

2.1.3 Communications Status

As the terminal communicates with the Moneris Host through the base, it displays PROCESSING to indicate that the transaction is proceeding correctly. Depending on the type of communication, additional status information is provided


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

Wireless Signal Status

The terminal must be [registered](#) to a communications base and be within the coverage area of that base to process transactions. If the wireless signal status icon does not appear, the terminal cannot process transactions.

The wireless signal status icon appears in the top right corner of the terminal display on the following screens: [MAIN MENU](#), [TRANSACTIONS](#), [REPORT FUNCS](#), [ADMIN FUNCS](#), and [CONFIG FUNCS](#).

To display this symbol from the [READY screen](#), press the **Admin** key to access the ADMIN FUNCTIONS menu.



| Icon | Description |
|---|--|
|  | The terminal can see the wireless signal from the base and can process transactions. |

Ethernet Communications Status

If your terminal is using Ethernet Communications to communicate with the Moneris Host, the terminal will connect to the Moneris Host each time you begin a transaction (it does not make any noise when it attempts to connect).

The following symbols appear in the top left corner on the following screens: [MAIN MENU](#), [TRANSACTIONS](#), [REPORT FUNCS](#), [ADMIN FUNCS](#), and [CONFIG FUNCS](#).

To display these icons from the [READY screen](#), press the **Admin** key to access the ADMIN FUNCTIONS menu.

| Icon | Description |
|---|--|
|  | (Ethernet Connection Available symbol) appears under normal conditions and indicates that the terminal is configured to use Ethernet communications and the Ethernet connection is up. |
|  | (Ethernet Connection Not Available symbol) appears when there is a problem with the Ethernet connection. An error message may also appear. |

If your terminal is configured to use Ethernet communications AND the Dial Parameters are configured on your terminal AND your terminal is connected to a dial line:

- when there is a problem with the Ethernet connection, the terminal will automatically attempt to use the dial line to communicate with the Moneris Host and the [ETHERNET COMMS ERROR-DIAL USED PRESS OK](#) prompt will appear.

Dial Communications Status

If your communication base is using dial communications to communicate with the Moneris Host, the terminal will ask the base to dial the Moneris Host each time you begin a transaction. (The base does not make any noise when it dials.)

- Under normal conditions the terminal will not indicate the status of the dial line.
- If there is a problem with the dial communications, an [error message](#) will appear.

2.1.4 The Menu Feature

All transactions and functions can be accessed through menus and sub-menus.

For quicker access to transactions and functions use the [Short-cut codes](#).

The Main Menu

The Main menu (see MAIN MENU below) gives you access to sub-menus that allow you to select financial transactions, manage processed financial transactions and configure your terminal to perform the transactions you need.

The menus are listed in the order they appear on the menu.

| MAIN MENU | Opens the: |
|------------------------------|-----------------------------|
| TRANSACTIONS | TRANSACTIONS menu |
| ERNEX | Ernex Gift and Loyalty menu |
| REWARDS | Air Miles REWARD menu |
| REPORTS | REPORT FUNCS menu |

2 Features and Procedures

| | |
|-------------------------------|-------------------|
| MAIN MENU | Opens the: |
| ADMIN | ADMIN FUNCS menu |
| CONFIGURATION | CONFIG FUNCS menu |

To access the MAIN MENU from the READY screen:

- Simply press the **Admin** key.

The Transactions Menu

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

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

| | |
|--------------------------------|--|
| TRANSACTIONS | From the READY screen |
| PURCHASE | process a credit or debit Purchase transaction |
| REFUND | process a credit or debit Refund transaction for a portion of or the full amount of the original Purchase |
| PRE-AUTH | process a Pre-Authorization transaction |
| P-A ADVICE | process an Advice (to complete a Pre-Authorization Transaction) |
| P-A ADVICE LST | complete or delete multiple Pre-Auth transactions from a list <i>Note: This item appears only if Tip Reporting is enabled.</i> |
| PAYMENT | processes a private label Payment transaction <i>Note: This item appears only if the terminal is set up on the Moneris Host to process this transaction.</i> |
| CHEQUE AUTH | connect to a cheque authorization service and obtain approval based on a credit card or driver's licence <i>Note: This item appears only if the terminal is set up on the Moneris Host to process this transaction.</i> |
| VOID-PURCHASE | void a credit or debit Purchase transaction for the full amount of the original Purchase transaction. In effect this cancels the original Purchase transaction. |
| VOID-REFUND | void a credit or debit Refund transaction for the full amount of the original Refund transaction. In effect this cancels the original Refund transaction. |
| VOID-PAYMENT | void a private label Payment transaction <i>Note: This item only appears if the terminal is set up on the Moneris Host to process this transaction.</i> |

To access the TRANSACTIONS menu from the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Press **OK** to select TRANSACTIONS.
The TRANSACTIONS menu appears.

The Reporting Functions Menu

This menu allows you to produce a variety of reports and perform a close batch on your terminal.

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.

| REPORT FUNCS | Allows you to print: |
|---------------------------------------|--|
| <u>CLOSE BATCH</u> | a Batch Totals report and close the current batch in order to deposit funds in your account |
| <u>TRANS LIST</u> | a list of all stored transactions by date or by batch |
| <u>TRANS INQUIRY</u> | a list of transactions based on selected criteria and print duplicate Merchant Copies of receipts and delete Pre-Authorization transactions |
| <u>DEPOSIT TOTALS</u> | a report listing deposit totals by card and transaction type |
| <u>MERCH SUBTOTAL</u> | a report listing totals in the current batch by card and transaction type |
| <u>TIP TOTALS</u> | a report that shows the Tip summary of all Purchase and Pre-Auth Advice transactions for the current batch <i>Note: This item appears only if <u>Tip Reporting</u> is enabled.</i> |
| <u>MULTI TERM RPT</u> | a Deposit Totals report for each terminal associated with your Moneris Merchant ID. This item appears only if <u>Multi-Terminal Reporting</u> is enabled. |
| <u>CLERK INQUIRY</u> | a report listing totals for a <u>specific clerk</u> , a <u>group of clerks</u> or <u>all clerks</u> This item appears only if <u>Clerk Subtotalling</u> is enabled. |
| <u>PRE-AUTH LIST</u> | a list of Pre-Authorization transactions based on selected criteria |
| <u>EMV PARMS LIST</u> | a report listing the current EMV parameter settings |
| <u>CONFIG LIST</u> | a report listing the current settings for each parameter |
| <u>HELP LIST</u> | a list of the functions and transactions with their Shortcut codes |

To access the REPORT FUNCS menu from the [READY screen](#):

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.

2 Features and Procedures

The Admin Functions Menu

This menu allows you to perform the administrative functions required to manage your terminal.

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

| ADMIN FUNCTIONS | Allows you to: |
|------------------------------|---|
| LOGON | log on to the Moneris Host and allow the terminal to process transactions. |
| LOGOFF | log off of the Moneris Host and prevent the terminal from processing transactions |
| REPRINT | print a duplicate copy of the most recently printed receipt or report |
| MC TRNS DATA | print the DE55 data for the most recent MasterCard EMV transaction that has gone online |
| LANGUAGE | switch the language displayed on the terminal and printed on the merchant copy of the receipt from English to French and vice versa |
| BACKLIGHT | turn the display backlight off and on |
| TRAINING | enter and exit Training mode |
| CREDIT APP | Allows for the instant processing of a customer's Private Label Credit Card Application |
| POWER OFF | power down the terminal |

To access the ADMIN FUNCS menu:

From the [READY screen](#):

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ADMIN, and press **OK**.
The ADMIN FUNCTIONS menu appears.

The Configuration Menu

The Configuration menu (see CONFIG FUNCTIONS below) contains a list of parameters and programs that can be enabled and configured on the Mobile 8200 terminal.

IMPORTANT: A number of these programs require agreements between the merchant and a service provider other than Moneris Solutions. Please ensure that the necessary agreements are in place before attempting to configure those programs on the terminal.

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

| CONFIG FUNCTIONS | Allows you to: |
|---------------------------------------|---|
| <u>INITIALIZATION</u> | initialize the terminal to the Moneris Host |
| <u>GENERAL PARAMS</u> | configure the communications (if not using Dial) and other parameters that affect all transactions, e.g., tip entry and admin card protection |
| <u>DIAL CONFIG</u> | configure the parameters required to use a regular phone line to communicate with the Moneris Host |
| <u>ETHERNET CFG</u> | configure the parameters required to use the Internet to communicate with the Moneris Host |
| <u>PRINTER CONFIG</u> | configure the receipt printing options including number of copies, signature lines and trailer messages on your receipt |
| <u>BASE CONFIG</u> | register the terminal to a communications base |
| <u>MULTI TERM CFG</u> | configure a terminal in order to use multi-terminal reporting |
| <u>CLERK TOTALS</u> | configure the terminal to display the Clerk ID prompt |
| <u>CLERK MAINT</u> | add and remove Clerk IDs (if Clerk Totals is enabled) |
| <u>DEFAULT CLERK</u> | configure the Default Clerk ID on a terminal |
| <u>PURCHASE CARD</u> | configure the merchant name and tax type for processing purchasing and corporate cards |
| <u>REMOTE D-LOAD</u> | download upgrades from the Moneris Host |
| <u>RESTORE DEFLT</u> | reset all of the parameters on the terminal to the factory defaults |

To access the CONFIG FUNCS menu:

From the [READY](#) screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.

The General Parameters Menu

The General Parameters menu allows you to enable and configure the optional features on your terminal.

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

| <u>GENERAL PARAMETERS</u> | Allows you to: |
|--|--|
| <u>COMMS TYPE</u> | select the communications type |
| <u>DECLINED BEEP</u> | enable the terminal to emit a beep when a financial transaction has been cancelled, declined, or not completed |

2 Features and Procedures

| <u>GENERAL PARAMETERS</u> | Allows you to: |
|---------------------------|---|
| <u>TIP REPORTING</u> | enables Pre-Authorization Advice List (found in the TRANSACTIONS menu) and a Tip Totals report (found in the REPORT FUNCS menu) |
| <u>TIP ENTRY</u> | display Tip prompts during debit or credit Purchase transactions |
| <u>TIP PERCENTAGE</u> | defines a default Tip Percentage |
| <u>CHIP PRE-AUTH</u> | process Pre-Authorization transactions using chip credit cards as well as magnetic stripe credit cards |
| COMM WARNINGS | Do NOT use this function unless directed to do so by the Moneris Merchant Service Centre. |
| <u>CASH BACK</u> | enable the ENTER CASH BACK prompt during debit Purchase transactions |
| <u>C BACK AMT 1</u> | set a preset Cashback Amount option during debit Purchase transactions |
| <u>C BACK AMT 2</u> | set a higher preset Cashback Amount option during debit Purchase transactions |
| <u>C BACK AMT 3</u> | set the highest preset Cashback amount or give the customer the option to key in another amount during debit Purchase transactions. |
| <u>CASHBACK LIMIT</u> | set the maximum Cashback amount that can be entered during debit Purchase transactions |
| <u>BALANCE PROMPT</u> | enable the ARE TOTALS BALANCED? prompt during the Close Batch transaction |
| <u>INVOICE NUMBER</u> | enable the ENTER INVOICE NO entry screen during all financial transactions |
| <u>TAKE IMPRINT</u> | enable the TAKE MANUAL IMPRINT OF CARD AND PRESS OK prompt during financial transactions (e.g., credit) in which the Card number is manually entered. |
| <u>PROVINCE CODE</u> | set the default Province Code value for Cheque Authorization transactions using a driver's licence |
| <u>MAIL/TEL ORDER</u> | identify a credit transaction as a Mail Order or Telephone Order during the transaction |

| <u>GENERAL PARAMETERS</u> | Allows you to: |
|---------------------------|---|
| <u>BACKLIGHT TIME</u> | set the amount of terminal idle time before the backlight turns off automatically |
| <u>CONTRAST</u> | adjust the level of contrast on the terminal display screen: |
| <u>ADMIN PROTECT</u> | enable the SWIPE ADMIN CARD prompt on all transactions accessed from the REPORTS, ADMIN and CONFIGURATION menus |
| RESTAURANT | See your restaurant POS vendor's documentation. |
| SURCHARGE AMT | Do NOT use. |
| SURCH MIN LMT | Do NOT use. |
| SURCH MAX LMT | Do NOT use. |

The Base Configuration Menu

The Base Configuration menu allows you to configure the handheld and optional features on your terminal.

Note: This menu can be accessed from the [Configuration menu](#) or using [Admin Code 17](#).

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

| BASE CONFIG | Allows you to: |
|----------------------|---|
| <u>REGISTER BASE</u> | register a terminal to a specific communications base in order to process transactions |
| SET TIME-OUT | Do NOT use this function unless directed to do so by the Moneris Merchant Service Centre. |
| SITE TEST | Do NOT use this function unless directed to do so by the Moneris Merchant Service Centre. |

The Ethernet Setup Menu

This menu allows you to configure the Ethernet Communications parameters.

The functions that appear on this menu vary according to the type of Ethernet Communications you select. Not all functions are available for every Ethernet Communication type.

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

2 Features and Procedures

| ETHERNET SETUP | Allows you to: |
|----------------|---|
| TERMINAL SETUP | select the terminal type and enter terminal address information |
| HOST SETUP | select the host type and enter host address information |
| DNS SETUP | enter the Primary and Secondary DNS addresses |
| PING | Do NOT use this function unless directed to do so by the Moneris Merchant Service Centre. |
| CONNECT T-OUT | Do NOT use this function unless directed to do so by the Moneris Merchant Service Centre. |
| RETRY CONNECT | Do NOT use this function unless directed to do so by the Moneris Merchant Service Centre. |
| ERROR REPORT | Do NOT use this function unless directed to do so by the Moneris Merchant Service Centre. |

To access the ETHERNET SETUP menu, from the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to ETHERNET CFG, and press **OK**.
The ETHERNET SETUP menu appears.

Note: The Communications Type must be set to Ethernet (complete Step 1 of [Configuring Dynamic Public IP Communications](#)) before the ETHERNET CFG item will appear on the menu.

The Printer Configuration Menu

This menu allows you to set the printer and receipt settings that work best for your business.

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

| PRINTER CFG | Allows you to: |
|------------------------------|--|
| PRE-PRINT | Set the printer to begin printing the beginning of the receipt while you enter the transaction information. DO NOT enable this feature. |
| NO OF COPIES | Select the number of receipts to print for each transaction. |
| PRINT DELAY | Set the length of time the printer waits before printing the next copy of the receipt |

| PRINTER CFG | Allows you to: |
|--------------------------------|--|
| P-A TIP LINE | Print a separate line for a Tip amount on Pre-Authorization transaction receipts . |
| SIGNATURE LINE | Print a signature line on credit transaction receipts . (Not necessary for terminals that process MOTO transactions). |
| PRINT P-A ADV | Print receipts for Pre-Auth Advice transactions . |
| PRINT PRE-AUTH | Print receipts for Pre-Authorization transactions . (Not necessary for some businesses). |
| CARD MASKING-M | Enable masking of the customer's Card number on the Merchant copy of the receipt. Masking is enabled by default. DO NOT change this setting. |
| RCPT LIMIT-M | Suppress the printing of the Merchant copy of the receipt if the credit Purchase qualifies as a signatureless transaction . Printing is enabled by default. Do NOT change this setting. |
| RCPT LIMIT-C | Suppress the printing of the Cardholder copy the receipt if the credit Purchase qualifies as a signatureless transaction . |
| TRAILER MSG | Add personalized messages (in English and/or French) to the bottom of Cardholder copy of the receipts . |

To access the PRINTER CFG menu:

From the READY screen:

1. Press the **Admin** key.
2. Scroll down to CONFIGURATION, and press **OK**.
3. Scroll down to PRINTER CONFIG, and press **OK**.

2.1.5 Admin Codes

To access transactions directly without having to navigate through a number of menus, use the **Admin** key and the Admin codes listed here.

- [Financial transactions](#) , [Loyalty/Gift transactions](#) and [Air Miles transactions](#) can be accessed using a 3-digit code.
- Other transactions can each be accessed using a 2-digit code:
 - [Reporting Transactions](#)
 - [Administrative Transactions](#)
 - [Configuration Transactions](#)

2 Features and Procedures

To start a transaction or function using the Admin code, at the READY screen:

1. Press the **Admin** key twice.
2. Key in the code and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

Note: You can also use Admin codes from the [TRANSACTIONS menu](#), the [REPORT FUNCS menu](#), the [ADMIN FUNCS menu](#) and the [CONFIG FUNCS menu](#) by pressing the **Admin** key once.

Financial Transactions

| TRANSACTION | CODE | BEGIN AT |
|---------------------------------------|------|--|
| Purchase | 100 | step 1. |
| Refund | 101 | step 4. |
| Pre-Auth | 102 | step 4. |
| Pre-Auth Advice | 103 | FIND ORIGINAL TRANSACTION?- step 4 of "Advice - Pre-Authorization Sequence Number" NO - step 4 of "Advice - Voice Authorization Number" |
| Pre-Auth Advice List | 109 | step 4. |
| Private Label Payment | 104 | step 4. |
| Cheque Authorization | 105 | Driver's Licence - step 5 of "Cheque Authorization with a Driver's Licence" Credit Card - step 5 of "Cheque Authorization with a Credit Card" |
| Purchase-Void | 106 | step 4. |
| Refund-Void | 107 | step 4. |
| Payment-Void | 108 | step 3. |

Reporting Transactions

| TRANSACTION | CODE |
|--|------|
| Close Batch | 99 |
| Transaction List | 60 |
| Transaction Inquiry | 66 |
| Deposit Totals Inquiry | 77 |
| Tip Totals | 96 |
| Merchant Subtotals Inquiry | 95 |
| Multi-Terminal Report | 85 |
| Clerk Subtotals Inquiry | 82 |
| Pre-Authorization List | 62 |
| Configuration Report | 16 |
| EMV Parameters Report | 19 |
| Print Help List | 40 |

Administrative Transactions

| TRANSACTION | CODE |
|---|------|
| Log on | 02 |
| Log off | 03 |
| Reprint (a receipt or report) | 29 |
| MasterCard Transaction Data | 41 |
| Language (change between English and French) | 04 |
| Backlight | 39 |
| Training | 05 |
| Private Label Credit Application | 48 |
| Power off | 49 |

2 Features and Procedures

Configuration Transactions

Note: Not all items appear on the list at all times.

| TRANSACTION | CODE |
|--|------|
| Initialization | 01 |
| General Parameters | 08 |
| Dial Communications Setup | 15 |
| Ethernet Communications Setup | 13 |
| Printer Setup | 14 |
| Base Configuration | 17 |
| Multi-Terminal Configuration | 80 |
| Clerk Subtotalling Configuration | 83 |
| Clerk ID Maintenance | 84 |
| Default Clerk ID | 81 |
| Purchasing (Corporate) Card | 50 |
| Remote Download | 97 |
| Restore Default Settings | 98 |

Loyalty and Gift Transactions

| TRANSACTION | CODE |
|--|------|
| Initialization (Loyalty/Gift) | 301 |
| Communication (Loyalty/Gift) | 332 |
| Configuration List (Loyalty/Gift) | 316 |
| Enable Ernex (Loyalty/Gift) | 322 |
| Disable Ernex (Loyalty/Gift) | 323 |
| General Parameters (Loyalty/Gift) | 308 |
| Open Batch Totals (Loyalty/Gift) | 390 |
| Reprint (Loyalty/Gift) | 329 |
| Routing Code (Loyalty/Gift) | 330 |
| Help List (Loyalty/Gift) | 340 |
| Transaction List (Loyalty/Gift) | 360 |
| Ernex Transaction Inquiry (Loyalty/Gift) | 366 |
| Tip Totals (Loyalty/Gift) | 370 |
| Clerk Subtotal Inquiry (Loyalty/Gift) | 382 |

| TRANSACTION | CODE |
|--|------|
| Close Batch (Loyalty/Gift) | 399 |
| Points Purchase / Gift Purchase | 300 |
| Points Refund / Gift Refund | 311 |
| Redemption (Loyalty) | 302 |
| Activate Loyalty card / Activate/Load Gift Card | 304 |
| Deactivate Loyalty card / Deactivate Gift Card | 312 |
| Card Inquiry (Loyalty/Gift) | 306 |
| Void (Loyalty/Gift) | 307 |
| Reports (Loyalty/Gift) | 309 |
| Setup (Loyalty/Gift) | 310 |

Air Miles Rewards Transactions

| TRANSACTION | CODE |
|---|------|
| Reward Purchase | 201 |
| Reward Refund | 202 |
| Reward Program Transaction List | 203 |
| SAF Transaction Inquiry | 204 |
| Reward Program Totals | 205 |
| Upload SAF | 206 |
| Reward Configuration List | 207 |
| Reward Program Set-up | 208 |
| Reward Reprint | 209 |
| Reward Help List | 210 |

2.1.6 Stored Transactions

The terminal can store up to 500 approved credit and debit transactions in its memory. These transactions are searchable, allowing you to print reports and reprint receipts in the event of a disputed transaction.

IMPORTANT: The oldest transaction is dropped once the terminal memory reaches capacity. If your terminal is replaced, the memory cannot be transferred to the new terminal, and is therefore lost. Moneris recommends printing a list of all transactions on the old terminal before disconnecting it then installing the new terminal.

2 Features and Procedures

2.1.7 Training Mode

Training mode allows you and your employees to practise operating the Moneris Mobile 8200 terminal without affecting your terminal total amounts, your financial accounts, and your customers' accounts.

***Note:** Once you enter Training mode you can not change the terminal language. If you wish to change the terminal language you must exit Training mode, [change the terminal display language](#), and then enter Training mode again.*

When using a chip card to perform chip transactions in Training mode, the card will prompt for a PIN even if the card requires a signature in normal processing mode. The terminal will then display PIN ENTERED BY CUSTOMER instead of allowing the PIN to be entered. After five seconds the terminal will continue the transaction.

2.1.8 Wireless Communication on the Mobile 8200

The Mobile 8200 wireless, handheld terminal runs on a [rechargeable battery](#) and connects to a [communications base](#) via wireless communications instead of a cable. This means that you can take the portable Mobile 8200 terminal to your customer.

The communications base also charges the terminal battery. An optional [charge-only base](#) is also available to charge the battery..

2.1.9 Stand-by Mode

The terminal automatically goes into stand-by mode when it is not in use for a set time period and it is not on a base. In stand-by mode, the green backlight is off and the display screen is blank.

To exit Stand-by mode, [Power On](#) the terminal.

To [change the time period](#) before the backlight turns off automatically, refer to the General Parameters section.

2.2 Optional Features

These features may be available on your Mobile 8200 depending on the configuration of your Merchant ID on the Moneris Host. If the feature is available and you wish to use it, you must enable and configure the feature. If you do not wish to use an enabled feature, you can deactivate 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.

- [Balanced Prompt on Close Batch](#)
- [Cashback on Debit](#)
- [Cheque Authorization](#)
- [Clerk Subtotalling and Clerk IDs](#)
- [Credit-Only Processing](#)
- [Dial Backup on Ethernet Communications](#)
- [Declined Beep](#)
- [Gift and Loyalty programs](#)
- [Invoice Number Prompt](#)
- [Mail Order and Telephone Order Transactions](#)
- [Multi-Terminal Reporting](#)

- [Personalized Message on Receipts](#)
- [Pre-Authorization Advice List](#)
- [Pre-Authorization as Default Transaction](#)
- [Pre-Authorizations using Chip Cards](#)
- [Private Label Cards](#)
- Restaurant Point-of-Sale Integration*
- [Rewards Program - Air Miles](#)
- [Signatureless Transactions](#) (credit)
- [Tax and reference number info on Corporate Cards](#)
- [Tip Entry by Cardholder](#)
- [Tip Line on Pre-Authorization Receipts](#)
- [Tip Percentage](#)
- [Tip Reporting](#)

* Please refer to your restaurant POS vendor's documentation.

2.2.1 **Balanced Prompt**

Use this feature to display a prompt during a [Close Batch](#) that asks you to indicate whether the terminal totals on the [Stored Transactions report](#) match the Moneris Host totals printed on the Current Batch Totals report (printed during the Close Batch).

This prompt is used solely for your in-house record keeping and is not reported to the Moneris Host.

2.2.2 **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 Close Batch transaction is processed.

Cashback is only available on debit [Purchases](#).

Perform a [Stored Transactions Report](#) to check the number of debit Purchases that included Cashback and the total dollar amount of all Cashback transactions in the terminal memory

2.2.3 **Cheque Authorization**

This feature allows you to give your customers the option of paying with a cheque while reducing your risk of accepting an NSF cheque. Use the terminal to connect to a cheque authorization service and obtain approval based on the identification your customer provides. The customer's [driver's licence](#) or [credit card](#) can be used as identification for this transaction.

2.2.4 **Using a Chip Card on the Mobile 8200**

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 display the REMOVE CARD prompt 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; therefore, different chip cards may have different prompts: Some prompt for a PIN (like a debit card), others print a signature line on the receipt (like a stripe credit card) for the cardholder to sign.

2 Features and Procedures

If the chip card prompts for a PIN, the cardholder must key in their PIN. If the PIN is incorrect, the cardholder will be prompted to retry.

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 (debit or credit) for payment:



Using a Chip Card

There are five basic steps to performing a transaction with a chip card.

1. **Begin the transaction**, and follow the prompts.
2. **Check for the chip** on the credit or debit card every time a cardholder presents a card for payment.



3. If the card has a chip: When the SWIPE OR INSERT CARD prompt appears, [insert the chip card](#) into the chip card reader. Make sure that the card is facing up (the chip on the visible front side), and the chip-end of the card is inserted into the reader first. Leave the card in the reader for the entire transaction.

Note: If you don't see a chip, swipe the card [on the terminal](#).

4. **Follow the prompts**, and have the cardholder follow their prompts.

5. **Remove the chip card** when the REMOVE CARD prompt appears. The terminal will beep if the chip card is left in the chip card reader after the transaction is completed.

2.2.5 Clerk Subtotalling

This feature allows you to produce Clerk Subtotals reports tracking financial totals and the number of transactions performed using the Clerk Inquiry function.

The Clerk Inquiry function can be performed for [one clerk](#), a [group of clerks](#) or [all clerks](#) on one or more terminals.

Totals are calculated according to the [Clerk ID](#) entered during a transaction or the [Default Clerk ID](#).

2.2.6 Clerk IDs

Clerk IDs are unique identifiers of one to six characters that a terminal operator keys in when prompted for each transaction they perform. This allows you to produce [Clerk Subtotal Reports](#) tracking financial totals and number of transactions.

A maximum of 255 Clerk IDs can be added for one Merchant ID.

Once Clerk Subtotalling and Clerk IDs are set up, the Clerk IDs associated with your Merchant ID can be used on any handheld terminal that has been configured using your Merchant ID.

Default Clerk ID

A default Clerk ID can be assigned on the terminal and all transactions performed on that terminal will be added to the Default Clerk IDs totals regardless of which operator performs the transaction. The terminal will not prompt for a Clerk ID if a Default Clerk ID has been set.

Clerk ID Groups

Clerk IDs are defined as a group when they share up to five common starting characters (a prefix). For example, Clerk IDs P1, P12 and P134 can be entered as a group with the prefix P1. When performing reports, all Clerk IDs that begin with the characters P1 are reported as Group P1.

2 Features and Procedures

2.2.7 Corporate Cards

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

If this feature is enabled on your terminal, the terminal will prompt for a Customer Reference number and tax amounts when a corporate card is swiped or keyed in for a transaction. The Customer Reference number and tax amounts will be printed on the receipt and will also appear on the cardholder's monthly statement from the corporate card issuer.

2.2.8 Credit-Only Processing

If your business accepts only credit card payments (i.e. does not accept debit card payment), you may wish to have a credit-only terminal that processes only magnetic stripe credit cards and chip credit cards.

Note: Some debit chip cards may still be used at a credit-only terminal.

Contact the Moneris Merchant Service Centre to determine whether this option meets your business needs.

2.2.9 Dial Backup Communications for Ethernet

When Ethernet communication is not available, the terminal will attempt to use dial communications as backup. After performing a transaction using dial as backup, the terminal will attempt to use Ethernet communications for the next transaction.

Note: When the communications base is using dial backup, the terminals cannot share the dial line. Only one terminal can process a transaction at a time and each transaction must be completed before the next transaction can be attempted.

The terminal must be [configured for dial](#) communications and the [dial communications cable](#) must be connected.

When the terminal uses dial backup, the message ETHERNET COMMS ERROR-DIAL USED PRESS OK appears. Press **OK** to acknowledge the message and return to the READY screen. The terminal will revert to Ethernet communications for the next transaction.

2.2.10 Declined Beep

If the Declined Beep feature is enabled, the terminal will emit a beep to alert you whenever a financial transaction is cancelled, declined, or not completed.

2.2.11 Invoice Number Prompt

This feature enables a prompt to key in an Invoice number for every credit and debit financial transaction. If this feature is activated, you have the option of entering an Invoice number or bypassing the prompt by simply pressing **OK** when the prompt appears.

2.2.12 Loyalty/Gift Programs

The Moneris Loyalty/Gift program allows you to offer your customers two electronic card-based programs that are activated and processed through the Mobile 8200 terminal:

- [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.
- [Loyalty Points](#): allows you to reward customer loyalty by awarding points based on the dollar value of Purchases a cardholder makes.

To enable a Gift/Loyalty program on your terminal:

1. Contact Moneris Solutions.
2. [Initialize](#) the terminal to the Moneris Host.
3. [Enable Ernex](#) on the terminal.
4. Enter the [Ernex Routing code](#).
5. [Initialize](#) the terminal to the Moneris/Ernex Host.

IMPORTANT: If you process more than one card plan with Moneris/Ernex, maintain a list of the card names along with the 14-character card description that will be displayed on the terminal screen during step 6 of the [Transaction Inquiry](#) report. This will allow the terminal operator to easily identify which card plan description to select.

6. If you wish to enable Tip Prompting (gift Purchases only):
 - a. Enable the loyalty/gift [Tip Entry](#) parameter.
 - b. If you wish to define a default the Tip Percentage, configure the loyalty/gift [Tip Percentage](#) parameter.

2.2.13 MOTO Transactions

If your business receives orders by Internet, mail or telephone, you can still process credit card (and some chip debit card) transactions by enabling the [Mail Order/Telephone Order \(MOTO\)](#) feature. This allows you to process transactions without the cardholder and their card being present in your place of business.

The key difference between regular transactions and MOTO transactions is that the cardholder and their card are not normally present. This means that:

- MOTO transactions are performed by keying in the Card number and the Expiry date. The card cannot be swiped or inserted. If the card is swiped or inserted, the terminal will perform a regular credit (or debit) transaction, not a MOTO transaction.
- "MAIL/TEL" must be selected (as opposed to "REGULAR") during the transaction.
- The cardholder signature is not required.
- Receipts do not need to be printed; however, Moneris recommends printing the Merchant copy and retaining it for your records.

To process MOTO transactions, you must configure your terminal to prompt for [MOTO](#) selection.

2.2.14 Multi-Terminal Reporting

This function allows you to perform the Close Batch function and print the Deposit Totals report on all terminals or a group of terminals associated with the same merchant number from one of the terminals.

For example, if you have 15 named terminals associated with your merchant number, you simply perform the Multi-Terminal Report function on one of the 15 terminals and the Close Batch and Deposit Totals functions are performed on all 15 terminals at the same time.

The totals are cleared in the terminal that performs the Multi-Terminal Reporting function, but the totals are not cleared on the other associated terminals.

To use Multi-Terminal Reporting, you must [enable the Multi-Terminal Report](#) function on each terminal.

2 Features and Procedures

2.2.15 Personalized Message on Receipts

This feature allows you to configure your terminal [to print a personalized trailer message](#) at the bottom of your receipts. The language of the message will match the language on the customer's card if the card is swiped or the language selected during the cardholder prompts. If the Card number and Expiry date are keyed in, the language of the customer's receipt will match the language displayed on the terminal.

2.2.16 Pre-Authorization as the Default Transaction

If you operate a service-based business such as a car rental location, a restaurant or a hotel and generally process Pre-Authorizations rather than Purchases, you may wish to have your [READY screen](#) configured to default to a [Pre-Authorization](#) transaction rather than a Purchase transaction.

This feature must be set at the Moneris Host and is downloaded to your terminal during [Initialization](#). To change it, please contact the Moneris Merchant Service Centre.

To use chip cards (credit and some debit) in addition to magnetic stripe credit cards for Pre-authorizations, you must configure the terminal to [allow for Pre-Authorizations with chip cards](#).

To [perform a Pre-Auth](#) transaction from the [Pre-Auth READY screen](#), refer to the "Pre-Authorization as Default" procedure.

2.2.17 Private Label Cards

Use this feature to offer your customers a credit card that can be used exclusively in your store(s). Depending on the program you create with the private label card issuer, you can process standard financial transactions, [Payment](#) and [Payment Void](#) transactions as well as produce reports of your Private Label transactions.

2.2.18 The Air Miles Rewards Program

The Air Miles rewards program allows you to offer your customers the opportunity to collect miles on a loyalty card based on the dollar value of Purchases they make. Some programs also provide miles based on the purchase of specific items or incentive calculations that can be implemented for a specific time period.

Configuring Air Miles

To enable an Air Miles rewards program on your terminal:

1. Contact Moneris Solutions.
2. [Plan how the program will calculate miles](#).
3. [Configure Air Miles](#) on your terminal.
4. [Initialize your terminal](#).

Air Miles Rewards Transactions

- [Reward Purchase](#)
- [Reward Refund](#)

Air Miles Rewards Administration

- [Reprint](#) the last Air Miles Reward receipt
- [Rewards Totals Report](#)
- [Rewards Transactions Report](#)
- [Rewards SAF Transactions Report](#)
- [Deleting Rewards SAF Transactions](#)

- [Completing Rewards](#) Transactions
- Printing the [Rewards Configuration Report](#)
- Printing the [Help List](#) of Rewards Transactions and Admin codes
- [Configuring](#) the Air Miles Rewards Program

2.2.19 Signatureless Transactions: Credit Cards

A “signatureless” transaction is a swiped credit Purchase for which a customer signature is not required because the amount of the Purchase is equal to or less than the maximum [Signatureless Dollar Value \(SDV\)](#) set for the card. Depending on how your terminal is configured, receipts may not be printed for signatureless transactions.

Note: If your Merchant account is enabled for signatureless transactions, you may configure your terminal so that it does not print a [Cardholder copy](#) (or even a Merchant copy) of the receipt for qualifying Purchases. (For instructions refer to the "Configuring the Receipt Format" procedure.) It is strongly recommended that you configure the terminal to print a Merchant copy for your records.

If a Merchant Receipt Prints

If a Merchant copy of the receipt prints for a qualifying transaction, the statement "NO SIGNATURE REQUIRED" appears on the receipt instead of a cardholder signature line.

IMPORTANT: Do NOT obtain a signature, but retain this receipt for your records.



Note: Receipts are always printed for Refunds, Void-Purchases, Void-Refunds or any Cancelled / Declined / Not Completed transaction. A signature line will appear on receipts for Refunds, Void-Purchases, or Void-Refunds; you or the cardholder will be required to sign a copy of the receipt depending on the type of transaction.

Card Entry Method

Only a [Purchase](#) can qualify as a signatureless transaction. Cards must be [swiped on the terminal](#) . The Purchase amount including all taxes must be equal to or less than the [maximum Signatureless Dollar Value](#) of the card type.

Maximum Signatureless Dollar Value (Maximum SDV)

To find the maximum SDV for a card and card entry method, print a terminal [Configuration Parameters](#) report. (Refer to the "Printing the Configuration Parameters List" procedure.)

Locate the CVM LIMITS near the bottom of the report. (A CVM LIMIT of 9999 means there is no maximum limit.)

2 Features and Procedures

| | |
|-----------------------------|--------|
| NSR ENABLED | YES |
| CVM LIMITS | |
| MASTERCARD QPS CVM LIMIT | \$ 000 |
| VISA NSR CVM LIMIT | \$ 000 |

card swiped: Purchase amount including tip and taxes must be equal to or less than this value.

card swiped: Purchase amount including tip and taxes must be equal to or less than this value.

Printing Receipts upon Request

IMPORTANT: **If the customer requests a receipt, you must give it to them. Use the [Reprint function](#) to print the Cardholder copy of the receipt. [If you need a Merchant copy](#), refer also to the "Transaction Inquiry-- Reprinting the Merchant Receipt Copy" procedure.**

2.2.20 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 the [Multi-Terminal Report](#) function, a Terminal Name must be assigned to each terminal you wish to include in the Multi-Terminal Report and Batch Close processes.

2.2.21 Tip Entry by Cardholder

This feature gives your customers the option of entering a Tip on the terminal during a debit or credit Purchase transaction rather than leaving cash or writing the Tip amount on a Pre-Authorization receipt. Tip entry is generally used in service-based industries.

The [Tip Entry prompt may be configured](#) to appear only for debit Purchase transactions or for both debit and credit Purchase transactions. During Tip Entry configuration, you may enable a default Tip percentage prompt and/or the option(s) to enter a percentage or dollar amount Tip that is customer-defined.

Even if enabled, the cardholder's Tip Entry prompt will not appear during:

- MOTO Purchase transactions because the cardholder is presumed not to be present for these types of transactions and, therefore, cannot key in a Tip amount.
- Pre-Authorization transactions
- Pre-Auth Advice transactions
- Refund transactions
- Void transactions

Note: *Tip entry may also be enabled for gift Purchases if the [Moneris Gift program](#) is enabled on your terminal.*

2.2.22 Tip Line on Pre-Authorization Receipts

This feature gives your customers the option of adding a Tip to the Purchase amount on a Pre-Authorization transaction by indicating the Tip amount on the Merchant copy of the receipt . It is traditionally used in restaurants and other service-based businesses.

If you wish to allow cardholders to add a Tip to Purchase transactions as well as Pre-Authorization transactions, you must enable the [Tip Entry](#) feature.

2.2.23 Tip Percentage

Defining a [default debit/credit Tip Percentage](#) gives your customers the option to select your default Tip percentage to calculate the Tip amount during debit and/or credit Purchases.

2.2.24 Tip Reporting

If [Tip Reporting is enabled](#), the Pre-Authorization Advice List transaction and the Tip Totals report appear as menu items.

- [Pre-Authorization Advice List](#)

From this Advice list, you can complete or delete multiple Pre-Auth transactions as well as record a Tip amount (if any was added by the cardholder) for every completion.

- The [Tip Totals report](#)

This report prints a summary of all Tip amounts entered for Purchase and Pre-Authorization Advice transactions stored in the current or a previous batch.

2.3 Standard Procedures

These procedures are followed for all configurations of the Moneris Mobile 8200 terminal.

- [Powering up the terminal](#)
- [Powering down the terminal](#)
- Using [Shortcut Codes](#)
- [Changing the Terminal Display Language](#)
- [Inserting a Chip Payment Card](#)
- [Swiping a Stripe Payment Card](#)
- Performing [Pre-Authorization and Advice Transactions](#)
- [Cancelling a Transaction](#)
- [Cancelling a Report](#)
- [Reprinting a Receipt or Report](#)
- [Dealing with Disputed Debit Transactions](#)
- [PAN Fraud Check](#)
- Requesting [Code 10 Authorization](#)
- [Terminal Security](#)

2 Features and Procedures

2.3.1 Powering Up the Mobile 8200


The Moneris Mobile 8200 handheld terminal does not have an ON/OFF switch.

To power up (or turn on) the terminal when the terminal is not on a base:

if the battery is charged, simply press **OK**.

OR

place the terminal on a powered base (communications or charge-only).

The green backlight comes on, the [READY](#) screen appears and the  icon appears until the terminal establishes the [charge level](#) of the battery.

***Note:** When the terminal is sitting on a base, it (the terminal) is always on; however, it is not using battery power.*

2.3.2 Powering Down the Mobile 8200

The Moneris Mobile 8200 handheld terminal does not have an ON/OFF switch. To help reduce battery usage, power down the terminal when you are not using it.

To power down (or turn off) the terminal from the READY screen:

IMPORTANT: Ensure the terminal is off the base. The terminal **CANNOT** be turned off when it is sitting on a base.

1. Press the **Admin** key.
The MAIN MENU appears.
2. Press the **Admin** key again.
The ENTER ADMIN CODE entry screen appears.
3. Key in **49**, and press **OK**.
The POWER OFF TERMINAL? prompt appears.
4. Press the **F1** key (YES) to power down the terminal.
The green backlight goes off and the display screen goes blank.

To reset the handheld terminal, power down the terminal, wait 30 seconds then [power up the terminal](#).

2.3.3 Attaching the Battery



1. Turn the handheld over so the keypad and display are facing down and the back of the handheld is facing up and the chip card reader slot is closest to you.
2. Hold the battery with the connectors facing downwards and towards the back of the handheld.

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

3. Insert the two plastic teeth at the bottom of the battery in to the slots at the bottom of the back of the handheld (close to the chip card reader).
4. Lower the battery on to the back of the handheld.
5. Press the top of the battery until a click is heard.

2.3.4 Removing the Battery

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

1. Power off the handheld OR
Leave it off the base and wait until it turns itself off.
2. Turn the handheld over so the keypad and display are facing down and the back of the handheld is facing up and the chip card reader slot is closest to you.
3. Slide the latch on the back of the terminal (in the middle of the back) down towards the chip card reader slot.
4. Pull the latch up and towards you.
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.**

2.3.5 Charging the Battery

To recharge the battery, it must be placed on a Mobile 8200 base. There are two types of base that can charge the battery:

- a communications base
- a charge-only base

Note: *The base must be [powered up](#) in order to charge the battery (i.e. the green Power Indicator light on the base must be lit up).*

To charge the battery:

IMPORTANT: **When charging a battery for the first time, it must be attached to a handheld terminal, which must be left on the base for a minimum of 3 hours.**

Place the battery on a base, ensuring that the gold coloured contacts on the battery casing are touching the gold coloured contacts on the base.

- The battery should be placed on the base ONLY when it is [attached to a terminal](#).
- The battery will re-charge only if it is not fully charged.
- The battery will re-charge only when the terminal is not in use.
- The [battery charge status icon](#) will appear on the terminal display while the handheld terminal is on the base and the battery is charged.

2 Features and Procedures

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


Note: The first 3 times the NiMH battery is used, allow it to fully discharge and then charge it to its full capacity. Full charging time after the first time is 2 hours.

Note: The first time the Li-ion battery is used, allow it to charge to its full capacity. Full charging time is 4 hours.

2.3.6 Battery Charging Status

The battery charging status icon and the [battery charge level icon](#) appear in the top right corner of the terminal display on the following screens: [MAIN MENU](#), [TRANSACTIONS](#), [REPORT FUNCS](#), [ADMIN FUNCS](#), and [CONFIG FUNCS](#), when the handheld terminal is sitting on the base.





To display this symbol from the [READY screen](#), press the **Admin** key to access the ADMIN FUNCTIONS menu.

| Icon | Description |
|---|---|
|  | The terminal is sitting correctly on the base and the battery is being charged. |

2.3.7 Battery Charge Level

The battery charge level icon and the [battery charging status icon](#) appear in the top right corner of the terminal display on the following screens: [MAIN MENU](#), [TRANSACTIONS](#), [REPORT FUNCS](#), [ADMIN FUNCS](#), and [CONFIG FUNCS](#).

To display these symbols from the [READY screen](#), press the **Admin** key to access the ADMIN FUNCTIONS 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 cannot be turned on again until a charged battery is attached to the terminal or the terminal is placed on a base. |

2.3.8 Battery Management Tips

The Moneris Mobile 8200 handheld terminal uses one of these two battery types: [nickel metal hydride \(NiMH\)](#) or [lithium ion \(Li-ion\)](#) .

Nickel Metal Hydride (NiMH)

New NiMH batteries are shipped fully charged.

- Always fully discharge the battery before recharging it. Do not put the terminal on the charger between uses as it shortens the life of the battery.
- If the terminal has been inactive for a number of weeks, a full recharge may be necessary.
- Avoid overcharging or overheating the battery.
- The battery must be attached to the terminal for charging--never charge the battery on the communications bay by itself.

Lithium-Ion (Li-ion)

New Li-ion batteries are shipped fully charged.

- This type of battery allows charging between transactions. It is safe to put the terminal back on the charging base between uses.
- Avoid frequent full discharges. Shallow (partial) discharges and frequent short charges are preferred.
- Li-ion batteries can hold a charge for many months.
- It is best to store a Li-ion battery with a partial or full charge.
- The battery must be attached to the terminal for charging: NEVER charge the battery on the communications base by itself.

2.3.9 Bilingual Displays and Receipts

Displays

The terminal displays messages and prompts in either English or French.

After the customer's card has been swiped or inserted, the language of the messages and prompts for the customer match the card's language code.

Receipts

Customer and merchant receipts can be printed in English , in French or bilingually.

- If the printer is configured to print separate copies for the customer and merchant (i.e., two or three copies), the customer receipt language is based on the language code on the customer's card OR the language selected during the cardholder prompts; the merchant receipt language is based on the current terminal language.
- If the printer is configured to print only one copy and the customer's language code matches the terminal language, the receipt will be printed in that language. If the customer's language code does not match the terminal language, one bilingual receipt will be printed.

2 Features and Procedures

2.3.10 Changing the Display Language

The terminal can display text in English or French. There are four options for changing from one language to the other:

- [enter Admin Code 04](#)
- [access the Admin Menu](#)
- [swipe or insert the Cardholder's card](#)
- [press the F3 key when FRANCAIS or ENGLISH is displayed above it](#)

The following two options change the default display language of both the merchant prompts and the cardholder prompts. This change is permanent until this function is used again. These options can only be used from the READY screen. They cannot be used during a transaction.

Use Admin Code 04 to Change Language

From the READY screen or the TERMINAL SETUP REQUIRED prompt:

1. Press the **Admin** key twice.
2. Key in 04, and press **OK**.
3. Select the language you wish the terminal to display.
4. Press the **Can/Ann** key once.

Use the ADMIN menu to Change Language

From the READY screen or the TERMINAL SETUP REQUIRED prompt:

1. Press the **Admin** key.
2. Scroll down to ADMIN, and press **OK**.
3. Scroll down to LANGUAGE, and press **OK**.
4. Select the language you wish the terminal to display.
5. Press the **Can/Ann** key twice.

The following two options change the language for the duration of the current transaction. The next transaction will be displayed in the default display language set up during the initial configuration of the terminal.

Swipe or Insert the cardholder's card

If the cardholder's card has a different language code on its magnetic stripe or chip, the cardholder prompts will be in the language indicated on the card.

Press the F3 key

If FRANCAIS or ENGLISH is displayed on the screen above the **F3** key, press the **F3** key to change the language of the remaining cardholder prompts. This will only appear during cardholder prompts.

2.3.11 Taking a Manual Imprint of a Card

If the TAKE MANUAL IMPRINT OF CARD AND PRESS OK prompt appears:

1. Take an imprint of the customer's card using the imprinter and 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.

If the transaction amount is over your Merchant Floor Limit, [call the Moneris Voice Authorization number](#) to obtain a Voice Authorization number for the transaction and record the Voice Authorization number on the Paper Sales Draft.

3. **PURCHASE:**

Have the cardholder sign the Sales Draft.

Ensure their signature matches the signature on the card. If not, [contact the Moneris Merchant Service Centre](#).

4. **REFUND:**

Sign the sales draft yourself.

5. Provide the customer with the Cardholder copy of the Sales Draft, and retain the Merchant copy for your records.

6. Press **OK** to continue the transaction.

Go back to the transaction.

2.3.12 Cancelling a Transaction

Note: Once the terminal has begun communicating with the Moneris Host, the transaction can no longer be cancelled.

To cancel a transaction :

1. Press the **Can/Ann** key during any of the merchant prompts.
The CANCELLED status prompt appears on the terminal screen .

If the CANCELLED REMOVE CARD prompt appears, remove the chip card from the chip card reader.

2. If the receipt has begun printing, the text * CANCELLED* will be printed on the receipt.

*Note: You may be prompted to confirm that you wish to cancel the transaction. Press the **FI** key (Yes) to cancel the transaction. The terminal will return to the READY screen automatically.*

3. Press **OK** to finish printing the receipts and return to the READY screen.

2.3.13 Cancelling a Report

To cancel a report:

1. Press the **Can/Ann** key.
The CANCELLED status prompt appears on the terminal screen.

2. If the report has begun printing, the text * CANCELLED* will be printed on the receipt.

*Note: You may be prompted to confirm that you wish to cancel the transaction. Press **FI** (YES) to cancel the transaction. The terminal will return to the READY screen automatically.*

3. If the REPORTS menu reappears, press the **Can/Ann** key twice to return to the READY screen.

2.3.14 Reprinting a Receipt or Report

Reprinting Receipts

You can print a duplicate of the Cardholder copy or the Merchant copy of a receipt.

- To print a duplicate of the most recently printed receipt (Cardholder copy) or report, use the [Reprint](#) function (see below) .

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- To print a duplicate of the Merchant copy of a receipt, use the [Transaction Inquiry](#) function.

Reprinting Reports

The following reports can be reprinted:

- Close Batch
- Merchant Subtotals Inquiry
- Multi-Terminal Report
- Clerk Subtotal Inquiry
- Deposit Totals Inquiry

Note: If the report you wish to reprint does not appear on this list, simply perform that report function again to print another copy.

2.3.15 The Reprint Function

Use this function to print a duplicate of the most recently printed receipt or report.

- If the most recently printed item was a Financial Transaction receipt, a copy of the Cardholder copy is re-printed with the text * DUPLICATE* at the top, below the merchant address and at the bottom.

Note: To print a duplicate of the Merchant copy of the receipt, use the [Transaction Inquiry](#) function.

- If the most recently printed item was a terminal report, a copy of the report is re-printed with the text * DUPLICATE* at the top and bottom.

There are two ways to access the Reprint function:

- [enter the Admin code](#)
- [access the ADMIN FUNCS menu](#)

Enter Admin Code 29

1. Press the **Admin** key twice.
2. Key in **29**, and press **OK**.

A duplicate of the Cardholder copy of the most recently printed receipt is printed.
OR

A duplicate of the most recently printed report is printed.

3. The terminal returns to the MAIN MENU.
4. Press the **Can/Ann** key to return to the READY screen.

Access the ADMIN Menu

From the READY screen:

1. Press the **Admin** key.
2. Scroll down to ADMIN and press **OK**.
The ADMIN FUNCS menu appears.
3. Scroll down to REPRINT, and press **OK**.

A duplicate of the Cardholder copy of the most recently printed receipt is printed.

OR

A duplicate of the most recently printed report is printed.

4. The terminal returns to the ADMIN FUNCS menu.
5. Press the **Can/Ann** key twice to return to the READY screen.

2.3.16 Disputed Debit Transactions

Do not attempt to resolve or compensate a cardholder for a disputed Debit transaction. Refer the cardholder to their financial institution.

2.3.17 PAN Fraud Check

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. The PAN Fraud Check then compares the keyed-in digits to the information contained in the card's magnetic stripe to ensure they match.

2.3.18 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 operator 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 Purchase 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.

2.3.19 Terminal Security

To minimize the risk of unauthorized transactions being processed through your terminal after your business hours, [log off](#) the terminal at the end of each business day and [log on](#) again at the beginning of each business day.

The POS Admin card allows you to restrict access to various terminal functions and financial transactions that impact your financial account (e.g., Refunds and Voids). See [POS Admin card](#) for important information about your liability for transactions performed using a POS Admin card.

2 Features and Procedures

2.3.20 POS Admin card

The POS Admin card (POS Admin card) 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 and care of all your POS Admin cards at all times. If your POS Admin card is lost, stolen or damaged (or you suspect it may be lost or stolen), call the Moneris Merchant Service Centre immediately.**

All financial transactions completed with a POS Admin card are subject to the guidelines of the Debit Card Merchant Agreement entered into with Moneris Solutions. The Agreement contains important provisions regarding your responsibility for POS Admin card security and your liability for financial transactions made with a POS Admin card.

There are a number of factors that affect whether the terminal prompts for a POS Admin card including whether debit cards are processed, how the terminal is set up on the Moneris Host and whether the SWIPE ADMIN CARD prompt has been enabled on the terminal.

The SWIPE ADMIN CARD prompt always appears for the following reports, regardless of the POS Admin card configuration:

- [Stored Transactions List](#)
- [Pre-Authorization List](#)
- [Transaction Inquiry](#)

These reports include credit and debit Card numbers.

To print complete Card numbers on the report, you must swipe a POS Admin card at the SWIPE ADMIN CARD prompt.

To print [masked Card numbers](#) on the report, simply press **OK** at the SWIPE ADMIN CARD prompt.

If the [SWIPE ADMIN CARD prompt is enabled](#) on your terminal, the prompt will appear for:

- [Refunds](#)
- all types of [Voids](#)
- [Payments](#) (if supported)
- all functions on the [REPORT FUNCS](#) menu
- all functions on the [CONFIG FUNCS](#) menu
- all functions on the [ADMIN FUNCS](#) menu except for [LANGUAGE](#), [BACKLIGHT](#) and [REPRINT](#)

If the prompt is not enabled, the SWIPE ADMIN CARD prompt may still appear for:

- [Refunds](#)
- all types of [Voids](#)
- [Payments](#) (if supported)

- [Logon](#)
- [Close Batch](#)
- [Deposit Totals Inquiry](#)
- [Merchant Subtotals Inquiry](#)
- Multi-terminal [configuration](#) and [report](#)
- Clerk Subtotalling [configuration](#) and [report](#)
- [Remote Code Download](#)
- [Restore Factory Defaults](#)

2.3.21 Entering Alphabetic Characters and Punctuation

The following punctuation and special characters are available:

Note: These are not allowed for Clerk IDs and Invoice Numbers.

| | |
|------------------|---|
| using the 1 key: | (space) |
| using the 0 key: | @ (at sign) * (asterisk) # (pound or number sign) , (comma) . (period or dot) |

To key in alphabetic characters and punctuation:

1. Press the number key with the character you wish to display
2. Press the **Admin** key repeatedly until the character appears.

For example, to key in THANK YOU. for a receipt message:

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

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

2 Features and Procedures

2.3.22 Entering the Clerk ID

When the ENTER CLERK ID entry screen appears:

- a. Key in the Clerk ID, and press **OK**. (Refer to "[Entering Alphabetic Characters and Punctuation](#)" .)

A Clerk ID **MUST** be entered. This cannot be left blank.

The Clerk ID can be up to 6 characters long and any combination of alphabetic and numeric characters (punctuation and special characters are not allowed).

Continue the transaction or report.

2.3.23 Entering the Invoice Number

When the ENTER INVOICE NO entry screen appears:

- a. Key in the Invoice number and press **OK**, or simply press **OK** to leave this blank.

The Invoice number can be up to seven characters long and any combination of alphabetic and numeric characters (punctuation and special characters are not allowed). (Refer to "[Entering alphabetic characters and punctuation](#)".)

Continue the transaction.

2.3.24 Entering Original Amount and Tip

At the ENTER ORIGINAL AMOUNT entry screen:

1. Take one of the following actions:

To proceed with the completion, continue at step 2.

To cancel a Pre-Auth and immediately release the hold on the cardholder's funds:

- a. Press the **CORR** key. (This automatically inputs a \$0.00 dollar value.)
- b. Press **OK**.
- c. Refer back to the Advice transaction.

2. Depending on the amount that appears, do one of the following:

If a dollar amount appears (this is the same value that is printed on the original Pre-Auth receipt), press **OK** to accept.

If the original Pre-Auth amount not including the Tip has changed, key in a new amount, and press **OK**.

If \$0.00 appears (i.e., for a Force Post), key in the amount written on the Paper Sales draft, and press **OK**.

The ENTER TIP AMOUNT entry screen appears.

3. Key in the Tip amount (if any) written on the Tip line of the original Pre-Auth receipt, and press **OK**.

The FINAL AMOUNT \$#.##-OK? prompt appears (the amount includes the Tip if any).

4. Press **OK**.

Refer back to the Advice transaction.

2.3.25 Deleting a Pre-Auth from the Pre-Authorization Advice List

Note: This operation does not immediately release the hold on the cardholder's funds.

At the DELETE PRE-AUTH? screen:

| | |
|------------------|----|
| DELETE PRE-AUTH? | |
| 0000000000 | |
| 0000 | |
| PA \$999,999.99 | |
| YES | NO |

1. Press the **FI** key (YES) to delete the Pre-Auth transaction. The P-A ADVICE LIST appears if there are remaining uncompleted Pre-Auths; otherwise, the TRANSACTION NOT FOUND message appears.
2. Do one of the following:
 - If the TRANSACTION NOT FOUND message appears, press the **Can/Ann** key to return to the READY screen.
 - If the P-A ADVICE LIST menu appears but you wish to return to the READY screen, press the **Can/Ann** key twice.
 - If the P-A Advice LIST menu appears and you wish to complete another Pre-Auth, refer back to the "Advice - Using Pre-Authorization Advice List" procedure beginning at [step 8](#).

2.3.26 Entering the Promo Code

When the ENTER PROMO CODE prompt appears:

- a. Key in the promotional code supplied to you by the private label card provider and press **OK** (Refer to "[Entering Alphabetic Characters and Punctuation](#)"), or simply press **OK** to leave this blank. The next prompt appears.

Continue the transaction.

2.3.27 Finding the Original Sequence Number

The Original Sequence number needed for a Pre-Auth Advice is found on the Pre-Authorization receipt.

If the Receipt number is:

X00000000-123-456-789-0

Then the Original Sequence number is: 456789

2.3.28 Transaction with MOTO Enabled

Note: Even if enabled, the Tip Entry prompt will not appear a MOTO transaction because the cardholder is presumed not to be present and therefore cannot key in an amount.

When the terminal prompts you to select either REGULAR or MAIL/TEL, do the following:

2 Features and Procedures

| If cardholder is present... | If cardholder is NOT present... |
|--|--|
| a. Select REGULAR. b. Continue the transaction. | a. Select MAIL/TEL. The MOTO options appear. b. Select the type of MOTO transaction to be processed: To process a one-time transaction, select SINGLE. OR To process a transaction that occurs on a regular basis (e.g. a monthly donation), select RECURRING. OR To process a transaction that occurs as part of a monthly payment plan, select INSTALLMENT. c. Go back to the transaction. |

2.3.29 Enter Reporting Data for Transaction with Purchasing Card

When the ENTER XXX AMOUNT entry screen appears (XXX is the tax type, e.g. GST):

1. Key in the Tax amount, and press **OK**, or simply press **OK** to leave this blank.
The ENTER CUSTOMER REFERENCE NUMBER entry screen appears.
2. Key in the Customer Reference number, and press **OK**, or simply press **OK** to leave this blank.
The terminal communicates with the Moneris Host.

Continue the transaction.

2.3.30 Cardholder Prompts

When the CUSTOMER PRESS OK TO CONTINUE prompt appears, do the following:

1. Pass the terminal to the cardholder, but do NOT press **OK**.
2. The cardholder presses **OK**.

If the [SELECT LANGUAGE](#) prompt appears , refer to the "Selecting the Display Language for Chip Cards" procedure.

If the [SELECT <Application name>](#) prompt appears , refer to the "Selecting the Chip Card Application" procedure.

If the <Transaction Name>\$.##-OK? prompt appears, the cardholder presses **OK**.

If the [CASH BACK?](#) prompt appears , refer to the "Entering Cashback Amount" procedure.

If the [TIP? % OTHER](#) prompt appears , refer to the "Entering a Tip on Terminal: Default Percentage Enabled" procedure.

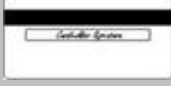

If the [ENTER TIP % \\$](#) prompt appears , refer to the "Selecting Percentage or Dollar Amount Tip on the Terminal" procedure.

If the [SELECT ACCOUNT](#) prompt appears , refer to the "Account Selection" procedure.

If the [ENTER PIN & OK](#) prompt appears , refer to the PIN entry procedure.

The terminal processes the transaction.

3. One of the following prompts may appear depending on the Card Entry method:

| <u>swiped</u> | <u>inserted</u> |
|--|---|
|  |  |
| <p>If the RETURN TO CLERK appears, the cardholder returns the terminal to you.</p> <p>If APPROVED THANK YOU CASH BACK \$ ### appears (debit only), the cardholder returns the terminal to you.</p> | <p>If the RETURN TO CLERK DO NOT REMOVE CARD appears, the cardholder returns the terminal to you. Do not remove the chip card.</p> <p>If APPROVED THANK YOU CASH BACK \$ ### REMOVE CARD appears (debit only), you or the cardholder must remove the chip card from the reader.</p> |

4. Continue with the transaction.

1. Follow the prompt that appears:

If CUSTOMER PRESS OK TO CONTINUE appears, pass the terminal to the cardholder without pressing **OK**. The cardholder presses **OK**.

2. Have the cardholder follow the prompts that appear:

***Note:** The prompts below are listed in the order in which they would appear. The prompts that appear are dependent a number of factors, including transaction type, merchant setup, and card type.*

If the [SELECT LANGUAGE](#) prompt appears, refer to the "Selecting the Display Language for Chip Cards" procedure.

If the [SELECT <Application name>](#) prompt appears, refer to the "Selecting the Chip Card Application" procedure.

If the [CASH BACK?](#) prompt appears, refer to the "Entering Cashback Amount" procedure.

If the <Transaction Name>\$#.##-OK? prompt appears, the cardholder presses **OK**.

If the [ENTER TIP AMOUNT OR PRESS OK % OTHER](#) prompt appears, refer to the "Entering a Tip: Default Percentage Enabled" procedure.

If the [ENTER TIP AMOUNT OR PRESS OK % \\$](#) prompt appears, refer to the "Selecting Percentage or Dollar Amount Tip" procedure.

If the [ENTER TIP PERCENTAGE](#) entry screen appears, refer to the "Entering a Percentage Tip" procedure.

If the [ENTER TIP AMOUNT](#) entry screen appears, refer to the "Entering a Dollar Amount Tip" procedure.

If the [SELECT ACCOUNT](#) prompt appears, refer to the "Account Selection" procedure.

If the [ENTER PIN & OK](#) entry screen appears, refer to the PIN Entry procedure.

4. Depending on the card used, do one of the following:

If a credit card was used, continue the financial transaction procedure.

If a debit card was used, continue below at step 5.

5. The cardholder returns the terminal to you when one of the following prompts appears:

2 Features and Procedures

Note: If the card is inserted (chip transaction), the cardholder removes their card from the chip reader. If the cardholder requested a cashback (debit only), then CASH BACK \$#.## also appears in the prompt.

| |
|--|
| APPROVED THANK YOU CASH BACK \$#.## RETURN TO CLERK |
| APPROVED THANK YOU RETURN TO CLERK |
| APPROVED THANK YOU CASH BACK \$#.## REMOVE CARD |
| APPROVED THANK YOU REMOVE CARD |

6. Press **OK** on the terminal when one of the following prompts appears:

APPROVED ##### CASH BACK \$#.## PRESS OK

APPROVED ##### CASH BACK \$#.## GIVE CUST COPY

APPROVED ##### PRESS OK

APPROVED ##### GIVE CUST COPY

7. [Process the receipts that print.](#) (Refer to the "Receipt Processing" procedure.)

Selecting the Display Language for Chip Cards

When the SELECT LANGUAGE prompt appears during a chip card transaction:

1. The cardholder presses the **F1** key to view their prompts in English the **F3** key to view them in French.
2. Continue following the "Cardholder Prompts" procedure.

Selecting the Chip Card Application

When the chip card has more than one application that the terminal also supports, the SELECT <Application name> prompt appears. The application to be used to process the current transaction must be selected.

Note: On the display <Application name> is replaced with the name of the first application in the list of available applications.

The cardholder selects the application during a [Purchase or Pre-Authorization](#) transaction. You, the Merchant, select the application during a [Refund, Purchase-Void, or Refund-Void](#):

Selecting Application for [Purchase or Pre-Authorization](#) transaction:

When the SELECT <Application name> prompt appears:

1. The cardholder presses the **F1** key (YES) to use the displayed application; otherwise, they press the **F3** key (NO) to view the next available application.

If The <Application name>-OK? prompt appears, the cardholder presses **OK** to confirm that they wish to use the displayed application.

The <Application name> SELECTED PLEASE WAIT message appears while the chip verifies that the card is valid.

2. Continue following the "Cardholder Prompts" procedure.

Selecting Application for Refund or Void transaction:

IMPORTANT: **Do NOT allow the cardholder to select the application. You must select the application used to perform the original transaction (indicated on the original transaction receipt).**

When the SELECT <Application name> prompt appears:

1. Press the **F1** key (YES) to use the displayed application; otherwise, press the **F3** key (NO) to view the next available application.

If The <Application name>-OK? prompt appears, press **OK** to confirm that you wish to use the displayed application..

The <application name> SELECTED PLEASE WAIT message appears while the chip verifies that the card is valid.

2. Continue following the "Cardholder Prompts" procedure.

Entering Cashback Amount on Debit Purchase

When the CASH BACK? prompt appears:

1. The cardholder presses the **F1** key (YES) on the terminal .
The SELECT CASH BACK prompt appears on the terminal .

***Note:** The Cashback amount will be withdrawn from the same account used for the Purchase transaction (e.g., if the cardholder selects CHQ when prompted, both the Purchase amount and the Cashback amount will be withdrawn from their Chequing account).*

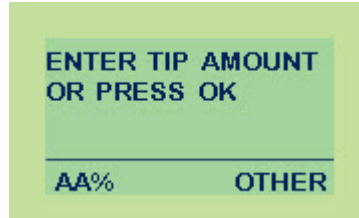
2. The cardholder selects either a Preset amount or, if the option is available, they can enter another amount as indicated below:

| Preset amount: | OTHER amount: |
|---|--|
| <p>a. The cardholder presses the F1 key (for preset Amount One), presses the F2 key (for preset Amount Two), or presses the F3 key (for preset Amount Three).</p> <p>PURCHASE \$#.##-OK? appears. (This includes the Cashback amount.)</p> <p>b. The cardholder presses OK to accept the displayed amount.</p> <p>c. Continue following the "Cardholder Prompts" procedure.</p> | <p>a. The cardholder presses the F3 key (OTHER).</p> <p>ENTER CASH BACK appears.</p> <p>b. The cardholder keys in the amount they wish to withdraw and then presses OK.</p> <p><i>Note: The dollar value entered must be in increments of 10 (e.g., \$10.00 or \$20.00 or \$30.00, etc.).</i></p> <p>PURCHASE \$#.##-OK? appears. (This includes the Cashback amount.)</p> <p>c. The cardholder presses OK.</p> <p>d. Continue following the "Cardholder Prompts" procedure.</p> |

Entering a Tip: Default Percentage Enabled

1. The cardholder follows the terminal prompt shown here:

2 Features and Procedures

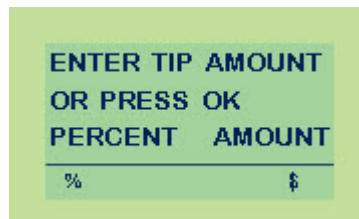


| To enter a default Tip Percentage: | To enter a different percentage or dollar amount Tip: | To bypass entering a Tip: |
|---|---|--|
| <p>a. The cardholder presses the F1 key (AA%).</p> <p>The PURCHASE \$#.##-OK? prompt appears (amount includes the Tip).</p> <p>b. The cardholder presses OK.</p> <p>c. Continue the "Cardholder Prompts" procedure.</p> | <p>a. The cardholder presses the F3 key (OTHER).</p> <p>The ENTER TIP AMOUNT OR PRESS OK % \$ prompt appears.</p> <p>b. Continue in the "Selecting Percentage or Dollar Amount" procedure.</p> | <p>a. The cardholder presses OK without making a selection.</p> <p>The PURCHASE \$#.##-OK? prompt appears.</p> <p>b. The cardholder presses OK.</p> <p>c. Continue the "Cardholder Prompts" procedure.</p> |

Selecting Percentage or Dollar Amount

- The cardholder follows the terminal prompt shown here:

*Note: If the previous prompt was also a Tip prompt, the cardholder may return to it by pressing the **CORR** key. (If the **CORR** key is pressed, refer back to the previous Tip procedure.)*

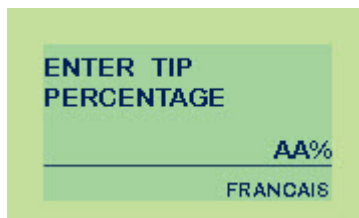


| To select the Tip-as-percentage option: | To select the Tip-as-dollar-amount option: | To bypass entering a Tip: |
|--|--|--|
| <p>a. The cardholder presses the F1 key (%).</p> <p>The ENTER TIP PERCENTAGE entry screen appears.</p> <p>b. Continue in the "Entering a Percentage Tip" procedure.</p> | <p>a. The cardholder presses the F3 key (\$).</p> <p>The ENTER TIP AMOUNT entry screen appears.</p> <p>b. Continue in the "Entering a Dollar Amount Tip" procedure.</p> | <p>a. The cardholder presses OK without making a selection.</p> <p>The PURCHASE \$#.##-OK? prompt appears.</p> <p>b. The cardholder presses OK.</p> <p>c. Continue the "Cardholder Prompts" procedure.</p> |

Entering a Percentage Tip

- The cardholder follows the terminal prompt shown here:

Note: *If the previous prompt was also a Tip prompt, the cardholder may return to it by pressing the **CORR** key. (If the **CORR** key is pressed, refer back to the previous Tip procedure.)*



| To enter a desired percentage Tip: | To bypass entering a Tip: |
|---|--|
| <p>a. The cardholder keys in a percentage value (replaces displayed value, AA) and presses OK.</p> <p>The PURCHASE \$#.##-OK? prompt appears (amount includes the Tip).</p> <p>b. The cardholder presses OK.</p> <p>c. Continue the "Cardholder Prompts" procedure.</p> | <p>a. The cardholder presses OK without entering a value.</p> <p>The PURCHASE \$#.##-OK? prompt appears.</p> <p>b. The cardholder presses OK.</p> <p>c. Continue the "Cardholder Prompts" procedure.</p> |

Entering a Dollar Amount Tip

- The cardholder follows the terminal prompt shown here:

Note: *If the previous prompt was also a Tip prompt, the cardholder may return to it by pressing the **CORR** key. (If the **CORR** key is pressed, refer back to the previous Tip procedure.)*



| To enter a desired dollar amount Tip: | To bypass entering a Tip: |
|---|--|
| <p>a. The cardholder keys in a dollar amount and presses OK.</p> <p>The PURCHASE \$#.##-OK? prompt appears (amount includes the Tip).</p> <p>b. The cardholder presses OK.</p> <p>c. Continue the "Cardholder Prompts" procedure.</p> | <p>a. The cardholder presses OK without entering an amount.</p> <p>The PURCHASE \$#.##-OK? prompt appears.</p> <p>b. The cardholder presses OK.</p> <p>c. Continue the "Cardholder Prompts" procedure.</p> |

2 Features and Procedures

Selecting an Account

When the SELECT ACCOUNT prompt appears:

1. The cardholder presses the **F1** key (Chequing) or the **F3** key (Savings).
2. Continue following the "Cardholder Prompts" procedure.

PIN Entry

When the ENTER PIN & OK prompt appears:

1. The cardholder keys in their Personal Identification number (PIN) and presses **OK**.

Note: Please respect the cardholder's privacy, and encourage them to protect their PIN.

2. Continue following the "Cardholder Prompts" procedure.

3 The Moneris Mobile 8200 Hardware



The Moneris Mobile 8200 Terminal and Base

The Mobile 8200 is a hand-held wireless [terminal](#) that consists of an integrated PINpad, an integrated [printer](#), a [magnetic stripe card reader](#), a chip reader, and a removable, rechargeable [battery](#). The terminal communicates over short distances with a communications [base](#). A [charge-only base](#) is also available.

3.1 Setting up the Hardware

Before setting up the hardware, consider the [most effective location](#) for a communications base.

You must perform four steps to set up the hardware:

1 Set up the communications base.

a. Connect the Ethernet [communications cable](#) to each communications base.

Note: If you use dial backup, connect the [dial communications cable](#) as well.

Note: If you have only one handheld terminal with only one communications base, the base can use dial communications as the default rather than the backup, i.e. Ethernet communications is not required. Connect the [dial communications cable](#) instead.

b. Connect the [power cable](#) to each communications base and any charge-only bases (charge-only bases are optional).

If you have more than one handheld communicating with a communications base, you must perform the remaining steps for each handheld. A maximum of 5 handhelds can be registered to one communications base.

3 The Moneris Mobile 8200 Hardware

2. [Charge the battery.](#)

IMPORTANT: When charging a battery for the first time, it must be attached to a handheld terminal and it must be left on the base for a minimum of 3 hours.

3. Check the printer for paper:
Press the [Paper Feed key](#) for several seconds to see if paper appears.

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

4. [Register the terminal](#) to the communications base.

3.2 Selecting the Base Location

When deciding where to put the communications base for your Mobile 8200 POS system:

1. Consider the factors listed below
2. Review the sample floor plans
 - [Centre-Obstruction Floor plan](#)
 - [Indoor/Outdoor Floor plan](#)
 - [L-Shaped Floor plan](#)
 - [Multi-Level Floor plan](#)
3. After you receive your Mobile 8200 POS system and configure it with the assistance of the Moneris installation team, the Moneris representative may [check the range of the base](#) from the spot you selected.

3.2.1 Base Location Considerations

3.2.2 Ensure a base is placed:

- on a flat, stable, horizontal surface
- in the center of the usage area with a large, open, unobstructed area surrounding the base
- so that the usage area is within the maximum range of the base:
Indoor max. = 60 m (196 ft)
Outdoor max. = 120 m (393 ft)
The range will vary depending on the environment.
- at least 2 m (6.5 ft) away from other 8200 communications bases, if more than one is installed
- at least 2m (6.5 ft) away from any other wireless devices that operate at 2.4 GHz (e.g., wireless routers, cordless phone bases, etc.)
- more than 3 m (10 feet) from any microwave oven in use

3.2.3 Protect a base from:

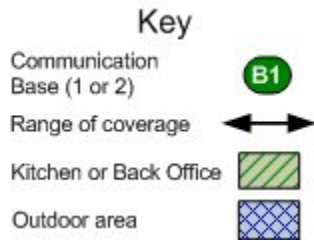
- extremely high and low temperatures
- inclement weather (e.g., precipitation, high winds)
- vibrations
- dust
- dampness

- liquid spills (this includes rain)
- electromagnetic radiation (e.g., from motors, compressors, computers, radio transmitters, etc.)

3.2.4 Do not place a base near:

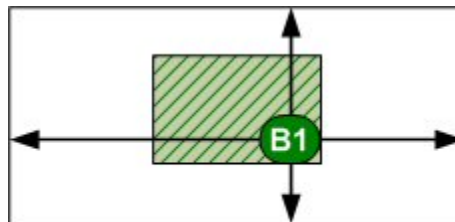
- computer screens
- televisions including flat screen televisions
- microwave ovens
- anti-theft barriers, etc.
- large, vertical, metal surfaces (e.g., refrigerators, large appliances, vending machines)
- cordless and cellular phones

3.2.5 Sample Floor plans



3.2.6 Center-Obstruction Floor Plan

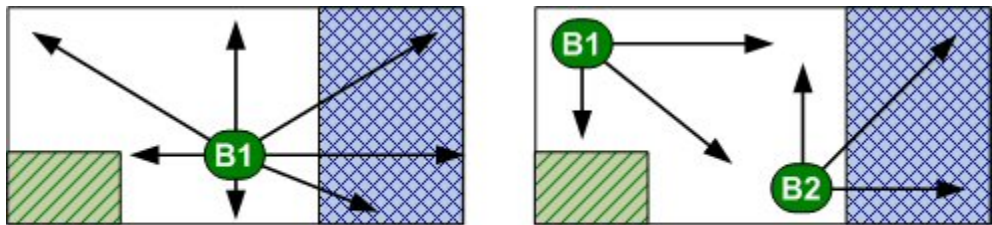
If your location has a central area (e.g. an office or kitchen), you may be able to place the communications base at one corner of the central area and still have wireless coverage throughout your location.



Center Obstruction Plan

3.2.7 Indoor/Outdoor Floor plan

If your location has an outdoor area where you wish to use the Mobile 8200 (e.g. a patio), try the base locations indicated below to see which provides the best coverage.

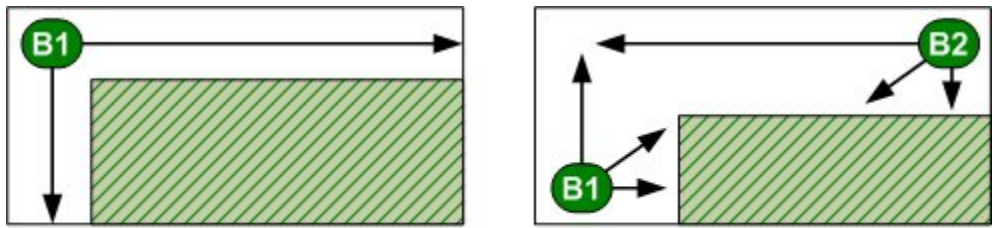


Indoor/Outdoor Plan

3 The Moneris Mobile 8200 Hardware

3.2.8 L-Shaped Floor plan

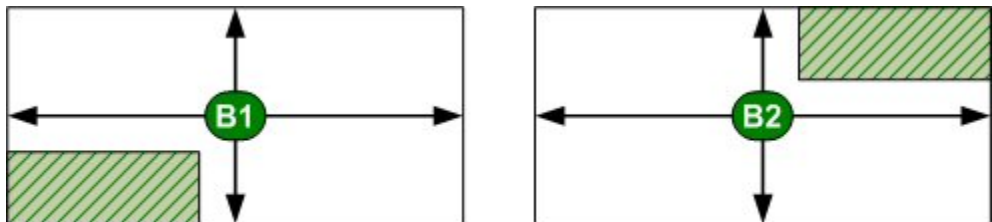
If the area in which you plan to use the Mobile 8200 in your location is an L-shape, try the base locations indicated below to see which provides the best coverage.



L-shaped Plan

3.2.9 Multi-Level Floor plan

If your location has more than one floor, you will need one communications base for each floor.





Multi-level Plan

3.2.10 Testing the Wireless Communications

To check the range of the communications base and determine whether the handheld terminal can communicate with the base, perform this test.

IMPORTANT: Ensure the terminal is [registered to the communications base](#) before beginning this test.

- [Power up the base](#) and [power up the handheld](#).
- Walk with the handheld to the spot furthest away from the base that the handheld is likely to be used (e.g., the far side of the room or the patio).
- While you are walking, check that the [wireless signal icon](#) (the ) is displayed on the screen of the handheld the whole time.

IMPORTANT: If the  symbol is not displayed, transactions cannot be performed when the handheld is in that spot.

3.3 Registering the Handheld to a Base

A terminal must be registered to a communications base in order to process transactions. Registering introduces the terminal to the base so that the terminal knows which base to look for and the base knows which terminal(s) to accept transactions from.

- Note:**
- A maximum of five terminals can be registered to one communications base.
 - Every terminal must be registered individually.
 - A terminal can only be registered to one communications base at any one time. To use a different base, register the terminal to that base.

1. Place the terminal on the communications base to which it is being registered. (The terminal does not have to remain on the base once registration has been completed.)

2. Press the **Admin** key.
The MAIN MENU appears.

3. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.

4. Scroll down to BASE CONFIG, and press **OK**.


If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

The BASE CONFIG menu appears.

5. Press **OK** to select REGISTER BASE.
The ENTER BASE ID entry screen appears.

6. Key in the [8-digit Base ID](#), and press **OK**.
The BASE CONFIG menu reappears.

7. Press the **Can/Ann** key until the READY screen reappears.

8. When the  icon appears on the handheld screen (in 10-15 seconds), the handheld is ready to talk to the communications base.

3.3.1 Communications Base ID

The communications base ID (8 digits) is found on the bottom of the communications base.



It consists of the last eight digits of the serial number printed below the bar code on the bottom of the communications base. In the image above, the base ID is 12400031.

3 The Moneris Mobile 8200 Hardware

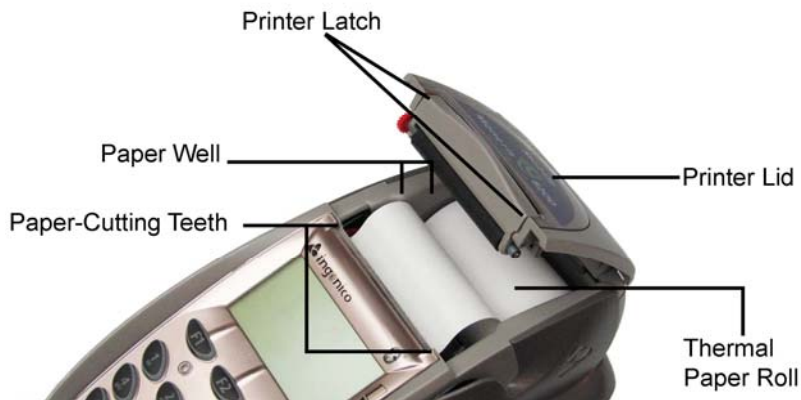
3.4 The Handheld Terminal

The handheld terminal consists of the following components:

- [Integrated printer](#)
- Display ([READY Screen](#))
- [Keypad](#)
- [Magnetic stripe reader](#)
- [Chip card reader](#)
- [Removable, rechargeable NiMH or Li-ion battery](#)

3.5 The Integrated Printer

A thermal printer is integrated into the Moneris Mobile 8200 terminal. It prints black text on white, one-part thermal paper.



Note: The maximum paper roll diameter is 2 inches.

To load a new paper roll into the terminal:

1. Open the paper well at the back of the terminal.
Press the printer latch towards the back of the printer then lift the printer lid up and back.
2. Remove the paper roll that is in the paper well.
3. Place the new paper roll into the paper well with the loose end unrolling from the bottom of the roll towards the front of the terminal.
4. Pull the loose end of the paper towards the front of the terminal at least one inch (2.2 cm) past the metal teeth at the front of the paper well.
5. Close the printer lid and press firmly on it to ensure that it is securely latched.
6. Tear off the loose end of the paper by pulling it towards the keypad.

The printer is ready to print again.

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

3.6 The Display

The display screen on the terminal displays the merchant and cardholder prompts as well as status and error messages.

The Idle screen is displayed when the terminal is not performing any transactions or functions. All transactions and functions begin at the Idle screen. There are two types of Idle screens on the terminal:

- [The READY screen](#)
- [The TRAINING screen](#)

3.6.1 The READY Screen

The READY screen displays "READY" over the default transaction. This screen appears when the terminal is operating normally.

| | | |
|--------------------------------------|-----------|-----------|
| The Purchase READY screen | | |
| READY | | |
| PURCHASE ENTER AMOUNT \$0.00 | | |
| F1 | F2 | F3 |

[If the default transaction is Pre-Auth](#) , refer to "The Pre-Auth READY screen".

[If the terminal is credit-only](#) , refer to "The Credit-Only READY screen".

If the READY screen isn't displayed, press the **Can/Ann** key repeatedly to access it.

3.6.2 The TRAINING Screen

The TRAINING Ready screen displays "TRAINING" (instead of "READY") over the default transaction (Purchase or Pre-Auth). This screen appears when the terminal is in [Training mode](#).

| | | |
|---|-----------|-----------|
| The Purchase TRAINING screen | | |
| TRAINING | | |
| PURCHASE ENTER AMOUNT \$0.00 | | |
| F1 | F2 | F3 |

To return to the READY screen, you must [exit Training mode](#).

3.6.3 The Credit-Only READY Screen

If the terminal is enabled for credit-only transactions:

The READY screen displays "READY" over "PURCHASE". This screen appears when the terminal is operating normally.

Note: Some debit chip cards may be used at a credit-only terminal.

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| |
|--------------------------------------|
| The Purchase READY screen |
| READY |
| PURCHASE ENTER AMOUNT \$0.00 |
| F1 F2 F3 |

If the READY screen isn't displayed, press the **Can/Ann** key repeatedly to access it.

3.6.4 The Pre-Auth READY Screen

If the default transaction on the terminal is Pre-Auth:

The READY screen displays "READY" over "PRE-AUTH". This screen appears when the terminal is operating normally.

| |
|--------------------------------------|
| The Pre-Auth READY screen |
| READY |
| PRE-AUTH ENTER AMOUNT \$0.00 |
| F1 F2 F3 |

If the READY screen isn't displayed, press the **Can/Ann** key repeatedly to access it.

To perform a [Pre-Auth from the Pre-Auth READY screen](#), refer to the "Pre-Authorization as Default" procedure.



3.7 The Terminal Keypad







The terminal keypad contains alpha-numeric keys and [function keys](#).

Alpha-numeric Keys

These keys allow you to enter amounts for transactions, text for receipt messages and selection criteria for reports.

The Function Keys

| NAME | IMAGE | ALLOWS YOU TO... |
|------|---|--|
| F1 |  | select the option above the key (e.g. CREDIT) scroll down through options |
| F2 |  | select an option |

| NAME | IMAGE | ALLOWS YOU TO... |
|------------|---|--|
| F3 |  | <p>select the option above the key (e.g. DEBIT)</p> <p>scroll up through options</p> <p>scroll left and right through text if the text is wider than the display</p> |
| Can/Ann |  | <p>cancel a transaction</p> <p>return to the READY screen after completing a transaction</p> <p>return to the previous menu when performing ADMIN functions</p> |
| CORR |  | <p>clear the last character or number entered (by the cardholder or the merchant)</p> <p>return to the previous cardholder prompt if no value is currently displayed for the cardholder prompt</p> <p>clear the value displayed when a prompt is first displayed</p> |
| OK |  | <p>confirm the data input is complete</p> <p>confirm the data displayed is correct</p> <p>select the highlighted item on a menu</p> |
| Paper Feed |  | <p>advance the paper in the printer</p> |
| Admin |  | <p>access the MAIN MENU</p> <p>access the Admin Shortcut Code input screen</p> <p>enter alphabetic characters for personalized receipt text, Clerk IDs, etc.</p> |

3.8 The Magnetic Stripe 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.

Ensure that:

the card is facing up

AND

the chip is closest to chip card reader slot on the terminal.

Then slide the card into the chip card reader slot until the card stops sliding in.

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

When the REMOVE CARD prompt appears, you or the cardholder must pull the card gently out of the chip card reader.

3.10 The Battery

The Mobile 8200 is powered by a removable NiMH or Li-ion battery. See [Identifying Battery Types](#).



3.10.1 Identifying Battery Types

To Identify which type of battery the Moneris Mobile 8200 terminal has been shipped with, locate the battery sticker on the handheld terminal side of the battery. Look for the Li-ion (for lithium ion) or NiMH (for nickel metal hydride) marking.

See also [Battery Management Tips](#) for more information about differences between NiMH and Li-ion battery types.

3 The Moneris Mobile 8200 Hardware

Battery Type Marking



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 base 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 [stand-by mode](#) after a set time period. If the handheld will be used in a well-lit area, you may wish to [disable the backlight](#) to further reduce battery usage. See also [Battery Management Tips](#).

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

3.11 The Communications Base

The communications base connects up to five (5) terminals via wireless communication to the Moneris Host via Ethernet and dial. The base is also be used to charge the terminal.

If you have a number of 8200 handheld terminals, they can communicate with the Moneris Host through one communications base, but each terminal will need a [charge-only base](#) to charge the battery when the handheld is not in use.



Top of the Communications Base





Bottom of the Communications Base



The Ports on the Communications Base

It has a [green LED](#) on the front, right corner and 5 connection ports on its back:

| | |
|---|---|
| PLUG>IT | with a YELLOW bar (for Ethernet Communications) |
| RS232-2 | with a BLUE bar (for future use) |
|  | with a GREY bar (power connection) |
| RS232-1 | with a GREEN bar (for future use) |
|  | with a RED bar (for Dial Communications) |

3.12 The Charge-Only Base

If you have a number of 8200 handheld terminals, they can communicate with the Moneris Host through one [communications base](#), but each terminal will need a charge-only base to charge the battery when the handheld is not in use.

3 The Moneris Mobile 8200 Hardware



Top of the Charge Base





Bottom of the Charge Base



Ports on the Charge-Only Base

The charge-only base has 5 connection ports on the bottom:

| | |
|---|----------------------------------|
| EXT LINE | Do not use. |
|  | Do not use. |
|  | power connection |
| COM2 | Do not use. |
| COM3 | Do not use. |

3.13 The LED on the Base

The green LED on the [communications base](#) and the [charge-only base](#) indicates the power status of the base. On the communications base, it also indicates the ready-to-communicate status between the base and the [handheld terminals](#), and the ready-to-communicate status between the base and the Moneris Host.



Green LED on the Base

3.13.1 LED States on the Communications Base

| LED STATE | Ethernet Communications | Dial Communications |
|---|---|--|
| OFF | The communications base is powered off. | The communications base is powered off. |
| FLASHING QUICKLY (2 times per second) | The base is powered on but cannot find any registered handhelds. For example: - there are no handhelds registered to the base OR - at least one handheld is registered, but is not powered on OR - at least one handheld is registered, but is out of range of the base. | The base is powered on but cannot find the registered handheld. For example: - the handheld is not registered to the base OR - the handheld is registered, but is not powered on OR - the handheld is registered, but is out of range of the base. |
| FLASHING SLOWLY (once every 2 seconds) | n/a | The handheld is: - registered to the base and - powered on and - within range of the base. AND The base is: - powered on but - not currently communicating with the Moneris Host. |
| CONSTANTLY ON | At least one handheld is: - registered to the base and - powered on and - within range of the base. AND The base is: - powered on and - has found at least one registered handheld and - ready to communicate OR is communicating with the Moneris Host. OR A handheld is sitting on the base. | The handheld is: - registered to the base and - powered on and - within range of the base. AND The base is: - powered on and - communicating with the Moneris Host. OR The handheld is sitting on the base. |

3 The Moneris Mobile 8200 Hardware

3.14 The Cables

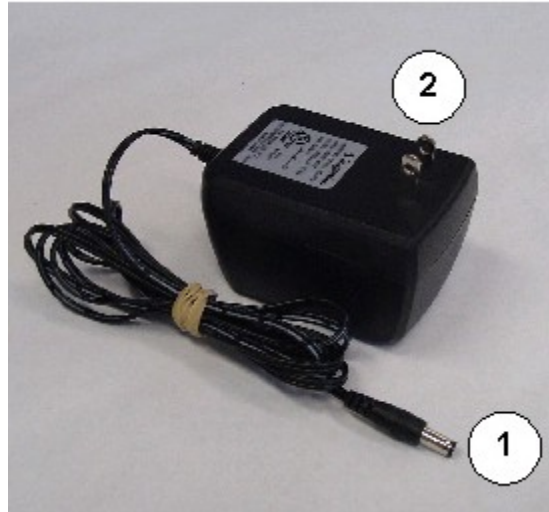
3.14.1 The Power Cable

The power cable supplies power to the base when it is connected to a power outlet and the power port on the base.

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


Refer to "Powering Up the Terminal" for image of the power cable and instructions on installing it.

3.14.2 Installing the Power Cable



To power up the base, simply connect the base to a power outlet as outlined below. These instructions apply to both the [communications base](#) and the [charge-only base](#):

IMPORTANT: You must use the exact power adaptor and cable provided with the terminal and base, 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 base and Moneris Solutions shall have no liability whatsoever for a failure to follow these instructions.

1. Insert the small end (1) of the power cable into the power port labelled with a  on the base ([communications](#) or [charge-only base](#)).

2. Insert the power pack (2) into a power outlet.
The base beeps three times and the [green LED](#) begins flashing.

If this is the first time you have powered up the base, go to [Setting up the Hardware](#).

To power down the base, simply remove the power pack (2) from the power outlet.


To reset the base, power down the base, then wait 30 seconds, and then power up the base.

3.14.3 Dial Communications Cable



When connected to a telephone wall jack and the LINE port on the communications base, this cable allows the base to use dial communications.

To connect the dial communications cable:

1. Insert one end of the cable into the  port on [the base](#).
2. Insert the other end into a telephone wall jack.

Note: If you have only one handheld terminal with only one communications base using dial communications, return to [Setting up the Hardware](#) before configuring Dial Communications.

You must configure the [dial communications](#) before attempting to communicate with the Moneris Host.

3.14.4 Ethernet Communications Cable

The cable pictured below allows the communications base to communicate over the Internet.



Ethernet cable

To connect the Ethernet communications cable:

1. Insert one end of the Ethernet cable into the PLUG>IT port (furthest to the left) on the [communication base](#).
2. Insert the other end of the Ethernet cable into an Ethernet wall jack or a router.

You must configure the [Ethernet Communications](#) before attempting to communicate with the Moneris Host.

4 Configuring Your Terminal

Your Mobile 8200 terminal can be set up to accept and process a variety of cards including debit cards, credit cards with a magnetic stripe, credit cards with a chip, private label cards, corporate (a.k.a. purchasing) cards, Moneris gift cards and loyalty programs. The terminal can also be set up to process cheque authorizations.

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

Ensure you have the following available:

- your Merchant ID,
- the Moneris Host Initialization phone number,
- your POS Admin card (if required).

Note: Before beginning to configure your terminal ensure that the terminal has been registered to a communications base.

1. [Configure the communications parameters.](#)
2. Select the [optional features](#) you intend to use on the terminal.
3. [Configure the features and general parameters.](#)
4. [Print a Configuration Parameters Report.](#)

4.1 Configuring Communications

The terminal can communicate with the Moneris Host over Ethernet and Dial Communications.

If you have more than one handheld terminal communicating with one communications base, the base must use Ethernet communications in order to process transactions from more than one handheld at a time.

If you have only one handheld terminal with only one communications base, the base can use dial communications as the default rather than the backup, i.e. Ethernet communications is not required.

- Ethernet Communications:
 - [Public Internet - Dynamic](#)
 - [Public Internet - Static](#)
 - [Private Internet - Dynamic](#)
 - [Private Internet - Static](#)
- [Dial Backup and Dial Communications](#)

To determine whether the communications are functioning correctly, check the [communications status](#) icons and messages.

Go back to [Getting Started](#).

Go back to .

4.1.1 Configuring Dial Communications

If your terminal will communicate with the Moneris Host over a standard analog telephone line as backup for Ethernet communications, you will need to set up these parameters.

4 Configuring Your Terminal

WARNING: Due to data security issues, terminals using dial communications must use a true analog phone line connecting to a public switched telephone network. Analog telephone adaptors (ATAs) and digital phone service over IP communications must NOT be used as an alternative to dial communications.

Moneris recommends installing a dedicated telephone line for the terminal to ensure transactions are processed quickly and reliably. Sharing the line with another device (e.g. a fax machine) can cause communication problems. Line splitters and filters are not recommended.

If you access a prompt and decide to keep the displayed value, simply press **OK** to keep that value and return to the previous menu.

Note: If [dial backup](#) is set up then, when Ethernet communication is not available, the terminal will attempt to use dial communications. After performing a transaction using dial as backup, the terminal will attempt to use Ethernet communications for the next transaction.

Note: If you have only one handheld terminal with only one communications base, the base can use dial communications as the default rather than the backup, i.e. Ethernet communications is not required.

From the READY screen or the TERMINAL SETUP REQUIRED prompt:

Note: The [dial communications cable must be connected](#) before attempting to communicate with the Moneris Host.

1. Press the **Admin** key.

The MAIN MENU appears.

2. Scroll down and select CONFIGURATION.

The CONFIG FUNCS menu appears.

3. Confirm the COMMS TYPE is set to DIAL:

a. Scroll to GENERAL PARAMS, and press **OK**.

The GENERAL PARAMETERS menu appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

b. Press **OK** to select COMMS TYPE.

The COMMUNICATIONS TYPE menu appears.

c. Scroll to DIAL, and press **OK**.

The GENERAL PARAMETERS menu re-appears.

d. Press the **Can/Ann** key.

The CONFIG FUNCS menu re-appears.

4. Scroll down to DIAL CONFIG, and press **OK**.

The DIAL CONFIG menu appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

5. To enter or change the PBX prefix for the seven-digit local telephone number and the ten-digit long distance telephone number to the Moneris Host:

Note: This field is optional.

a. Press **OK** to select PREFIX.

The PREFIX entry screen appears.

b. Key in the local PBX prefix (min. 1 digit, max. 20 digits), and press **OK**.

The DIAL CONFIG menu reappears.

Note: If Call Waiting or Call Answer is activated on the phone line that the terminal will use, the Prefix must be configured as: *70,, (star, seven, zero, comma, comma). Refer to "[Entering alphabetic characters and punctuation](#)".

6. To change the modem speed for the primary and backup lines:
 - a. Scroll down to **PRI LINE SPEED**, and press **OK**.
The **PRIMARY LINE SPEED** menu appears.
 - b. Scroll to the list item with the appropriate Baud rate, and press **OK**.
(The default is 1200 Baud.)
The **DIAL CONFIG** menu reappears.
 - c. Scroll down to **BCK LINE SPEED**, and press **OK**.
The **BACKUP LINE SPEED** menu appears.
 - d. Scroll to the list item with the appropriate Baud rate, and press **OK**.
(The default is 1200 Baud.)
The **DIAL CONFIG** menu reappears.
7. To set the terminal to check that the phone line is available before attempting to dial out:
 - a. Scroll down to **LINE AVAIL CHK**, and press **OK**.
The **LINE AVAILABLE CHECK?** prompt appears.
 - b. Press the **F1** key (**YES**) to force the terminal to check that the line is available before dialling out .
Press the **F3** key (**NO**) to set the terminal to begin dialling without checking (default) .
The **DIAL CONFIG** menu reappears.
8. To change the number of tones dialled per second (if you are using tone dialling rather than pulse dialling):
 - a. Scroll down to **TONE DIAL SPD**, and press **OK**.
The **TONE DIAL SPEED** menu appears.
 - b. Scroll to the item with the appropriate Dial Speed, and press **OK**. (The default speed is **FAST (10)**, which is 10 tones per second.)
The **DIAL CONFIG** menu reappears.
9. To change the number of seconds the dial tone must be present before the connection is determined to be successful:
 - a. Scroll down to **STABILIZATION**, and press **OK**.
The **STABILIZATION TIMER** entry screen appears.
 - b. Key in a value (min. 0.06, max. 5.00 seconds), and press **OK**. (The default is 0.06 seconds.)
The **DIAL CONFIG** menu reappears.
10. To determine whether the terminal monitors the modem-to-host connection process:
 - a. Scroll down to **CALL PROGS CHK**, and press **OK**.
The **CALL PROGRESS CHECK?** prompt appears.
 - b. Press the **F1** key (**YES**) to monitor the modem-to-host connection process.
Press the **F3** key (**NO**) to if the phone environment is noisy.
The **DIAL CONFIG** menu reappears.
11. Press the **Can/Ann** key three times to return to the **READY** screen or the **TERMINAL SETUP REQUIRED** prompt.
The terminal is ready to communicate with the Moneris Host over a dial line.

4 Configuring Your Terminal

4.1.2 Dial Backup Communications for Ethernet

When Ethernet communication is not available, the terminal will attempt to use dial communications as backup. After performing a transaction using dial as backup, the terminal will attempt to use Ethernet communications for the next transaction.

Note: *When the communications base is using dial backup, the terminals cannot share the dial line. Only one terminal can process a transaction at a time and each transaction must be completed before the next transaction can be attempted.*

The terminal must be [configured for dial](#) communications and the [dial communications cable](#) must be connected.

When the terminal uses dial backup, the message ETHERNET COMMS ERROR-DIAL USED PRESS OK appears. Press **OK** to acknowledge the message and return to the READY screen. The terminal will revert to Ethernet communications for the next transaction.

4.1.3 Configuring Ethernet Communications

Configuring Dynamic Public IP Communications

If your terminal will communicate with the Moneris Host over the Internet using Public IP with Dynamic addressing, you will need to set up these parameters.

Each handheld terminal must have its own unique IP address assigned to it.

Note: *If the terminal is configured to use Ethernet communications and [dial backup](#) is available, when Ethernet communication is not available the terminal will attempt to use dial communications. After performing a transaction using Dial as backup, the terminal will attempt to use Ethernet Communications for the next transaction.*

From the READY screen or the TERMINAL SETUP REQUIRED prompt:

Note: *The [Ethernet communications cable must be connected](#) before attempting to communicate with the Moneris Host.*

1. Select the Communications Type

a. Press the **Admin** key.

The MAIN MENU appears.

b. Scroll down to CONFIGURATION, and press **OK**.

The CONFIG FUNCS menu appears.

c. Scroll down to GENERAL PARAMS, and press **OK**.

The GENERAL PARAMETERS menu appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

d. Press **OK** to select COMMS TYPE.

The COMMUNICATION TYPE menu appears.

e. Scroll to ETHERNET, and press **OK**.

The ETHERNET SETUP menu appears.

Note: *You may need to press the **Can/Ann** key once then scroll down to and select ETHERNET CFG to access the ETHERNET SETUP menu.*

2. Set up the Terminal Type as Dynamic

a. Press **OK** to select TERMINAL SETUP.

The TERMINAL SETUP menu appears.

- b. Press **OK** to select TERMINAL TYPE.
The TERMINAL TYPE menu appears.
- c. Scroll to DYNAMIC, and press **OK**.
The TERMINAL SETUP menu reappears.
- d. Press the **Can/Ann** key once.
The ETHERNET SETUP menu reappears.

3. Set up the Host Parameters as Public

Note: If you change any of the Host parameters after the terminal has been initialized, the terminal will prompt you to perform a [re-initialization](#) after the TCP HOST CONNECTION OK message appears.

- a. Scroll down to HOST SETUP, and press **OK**.

| If the HOST SETUP menu appears... | If the ETHERNET SETUP menu appears... |
|--|---|
| <ul style="list-style-type: none"> b. Scroll down to PUBLIC, and press OK. c. Scroll down to PRODUCTION, and press OK. <p>The ETHERNET SETUP menu reappears.</p> | <ul style="list-style-type: none"> b. Scroll down to SET TYPE, and press OK. c. Scroll down to PUBLIC, and press OK. d. Press the Can/Ann key. <p>The ETHERNET SETUP menu re-appears.</p> |

Note: If your terminal uses customized DNS addresses, you will need to [enter the DNS addresses](#).

4. Test the Ethernet Connection

- a. Press the **Can/Ann** key to test the connection.
The TCP HOST CONNECTION OK PRESS OK prompt appears if the connection is up.
- b. Press **OK** to return to the READY screen.

Note: If the RE-INITIALIZATION REQUIRED message appears, you must perform a [re-initialization](#) to complete the configuration process.

The terminal is ready to communicate with the Moneris Host over the Internet.

Configuring Dynamic Private IP Communications

If your terminal will communicate with the Moneris Host over the Moneris Private IP Network with Dynamic addressing, you will need to set up these parameters.

Each handheld terminal must have its own unique IP address assigned to it.

Note: If the terminal is configured to use Ethernet communications and [dial backup](#) is available, when Ethernet communication is not available the terminal will attempt to use dial communications. After performing a transaction using dial as backup, the terminal will attempt to use Ethernet communications for the next transaction.

Before you begin you will need to know:

- the Moneris Region the terminal is located in

From the READY screen or the TERMINAL SETUP REQUIRED prompt:

Note: The [Ethernet Communications cable must be connected](#) before attempting to communicate with the Moneris Host.

4 Configuring Your Terminal

1. Select the Communications Type

- a. Press the **Admin** key.
The MAIN MENU appears.
- b. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
- c. Scroll down to GENERAL PARAMS, and press **OK**.
The GENERAL PARAMETERS menu appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

- d. Press **OK** to select COMMS TYPE.
The COMMUNICATION TYPE menu appears.
- e. Scroll down to ETHERNET, and press **OK**.
The ETHERNET SETUP menu appears.

Note: You may need to press the **Can/Ann** key once then scroll down to and select *ETHERNET CFG* to access the *ETHERNET SETUP* menu.

2. Set up the Terminal Type as Dynamic

- a. Press **OK** to select TERMINAL SETUP.
The TERMINAL SETUP menu appears.
- b. Press **OK** to select TERMINAL TYPE.
The TERMINAL TYPE menu appears.
- c. Scroll to DYNAMIC, and press **OK**.
The TERMINAL SETUP menu reappears.
- d. Press the **Can/Ann** key once.
The ETHERNET SETUP menu reappears.

3. Set up the Host Parameters as Private

Note: If you change any of the Host parameters after the terminal has been initialized, the terminal will prompt you to perform a [re-initialization](#) after the TCP HOST CONNECTION OK message appears.

- a. Scroll down to HOST SETUP, and press **OK**.

| If the HOST SETUP menu appears... | If the ETHERNET SETUP menu appears... |
|--|---|
| <ol style="list-style-type: none"> b. Scroll to PRIVATE, and press OK. c. Scroll to PROD'N PRIVATE, and press OK. The ETHERNET SETUP menu reappears. | <ol style="list-style-type: none"> b. Scroll to SET TYPE, and press OK. c. Scroll to PRIVATE IP, and press OK. d. Scroll to SET REGION, and press OK. e. Scroll to the region your terminal is located in, and press OK. f. Press the Can/Ann key. The ETHERNET SETUP menu reappears. |

4. Test the Ethernet Connection

- a. Press the **Can/Ann** key to test the connection.
The TCP HOST CONNECTION OK PRESS OK prompt appears if the connection is up.
- b. Press **OK** to return to the READY screen.

Note: If the *RE-INITIALIZATION REQUIRED* message appears, you must perform a [re-initialization](#) to complete the configuration process.

The terminal is ready to communicate with the Moneris Host over the Internet.

Configuring Customized DNS Addresses for Dynamic Public IP Communications

If your terminal uses customized DNS addresses, you must manually enter the DNS addresses.

From the ETHERNET SETUP menu:

- a. Scroll down to DNS SETUP, and press **OK**.
- b. Press **OK** to select AUTOMATIC DNS.
- c. Press the **F3** key (NO) to disable Automatic DNS.
The ETHERNET SETUP menu reappears with additional DNS options.
- d. Scroll down to PRIM ADDRESS, and press **OK**.
The ENTER PRIMARY ADDRESS entry screen appears.
- e. Key in the Primary DNS Address, and press **OK**.
- f. Scroll down to SEC ADDRESS, and press **OK**.
The ENTER SECONDARY ADDRESS entry screen appears.
- g. Key in the Secondary DNS Address, and press **OK**.
- h. Press the **Can/Ann** key.
The ETHERNET SETUP menu reappears.

Return to [Step 4. Test the Ethernet connection](#) and continue configuring Dynamic Public IP Communications.

Configuring Static Public IP Communications

If your terminal will communicate with the Moneris Host over the Internet using Public IP with Static addressing, you will need to set up these parameters.

Each handheld terminal must have its own unique IP address assigned to it.

***Note:** If the terminal is configured to use Ethernet communications and [dial backup](#) is available, when Ethernet communication is not available the terminal will attempt to use Dial Communications. After performing a transaction using dial as backup, the terminal will attempt to use Ethernet Communications for the next transaction.*

Before you begin you will need:

- the terminal's IP Address
- the terminal's Mask ID
- the Gateway Address
- the Primary DNS Address
- the Secondary DNS Address

From the READY screen or the TERMINAL SETUP REQUIRED prompt:

***Note:** The [Ethernet Communications cables must be connected](#) before attempting to communicate with the Moneris Host.*

1. Select the Communications Type
 - a. Press the **Admin** key.
The MAIN MENU appears.
 - b. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.

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- c. Scroll down to GENERAL PARAMS, and press **OK**.
The GENERAL PARAMETERS menu appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

- d. Press **OK** to select COMMS TYPE.
The COMMUNICATION TYPE menu appears.

- e. Scroll to ETHERNET, and press **OK**.
The ETHERNET SETUP menu appears.

Note: You may need to press the **Can/Ann** key once then scroll down to and select **ETHERNET CFG** to access the **ETHERNET SETUP** menu.

2. Set up the Terminal Type as Static

- a. Press **OK** to select TERMINAL SETUP.
The TERMINAL SETUP menu appears.

- b. Press **OK** to select TERMINAL TYPE.
The TERMINAL TYPE menu appears.

- c. Scroll to STATIC, and press **OK**.
The TERMINAL SETUP menu reappears.

- d. Scroll down to TERMINAL ADDR, and press **OK**.
The ENTER TERMINAL ADDRESS entry screen appears.

- e. Key in the terminal's IP Address, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)
The TERMINAL SETUP menu reappears.

- f. Scroll down to MASK ID, and press **OK**.
The ENTER MASK ID entry screen appears.

- g. Key in the terminal's Mask ID, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)
The TERMINAL SETUP menu reappears.

- h. Scroll down to GATEWAY, and press **OK**.
The ENTER GATEWAY ADDRESS entry screen appears.

- i. Key in the Gateway Address, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)
The TERMINAL SETUP menu reappears.

- j. Press the **Can/Ann** key once.
The ETHERNET SETUP menu reappears.

3. Set up the Host Parameters as Public

Note: If you change any of the Host parameters after the terminal has been initialized, the terminal will prompt you to perform a **re-initialization**.

- a. Select HOST SETUP.

| If the HOST SETUP menu appears... | If the ETHERNET SETUP menu appears... |
|---|--|
| b. Scroll to PUBLIC, and press OK . c. Scroll down to PRODUCTION, and press OK . | b. Scroll to SET TYPE, and press OK . c. Scroll down PUBLIC, and press OK . |

The ETHERNET SETUP menu reappears.

4. Set up the DNS Addresses

- a. Scroll down to DNS SETUP, and press **OK**.

Note: If the AUTOMATIC DNS item appears instead of the PRIM ADDRESS and SEC ADDRESS items, select AUTOMATIC DNS then press the F3 key.

- b. Scroll down to PRIM ADDRESS, and press **OK**.
The ENTER PRIMARY ADDRESS entry screen appears.
- c. Key in the Primary DNS Address, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)
- d. Scroll down to SEC ADDRESS, and press **OK**.
The ENTER SECONDARY ADDRESS entry screen appears.
- e. Key in the Secondary DNS Address, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)

5. Test the Ethernet Connection

- a. Press the **Can/Ann** key twice to test the connection.
The TCP HOST CONNECTION OK PRESS OK prompt appears if the connection is up.
- b. Press **OK** to return to the READY screen.

Note: If the RE-INITIALIZATION REQUIRED message appears, you must perform a [re-initialization](#) to complete the configuration process.

The terminal is ready to communicate with the Moneris Host over the Internet.

Configuring Static Private IP Communications

If your terminal will communicate with the Moneris Host over the Moneris Private IP Network with Static addressing, you will need to set up these parameters.

Each handheld terminal must have its own unique IP address assigned to it.

Note: If the terminal is configured to use Ethernet communications and [dial backup](#) is available, when Ethernet communication is not available the terminal will attempt to use dial communications. After performing a transaction using dial as backup, the terminal will attempt to use Ethernet communications for the next transaction.

Before you begin you will need:

- the terminal's IP Address
- the terminal's Mask ID
- the Gateway Address
- the Moneris region the terminal is located in

From the READY screen or the TERMINAL SETUP REQUIRED prompt:

Note: The [Ethernet communications cable must be connected](#) before attempting to communicate with the Moneris Host.

1. Select the Communications Type
 - a. Press the **Admin** key.
The MAIN MENU appears.
 - b. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
 - c. Scroll down to GENERAL PARAMS, and press **OK**.
The GENERAL PARAMETERS menu appears.

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If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

d. Press **OK** to select COMMS TYPE.
The COMMUNICATION TYPE menu appears.

e. Scroll to ETHERNET, and press **OK**.
The ETHERNET SETUP menu appears.

Note: You may need to press the **Can/Ann** key once then scroll down to and select ETHERNET CFG to access the ETHERNET SETUP menu.

2. Set up the Terminal Type as Static

a. Press **OK** to select TERMINAL SETUP.
The TERMINAL SETUP menu appears.

b. Press **OK** to select TERMINAL TYPE.
The TERMINAL TYPE menu appears.

c. Scroll to STATIC, and press **OK**.
The TERMINAL SETUP menu reappears.

d. Scroll to TERMINAL ADDR, and press **OK**.
The ENTER TERMINAL ADDRESS entry screen appears.

e. Key in the terminal's IP address and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)
The TERMINAL SETUP menu reappears.

f. Scroll down to MASK ID, and press **OK**.
The ENTER MASK ID entry screen appears.

g. Key in the terminal's Mask ID, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)
The TERMINAL SETUP menu reappears.

h. Scroll down to GATEWAY, and press **OK**.
The ENTER GATEWAY ADDRESS entry screen appears.

i. Key in the Gateway Address, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)
The TERMINAL SETUP menu reappears.

j. Press the **Can/Ann** key once.
The ETHERNET SETUP menu reappears.

3. Set up the Host Parameters as Private

Note: If you change any of the Host parameters after the terminal has been initialized, the terminal will prompt you to perform a [re-initialization](#).

a. Scroll down to HOST SETUP, and press **OK**.

| If the HOST SETUP menu appears... | If the ETHERNET SETUP menu appears... |
|---|---|
| <p>b. Scroll to PRIVATE, and press OK.</p> <p>c. Scroll down and select the region your terminal is located in, and press OK.</p> <p>The ETHERNET SETUP menu reappears.</p> | <p>b. Scroll to SET TYPE, and press OK.</p> <p>c. Scroll to PRIVATE IP, and press OK.</p> <p>d. Scroll to SET REGION, and press OK.</p> <p>e. Scroll to the region your terminal is located in, and press OK.</p> <p>f. Press the Can/Ann key.</p> <p>The ETHERNET SETUP menu reappears.</p> |

4. Test the Ethernet Connection

a. Press the **Can/Ann** key to test the connection.

The TCP HOST CONNECTION OK PRESS OK prompt appears if the connection is up.

b. Press **OK** to return to the READY screen.

Note: If the *RE-INITIALIZATION REQUIRED* message appears, you must perform a [re-initialization](#) to complete the configuration process.

The terminal is ready to communicate with the Moneris Host over the Internet.

As the terminal communicates with the Moneris Host through the base, it displays PROCESSING to indicate that the transaction is proceeding correctly. Depending on the type of communication, additional status information is provided

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

4.2 Configuring the Receipt Format

This function allows you to configure the terminal to print a Pre-Authorization tip line and a signature line on credit card transaction receipts, set the number of receipt copies printed, and select which trailer messages to print on receipts .

Note: "Declined" or "Not Approved" messages always appear in reverse font.

From the READY screen:

1. Press the **Admin** key.

2. Scroll down to CONFIGURATION, and press **OK**.

The CONFIG FUNCS menu appears.

3. Scroll down to PRINTER CONFIG, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

The PRINTER CFG menu appears.

Note: The default values for the following printer parameters are highlighted in reverse text (e.g., **YES**).

To start printing the receipt before all the transaction information is entered on the terminal:

DO NOT enable this feature:

a. Scroll down to PRE-PRINT, and press **OK**.

The PREPRINTING? prompt appears.

b. Press the **F1** key to select YES.

The PRINTER CFG menu re-appears.

To select the number of receipts printed for a transaction:

a. Scroll down to NO OF COPIES, and press **OK**.

The NUMBER OF COPIES menu appears.

b. Scroll down to the number of copies the terminal should print for each transaction, and press **OK** at your selection. There are [five options](#).

The PRINTER CFG menu re-appears.

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To force the printer to pause between copies for a specified number of seconds:

- a. Scroll down to PRINT DELAY, and press **OK**.
The PRINT DELAY entry screen appears.
- b. Key in the number of seconds the printer will wait between printing receipt copies, and press **OK**. The default is 99 seconds.
The PRINTER CFG menu re-appears.

Note: If, during the transaction, the operator does not want to wait for the receipt copies to print automatically, they can press **OK** to force the next receipt to begin printing immediately.

To print a tip line on Pre-Authorization receipts for the customer to indicate a Tip amount :

- a. Scroll down to P-A TIP LINE, and press **OK**.
The PRINT PRE-AUTH TIP LINE? prompt appears.
- b. Press the **F1** key to select YES.
The PRINTER CFG menu re-appears.

To print a signature line on Credit Card Transaction receipts (including private label and corporate cards):

Note: If a chip card requires a signature, a signature line will be printed even if this parameter is set to NO. If a chip card does NOT require a signature, a signature line will NOT be printed even if this parameter is set to YES.

- a. Scroll down to SIGNATURE LINE, and press **OK**.
The PRINT CREDIT SIGNATURE LINE? appears.
- b. Press the **F1** key to select YES.
The PRINTER CFG menu re-appears.

To print receipts for Advice transactions :

- a. Scroll down to PRINT P-A ADV, and press **OK**.
The PRINT PRE-AUTH ADVICE? prompt appears.
- b. Press the **F1** key to select YES.
The PRINTER CFG menu re-appears.

To print receipts for Pre-Authorization transactions :

- a. Scroll down to **PRINT PRE-AUTH**, and press **OK**.
The PRINT PRE-AUTH? prompt appears.
- b. Press the **F1** key to select YES.
The PRINTER CFG menu re-appears.

To enable masking of the Card number on the Merchant copy of the receipt:

IMPORTANT: Masking is enabled by default (i.e., set to YES). **DO NOT** change this setting.

- a. Scroll down to CARD MASKING-M, and press **OK**.
The MERCHANT RECEIPT CARD MASKING? prompt appears.

- b. Press the **F1** key (YES).
The PRINTER CFG menu re-appears.

To suppress the printing of a Merchant copy of the receipt for any credit Purchase that qualifies as a [signatureless transaction](#):

*Note: Merchant copy printing is enabled by default (i.e., set to YES).
Moneris recommends that you do not change this setting.*

- a. Scroll down to RCPT LIMIT-M, and press **OK**.
The MERCHANT RECEIPT BELOW FLOOR LMT? prompt appears.
- b. Press the **F3** key (NO).
The PRINTER CFG menu re-appears.

To suppress the printing of a Cardholder copy of the receipt for any credit Purchase that qualifies as a [signatureless transaction](#):

- a. Scroll down to RCPT LIMIT-C, and press **OK**.
The CUSTOMER RECEIPT BELOW FLOOR LMT? prompt appears.
- b. Press the **F3** key (NO).
The PRINTER CFG menu re-appears.

To print one or more personalized messages at the bottom of cardholder receipts :

- a. Scroll down to TRAILER MSG, and press **OK**.
The ACTIVE TRAILER MSG menu appears.
 - b. [Select and edit the trailer message](#) for cardholder receipts.
The PRINTER CFG menu re-appears.
- Press the **Can/Ann** key three times to return to the READY screen.

4.2.1 Select number of receipts printed for a transaction

There are five options:

Note: In order to produce cardholder receipt copies with [masked Card numbers](#), the terminal must print at least 2 COPIES.

| OPTION | DESCRIPTION |
|---------------|---|
| 1 COPY | PRINTS ONLY ONE COPY |
| 2 COPIES | PRINTS ONE CARDHOLDER AND ONE MERCHANT COPY |
| 2 COPIES OPTN | PRINTS THE FIRST COPY TO PRINT THE SECOND COPY, PRESS OK . TO CANCEL THE SECOND COPY, PRESS THE CAN/ANN KEY. |
| 3 COPIES | PRINTS ONE CARDHOLDER AND TWO MERCHANT COPIES |
| 3 COPIES OPTN | PRINTS TWO COPIES (ONE CARDHOLDER AND ONE MERCHANT COPY) TO PRINT THE THIRD COPY (ANOTHER MERCHANT COPY), PRESS OK . TO CANCEL THE THIRD COPY, PRESS THE CAN/ANN KEY. |

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4.2.2 Select and edit the trailer message for cardholder receipts

There are [10 Trailer Message options](#) available in each language.

Select one of the default messages (1 through 5) and edit it to suit your requirements or select a blank message (6 through 10) to create your own promotional message.

If you have customized a trailer message, you can [reset the message to the original text](#).

IMPORTANT: **If you edit or change an English trailer message, ensure that you also edit the corresponding French message. The trailer message that prints on the cardholder receipt is determined by the language on the card's magnetic stripe.**
For example: If you select Option 1 and replace 'xxxxxx' with your company name in the English message, make sure to replace the 'xxxxxx' in the French Option 1 message as well.

Note: *You can select more than one trailer message to print on your receipts.*

There are four lines per trailer message; each line can be from zero to 24 characters (if no double width is used) or from zero to 12 characters (if double width is used). All characters are allowed.

A. Select a trailer message option:

1. Scroll down to the option on the terminal, and press **OK**.
2. Select **ENABLED** (i.e. press **OK**).
3. Press the **F1** key to confirm that you wish to enable the trailer message.

B. Edit the trailer message option:

1. Scroll down to the line number and language you wish to edit (e.g. **LINE 3 ENGLISH**).
2. Press the **CORR** key. (This deletes the entire line.)

Note: *A single message line can be from zero to 24 characters (if no double width is used) or from zero to 12 characters (if double width is used). All characters are allowed.*

3. Key in the new text. (Refer to "[Entering alphabetic characters and punctuation](#)").

Note: *Once you have keyed in new text, you can use the **CORR** key to delete characters one at a time.*

4. Press **OK** to save the new line of text.

C. Format the font of the entire trailer message:

1. Scroll down to the format you wish to apply to all lines of the message (**BOLD**, **DOUBLE HEIGHT** or **DOUBLE WIDTH**) and press **OK**.
2. Press the **F1** key to apply the format.

D. Press the Can/Ann key four times to return to the READY screen.

4.2.3 Reset the trailer message to the original text

If you have edited a trailer message, you can reset the message to the [original text](#).

IMPORTANT: If you edit or change an English trailer message, ensure that you also edit the corresponding French message. The trailer message that prints on the cardholder receipt is determined by the language on the card's magnetic stripe.
 For example: If you reset Option 1 to the original English text, make sure to reset the French Option 1 message as well.

From the READY screen:

1. Press the **Admin** key.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to PRINTER CONFIG, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

The PRINTER CFG menu appears.

4. Scroll down to TRAILER MSG, and press **OK**.
The ACTIVE TRAILER MSG menu appears.
5. Select the trailer message option you wish to reset to the [original text](#):
 - a. Scroll down to the trailer message option, and press **OK**.
 - b. Scroll down and select INITIAL TEXT (i.e., press **OK**).
The RESET MSG TO ITS INITIAL TEXT? prompt appears.
 - c. Press the **F1** key (YES) to confirm that you wish to reset the trailer message to the [original text](#).
The ACTIVE TRAILER MSG menu re-appears.
6. Press the **Can/Ann** key four times to return to the READY screen.

4.2.4 Trailer Message Options

If the Language on the cardholder's card is ENGLISH OR the cardholder selected ENGLISH during the cardholder prompts, the [ENGLISH MESSAGE](#) selected will appear.

If the Language on the cardholder's card is FRENCH OR the cardholder selected FRANCAIS during the cardholder prompts, the [FRENCH MESSAGE](#) selected will appear.

English Trailer Messages

| OPTION | ENGLISH MESSAGES |
|----------------------|--|
| 1 HAPPY HOLID | HAPPY HOLIDAYS THANK YOU FOR SHOPPING AT XXXXXX |
| 2 SPECIAL OFF | SPECIAL OFFER ON YOUR NEXT VISIT PRESENT THIS RECEIPT AND RECEIVE A 10 PERCENT DISCOUNT |
| 3 XXXXXX | XXXXXX KEEP THIS RECEIPT FOR A REFUND WITHIN 14 DAYS |

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| OPTION | ENGLISH MESSAGES |
|----------------------|--|
| 4 MOTHERS DAY | MOTHERS DAY IS COMING RESERVE YOUR SPACE CALL XXX XXX XXXX TO AVOID DISAPPOINTMENT |
| 5 BACK TO SCH | BACK TO SCHOOL SPECIAL PRESENT THIS RECEIPT TO CLAIM A FREE BACKPACK WITH YOUR NEXT PURCHASE |
| 6 | [These messages are blank and can be used to create personalized messages for your cardholder receipts.] |
| 7 | |
| 8 | |
| 9 | |
| 10 | |

French Trailer Messages

| OPTION | FRENCH MESSAGES |
|----------------------|--|
| 1 HAPPY HOLID | JOYEUSES FETES MERCI DE MAGASINER CHEZ XXXXXX |
| 2 SPECIAL OFF | OFFRE SPECIALE RABAIS DE 10 POURCENT A LA PROCHAINE VISITE, PRESENTEZ CE RELEVE |
| 3 XXXXXX | XXXXXX POUR UN REMBOURSEMENT DELAI DE 14 JOURS, CONSERVEZ CE RELEVE. |
| 4 MOTHERS DAY | LA FETE DES MERES APPROCHE. RESERVEZ TOUT DE SUITE. APPELEZ AU XXX XXX XXXX |
| 5 BACK TO SCH | OFFER POUR LA RENTREE SAC A DOS GRATUIT AU PROCHAIN ACHAT, PRESENTEZ CE RELEVE. |

| OPTION | FRENCH MESSAGES |
|--------|--|
| 6 | [These messages are blank and can be used to create personalized messages for your cardholder receipts.] |
| 7 | |
| 8 | |
| 9 | |
| 10 | |

4.3 Disabling the Backlight

The Backlight can be disabled to reduce battery usage.

From the READY screen or the TERMINAL SETUP REQUIRED prompt:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll to ADMIN, and press **OK**.
The ADMIN FUNCS menu appears.
3. Scroll to BACKLIGHT, and press **OK**.
The BACKLIGHT menu appears.
4. Scroll to DISABLE, and press **OK** to turn the backlight off permanently.
The ADMIN FUNCS menu appears (and the backlight turns off).

Note: The backlight will no longer come on when the terminal keys are pressed.

5. Press the **Can/Ann** key twice to return to the READY screen or the TERMINAL SETUP REQUIRED prompt.

4.4 Configuring Corporate (Purchasing) Cards

Use this function to indicate the type of sales tax applied in your geographic location and enter your GST and provincial tax numbers as applicable. This will determine which tax type prompt appears during corporate card transactions and the tax number that appears on the monthly statements your corporate card customers receive.

From the READY screen:

1. Press the **Admin** key.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to PURCHASE CARD, and press **OK**.
The PURCHASING CRD menu appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

4. Press **OK** to select PURCHASE CARD.
The ENABLE PURCHASING CARD? prompt appears.
5. Press the **F1** key to select YES.
The PURCHASING CRD menu appears with additional items.
6. Scroll down to SALES TAX TYPE, and press **OK**.
The SALES TAX TYPE menu appears.
7. Scroll to the combination of taxes that you are required to charge, and press **OK**.
The PURCHASING CRD menu appears.

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8. Scroll down to MERCHNT GST NO, and press **OK**.
The MERCHANT GST NUMBER entry screen appears.

9. Key in your GST number, and press **OK**.
The PURCHASING CRD menu appears.

If necessary:

a. Scroll down to MERCHNT PST NO or MERCHNT QST NO, and press **OK**.

b. Key in your Provincial Tax number, and press **OK**.

The PURCHASING CRD menu appears.

10. Press the **Can/Ann** key three times to return to the READY screen.

The terminal is now ready to process financial transactions using [corporate \(purchasing\) Cards](#).

4.5 Configuring Private Label

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](#)

4.6 Configuring General Parameters

The General Parameters menu allows you to enable and configure the optional features on your terminal.

If you access a prompt and decide to keep the displayed value, simply press **OK** to keep that value and return to the previous menu.

Press the **Can/Ann** key repeatedly to return to the READY screen at any time.

From the READY screen OR the TERMINAL SETUP REQUIRED prompt:

1. Press the **Admin** key.

The MAIN MENU appears.

2. Scroll down to CONFIGURATION, and press **OK**.

The CONFIG FUNCS menu appears.

3. Scroll down to GENERAL PARAMS, and press **OK**.

The GENERAL PARAMETERS menu appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

To select the communications type:

a. Press **OK** to select COMMS TYPE.

b. Select the appropriate communication type.

***Note:** You may have to do some additional configuration depending on your communications requirements. Refer to [Communications Configuration](#) for an overview on configuring the communications parameters on the terminal.*

The GENERAL PARAMETERS menu reappears.

To enable the Declined Beep alert:

- a. Scroll down to DECLINED BEEP, and press **OK**.
The DECLINED AUDIBLE NOTIFICATION prompt appears.
- b. Press the **F1** key (YES) to enable Declined Beep.
The terminal beeps and then the GENERAL PARAMETERS menu reappears.

To enable Tip Reporting

(Enables option to record a Tip amount during Pre-Auth Completions (Advices) and prints a Tip amount line on Pre-Auth Completion receipts; enables Tip Totals report; enables option for completion or deletion of multiple Pre-Auths from list):

- a. Scroll down to TIP REPORTING, and press **OK**.
The ENABLE TIP REPORTING? prompt appears.
- b. Press the **F1** key (YES).
The GENERAL PARAMETERS menu reappears.

To enable Tip Entry:

- a. [Refer](#) to the "Configuring Tip Entry - Debit/Credit" procedure.

To define a default debit/credit Tip Percentage:

Note: For this feature to work, [debit/credit Tip Entry](#) must be also enabled.

- a. Scroll down to TIP PERCENTAGE, and press **OK**.
The ENTER TIP PERCENTAGE entry screen appears.

Note: If debit/credit Tip Entry is enabled, and the Tip Percentage value is set to "0," the cardholder will still be prompted to enter a Tip in percentage and/or dollars. (The cardholder may choose to enter nothing at all when prompted to enter Tip.)

- b. Key in a percentage value, and press **OK**.
The GENERAL PARAMETERS menu reappears.

To allow the terminal to process [Pre-Authorization transactions](#) using chip cards (credit and some debit cards) as well as magnetic stripe cards:

- a. Scroll down to CHIP PRE-AUTH, and press **OK**.
The CHIP CARD PRE-AUTH ALLOWED prompt appears.
- b. Press the **F1** key (YES) to use chip cards for Pre-Auth transactions.
Press the **F3** key (NO) to use only magnetic stripe cards for Pre-Auth transactions.
The GENERAL PARAMETERS menu reappears.

To enable the CASH BACK? prompt during Debit Purchase transactions:

- a. Scroll down to CASHBACK, and press **OK**.
The ENABLE CASH BACK? prompt appears.
- b. Press the **F1** key (YES) to have the CASH BACK? prompt appear.
Press the **F3** key (NO) to disable the CASH BACK? prompt.
The GENERAL PARAMETERS menu reappears.

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To set Cashback Preset Amount 1:

Note: The amount displayed is in dollars (cent values cannot be entered: e.g., 10 = \$10.00).

- a. Scroll down to C BACK AMT 1, and press **OK**.
The CASH BACK PRESET AMOUNT 1 entry screen appears.

Note: The Default amount is 10; the amount can range from 10 to 90.

- b. Key in the dollar value for Cash Back Preset Amount 1, and press **OK**.
The GENERAL PARAMETERS menu reappears.

To set Cashback Preset Amount 2:

Note: The amount displayed is in dollars (cent values cannot be entered: e.g., 20 = \$20.00.)

- a. Scroll down to C BACK AMT 2, and press **OK**.
The CASH BACK PRESET AMOUNT 2 entry screen appears.

Note: The Default amount is 20; the amount can be from 20 to 990.

- b. Key in the dollar value for Cash Back Preset Amount 2, and press **OK**.
The GENERAL PARAMETERS menu reappears.

Note: The amount that you key in must be less than and not equal to Preset Amount 3, but it must be greater than and not equal to Preset Amount 1.

Set Cashback Preset Amount 3:

(This can be used to set a third amount or allow a customer to enter a different amount)

a. To allow your customer to key in any other amount that is less than or equal to your Cashback Limit:

1. Scroll down to C BACK AMT 3, and press **OK**.
The CASH BACK PRESET AMOUNT 3 entry screen appears.
2. Select **OTHER** (press the **F1** key).
The GENERAL PARAMETERS menu reappears.

Note: The amount that the customer keys in at the **ENTER CASH BACK** entry screen cannot be greater than your set Cashback Limit.

b. To set a specific amount for Preset Amount 3:

Note: The Cashback Limit that you set does not apply to Amount 3. (For example, even if your Cashback Limit is set to \$40, you could still set Amount 3 to be any value from \$150 to \$990).

1. Scroll down to C BACK AMT 3, and press **OK**.
The CASH BACK PRESET AMOUNT 3 entry screen appears.

Note: The Default amount is 30; the amount can be from 30 to 990.

Note: The amount displayed is in dollars (cent values cannot be entered: e.g., 300 = \$300.00.)

2. Select **VALUE** (press the **F3** key).

Note: The amount that you key in for VALUE must be greater than and not equal to Preset Amount 2 and greater than and not equal to Preset Amount 1.

3. Key in the amount, and press **OK**.
The GENERAL PARAMETERS menu reappears.

To set the maximum Cashback amount that can be entered during debit Purchase transactions:

a. Scroll down to CASHBACK LIMIT, and press **OK**.
The CASH BACK LIMIT prompt appears.

Note: The default is 40.

b. Key in the maximum dollar amount that can be entered at the ENTER CASH BACK prompt, and press **OK**.
The GENERAL PARAMETERS menu reappears.

Note: The amount displayed is in dollars (cent values cannot be entered: e.g., 40 = \$40.00).

Note: The Cashback Limit amount only applies to Preset Amount 3 if the cardholder keys in an amount that is higher than the set Cashback Limit. However, if you set Preset Amount 3 to an amount that is higher than the Cashback Limit, that restriction will not apply.

To enable the ARE TOTALS BALANCED? prompt during the Close Batch transaction:

a. Scroll down to BALANCE PROMPT, and press **OK**.
The TOTALS BALANCED PROMPT? prompt appears.

b. Press the **F1** key (YES) to have the Balanced prompt appear.
Press the **F3** key (NO) to skip the Balanced prompt.

The GENERAL PARAMETERS menu reappears.

To enable the ENTER INVOICE NO prompt during all financial transactions:

a. Scroll down to INVOICE NUMBER, and press **OK**.
The ENABLE INVOICE NUMBER? prompt appears.

b. Press the **F1** key (YES) to have the Invoice Number prompt appear.
Press the **F3** key (NO) to skip the Invoice Number prompt.

The GENERAL PARAMETERS menu reappears.

To enable the TAKE MANUAL IMPRINT OF CARD AND PRESS OK prompt during financial transactions (e.g., credit) in which the Card number is manually entered:

a. Scroll down to TAKE IMPRINT, and press **OK**.
The TAKE IMPRINT MESSAGE? prompt appears.

b. Press the **F1** key (YES) to have the Take Imprint prompt appear.
Press the **F3** key (NO) to skip the Take Imprint prompt.

The GENERAL PARAMETERS menu reappears.

To set the default Province Code value for Cheque Authorization transactions using a driver's licence:

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- a. Scroll down to PROVINCE CODE, and press **OK**.
The DEFAULT PROVINCE CODE prompt appears.
- b. Key in the two-character alphanumeric Province code that will most likely be used during Cheque Authorization transactions using a driver's licence, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)

Note: The province codes are provided by the cheque authorization service.

The GENERAL PARAMETERS menu reappears.

To be able to identify a transaction (e.g., credit) as a Mail Order or Telephone Order during the transaction:

- a. Scroll down to MAIL/TEL ORDER, and press **OK**.
The MAIL/TEL ORDER TRANSACTIONS? prompt appears.
- b. Press the **F1** key (YES) to have the Mail/Tel item appear.
Press the **F3** key (NO) to leave the Mail/Tel item off.

The GENERAL PARAMETERS menu reappears.

To set the amount of terminal idle time before the green back light turns off automatically:

Note: Reducing the idle time before the backlight turns off can reduce battery usage and extend battery life.

- a. Scroll down to BACKLIGHT TIME, and press **OK**.
The BACKLIGHT OFF TIME IN SECONDS entry screen appears.
- b. Key in the number of seconds before the backlight turns off, and press **OK**.
(minimum is 15, maximum is 998, default is 60.)
To stop the backlight from turning off, key in the value 999, and press **OK**.

The GENERAL PARAMETERS menu reappears.

To adjust the level of contrast on the terminal display screen:

- a. Scroll down to CONTRAST, and press **OK**.
The CONTRAST menu appears.
- b. Scroll up (using the **F1** key) or down (using the **F3** key) to highlight the level of contrast, and press **OK**.
The lowest level of contrast is 5, the highest level of contrast is 10. The default is 10.

The GENERAL PARAMETERS menu reappears.

To enable the SWIPE ADMIN CARD prompt on all transactions on the REPORTS, ADMIN and CONFIGURATION menus:

- a. Scroll down to ADMIN PROTECT, and press **OK**.
The PROTECT ALL ADMIN OPTIONS? prompt appears.
- b. Press the **F1** key (YES) to have the [Admin card](#) prompt appear for all reporting, admin and configuration transactions.
Press the **F3** key (NO) to have the [Admin card](#) prompt appear only for those transactions that are required by Moneris.

The GENERAL PARAMETERS menu reappears.

4.7 Configuring Tip Entry - Debit/Credit

From the READY screen OR the TERMINAL SETUP REQUIRED prompt:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to GENERAL PARAMS, and press **OK**.
The GENERAL PARAMETERS menu appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

4. Scroll down to TIP ENTRY, and press **OK**.
The TIP ENTRY menu appears.
5. Depending on your requirements, do one of the following:

To disable the Tip Entry prompt:

- a. Scroll down to NO TIP, and press **OK**.
- b. Continue at step 6.

To enable the Tip Entry prompt:

- a. Scroll down to the card type (DEBIT only or DEBIT & CREDIT), and select the one for which the Tip Entry prompt should appear, and press **OK**.
The TIP ENTRY menu appears listing three Tip prompt formats.
- b. Scroll to a Tip Entry format (TIP BY AMOUNT or TIP BY PERCENT or TIP BY \$ AND %), and press **OK**.



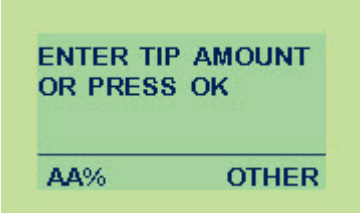
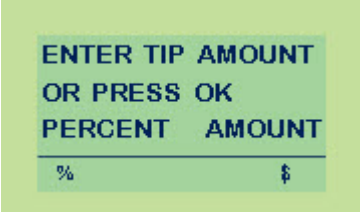
Note: To see how Tip Entry formats affect debit/credit [Tip prompting](#), refer to the "Tip Prompt Formats" table.

The TIP ENTRY menu appears.

- c. Continue at step 6.
6. Press the **Can/Ann** key repeatedly to return to the READY screen.

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4.7.1 Tip Prompt Formats

| Tip Prompt Format | What Happens During a debit/credit Purchase | Actual Tip Prompt/Screen |
|-------------------|--|--|
| TIP BY AMOUNT | The cardholder will be prompted to enter the Tip as a dollar amount only. (The cardholder may press OK to bypass entering a Tip during this prompt.) |  |
| TIP BY PERCENT | The cardholder will be prompted to enter a Tip as a percentage value only. (The cardholder may press OK to bypass entering a Tip during this prompt.) <i>Note:</i> If the <u>Tip Percentage</u> parameter is set as a value greater than zero, the value will appear beside the percent sign (e.g., 15%) during Tip prompting. |  |
| TIP BY \$ AND % | The cardholder will be prompted to enter the Tip as a percentage value or as a dollar amount. (The cardholder may press OK to bypass entering a Tip during one of the following prompts.) <i>Note:</i> If the <u>Tip Percentage</u> parameter is set to a value greater than zero, the cardholder will be prompted to enter the default value (AA%), or they may select OTHER and then enter their own percentage value or dollar amount. <i>Note:</i> If the Tip percentage parameter is set to zero, the cardholder will automatically be prompted to choose to enter their own Tip either as a percentage value or a dollar amount. |   |

4.8 Configuring Clerk Subtotals

To configure the terminal to perform Clerk Subtotalling:

Note: If you have more than one terminal, you must configure Clerk Subtotalling on each terminal individually.

1. [Enable Clerk Subtotalling](#).
2. [Configure the ENTER CLERK ID prompt](#).
3. [Identify the Clerk Entry Method](#).
4. [Allow Clerks to Zero Totals](#).

IMPORTANT: Clerk Subtotals must be cleared manually (by performing a [Clerk Subtotals Report](#)) 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.

5. [Add Clerk IDs](#).
 6. If you are using a Default Clerk ID, [enable the Default Clerk ID](#).
- You can now perform Clerk Subtotalling on your terminal.

4.8.1 Allow Clerks to Zero Totals

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to CLERK TOTALS, and press **OK**.
The MERCHANT ID entry screen appears.

If the SWIPE ADMIN CARD prompt appears, swipe your [POS Admin card](#).

4. Key in your Merchant ID, and press **OK**.
The CLERK SUBTTL CFG menu appears.
5. Scroll down to CLERK ZERO TTL, and press **OK**.
The CAN CLERK ZERO TOTALS? prompt appears.
6. Press the **F1** key (YES) to display the Zero Clerk Totals? prompt during the [Clerk Subtotals Inquiry](#). This allows terminal operators to reset the totals for their Clerk ID to zero.
OR
Press the **F3** key (NO) to skip the ZERO CLERK TOTALS? prompt during the [Clerk Subtotals Inquiry](#).
The CLERK SUBTTL CFG menu reappears.
7. Press the **Can/Ann** key repeatedly until the READY screen reappears.

4.8.2 Identify Clerk ID Entry Method

You must identify the method that will be used to enter the Clerk ID during transactions.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.

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2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to CLERK TOTALS, and press **OK**.
The MERCHANT ID entry screen appears.

If the SWIPE ADMIN CARD prompt appears, swipe your [POS Admin card](#).
4. Key in your Merchant ID, and press **OK**.
The CLERK SUBTTL CFG menu appears.
5. Scroll down to CLERK ENTRY, and press **OK**.
6. Select the method for entering the Clerk ID at the ENTER CLERK ID entry screen.
 - Select SWIPE/MANUAL to allow the use of Clerk ID cards and manually keyed in Clerk IDs
 - OR
 - Scroll down and select MANUAL if only manually entered Clerk IDs will be used
 - OR
 - Scroll down and select SWIPE if only Clerk ID cards will be used. You must now [identify the location](#) of the Clerk ID on the card stripe.The CLERK SUBTTL CFG menu reappears.
7. Press the **Can/Ann** key repeatedly until the READY screen reappears.

4.8.3 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 ENTER CLERK ID entry screen during transactions and will be used in Clerk Subtotals Reporting.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to CLERK MAINT, and press **OK**.
The CLRK MAINTCE(## PEND) menu appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

Note: (## PEND) indicates the number of Clerk IDs waiting to be processed.

4. Press **OK** to select ADD.
The ENTER CLERK ID TO BE ADDED entry screen appears.
5. Key in the Clerk ID, and press **OK**. (Min. 1, max. 6 characters. Any combination of numbers and letters. Refer to "[Entering alphabetic characters and punctuation](#)".)
The CLRK MAINTCE(## PEND) menu reappears.

To continue to add Clerk IDs, repeat steps 4 and 5.

You can add a maximum of 20 Clerk IDs at one time.

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

When all the Clerk IDs have been added:

6. Scroll down to FINISHED, and press **OK**.
The terminal communicates with the Moneris Host to add the Clerk IDs to the Host then returns to the READY screen.

4.8.4 Removing 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 ENTER CLERK ID entry screen during transactions and cannot be used in Clerk Subtotals Reporting.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to CLERK MAINT, and press **OK**.
The CLRK MAINTCE(## PEND) menu appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

Note: (## PEND) indicates the number of Clerk IDs waiting to be processed.

4. Scroll down to REMOVE, and press **OK**.
The ENTER CLERK ID TO BE REMOVED entry screen appears.
5. Key in the Clerk ID, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)
Min. 1, max. 6 characters. Any combination of numbers and letters.
The CLRK MAINTCE(## PEND) menu reappears.

To continue removing Clerk IDs, repeat steps 4 and 5.

You can remove a maximum of 20 Clerk IDs at one time.

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

When all the Clerk IDs have been removed:

6. Scroll down to FINISHED, and press **OK**.
The terminal communicates with the Moneris Host to remove the Clerk IDs from the Host then returns to the READY screen.

4.8.5 Enabling Clerk Subtotalling

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to CLERK TOTALS, and press **OK**.
The MERCHANT ID entry screen appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

4. Key in your Merchant ID, and press **OK**.
The CLERK SUBTTL CFG menu appears.
5. Select CLERK SUBTTL.
The ENABLE CLERK SUBTOTALLING prompt appears.
6. Press the **F1** key (YES) to enable Clerk Subtotalling.
The CLERK SUBTTL CFG menu reappears.
7. Press the **Can/Ann** key repeatedly until the READY screen reappears.

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4.8.6 Enabling the Clerk ID Prompt

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to CLERK TOTALS, and press **OK**.
The MERCHANT ID entry screen appears.

If the SWIPE ADMIN CARD prompt appears, swipe your [POS Admin card](#).

4. Key in your Merchant ID, and press **OK**.
The CLERK SUBTTL CFG menu appears.
5. Scroll down to PROMPT CLERK, and press **OK**.
The PROMPT FOR CLERK ID? prompt appears.
6. Press the **F1** key (Yes) to enable the Clerk ID prompt for all transactions.

*Note: If you are using a Default Clerk ID, you must press the **F3** key (NO) to disable this prompt.*

The CLERK SUBTTL CFG menu reappears.

7. Press the **Can/Ann** key repeatedly until the READY screen reappears.

4.8.7 Enabling the Default Clerk ID

The [Clerk ID prompt](#) must be disabled.

You must [add the Default Clerk ID](#) to the terminal before enabling it.

The ENTER CLERK ID entry screen will not appear during transactions when the Default Clerk ID is enabled.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to DEFAULT CLERK, and press **OK**.
The ENTER CLERK ID entry screen appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

4. Key in the Clerk ID to be used as the default, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)
The READY screen reappears.

4.8.8 Identifying the Clerk ID Location

From the CLERK SUBTTL CFG menu:

- a. Select DATA LOCATION.
- b. Select the location:

Note: This information is provided by the card manufacturer.

TRACK 1
 TRACK 2 (This is the default selection.)
 NAME

The CLERK SUBTTL CFG menu reappears.

4.9 Configuring Multi-terminal Reporting

You must perform this configuration on every terminal you wish to include in the [Multi-Terminal Report](#). This configuration enables Multi-Terminal Reporting and assigns a [terminal name](#) to the terminal.

4.9.1 Enabling Multi-Terminal Reporting

From the READY screen:

Note: The terminal must be [registered](#) to a communications base and [logged on](#) before performing this configuration.

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to MULTI TERM CFG, and press **OK**.
The MULTIPLE TERM TRANSACTION? prompt appears.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.
4. Press the **F1** key to select YES.
The MERCHANT TERMINAL NAME entry screen appears.
5. Key in the [terminal name](#) (max. 6 characters) and press **OK**. (Refer to [Entering Alphanumeric Characters](#)).
The ALLOW CLOSE BY ADMIN 99? prompt appears.
6. If you wish to:
 - use the [Multi-Terminal Report](#) function to remotely close the batch for this terminal, press the **F1** key to select YES.
 - use only the Close Batch transaction to close the batch on this terminal, press the **F3** key to select NO.
 The terminal communicates with the Moneris Host then returns to the READY screen.

4.9.2 Disabling Multi-terminal Reporting

Follow steps 1 through 5 above. At step 6, press the **F3** key to select NO. The terminal communicates with the Moneris Host then returns to the READY screen.

The terminal can no longer be closed from another terminal and cannot close other terminals.

4 Configuring Your Terminal

4.9.3 Changing the Terminal Name

Use this function to assign a different terminal name to a terminal that has [Multi-Terminal Report](#) enabled on it.

From the READY screen:

Note: The terminal must be [logged on](#) before performing this configuration.

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to MULTI TERM CFG, and press **OK**.
The MULTIPLE TERM TRANSACTION? entry screen appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

4. Press the **F1** key to select YES.
The MERCHANT TERMINAL NAME entry screen appears with the existing terminal name displayed in the bottom right corner of the screen.
5. Press the **CORR** key to clear the existing terminal name.
6. Key in the new terminal name (max. 6 characters) and press **OK**. (Refer to "[Entering Alphabetic Character and Punctuation](#)".)
The ALLOW CLOSE BY ADMIN 99? prompt appears.
7. If you wish to:
 - use the [Multi-Terminal Report](#) function to remotely close the batch for this terminal, press the **F1** key to select YES.
 - use only the Close Batch function to close the batch on this terminal, press the **F3** key to select NO.The terminal communicates with the Moneris Host then returns to the READY screen.

4.9.4 Deleting the Terminal Name

To delete a terminal name, simply disable the [Multi-terminal Report](#) function on the terminal.

Note: Once the terminal name is deleted, the terminal can no longer be closed using the Multi-Terminal Report function.

From the READY screen:

Note: The terminal must be [logged on](#) before performing this configuration.

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Scroll down to MULTI TERM CFG, and press **OK**.
The MULTIPLE TERM TRANSACTION? prompt appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

4. Press the **F3** key to select NO.
The terminal communicates with the Moneris Host then returns to the READY screen.
- The terminal name has now been removed from the Moneris Host and the terminal can no longer be closed using the [Multi-terminal Report](#) function.

4.10 Configuring Cheque Authorization

The terminal does not require additional configuration in order to process Cheque Authorizations. However, before performing Cheque Authorizations you must:

- contact Moneris to obtain a list of Cheque Authorization service providers.
- contact a Cheque Authorization service 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](#)

If the Cheque Authorization service requires the entry of a province code for Cheque Authorizations using a drivers' licence, you may wish to [configure a default province code](#) to avoid having to enter it each time.

4.11 Initialization

This function sends information about the terminal to the Moneris 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.

From time to time, the Moneris Merchant Service Centre may ask you to re-initialize your terminal if changes have been made to your terminal or your merchant account. Follow the [Re-initialization](#) instructions below.

The handheld terminal does not need to be sitting on a base (communications or charge-only) during initialization; however, it is recommended.

4.11.1 First Initialization

This function **MUST** be performed once, after completing configuration, in order to use your terminal to process transactions.

- Note:* Before attempting this transaction, ensure that :
- the [Communications parameters](#) have been configured.
 - the terminal has been [registered](#) to a communications base.

From the TERMINAL SETUP REQUIRED prompt:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Press **OK** to select INITIALIZATION.
The MERCHANT ID entry screen appears.
4. Key in your Moneris Merchant ID, and press **OK**.
The PHONE NUMBER entry screen appears.
5. If you are using dial communications: Key in the Initialization Phone Number, and press **OK**.
If you are using Ethernet communications: simply press **OK**.
The terminal communicates with the Moneris Host. This may take a few minutes.
6. The [PLEASE LOGON](#) prompt appears.

4 Configuring Your Terminal

4.11.2 Re-initialization

The Moneris Merchant Service Centre may ask you to re-initialize your terminal from time to time.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to CONFIGURATION, and press **OK**.
The CONFIG FUNCS menu appears.
3. Press **OK** to select INITIALIZATION.
The RETAIN CURRENT MERCH SETTINGS? prompt appears.

If the SWIPE ADMIN CARD prompt appears instead, swipe the POS Admin card.

4. Press the **F1** key to select YES.

IMPORTANT: Do NOT select NO unless instructed to do so by a Moneris Service Centre representative.

5. Please wait while the terminal communicates with the Moneris Host. This may take a few minutes.

The CLEAR TERMINAL STORAGE? prompt appears.

6. Press the **F3** key to select NO.

IMPORTANT: Do NOT select YES unless instructed to do so by a Moneris Service Centre representative. Selecting YES will erase all the transaction information from the terminal memory.

The [PLEASE LOGON](#) prompt appears.

4.12 Restore Factory Defaults

IMPORTANT: Do NOT use this function unless directed to do so by the Moneris Merchant Service Centre.

This function returns the terminal's parameters to the original factory settings.

4.13 Remote Code Download

IMPORTANT: Do NOT use this function unless directed to do so by the Moneris Merchant Service Centre.

5 Financial Transactions

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

The Moneris Mobile 8200 point-of-sale terminal can process a variety of financial transactions on cards including debit cards, magnetic stripe credit cards, chip cards, private label credit cards and purchasing/corporate cards.

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](#).

5.1 Payment Types

5.1.1 Credit Transactions

The terminal processes the following credit card transactions:

- [Purchase](#)
- [Purchase-Void](#)
- [Refund](#)
- [Refund-Void](#)
- [Pre-Authorization](#)
- [Pre-Auth Advice](#)
- [Force Post](#) (Advice-Voice Authorization)
- [Private Label Payment](#)
- [Private Label Payment-Void](#)

Note: All transactions may also be processed as [Mail Order/Telephone Order](#) transactions.

The terminal can process the following types of credit cards:

- Standard credit cards (e.g., MasterCard, Visa, AMEX and others depending on the services for which you are registered).
- [Corporate \(purchasing\) cards](#) if you are already processing the same standard card. For example, if you can process VISA cards, you can also process VISA Corporate cards. Refer to "Corporate Card Purchase" for detailed instructions.
- [Private label cards](#). These require additional agreements with Moneris and a private label provider depending on the card(s) you wish to process.

5 Financial Transactions

5.1.2 Debit Transactions

The terminal processes the following transactions for debit:

Note: *Some debit chip cards may be used to process these transactions as [Mail Order/Telephone Order](#) transactions.*

- [Purchase](#)
- [Purchase-Void](#) (Purchase Correction)
- [Refund](#)
- [Refund-Void](#) (Refund Correction)
- Some debit chip cards may also be used to process:
 - [Pre-Authorization](#)
 - [Pre-Auth Advice](#)
 - [Force Post](#) (Advice-Voice Authorization)
 - [Private Label Payment](#)
 - [Private Label Payment-Void](#)

To process a Debit Transaction:

- the cardholder swipes their card through the magnetic stripe reader or inserts their card into the chip reader on the terminal
- the debit cardholder **MUST** key in their own PIN (Personal Identification number) on the terminal .

IMPORTANT: For security reasons, please respect the cardholder's privacy while they enter their PIN and encourage them to protect their PIN.

5.2 Card Functionality

Depending on the card issuer, a payment card may incorporate Chip and/or Stripe and/or Contactless functionality. The card entry method at the POS (see below) determines which functionality is used and how the card interfaces with the POS device.

5.2.1 Card Entry at the POS

To use [Chip functionality](#):



When the SWIPE OR INSERT CARD prompt displays , you or the customer insert the card into the terminal chip reader. (For more information about using chip cards, refer to "Using a Chip Cards on the Mobile 8200 .")

To use [Stripe functionality](#):



When the SWIPE CARD prompt or the SWIPE OR INSERT CARD prompt displays , swipe the card on the terminal's magnetic stripe reader. (For more information about using stripe cards, refer to "The Magnetic Stripe Reader on the Handheld Terminal.")

Note: *Contactless functionality is not available on the 8200 terminal.*

Manual Entry: If all available Card Entry methods fail, you may manually enter the Card number for credit cards and some debit chip cards: When SWIPE CARD or SWIPE OR INSERT CARD displays, simply key in the Card number on the terminal, and press **OK**.

5.3 Transaction Flows in v6.xx and above

To reduce the number of times the terminal is handed to the cardholder for their input (e.g. Tip amount entry, PIN entry, etc.), the terminal begins at the ENTER AMOUNT entry screen. To begin a credit, debit or chip Purchase transaction simply key in the dollar amount, and then swipe the credit or debit card, or insert the chip card. The terminal can determine the card type (i.e., debit, credit, or chip) from the information on the card's magnetic stripe or chip.

5.4 Transaction Guidelines

To process financial transactions, you will follow these general guidelines:

1. [Determine the transaction](#) to be processed (e.g., Purchase or Refund).
2. Establish the means of payment, i.e., [credit](#) or [debit](#).
3. [Enter the card data on the POS device](#) (refer to "Card Entry at the POS.")
4. Follow the terminal prompts. (Refer to individual financial transaction procedures).*
5. [Process receipts](#).

* These variables affect which transaction prompts you and the cardholder will see:

- Terminal and merchant setup.
- Transaction type (e.g., Purchase or Refund).
- [Card functionality](#) (i.e., stripe or chip).
- [Card Entry method at the POS](#) (e.g., swipe, insert or manually enter).
- Payment type (i.e., credit or debit)

1 Some debit cards may initiate Cashback and/or Tip, and/or Account & PIN prompting after the terminal has been returned to you, which means you will have to hand the terminal back to the cardholder.

5.5 Credit and Debit Transactions

5.5.1 Purchase

- Note:**
- The cardholder may be prompted for input under the following circumstances: 1) If a chip card is used; 2) If a debit card is swiped or inserted; or 3) If [Tip Entry](#) or [Cashback](#) is enabled.
 - If a [Corporate \(purchasing\) credit card](#) is used, you may be prompted to enter Tax data.
 - If a [Private label credit card](#) is used, you may be prompted to enter a Promo code.

From the [READY](#) screen:

1. Key in the amount of the Purchase, and press **OK**.



If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

If the [ENTER INVOICE NO](#) entry screen appears, refer to the "Entering the Invoice Number" procedure.

The SWIPE OR INSERT CARD prompt appears.

2. Enter the card on the terminal:

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| <p style="text-align: center;"><u>swipe</u></p>  | <p style="text-align: center;"><u>insert</u></p>  | <p style="text-align: center;">manually enter (credit and some debit chip cards)</p> |
|--|---|---|
| <p>a. Swipe the card on the terminal .</p> <p>If the ENTER LAST 4 DIGITS entry screen appears , key in the last 4 digits of the Card number, and press OK.</p> <p>If ##### PRESS [OK] appears , confirm that the displayed Card number is the same number on the card. Press OK.</p> <p>b. Continue below at step 3.</p> | <p>a. You or the cardholder must insert the card into the terminal chip reader .</p> <p>IMPORTANT: Leave the chip card in the reader for the entire transaction.</p> <p>b. Continue below at step 3.</p> | <p>a. Key in the Card number, and press OK.</p> <p>The ENTER EXPIRY DATE entry screen appears .</p> <p>b. Key in the Expiry date, and press OK.</p> <p>If <u>MAIL/TEL</u> options appear , refer to the "Transaction with MOTO Enabled" procedure.</p> <p>If the <u>TAKE MANUAL IMPRINT OF CARD AND PRESS OK</u> prompt appears , refer to the "Taking a Manual Imprint of a Card" procedure.</p> <p>c. Continue below at step 3.</p> |

3. Please wait while the terminal processes the transaction:

If the CUSTOMER PRESS OK TO CONTINUE prompt appears , refer to the "Cardholder Prompts" procedure.

If the ENTER PROMO CODE entry screen appears , refer to the "Entering the Promo Code" procedure.

If the ENTER INVOICE NO entry screen appears , refer to the "Entering the Invoice Number" procedure.

If the ENTER XXX AMOUNT entry screen appears (XXX is the tax type, e.g. GST) , refer to the "Entering Reporting Data for Transaction with Purchasing Card" procedure.

If an APPROVED message appears, go to step 4.

***Note:** For some debit cards, the CUSTOMER PRESS OK TO CONTINUE prompt may appear again. If this happens, simply hand the terminal back the cardholder, who may then be prompted to select a Cashback amount, key in a Tip, select a debit account, or key in their PIN.*

4. When an APPROVED message appears , process the receipts that are printed (if any). (Refer to the "Receipt Processing" procedure.)

***Note:** If REMOVE CARD appears in any message, you or the cardholder must remove the card from the chip reader.*

APPROVED ##### OBTAIN SIGNATURE

APPROVED ##### REMOVE CARD

APPROVED ##### GIVE CUST COPY

APPROVED #####

5.5.2 Purchase-Void

This transaction (also known as a Purchase Correction) is used only when a Purchase transaction was entered incorrectly and needs to be cancelled.

IMPORTANT: **This transaction must be processed for the full amount of the original Purchase, and it must be processed in the same batch as the original Purchase.**

Note: - If a debit card is used, the cardholder may be prompted to select an Account and enter a PIN.
 - If a [Corporate \(purchasing\) credit card](#) is used, you may be prompted to enter Tax data.
 - If a [Private label credit card](#) is used, you may be prompted to enter a Promo code.

From the [READY](#) screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Press **OK** to select TRANSACTIONS.
The TRANSACTIONS menu appears.
3. Scroll down to VOID-PURCHASE, and press **OK**.
The SWIPE ADMIN CARD prompt appears.
4. Swipe the [POS Admin card](#).
The ENTER AMOUNT entry screen appears.
5. Key in the amount of the Purchase to be voided, and press **OK**.

IMPORTANT: **This transaction must be processed for the full amount of the original Purchase.**

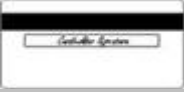

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

If the [ENTER INVOICE NO](#) entry screen appears, refer to the "Entering the Invoice Number" procedure.

The SWIPE OR INSERT CARD prompt appears.

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6. Enter the card on the terminal:

| <p style="text-align: center;"><u>swipe</u></p>  | <p style="text-align: center;"><u>insert</u></p>  | <p style="text-align: center;">manually enter (credit and some debit chip cards)</p> |
|---|--|--|
| <p>a. Swipe the card on the terminal .</p> <p>If the ENTER LAST 4 DIGITS entry screen appears , key in the last 4 digits of the Card number, and press OK.</p> <p>If ##### PRESS [OK] appears , confirm that the displayed Card number is the same number on the card. Press OK.</p> <p>The ENTER ORIGINAL AUTHORIZATION # entry screen appears .</p> <p>b. Key in the Auth # found on the Purchase receipt, and press OK.</p> <p>IMPORTANT: Enter an Original Authorization number that exists in the current Batch.</p> <p>c. Continue below at step 7.</p> | <p>a. You or the cardholder must insert the card into the terminal chip reader .</p> <p>IMPORTANT: Leave the chip card in the reader for the entire transaction.</p> <p>If the <u>SELECT <Application name></u> prompt appears , refer to the "Selecting the Chip Card Application" procedure.</p> <p>The ENTER ORIGINAL AUTHORIZATION # entry screen appears .</p> <p>b. Key in the Auth # found on the Purchase receipt, and press OK.</p> <p>IMPORTANT: Enter an Original Authorization number that exists in the current Batch.</p> <p>c. Continue below at step 7.</p> | <p>a. Key in the Card number, and press OK.</p> <p>The ENTER EXPIRY DATE entry screen appears .</p> <p>b. Key in the Expiry date, and press OK.</p> <p>If <u>MAIL/TEL</u> options appear , refer to the "Transaction with MOTO Enabled" procedure.</p> <p>If the <u>TAKE MANUAL IMPRINT OF CARD AND PRESS OK</u> prompt appears , refer to the "Taking a Manual Imprint of a Card" procedure.</p> <p>The ENTER ORIGINAL AUTHORIZATION # entry screen appears .</p> <p>c. Key in the Auth # found on the Purchase receipt, and press OK.</p> <p>IMPORTANT: Enter an Original Authorization number that exists in the current Batch.</p> <p>d. Continue below at step 8.</p> |

7. The prompt listed below may appear:

If CUSTOMER PRESS OK TO CONTINUE appears, refer to the "Cardholder Prompts" procedure.

8. Please wait while the terminal processes the transaction. Some of the prompts listed below may appear :

If ENTER PROMO CODE appears, refer to the "Entering the Promo Code" procedure.

If ENTER INVOICE NO appears, refer to the "Entering the Invoice Number" procedure.

If [ENTER XXX AMOUNT](#) appears (XXX is the tax type, e.g. GST), refer to the "Entering Reporting Data for Transaction with Purchasing Card" procedure.

9. The terminal communicates with the Moneris Host, and then one of the following APPROVED messages appears depending on the Card Entry method or Payment type:

If APPROVED ##### MERCHANT COPY appears, press **OK**. A receipt prints.

If APPROVED ##### GIVE CUST COPY appears, press **OK**. A receipt prints.

10. [Process receipts](#). (Refer to the "Receipt Processing" procedure.)

5.5.3 Refund

Credit: Use this transaction to credit a cardholder's account for all or a portion of a previous credit Purchase (e.g., when they return merchandise).

Debit: Use this transaction to return money to a cardholder's account for a portion of the previous debit Purchase (e.g., when they return merchandise).

Note:

- If a debit card is swiped or inserted, the cardholder may be prompted to select an Account and enter a PIN.
- If a [Corporate \(purchasing\) credit card](#) is used, you may be prompted to enter Tax data.
- If a [Private label credit card](#) is used, you may be prompted to enter a Promo code.

From the [READY](#) screen:

1. Press the **Admin** key.

The MAIN MENU appears.

2. Press **OK** to select TRANSACTIONS.

The TRANSACTIONS menu appears.

3. Scroll down to REFUND, and press **OK**.

The SWIPE ADMIN CARD prompt appears.

4. Swipe the [POS Admin card](#).

The ENTER AMOUNT entry screen appears.

5. Key in the amount of the Purchase to be refunded, and press **OK**.

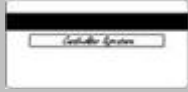

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

If the [ENTER INVOICE NO](#) entry screen appears, refer to the "Entering the Invoice Number" procedure.

The SWIPE OR INSERT CARD prompt appears .

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6. Enter the card on the terminal:

| <p style="text-align: center;"><u>swipe</u></p>  | <p style="text-align: center;"><u>insert</u></p>  | <p style="text-align: center;">manually enter (credit and some debit chip cards)</p> |
|--|---|--|
| <p>a. Swipe the card on the terminal .</p> <p>If the ENTER LAST 4 DIGITS entry screen appears , key in the last 4 digits of the Card number, and press OK.</p> <p>If ##### PRESS [OK] appears , confirm that the displayed Card number is the same number on the card. Press OK.</p> <p>If the ENTER ORIGINAL AUTHORIZATION # entry screen appears , key in the Auth # found on the Purchase receipt, and press OK.</p> <p>b. Continue below at step 7.</p> | <p>a. You or the cardholder must insert the card into the terminal chip reader .</p> <p>IMPORTANT: Leave the chip card in the reader for the entire transaction.</p> <p>If the <u>SELECT <Application name></u> prompt appears , refer to the "Selecting the Chip Card Application" procedure.</p> <p>If the ENTER ORIGINAL AUTHORIZATION # entry screen appears , key in the Auth # found on the Purchase receipt, and press OK.</p> <p>b. Continue below at step 7.</p> | <p>a. Key in the Card number, and press OK.</p> <p>The ENTER EXPIRY DATE entry screen appears .</p> <p>b. Key in the Expiry date, and press OK.</p> <p>If <u>MAIL/TEL</u> options appear , refer to the "Transaction with MOTO Enabled" procedure.</p> <p>If the <u>TAKE MANUAL IMPRINT OF CARD AND PRESS OK</u> prompt appears , refer to the "Taking a Manual Imprint of a Card" procedure.</p> <p>The ENTER ORIGINAL AUTHORIZATION # entry screen appears .</p> <p>c. Key in the Auth # found on the Purchase receipt, and press OK.</p> <p>d. Continue below at step 8.</p> |

7. The prompt listed below may appear:

If CUSTOMER PRESS OK TO CONTINUE appears , refer to the “Cardholder Prompts” procedure.

8. Please wait while the terminal processes the transaction. Some of the prompts listed below may appear :

If ENTER PROMO CODE appears , refer to the "Entering the Promo Code" procedure.

If ENTER INVOICE NO appears , refer to the "Entering the Invoice Number" procedure.

If ENTER XXX AMOUNT appears (XXX is the tax type, e.g. GST) , refer to the "Entering Reporting Data for Transaction with Purchasing Card" procedure.

9. The terminal communicates with the Moneris Host, and then one of the following APPROVED messages appears depending on the Card Entry method or Payment type:

If APPROVED ##### MERCHANT COPY appears, press **OK**. A receipt prints.

If APPROVED ##### GIVE CUST COPY appears, press **OK**. A receipt prints.

10. [Process receipts](#). (Refer to the "Receipt Processing" procedure.)

5.5.4 Refund-Void

This transaction (also known as a Refund Correction) is used only when a Refund transaction was entered incorrectly and needs to be cancelled.

IMPORTANT: **This transaction must be processed for the full amount of the original Refund, and it must be processed in the same batch as the original Refund.**

Note: - If a debit card is used, the cardholder may be prompted to select an Account and enter a PIN.
 - If a [Corporate \(purchasing\) credit card](#) is used, you may be prompted to enter Tax data.
 - If a [Private label credit card](#) is used, you may be prompted to enter a Promo code.

From the [READY](#) screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Press **OK** to select TRANSACTIONS.
The TRANSACTIONS menu appears.
3. Scroll down to VOID-REFUND, and press **OK**.
The SWIPE ADMIN CARD prompt appears.
4. Swipe the [POS Admin card](#).
The ENTER AMOUNT entry screen appears.
5. Key in the amount of the Refund to be voided, and press **OK**.

IMPORTANT: **This transaction must be processed for the full amount of the original Refund.**



If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

If the [ENTER INVOICE NO](#) entry screen appears, refer to the "Entering the Invoice Number" procedure.

The SWIPE OR INSERT CARD prompt appears.

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6. Enter the card on the terminal:

| <p style="text-align: center;"><u>swipe</u></p>  | <p style="text-align: center;"><u>insert</u></p>  | <p style="text-align: center;">manually enter (credit and some debit chip cards)</p> |
|---|--|--|
| <p>a. Swipe the card on the terminal .</p> <p>If the ENTER LAST 4 DIGITS entry screen appears , key in the last 4 digits of the Card number, and press OK.</p> <p>If ##### PRESS [OK] appears , confirm that the displayed Card number is the same number on the card. Press OK.</p> <p>The ENTER ORIGINAL AUTHORIZATION # entry screen appears .</p> <p>b. Key in the Auth # found on the Refund receipt, and press OK.</p> <p>IMPORTANT: Enter an Original Authorization number that exists in the current Batch.</p> <p>c. Continue below at step 7.</p> | <p>a. You or the cardholder must insert the card into the terminal chip reader .</p> <p>IMPORTANT: Leave the chip card in the reader for the entire transaction.</p> <p>If the <u>SELECT <Application name></u> prompt appears , refer to the "Selecting the Chip Card Application" procedure.</p> <p>The ENTER ORIGINAL AUTHORIZATION # entry screen appears .</p> <p>b. Key in the Auth # found on the Refund receipt, and press OK.</p> <p>IMPORTANT: Enter an Original Authorization number that exists in the current Batch.</p> <p>c. Continue below at step 7.</p> | <p>a. Key in the Card number, and press OK.</p> <p>The ENTER EXPIRY DATE entry screen appears .</p> <p>b. Key in the Expiry date, and press OK.</p> <p>If <u>MAIL/TEL</u> options appear , refer to the "Transaction with MOTO Enabled" procedure.</p> <p>If the <u>TAKE MANUAL IMPRINT OF CARD AND PRESS OK</u> prompt appears , refer to the "Taking a Manual Imprint of a Card" procedure.</p> <p>The ENTER ORIGINAL AUTHORIZATION # entry screen appears .</p> <p>c. Key in the Auth # found on the Refund receipt, and press OK.</p> <p>IMPORTANT: Enter an Original Authorization number that exists in the current Batch.</p> <p>d. Continue below at step 8.</p> |

7. The prompt listed below may appear:

If CUSTOMER PRESS OK TO CONTINUE appears, refer to the “Cardholder Prompts” procedure.

8. Please wait while the terminal processes the transaction. Some of the prompts listed below may appear :

If ENTER PROMO CODE appears, refer to the "Entering the Promo Code" procedure.

If ENTER INVOICE NO appears, refer to the "Entering the Invoice Number" procedure.

If [ENTER XXX AMOUNT](#) appears (XXX is the tax type, e.g. GST), refer to the "Entering Reporting Data for Transaction with Purchasing Card" procedure.

9. The terminal communicates with the Moneris Host, and then one of the following APPROVED messages appears depending on the Card Entry method or Payment type:

If APPROVED ##### OBTAIN SIGNATURE appears, press **OK**. A receipt prints.

If APPROVED ##### GIVE CUST COPY appears, press **OK**. A receipt prints.

10. [Process receipts](#). (Refer to the "Receipt Processing" procedure.)

5.5.5 Pre-Authorizations and Completions (Advices)

A Pre-Authorization transaction starts the purchase process by confirming that the Pre-authorization amount is available on the card and then placing a hold on that amount. This is useful if the final amount of the transaction is not known. An Advice transaction completes or cancels a Pre-Authorization. Once the final amount of the Purchase transaction is known, an Advice transaction **MUST** be performed to complete the Purchase process and transfer those funds to your business account.

Note: If you processed a Pre-Authorization transaction and no longer need to complete it (e.g. the cardholder chose another method of payment when the final amount was known) you can remove the Pre-Auth from the terminal memory by deleting or cancelling it to ensure that it is not completed accidentally.

Pre-Authorizations

Pre-Authorization transactions are commonly used in hotel, restaurant and car rental environments where the final amount of the sale is unknown when the card is first swiped. In these service-based environments, the Pre-Authorization transaction is often [set as the default](#) transaction started from the READY screen.

Note: Pre-Authorizations can only be performed using chip functionality if the [CHIP CARD PRE-AUTH](#) parameter is set to YES on the terminal.

You can process a [Pre-Authorization](#) from the (Purchase default) [READY screen](#).

OR

You can process a [Pre-Authorization](#) from the (Pre-Auth default) [READY screen](#).

Pre-Auth Completion (Advice)

If [Tip Reporting](#) is enabled, you can:

- Complete , or cancel, the Pre-Auth from an [Advice List](#).

If Tip Reporting is disabled, you can:

- Complete or cancel the transaction by using the Pre-Auth's [Original Sequence number](#).
- Delete the transaction by performing a [Transaction Inquiry](#).

Pre-Authorization

Note:

- If a chip card is used, the cardholder may be prompted to enter a PIN.
- If a [Private label credit card](#) is used, you may be prompted to enter a Promo code.
- Some debit chip cards may be used for this transaction.

From the [READY screen](#):

1. Press the **Admin** key.
The MAIN MENU appears.

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2. Press **OK** to select TRANSACTIONS.

The TRANSACTIONS menu appears.

3. Scroll down to PRE-AUTH., and press **OK**.

If the [ENTER CLERK ID](#) entry screen appears , refer to the "Entering the Clerk ID" procedure.



If the [ENTER INVOICE NO](#) entry screen appears , refer to the "Entering the Invoice Number" procedure.

The ENTER AMOUNT entry screen appears.

4. Key in the amount of the Pre-Auth, and press **OK**.

The SWIPE OR INSERT CARD prompt appears.

5. Enter the card on the terminal :

| <p style="text-align: center;">swipe</p>  | <p style="text-align: center;">insert</p>  | <p style="text-align: center;">manually enter (credit and some debit chip cards)</p> |
|--|---|---|
| <p>a. Swipe the card on the terminal .</p> <p>If the ENTER LAST 4 DIGITS entry screen appears , key in the last 4 digits of the Card number, and press OK.</p> <p>If ##### PRESS [OK] appears , confirm that the displayed Card number is the same number on the card. Press OK.</p> <p>b. Continue below at step 6.</p> | <p>a. You or the cardholder must insert the card into the terminal chip reader .</p> <p>IMPORTANT: Leave the chip card in the reader for the entire transaction.</p> <p>b. Continue below at step 6.</p> | <p>a. Key in the Card number, and press OK.</p> <p>The ENTER EXPIRY DATE entry screen appears .</p> <p>b. Key in the Expiry date, and press OK.</p> <p>If MAIL/TEL options appear , refer to the "Transaction with MOTO Enabled" procedure.</p> <p>If the TAKE MANUAL IMPRINT OF CARD AND PRESS OK prompt appears , refer to the "Taking a Manual Imprint of a Card" procedure.</p> <p>c. Continue below at step 6.</p> |

6. The prompt listed below may appear:

If the [CUSTOMER PRESS OK TO CONTINUE](#) prompt appears, refer to the "Cardholder Prompts" procedure.

7. Please wait while the terminal processes the transaction. Some of the prompts listed below may appear :

If the [ENTER PROMO CODE](#) entry screen appears, refer to the "Entering the Promo Code" procedure.

If the [ENTER INVOICE NO](#) entry screen appears, refer to the "Entering the Invoice Number" procedure.

8. The terminal communicates with the Moneris Host, and then one of the following APPROVED messages appears depending on the Card Entry method:

If APPROVED ##### OBTAIN SIGNATURE appears, press **OK**. A receipt prints.

If APPROVED ##### MERCHANT COPY appears, press **OK**. A receipt prints.

9. [Process receipts](#). (Refer to the "Receipt Processing" procedure.)

Note: You must perform a Pre-Auth Advice transaction (using the [sequence number](#) or the [Advice List](#)) to complete this transaction, or alternatively you may use the Advice List to delete or cancel the transaction. You may also delete the Pre-Auth by performing a [Transaction Inquiry](#).

Note: If the Pre-Auth is cancelled, the hold on the cardholder's funds is immediately released. If the Pre-Auth is deleted, the hold is NOT immediately released.

Note: The Pre-Auth Advice must be performed on the same handheld terminal as the original Pre-Authorization transaction.

Pre-Authorization as Default

Note:

- If a chip card is used, the cardholder may be prompted to enter a PIN.
- If a [Private label credit card](#) is used, you may be prompted to enter a Promo code.
- Some debit chip cards may be used for this transaction.

From the [\(PRE-AUTH\) READY](#) screen:

1. Key in the amount of the Pre-Auth, and press **OK**.



If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

If the [ENTER INVOICE NO](#) entry screen appears, refer to the "Entering the Invoice Number" procedure.

The SWIPE OR INSERT CARD prompt appears.

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2. Enter the card on the terminal:

| <p style="text-align: center;">swipe</p>  | <p style="text-align: center;">insert</p>  | <p style="text-align: center;">manually enter (credit and some debit chip cards)</p> |
|---|---|--|
| <p>a. Swipe the card on the terminal .</p> <p>If the ENTER LAST 4 DIGITS entry screen appears , key in the last 4 digits of the Card number, and press OK.</p> <p>If ##### PRESS [OK] appears , confirm that the displayed Card number is the same number on the card. Press OK.</p> <p>b. Continue below at step 3.</p> | <p>a. You or the cardholder must insert the card into the terminal chip reader .</p> <p>IMPORTANT: Leave the chip card in the reader for the entire transaction.</p> <p>b. Continue below at step 3.</p> | <p>a. Key in the Card number, and press OK.</p> <p>The ENTER EXPIRY DATE entry screen appears .</p> <p>b. Key in the Expiry date, and press OK.</p> <p>If MAIL/TEL options appear , refer to the "Transaction with MOTO Enabled" procedure.</p> <p>If the TAKE MANUAL IMPRINT OF CARD AND PRESS OK prompt appears , refer to the "Taking a Manual Imprint of a Card" procedure.</p> <p>c. Continue below at step 3.</p> |

3. The prompt listed below may appear:

If the [CUSTOMER PRESS OK TO CONTINUE](#) prompt appears, refer to the "Cardholder Prompts" procedure.

4. Please wait while the terminal processes the transaction.

If the [ENTER PROMO CODE](#) entry screen appears, refer to the "Entering the Promo Code" procedure.

If the [ENTER INVOICE NO](#) entry screen appears, refer to the "Entering the Invoice Number" procedure.

5. The terminal communicates with the Moneris Host, and then one of the following APPROVED messages appears depending on the Card Entry method:

If APPROVED ##### OBTAIN SIGNATURE appears, press **OK**. A receipt prints.

If APPROVED ##### MERCHANT COPY appears, press **OK**. A receipt prints.

6. [Process receipts](#). (Refer to the "Receipt Processing" procedure.)

Note: You must perform a Pre-Auth Advice transaction (using the [sequence number](#) or the [Advice List](#)) to complete this transaction, or alternatively you may use the Advice List to delete the transaction. You may also delete the Pre-Auth by performing a [Transaction Inquiry](#).

Note: The Pre-Auth Advice must be performed on the same handheld terminal as the original Pre-Authorization transaction.

Advice - with Pre-Authorization Sequence Number

- Note:**
- This transaction may be used to cancel a Pre-Auth and immediately release the hold on the cardholder's funds.
 - If a [Corporate \(purchasing\) credit card](#) was used for the original Pre-Auth, you may be prompted to enter Tax data.
 - If a [Private label credit card](#) was used for the original Pre-Auth, you may be prompted to enter a Promo code.

From the READY screen:

IMPORTANT: **The Advice must be performed on the same handheld terminal as the original Pre-Authorization transaction in order to find the original Pre-Auth transaction in the terminal memory.**

1. Press the **Admin** key.
The MAIN MENU appears.
2. Press **OK** to select TRANSACTIONS.
The TRANSACTIONS menu appears.
3. Scroll down to P-A ADVICE, and press **OK**.
The FIND ORIGINAL TRANSACTION? prompt appears.

Note: *If you do not have the Pre-Authorization receipt available, you must use the [Card number](#) to find the Pre-Authorization transaction.*

4. Press the **F3** key (YES).
The ENTER ORIGINAL SEQUENCE NUMBER entry screen appears.
5. Key in the 6-digit [Original Sequence number](#) (refer to "Finding the Sequence Number") found on the Pre-Authorization receipt, and press **OK**.
The last 16 digits of the Card number are displayed.
6. Compare to the Card number on the Pre-Authorization receipt.
If they match, press **OK**.

Note: *If they do NOT match, press the **Can/Ann** key and retry the transaction.*

7. One of the prompts listed below may appear:

If the [ENTER ORIGINAL AMOUNT](#) entry screen appears , refer to the "Entering Original Amount and Tip" procedure .

If the ENTER AMOUNT entry screen appears, do one of the following:

If the amount displayed is the final amount of the transaction, simply press **OK**.

OR

If the amount has changed (e.g., because a Tip has been added), key in the final amount of the transaction, and press **OK**.

OR

To cancel the Pre-Auth and release the hold on the cardholder's funds, press **CORR** key (inputs a \$0.00 dollar value), and press **OK**.

8. The following prompts may appear:

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

If the [ENTER INVOICE NO](#) entry screen appears, refer to the "Entering the Invoice Number" procedure.

If [MAIL/TEL](#) options appear , refer to the "Transaction with MOTO Enabled" procedure.

If the [ENTER PROMO CODE](#) entry screen appears, refer to the "Entering the Promo Code" procedure.

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If the [ENTER XXX AMOUNT](#) entry screen appears (XXX is the tax type, e.g. GST), refer to the "Entering Reporting Data for Transaction with Purchasing Card" procedure.

The terminal communicates with the Moneris Host.

9. When APPROVED ##### MERCHANT COPY appears, press **OK**.
10. [Process receipts](#). (Refer to the "Receipt Processing" procedure.)

Advice - Using Pre-Authorization Advice List

This menu shows a list of all Pre-Auth transactions that have not yet been completed. From this menu, you may select and then complete, delete, or cancel Pre-Auth transactions.

IMPORTANT: **The Advice must be performed on the same handheld terminal as the original Pre-Authorization transaction in order to find the original Pre-Auth transaction in the terminal memory.**

From the [READY](#) screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Press **OK** to select TRANSACTIONS.
The TRANSACTIONS menu appears.
3. Scroll down to P-A ADVICE LST, and press **OK**.
The SWIPE ADMIN CARD prompt appears.
4. Swipe the [POS Admin card](#).

If the [ENTER CLERK ID](#) entry screen appears, key in a Clerk ID to use as a selection criterion. (Refer to the "Entering the Clerk ID" procedure.) OR Simply press **OK**.

The ENTER AMOUNT entry screen appears.

5. Key in a specific amount for which to search, and press **OK**. OR Simply press **OK**.
The DATE entry screen appears.
6. Key in either a specific 4-digit date (MM/DD) or a 6-digit date (YY/MM/DD) for which to search, and press **OK**.
OR Simply press **OK**.

The BATCH NUMBER entry screen appears.

7. Key in a Batch number (1 to 3 digits long) for which to search, and press **OK**. OR Simply press **OK**.

THE P-A ADVICE LIST menu appears listing all uncompleted Pre-Auth transactions.

| P-A ADVICE LIST | |
|-----------------|----------|
| PA0000 | \$999.99 |
| PA0000 | \$999.99 |
| PA0000 | \$999.99 |

0000 = last four digits of the Card number

8. Press the **F1** key to scroll down the list of uncompleted Pre-Authorization transactions (press the **F3** key to scroll up), and then press **OK** at your selection.

9. When the prompt to complete (COMPL) or delete (DELETE) the transaction appears, do one of the following:

| To complete the transaction: | To cancel the transaction: | To delete the transaction: |
|--|---|---|
| <p>a. Press the F1 key (COMPL). The ENTER ORIGINAL AMOUNT screen appears.</p> <p>b. Enter the transaction amount. (Refer to the "Entering Original Amount and Tip" procedure.)</p> <p>c. Wait while the terminal communicates with the Moneris Host.</p> <p>d. Continue at step 10.</p> | <p><i>Note: Cancelling the transaction immediately releases the hold placed on the cardholder's funds.</i></p> <p>a. Press the F1 key (COMPL). The ENTER ORIGINAL AMOUNT screen appears.</p> <p>b. Press the CORR key (automatically enters a \$0.00) amount, and press OK.</p> <p>c. Wait while the terminal communicates with the Moneris Host.</p> <p>d. Continue at step 10.</p> | <p><i>Note: Deleting the Pre-Auth DOES NOT immediately release the hold placed on the cardholder's funds.</i></p> <p>a. Press the F3 key (DELETE).</p> <p>b. Continue in the "Deleting a Pre-Auth from the Pre-Authorization Advice List" procedure.</p> |

10. When APPROVED ##### MERCHANT COPY appears, press **OK**.

11. [Process receipts](#). (Refer to the "Receipt Processing" procedure.)

If the TRANSACTION NOT FOUND message appears, press the **Can/Ann** key to return to the READY screen.

If the P-A ADVICE LIST menu appears but you wish to return to the READY screen, press the **Can/Ann** key twice.

If the P-A Advice LIST menu appears and you wish to complete another Pre-Auth, refer back to [step 8](#).

Advice - with Voice Authorization Number

Use this transaction to complete a Purchase transaction performed using an imprinter and a Paper Sales Draft when the terminal was down.

- Note:*
- This transaction is also known as a Force Post transaction.
 - If a [Corporate \(purchasing\) credit card](#) was used for the original Pre-Auth, you may be prompted to enter Tax data.
 - If a [Private label credit card](#) was used for the original Pre-Auth, you may be prompted to enter a Promo code.
 - Some debit chip cards may be used for this transaction.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Press **OK** to select TRANSACTIONS.
The TRANSACTIONS menu appears.
3. Scroll down to P-A ADVICE, and press **OK**.
The FIND ORIGINAL TRANSACTION? prompt appears.
4. Press the **F3** key to select NO.

If the [ENTER ORIGINAL AMOUNT](#) entry screen appears, refer to the "Entering Original Amount and Tip" procedure.

5 Financial Transactions

If the ENTER AMOUNT entry screen appears, key in the total amount found on the Paper Sales Draft, and press **OK**.

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

If the [ENTER INVOICE NO](#) entry screen appears, refer to the "Entering the Invoice Number" procedure.

5. When the ENTER ORIGINAL AUTHORIZATION # entry screen appears, key in the Voice-authorized number (max 8 digits) written on the Paper Sales Draft, and press **OK**. The ENTER CARD NUMBER entry screen appears.

6. Key in the Card number, and press **OK**. The ENTER EXPIRY DATE entry screen appears.

7. Key in the Expiry date, and press **OK**.

If [MAIL/TEL](#) options appear, refer to the "Transaction with MOTO Enabled" procedure.

If the [ENTER PROMO CODE](#) entry screen appears, refer to the "Entering the Promo Code" procedure.

If the [ENTER INVOICE NO](#) entry screen appears, refer to the "Entering the Invoice Number" procedure.

If the [ENTER XXX AMOUNT](#) entry screen appears (XXX is the tax type, e.g. GST), refer to the "Entering Reporting Data for Transaction with Purchasing Card" procedure.

The terminal communicates with the Moneris Host.

8. When APPROVED ##### MERCHANT COPY appears, press **OK**.

9. [Process receipts](#). (Refer to the "Receipt Processing" procedure.)

5.5.6 Manually Processing Transactions

In order to process credit (and some debit chip) Purchase and Refund transactions 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.

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

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

5.5.7 Manually Processing Transactions UNDER Floor Limit

If the terminal is down, report the problem to Moneris then follow these instructions to process the transaction manually.

Note: In order to process credit (and some debit chip) 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:

1. [Take an imprint](#) of the customer's card.

When the terminal is functioning properly again:

2. Process a [Purchase](#) or [Refund](#) transaction on the terminal for the amount on the Paper Sales Draft. You will need to key in the Card number and Expiry date.
3. Attach the Merchant copy of the terminal's receipt to the Merchant copy of the Paper Sales Draft, and retain the two copies for your records.

5.5.8 Manually Processing Transactions OVER Floor Limit

If the terminal is down, report the problem to Moneris then follow these instructions to process the transaction manually.

Note: In order to process credit (and some debit chip) 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 card.
 - a. [Call the Moneris Voice Authorization number](#) 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:

2. Process a [Pre-Auth Advice](#) transaction on the terminal for the amount on the Sales Draft. You will need to key in the Card number, Expiry date and Voice Authorization number.
3. 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.

5.5.9 Private Label Transactions

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 Purchase with one possible additional step: a prompt to enter a [Promo code](#) may appear.

You may also do an [instant application for a private label card](#).

There are two transactions that can only be performed using a Private label card:

[Payment](#)

[Payment Void](#)

Private Label Payment

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

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Press **OK** to select TRANSACTIONS.
The TRANSACTIONS menu appears.
3. Scroll down to PAYMENT, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

The ENTER AMOUNT entry screen appears.

4. Key in the amount the cardholder wishes to pay towards the balance owing

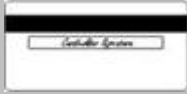
If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

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If the [ENTER INVOICE NO](#) entry screen appears, refer to the "Entering the Invoice Number" procedure.

The SWIPE CARD prompt appears

5. Enter the card on the terminal:

| <p style="text-align: center;">swipe</p>  | <p style="text-align: center;">manually enter (credit and some debit chip cards)</p> |
|--|--|
| <p>a. Swipe the card on the terminal .</p> <p>If the ENTER LAST 4 DIGITS entry screen appears , key in the last 4 digits of the Card number, and press OK.</p> <p>If ##### PRESS [OK] appears , confirm that the displayed Card number is the same number on the card. Press OK.</p> <p>The terminal communicates with the Moneris Host.</p> <p>b. Continue below at step 6.</p> | <p>a. Key in the Card number, and press OK.</p> <p>The ENTER EXPIRY DATE entry screen appears.</p> <p>b. Key in the Expiry date, and press OK.</p> <p>If the TAKE MANUAL IMPRINT OF CARD AND PRESS OK prompt appears , refer to the "Taking a Manual Imprint of a Card" procedure.</p> <p>The terminal communicates with the Moneris Host.</p> <p>c. Continue below at step 6.</p> |

6. Please wait while the terminal processes the transaction. The prompts listed below in this step may appear:

If APPROVED ##### OBTAIN SIGNATURE appears, press **OK**. A receipt prints. Continue at step 7.

If APPROVED ##### appears, press **OK**. Continue at step 7.

7. [Process receipts](#). (Refer to the "Receipt Processing" procedure.)

Private Label Payment-Void

This transaction reverses a Private Label Payment transaction made in error. It may also be referred to as a Payment Correction transaction.

IMPORTANT: **This transaction must be processed for the full amount of the original Payment transaction and it must be processed in the same batch as the original Payment transaction.**

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Press **OK** to select TRANSACTIONS.
The TRANSACTIONS menu appears.
3. Scroll up (it's faster) to VOID-PAYMENT, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

The ENTER AMOUNT entry screen appears.

4. Key in the amount of the original Payment, and press **OK**.


If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

If the [ENTER INVOICE NO](#) entry screen appears, refer to the "Entering the Invoice Number" procedure.

The ENTER ORIGINAL AUTHORIZATION # entry screen appears.

5. Key in the 6-digit AUTH # found on the Payment receipt, and press **OK**.
The SWIPE CARD prompt appears.

6. Enter the card on the terminal:

| swipe  | manually enter (credit and some debit chip cards) |
|---|--|
| <p>a. Swipe the card on the terminal.</p> <p>If the ENTER LAST 4 DIGITS entry screen appears, key in the last 4 digits of the Card number, and press OK.</p> <p>If ##### PRESS [OK] appears, confirm that the displayed Card number is the same number on the card. Press OK.</p> <p>b. Continue below at step 7.</p> | <p>a. Key in the Card number, and press OK. The ENTER EXPIRY DATE entry screen appears.</p> <p>b. Key in the Expiry date, and press OK. If MAIL/TEL options appear, refer to the "Transaction with MOTO Enabled" procedure.</p> <p>If the TAKE MANUAL IMPRINT OF CARD AND PRESS OK prompt appears, refer to the "Taking a Manual Imprint of a Card" procedure.</p> <p>c. Continue below at step 7.</p> |

7. Please wait while the terminal processes the transaction.

8. When APPROVED ##### MERCHANT COPY appears, press **OK**.
A receipt prints.

9. [Process receipts](#). (Refer to the "Receipt Processing" procedure.)

5.6 Cheque Authorization Transactions

5.6.1 Cheque Authorization

This feature allows you to give your customers the option of paying with a cheque while reducing your risk of accepting an NSF cheque. Use the terminal to connect to a cheque authorization service and obtain approval based on the identification your customer provides. The customer's [driver's licence](#) or [credit card](#) can be used as identification for this transaction.

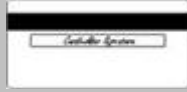
5.6.2 Cheque Authorization with a Credit Card

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Press **OK** to select TRANSACTIONS.
The TRANSACTIONS menu appears.
3. Scroll down to CHEQUE AUTH, and press **OK**.
The CHEQUE AUTHORIZATION menu appears.

5 Financial Transactions

4. Scroll down to CREDIT CARD, and press **OK**.
The ENTER AMOUNT entry screen appears.
5. Key in the amount of the cheque, and press **OK**.
The SWIPE CARD prompt appears .
6. Choose a Card Entry method as indicated in the table below, and follow the appropriate instructions:

| <u>swipe</u>  | manually enter |
|--|---|
| <ol style="list-style-type: none">a. Swipe the card on the terminal . If the ENTER LAST 4 DIGITS entry screen appears, key in the last 4 digits of the Card number, and press OK. If ##### PRESS [OK] appears, confirm that the displayed Card number is the same number on the card. Press OK.b. Continue below. | <ol style="list-style-type: none">a. Key in the Card number, and press OK. The ENTER EXPIRY DATE entry screen appears .b. Key in the Expiry date, and press OK.c. Continue below. |

The terminal communicates with the Moneris Host.

7. Record the APPROVED number on the back of the cheque.

Note: A receipt is **NOT** printed for Cheque Authorizations.

8. Press **OK** to return to the READY screen.

5.6.3 Cheque Authorization with a Driver's Licence

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Press **OK** to select TRANSACTIONS.
The TRANSACTIONS menu appears.
3. Scroll down to CHEQUE AUTH, and press **OK**.
The CHEQUE AUTHORIZATION menu appears.
4. Scroll to DRIVERS LICNCE, and press **OK**.
The ENTER AMOUNT entry screen appears.
5. Key in the amount of the cheque, and press **OK**.
The ENTER DRIVERS LICENCE NUMBER entry screen appears.
6. Key in the Driver's Licence number, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)
The ENTER PROVINCE OR STATE CODE entry screen appears.
7. Key in the [2-character code](#) for the province or state in which the licence was issued, and press **OK**.

Note: If you have [configured a default Province code](#) and the code is correct for this transaction, simply press **OK**.

The ENTER BIRTH DATE (YYMMDD) entry screen appears.

8. Key in the Birth date found on the driver's licence, and press **OK**.
The terminal communicates with the Moneris Host.

9. Record the APPROVED number on the back of the cheque.

Note: A receipt is NOT printed for Cheque Authorizations.

10. Press **OK** to return to the READY screen.

5.6.4 Province or State Code

This code is used to identify the province or state that issued the driver's licence.

A list of codes is provided by the cheque authorization service provider.

A [default Province or State code](#) can be configured to speed up the Cheque Authorization transaction.

5.7 Receipt Processing

If Merchant and/or Cardholder receipts print after a transaction has been submitted, follow these recommended procedures to process the receipts:

1. Receipts may not print in the order presented below:

Note: Receipts always print for contactless debit transactions; however, neither a Signature line nor a statement (i.e., NO SIGNATURE REQUIRED or VERIFIED BY PIN) will be printed.

If the Merchant copy prints:

a. Tear it off, and press **OK**.

If a TIP line prints on this copy, you or the cardholder write in the Tip amount if any.

If a TOTAL line prints on this copy, you or the cardholder write in the final amount to be charged to the card (include the Tip amount if any).

If a Signature line prints on this copy, have the cardholder sign it.

If [NO SIGNATURE REQUIRED](#) prints on this copy, do not obtain the cardholder's signature.

If [VERIFIED BY PIN](#) prints on this copy, do not obtain the cardholder's signature.

b. Retain this copy for your records.

If the Cardholder copy prints:

a. Tear it off, and press **OK**.

If a TIP line prints on this copy, follow the same instructions as for the Merchant copy.

If a TOTAL line prints on this copy, follow the same instructions as for the Merchant copy.

If a Signature line prints on this copy, sign it.

b. Give this copy to the cardholder.

If no receipts print, continue at step 2.

5 Financial Transactions

2. The prompts listed below may appear ; otherwise, the terminal returns to the READY screen.

If UPDATE POINTS TO ANOTHER CARD? appears , refer to the "Starting a Loyalty Card Transaction" procedure.

If USE LOYALTY INFO FROM PRE-AUTH? appears , refer to the "Starting a Loyalty Card Transaction from a Pre-Auth Completion Transaction" procedure.

If the FIND ORIGINAL TRANSACTION? prompt appears , complete or cancel another Pre-Auth, or press the **Can/Ann** key twice to return to the READY screen.

If the P-A ADVICE LIST menu re-appears , complete or cancel another Pre-Auth, or press the **Can/Ann** key to return to the READY screen.

If TRANSACTION NOT FOUND appears , press **OK** to return to the READY screen.

6 Loyalty and Gift Card Programs

6.1 Loyalty/Gift Programs

The Moneris Loyalty/Gift program allows you to offer your customers two electronic card-based programs that are activated and processed through the Mobile 8200 terminal:

- [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.
- [Loyalty Points](#): allows you to reward customer loyalty by awarding points based on the dollar value of Purchases a cardholder makes.

To enable a Gift/Loyalty program on your terminal:

1. Contact Moneris Solutions.
2. [Initialize](#) the terminal to the Moneris Host.
3. [Enable Ernex](#) on the terminal.
4. Enter the [Ernex Routing code](#).
5. [Initialize](#) the terminal to the Moneris/Ernex Host.

IMPORTANT: If you process more than one card plan with Moneris/Ernex, maintain a list of the card names along with the 14-character card description that will be displayed on the terminal screen during step 6 of the [Transaction Inquiry](#) report. This will allow the terminal operator to easily identify which card plan description to select.

6. If you wish to enable Tip Prompting (gift Purchases only):
 - a. Enable the loyalty/gift [Tip Entry](#) parameter.
 - b. If you wish to define a default the Tip Percentage, configure the loyalty/gift [Tip Percentage](#) parameter.

6.2 The Moneris Gift Card Program

The Moneris Gift Card program allows you to offer your customers stored-value gift cards for pre-defined dollar values as well as variable-value cards and reloadable cards.

Gift Card Transactions

- [Purchase](#)
- [Refund](#)
- [Activate/Reload](#)
- [Deactivate](#)
- [Card Inquiry](#)
- [Void](#)
- [Reprint](#)

6 Loyalty and Gift Card Programs

Gift Reports

- [Clerk Inquiry on Transactions](#)
- [Close Batch](#)
- [Help List](#)
- [Configuration Parameters List](#)
- [Stored Transactions](#)
- [Transaction Inquiry](#)
- [Open Batch Totals](#)
- [Tip Totals](#)

6.3 Configuring Tip Entry for Gift

Enabling Tip Entry gives your customers the option to enter a Tip on the terminal during a gift Purchase transaction. (Tip entry is generally used in service-based industries.)

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll up to SETUP, and press **OK**.
The SETUP menu appears.
4. Scroll up to TIP ENTRY, and press **OK**.
The ENABLE TIP? prompt appears.
5. Press the **F1** key (YES) to enable Tip prompting.
The SETUP menu appears.
6. Press the **Can/Ann** key repeatedly to return to the READY screen.

Optional: To preset a default [Tip Percentage](#), refer to the "Configuring the Tip Percentage for Gift" procedure.

6.4 Configuring the Tip Percentage for Gift

Defining a default Tip Percentage gives your customers the option to select your default Tip percentage to calculate the Tip amount during gift Purchases.

Note: For this feature to work, [Tip Entry for Gift](#) must be enabled.


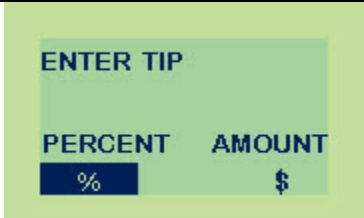
From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll up to SETUP, and press **OK**.
The SETUP menu appears.
4. Scroll up to TIP PERCENTAGE, and press **OK**.
The ENTER TIP PERCENTAGE entry screen appears.

Note: To see how defining the gift Tip Percentage affects [Tip prompting](#), refer to the "Gift Tip Prompt Formats"

5. Key in the desired default percentage value, and press **OK**.
The **SETUP** menu appears.
6. Press the **Can/Ann** key repeatedly to return to the **READY** screen.

6.4.1 Gift Tip Prompt Formats

| Tip Percentage value | What Happens During a Gift Purchase | Actual Tip Prompt/Screen on Terminal |
|----------------------|--|---|
| greater than zero | The cardholder will be prompted to enter the default value (AA%), or they may select OTHER and then enter their own percentage value or dollar amount. |  |
| zero | The cardholder will automatically be prompted to enter their own Tip as a percentage value or as a dollar amount. |  |

6.5 Gift Card Transactions

6.5.1 Activate a Gift Card

This transaction activates a Moneris gift card and allows the card to be used as payment for Purchases.

IMPORTANT: To control usage of new gift cards, activate them **ONLY** at the time they are purchased (e.g., do not activate a batch of cards ahead of time.) Gift cards are essentially cash once they are activated.

This transaction can also add an additional dollar value to gift cards that can be reloaded after they are activated.

From the **READY** screen:

1. Press the **Admin** key .
The **MAIN MENU** appears.
2. Scroll down to **ERNEX**, and press **OK** .
The **ERNEX** menu appears.
3. Scroll down to **ACTIVATE/LOAD**, and press **OK** .
The **SWIPE OR ENTER CARD** prompt appears.
4. Swipe the gift card on the terminal.
The **ENTER CVC** entry screen appears.

6 Loyalty and Gift Card Programs

5. Key in the Card Validation Code (CVC), and press **OK** .

Note: The CVC is found on the back of the card after the card number. It may be located under a scratch-off panel. If the ENTER CVC entry screen appears, this code must be keyed in to ensure that the card is authentic.

If the [ENTER CLERK ID](#) entry screen appears , refer to the "Entering the Clerk ID" procedure.

If the [ENTER AMOUNT](#) entry screen appears , refer to the "Entering the Activation Amount" procedure.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Tracking Code PRESS OK") , refer to the "Entering Optional Information" procedure.

The PROCESSING message appears, and then the APPROVED ACTIVATE NEXT? prompt appears.

6. To activate/load another card, press the **F1** key (YES). OR To continue without activating another card, press the **F3** key (NO).

7. Do one of the following:

If you pressed the **F1** key (YES):

- a. The Cardholder copy prints, which you give to the customer.
- b. Press **OK** .
The SWIPE OR ENTER CARD prompt appears.
- c. Go back to [step 4](#).

If you pressed the **F3** key (NO), and the [BALANCE DUE \\$#.## PRESS OK](#) prompt appears , refer to the "Selecting the Balance Due Payment Method" procedure.

If you pressed the **F3** key (NO), and "Approved" appears:

- a. Press **OK** .
The Merchant copy prints, which you retain.
- b. Press **OK** .
The Cardholder copy prints, which you retain.
- c. Press the **Can/Ann** key to return to the READY screen.

6.5.2 Deactivate a Gift Card

Deactivating a gift card renders the card unusable. This should be done when a card is lost, stolen or demagnetized in order to stop unauthorized use. The terminal will print a receipt with the last available balance on the card.

From the READY screen:

1. Press the **Admin** key .
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll down to DEACTIVATE, and press **OK**.
The SWIPE OR ENTER CARD prompt appears.

4. Key in the gift card number, and press **OK**. (The gift card number can be found on the receipt from a gift transaction performed using the gift card.)

OR If the gift card is available, it can be swiped.

The ENTER CVC entry screen appears.

5. Key in the Card Validation Code (CVC), and press **OK**.

***Note:** The CVC is found on the back of the card after the card number. It may be located under a scratch-off panel. If the ENTER CVC entry screen appears, this code must be keyed in to ensure that the card is authentic.*

If the [ENTER CLERK ID](#) entry screen appears , refer to the "Entering the Clerk ID" procedure.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Tracking Code PRESS OK") , refer to the "Entering Optional Information" procedure.

The PROCESSING prompt appears, and then the APPROVED PRESS OK message appears.

6. Press **OK** .

If the [TRANSFER BALANCE TO NEW CARD?](#) prompt appears , refer to the "Transferring the Balance to a New Gift Card" procedure.

The receipts are printed, and then the terminal returns to the ERNEX menu.

7. Press the **Can/Ann** key to return to the READY screen.

6.5.3 Gift Card Purchase

Use this transaction when a Moneris gift card is presented as payment. If the Purchase amount is greater than the value on the card, the terminal may prompt for payment of the outstanding amount.

From the READY screen:

1. Press the **Admin** key .

The MAIN MENU appears.

2. Scroll down to ERNEX, and press **OK** .

The ERNEX menu appears.

3. Press **OK** to select PURCHASE.

The SWIPE OR ENTER CARD prompt appears.

4. Swipe the gift card on the terminal, or key in the card number, press **OK**, and swipe the POS Admin card.

The ENTER CVC entry screen appears.

5. Key in the Card Validation Code (CVC), and press **OK**.

***Note:** The CVC is found on the back of the card after the card number. It may be located under a scratch-off panel. If the ENTER CVC entry screen appears, this code must be keyed in to ensure that the card is authentic.*

If the [ENTER CLERK ID](#) entry screen appears , refer to the "Entering the Clerk ID" procedure.

The ENTER TOTAL AMOUNT entry screen appears.

6. Key in the amount of the Purchase including taxes, and press **OK** .

If the [CUSTOMER PRESS OK TO CONTINUE](#) prompt appears , refer to the "Cardholder Prompts - Gift" procedure.

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If the RETURN TO CLERK prompt appears, press the **OK**.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Tracking Code PRESS OK"), refer to the "Entering Optional Information" procedure.

The PROCESSING prompt appears, and then the APPROVED message appears.

If the [BALANCE DUE \\$#.## PRESS OK](#) prompt appears, refer to the "Selecting the Balance Due Payment Method" procedure.

7. Press **OK**.

The receipts are printed and the terminal returns to the ERNEX menu.

8. Press the **Can/Ann** key to return to the READY screen.

6.5.4 Gift Card Refund

Note: Not all Moneris Gift programs process gift Refunds.

If a Purchase using a Moneris gift card as payment was processed incorrectly, use this transaction to return the value of the Purchase back on to the card.

Note: You must have the original gift Purchase receipt available in order to perform this transaction.

From the READY screen:

1. Press the **Admin** key.

The MAIN MENU appears.

2. Scroll down to ERNEX, and press **OK**.

The ERNEX menu appears.

3. Scroll down to REFUND, and press **OK**.

The SWIPE OR ENTER CARD prompt appears.

4. Swipe the gift card on the terminal. (Cards cannot be manually entered.)

The ENTER CVC entry screen appears.

5. Key in the Card Validation Code (CVC), and press **OK**.

Note: The CVC is found on the back of the card after the card number. It may be located under a scratch-off panel. If the ENTER CVC entry screen appears, this code must be keyed in to ensure that the card is authentic.

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

The ENTER TOTAL AMOUNT entry screen appears.

6. Key in the total amount of the Purchase including taxes, and press **OK**.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Tracking Code PRESS OK"), refer to the "Entering Optional Information" procedure.

The ERNEX REFERENCE NUMBER entry screen appears.

7. Key in the REF # that appears on the Gift Card Purchase receipt, and press **OK**.

The PROCESSING prompt appears, and then the APPROVED message appears.

8. Press **OK**.

The receipts are printed and the terminal returns to the ERNEX menu.

9. Press the **Can/Ann** key to return to the READY screen.

6.6 The Moneris Loyalty Program

The Moneris Loyalty Card program allows you to award loyalty points that can be used for rewards. The program for which you are enrolled determines which prompts will appear during transactions. For example, you may have the option to award bonus points during a loyalty Purchase for one program but not another. One program may support auto-Redemption/coupons while another program supports both auto-Redemption/coupons and manual Redemption transactions.

6.6.1 Loyalty Card Transactions

- [Purchase](#) (awards points)
- [Refund](#) (removes points)
- [Redemption](#) (uses points)
- [Activate Card](#)
- [Deactivate Card](#)
- [Card Inquiry](#)
- [Void](#)
- [Reprint](#) receipt

6.6.2 Combo Card Transactions

Combo Cards act as both a credit card and a Moneris loyalty card. When a Combo Card is used to perform one of the credit transactions listed below, the terminal asks if you wish to award the points to the combo card or another loyalty card and automatically begins the loyalty transaction once the credit transaction is complete.

- [Purchase](#)
- [Refund](#)
- [Pre-Authorization](#)
- [Pre-Auth Advice](#)
- [Pre-Auth Advice with Voice Authorization](#)
- [Purchase Void](#)
- [Refund Void](#)

6.6.3 Loyalty Reports

- [Clerk Inquiry on Transactions](#)
- [Close Loyalty Batch](#)
- [Help List](#)
- [Configuration Parameters List](#)
- [Stored Transactions](#)
- [Transaction Inquiry](#)

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6.7 Loyalty Transactions

6.7.1 Activate a Loyalty Card

Activating a loyalty card allows it to be used.

From the READY screen:

1. Press the **Admin** key .
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK** .
The ERNEX menu appears.
3. Scroll down to ACTIVATE/LOAD, and press **OK** .
The SWIPE OR ENTER CARD prompt appears.
4. Swipe the loyalty card on the terminal.
OR Key in the Loyalty Card number, and press **OK** .

If the [ENTER CLERK ID](#) entry screen appears , refer to the "Entering the Clerk ID" procedure.

If the [ENTER AMOUNT](#) entry screen appears , refer to the "Entering the Activation Amount" procedure.

If the "[Bonus Code PRESS OK](#)" prompt appears , refer to the "Entering the Bonus Code" procedure.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Tracking Code PRESS OK") , refer to the "Entering Optional Information" procedure.

The PROCESSING message appears, and then the APPROVED ACTIVATE NEXT? prompt appears.

5. To activate/load another card, press the **F1** key (YES). OR To continue without activating another card, press the **F3** key (NO).
6. Do one of the following:

If you pressed the **F1** key (YES):

- a. The Cardholder copy prints, which you give to the customer.
- b. Press **OK** .
The SWIPE OR ENTER CARD prompt appears.
- c. Go back to [step 4](#).

If you pressed the **F3** key (NO), and the [BALANCE DUE \\$#.## PRESS OK](#) prompt appears , refer to the "Selecting the Balance Due Payment Method" procedure.

If you pressed the **F3** key (NO), and "Approved" appears:

- a. Press **OK** .
The Merchant copy prints, which you retain.
- b. Press **OK** .
The Cardholder copy prints, which you retain.
- c. Press the **Can/Ann** key to return to the READY screen.

6.7.2 Deactivate a Loyalty Card

Deactivating a loyalty renders the card unusable. The card can no longer be used to accumulate points.

This should be done when a Loyalty card is lost, stolen or demagnetized in order to stop unauthorized use. The terminal will print a receipt with the last available points balance on the card.

From the READY screen:

1. Press the **Admin** key .
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll down to DEACTIVATE, and press **OK**.
The SWIPE OR ENTER CARD prompt appears.
4. Key in the loyalty card number, and press **OK**. The loyalty card number can be found on the receipt from a loyalty transaction performed using the loyalty card.
OR Swipe the Loyalty Card on the terminal.

If the [ENTER CLERK ID](#) entry screen appears , refer to the "Entering the Clerk ID" procedure.

If the "[Bonus Code PRESS OK](#)" prompt appears , refer to the "Entering the Bonus Code" procedure.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Tracking Code PRESS OK") , refer to the "Entering Optional Information" procedure.

The PROCESSING prompt appears, and then the APPROVED PRESS OK message appears.

5. Press **OK** to return to the READY screen.

6.7.3 Redemption

This transaction allows a loyalty cardholder to purchase items using the points on their loyalty card.

From the READY screen:

1. Press the **Admin** key .
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK** .
The ERNEX menu appears.
3. Scroll down to REDEMPTION, and press **OK** .
The SWIPE OR ENTER CARD prompt appears.
4. Swipe the loyalty card on the terminal
OR Key in the loyalty card number, and press **OK** .

If the [ENTER CLERK ID](#) entry screen appears , refer to the "Entering the Clerk ID" procedure.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Tracking Code PRESS OK") , refer to the "Entering Optional Information" procedure.

If the "[Bonus Code PRESS OK](#)" prompt appears , refer to the "Entering the Bonus Code" procedure.

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One of the following "Redemption-as-dollars" prompts may appear:

If the [ENTER AMOUNT](#) entry screen appears , refer to the "Entering the Redemption Amount" procedure.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Dollars to be Redeemed PRESS OK") , refer to the "Customized Prompt Redemption Amount Example" procedure.

One of the following "Redemption-as-points" prompts may appear:

If the [ENTER NUMBER OF POINTS](#) entry screen appears , refer to the "Entering the Number of Points" procedure.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Redemption Points PRESS OK") , refer to the "Customized Prompt for Redemption Points Example" procedure.

The PROCESSING message appears.

If the [BALANCE DUE \\$#.## PRESS OK](#) prompt appears , refer to the "Selecting the Balance Due Payment Method" procedure.

The APPROVED message appears, and then the first receipt prints.

5. Press **OK** to print the next receipt.
6. Press **OK** to return to the ERNEX menu.
7. Press the **Can/Ann** key to return to the READY screen.

6.7.4 Loyalty Card Purchase

This transaction adds points to a loyalty card based on the Purchase amount.

Most loyalty card transactions are started [automatically at the end of a debit or credit transaction](#); however, they can also be started through the Ernex menus.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Press **OK** to select PURCHASE.
The SWIPE OR ENTER CARD prompt appears.
4. Swipe the Loyalty Card on the terminal
OR Key in the Loyalty Card number, and press **OK**.

If the [ENTER CLERK ID](#) entry screen appears , refer to the "Entering the Clerk ID" procedure.

The ENTER TOTAL AMOUNT entry screen appears.

5. Key in the amount of the Purchase including taxes (or leave the amount at \$0.00 to process a coupon), and press **OK**.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Tracking Code PRESS OK") , refer to the "Entering Optional Information" procedure.

If the "[Bonus Code PRESS OK](#)" prompt appears , refer to the "Entering the Bonus Code" procedure.

One of the following Benefit prompts/entry screens may appear depending on your loyalty program's configuration:

If the "[Pre-Tax Amount PRESS OK](#)" prompt appears , refer to the "Entering the Pre-Tax Amount" procedure.

If the [ENTER BENEFIT AMOUNT](#) entry screen appears , refer to the "Entering the Benefit Amount" procedure.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Food Amount PRESS OK" or "Amount PRESS OK") , refer to the "Customized Prompt for Benefit Amount Example" procedure.

The PROCESSING message appears, and then APPROVED appears while the first receipt prints.

6. Press **OK** to print the next receipt.
7. Press **OK** to return to the ERNEX menu.
8. Press the **Can/Ann** key to return to the READY screen.

6.7.5 Starting a Loyalty Card Transaction from a Pre-Authorization Transaction

- a. Swipe the loyalty card or key in the card number:

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Tracking Code PRESS OK") , refer to the "Entering Optional Information" procedure.

If the "[Bonus Code PRESS OK](#)" prompt appears , refer to the "Entering the Bonus Code" procedure.

One of the following Benefit prompts/entry screens may appear depending on your loyalty program's configuration:

If the "[Pre-Tax Amount PRESS OK](#)" prompt appears , refer to the "Entering the Pre-Tax Amount" procedure.

If the [ENTER BENEFIT AMOUNT](#) entry screen appears , refer to the "Entering the Benefit Amount" procedure.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Food Amount PRESS OK" or "Amount PRESS OK") , refer to the "Customized Prompt for Benefit Amount Example" procedure.

The PROCESSING prompt appears, and then the APPROVED message appears while the first receipt prints.

- b. Press **OK** to print the next receipt.
- c. Press **OK** to return to the ERNEX menu.
- d. Press the **Can/Ann** key to return to the READY screen.

6.7.6 Starting a Loyalty Card Transaction from a Pre-Auth Completion Transaction

When the USE LOYALTY INFO FROM PRE-AUTH? prompt appears:

- a. To complete the loyalty transaction using the data keyed in during the Pre-Auth transaction, press the **F1** key to select YES.

OR

To key in different data for the loyalty transaction, press the **F3** key to select NO.

If the APPLY TO ##### PRESS OK prompt appears, press **OK** to apply points to the Card number (#####) displayed.

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If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Tracking Code PRESS OK"), refer to the "Entering Optional Information" procedure.

If the "[Bonus Code PRESS OK](#)" prompt appears, refer to the "Entering the Bonus Code" procedure.

One of the following Benefit prompts/entry screens may appear depending on your loyalty program's configuration:

If the "[Pre-Tax Amount PRESS OK](#)" prompt appears, refer to the "Entering the Pre-Tax Amount" procedure.

If the [ENTER BENEFIT AMOUNT](#) entry screen appears, refer to the "Entering the Benefit Amount" procedure.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Food Amount PRESS OK" or "Amount PRESS OK"), refer to the "Customized Prompt for Benefit Amount Example" procedure.

The PROCESSING prompt appears, and then the APPROVED message appears while the first receipt prints.

- b. Press **OK** to print the next receipt.
- c. Press **OK** to return to the READY screen.

If the P-A ADVICE LIST menu re-appears, complete another Pre-Auth Advice, or press the **Can/Ann** key to return to the READY Screen.

If the TRANSACTION NOT FOUND message displays, press **OK** to return to the READY Screen.

6.7.7 Loyalty Card Refund

If a loyalty Purchase was processed incorrectly, use this transaction to remove the incorrectly assigned points from the loyalty card.

Most loyalty card transactions are started [automatically at the end of a debit or credit transaction](#), however they can also be started through the Ernex menus.

***Note:** You must have the original loyalty Purchase receipt available in order to perform this transaction.*

From the READY screen:

1. Press the **Admin** key .
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll down to REFUND, and press **OK**.
The SWIPE OR ENTER CARD prompt appears.
4. Swipe the loyalty card on the terminal
OR Key in the loyalty card number, and press **OK**.

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

The ENTER TOTAL AMOUNT entry screen appears.

5. Key in the total amount of the Purchase including taxes, and press **OK**.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Tracking Code PRESS OK"), refer to the "Entering Optional Information" procedure.

If the "[Bonus Code PRESS OK](#)" prompt appears , refer to the "Entering the Bonus Code" procedure.

One of the following Benefit prompts/entry screens may appear depending on your loyalty program's configuration:

If the "[Pre-Tax Amount PRESS OK](#)" prompt appears , refer to the "Entering the Pre-Tax Amount" procedure.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Food Amount PRESS OK" or "Amount PRESS OK") , refer to the "Customized Prompt for Benefit Amount Example" procedure.

If the [ENTER BENEFIT AMOUNT](#) entry screen appears , refer to the "Entering the Benefit Amount" procedure.

The ERNEX REFERENCE NUMBER entry screen appears.

6. Key in the REF # that appears on the loyalty card Purchase receipt, and press **OK**. The PROCESSING prompt appears then the APPROVED message appears while the first receipt prints.
7. Press **OK** to return to print the next receipt.
8. Press **OK** to return to the ERNEX menu.
9. Press the **Can/Ann** key to return to the READY screen.

6.8 Loyalty/Gift Procedures

6.8.1 Reprinting Loyalty/Gift Receipts

Use this function to print a duplicate cardholder or Merchant copy of the most recently printed Loyalty/Gift receipt.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll down to REPRINT, and press **OK**.
The REPRINT menu appears.

To print a duplicate of the:

- Merchant Copy of the loyalty/gift receipt, press the **F1** key to select MERCHANT.
- Cardholder Copy of the loyalty/gift receipt, press the **F3** key to select CUSTOMER.

The PRINTING message appears while a duplicate of the most recently printed receipt is printed.

4. The terminal returns to the ERNEX menu.
5. Press the **Can/Ann** key to return to the READY screen.

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6.8.2 Starting a Loyalty Card Transaction from a Financial Transaction

The Moneris loyalty application can be started automatically at the end of a financial transaction (debit/credit) as well as [through the Ernex menus](#).

When the UPDATE POINTS TO ANOTHER CARD? prompt appears:

- a. To complete the financial transaction without starting a Loyalty card transaction, press the **F3** key to select NO.

IMPORTANT: **If this prompt appears at the end of a Pre-Auth Advice for a [Voice Authorized transaction](#), you MUST select NO.**

The terminal returns to the READY screen.

OR

To start a Loyalty transaction using a loyalty card, press the **F1** key to select YES. The SWIPE OR ENTER CARD prompt appears.

- b. If the financial card was swiped, swipe the loyalty card. If the financial card number was keyed in (e.g. for a [MOTO transaction](#)), key in the loyalty card number, and press **OK**.

Go to the appropriate loyalty transaction and continue from the SWIPE OR ENTER CARD prompt.

| | |
|--|---|
| If you completed a financial (debit/credit): | this loyalty transaction will begin: |
| Purchase | loyalty Purchase (step 4) |
| Refund | loyalty Refund (step 4) |
| Purchase-Void | loyalty Void (step 4) |
| Refund-Void | loyalty Void (step 4) |
| Pre-Auth | loyalty Pre-Auth |
| Pre-Auth Advice | loyalty Pre-Auth Advice |

6.8.3 Transferring the Balance to a New Gift Card

There was a balance remaining on the deactivated Gift Card.

Note: *If you transfer the balance, the new gift card MUST be one that can be activated for a variable amount (i.e., NOT a fixed value card).*

When the TRANSFER BALANCE TO NEW CARD? prompt appears:

To transfer the remaining balance to a new gift card:

- a. Press the **F1** key to select YES. The terminal automatically begins an [Activation transaction](#) (start at step 4).

To simply deactivate the card and forfeit the remaining balance:

- a. Press the **F3** key to select NO. The READY screen appears.

6.8.4 Selecting the Balance Due Payment Method

The BALANCE DUE prompt appears in four transactions:

- A gift card activation for which the customer must pay for the card
- A gift card Purchase for which the dollar value on the card is less than the Purchase amount.
- A loyalty card activation for which the cardholder can pay to have points put on the card balance
- A loyalty card redemption for which the amount to be redeemed is greater than the amount on the card.

When the BALANCE DUE \$#.## PRESS OK prompt appears:

1. Press **OK**.

The BALANCE DUE PAY WITH prompt appears.

2. Select a payment method:

To enter a debit card or credit card, press the **F1** key (CR/DB).

OR

To enter another gift card (already activated and loaded), press the **F2** key (GIFT).

OR

To accept payment with cash, press the **F3** key (CASH).

3. Depending on the number of Activation/Loads processed, do one of the following:

| If a single Activation/Load or gift Purchase or loyalty Redemption was processed, and: | If multiple Activations/Loads were processed, and: |
|---|--|
| <p>If CR/DB was selected:</p> <ol style="list-style-type: none"> a. The Merchant copy prints, which you retain. b. Press OK. c. The Cardholder copy prints, which you give to the customer. d Press OK. The SWIPE OR INSERT CARD prompt appears. e. Continue the transaction in "Purchase" at step 2. <p>If GIFT was selected:</p> <ol style="list-style-type: none"> a. The Merchant copy prints, which you retain. b. Press OK. c. The Cardholder copy prints, which you give to the customer. d Press OK. The SWIPE OR ENTER CARD prompt appears. e. Continue the transaction in "Gift Card Purchase" at step 4. | <p>If CR/DB was selected:</p> <ol style="list-style-type: none"> a. The Activation Summary report prints (which you retain), and the SWIPE OR INSERT CARD prompt appears. b. Continue the transaction in "Purchase" at step 2. <p>If GIFT was selected:</p> <ol style="list-style-type: none"> a. The Activation Summary report prints (which you retain), and the SWIPE OR ENTER CARD prompt appears. b. Continue the transaction in "Gift Card Purchase" at step 4. <p>If CASH was selected:</p> <ol style="list-style-type: none"> a. The Activation Summary report prints (which you retain), and the ERNEX menu appears. b. Press the Can/Ann key to return to the READY screen. |

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| If a single Activation/Load or gift Purchase or loyalty Redemption was processed, and: | If multiple Activations/Loads were processed, and: |
|--|--|
| If CASH was selected: <ul style="list-style-type: none">a. The Merchant copy prints, which you retain.b. Press OK.c. The Cardholder copy prints, which you give to the customer.d Press OK. The ERNEX menu appears.e. Press the Can/Ann key to return to the READY screen. | |

6.8.5 Entering the Optional Information

The default text of the optional information prompt is "Info Data PRESS OK"; however, the Moneris/Ernex Host may send a customized prompt (e.g., "Tracking Code PRESS OK"). If this prompt has been customized, see the [Customized Prompt Example](#) below.

When the "Info Data PRESS OK" prompt appears:

1. Press **OK** .

The ENTER DATA entry screen appears.

2. Key in the required information, and press **OK** . (Refer to "[Entering alphabetic characters and punctuation](#)".)

OR

If data is displayed and you want to accept that data, press **OK** . To change it, simply key in the new information then press **OK** .

Continue the transaction.

Customized Prompt Example

If the Info prompt has been customized to display the "Tracking Code" prompt, then:

When the "Tracking Code PRESS OK" prompt appears:

1. Press **OK** .

The ENTER DATA entry screen appears.

2. Key in the tracking code, and press **OK** . (Refer to "[Entering alphabetic characters and punctuation](#)".)

Continue the transaction.

6.8.6 Entering the Activation Amount

When the ENTER AMOUNT entry screen appears:

a. Key in the dollar amount (gift) or points (loyalty) to be made available on the card, and press **OK** .

Go back to the Activation transaction.

6.8.7 Entering the Benefit Amount

The default text of this optional prompt is ENTER BENEFIT AMOUNT; however, the Moneris/Ernex Host may send a customized prompt .If this prompt has been customized, see the [Customized Prompt Example](#) below.

1. When the ENTER BENEFIT AMOUNT entry screen appears:

| | |
|----------------------------------|---|
| for loyalty Purchase: | Key in the dollar amount excluding tax and tip for which regular points are to be awarded, and press OK . OR If the amount for which points are to be awarded is the same as the total dollar amount of the Purchase, press OK . |
| for Void (of loyalty Purchase): | Key in the dollar amount excluding tax and tip for which regular points are to be removed, and press OK . OR If the amount for which points are to be removed is the same as the total dollar amount of the Purchase, press OK . |
| for Void (of loyalty Refund): | Key in the dollar amount excluding tax and tip for which regular points are to be returned, and press OK . OR If the amount for which points are to be returned is the same as the total dollar amount of the Refund, press OK . |
| for loyalty Refund: | Key in the dollar amount excluding tax and tip for which regular points are to be deducted, and press OK . OR If the amount for which points are to be deducted is the same as the total dollar amount of the Refund, press OK . |
| for loyalty Pre- Authorization: | Key in the dollar amount excluding tax and tip for which regular points are to be awarded, and press OK . OR If the amount for which points are to be awarded is the same as the total dollar amount of the Pre-Auth, press OK . <i>Note: Points are not actually awarded until the loyalty Pre-Auth is completed.</i> |
| for loyalty Pre-Auth Completion: | If the Pre-Auth amount has changed, key in the dollar amount excluding tax and tip for which regular points are be awarded, and press OK . OR If the Pre-Auth amount has not changed, press OK to award points based on the currently displayed dollar amount (which excludes tax and tip). |

2. Continue the transaction.

Customized Prompt for Benefit Amount Example

Note: The following is an example of a customized Benefit prompt. Your program may support a different prompt/require the input of different information.

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If the Benefit prompt has been configured to display a customized prompt (e.g., "Food Amount PRESS OK"), then when the "Food Amount PRESS OK" prompt appears:

1. Press **OK** .
The ENTER BENEFIT AMOUNT entry screen appears.
2. Key in the dollar amount of the food purchased excluding tax and tip, and press **OK**. This amount will be used to calculate the number of points (i.e., the benefit).

Note: For examples of what to enter per transaction type, refer to the table in the preceding "[Entering the Benefit Amount](#)" procedure.

3. Continue the transaction.

6.8.8 Entering the Number of Points for a Redemption

The default text of this optional prompt is ENTER NUMBER OF POINTS, however the Moneris/Ernex Host may send a customized prompt. If this prompt has been customized, see the [Customized Prompt Example](#) below.

When the ENTER NUMBER OF POINTS entry screen appears:

- a. Key in the number of points to be deducted from the card to pay for the goods/services, and press **OK** .

Go back to the [Redemption](#) transaction.

Customized Prompt for Redemption Points Example

If this prompt has been customized, e.g. "Redemption Points PRESS OK" appears, an additional prompt appears:

Note: The following is an example of a customized Benefit prompt. Your program may support a different prompt/require the input of different information.

When the "Redemption Points PRESS OK" prompt appears:

- a. Press **OK** .
The ENTER DATA entry screen appears.
- b. Key in the number of points to be deducted from the card to pay for the goods/services, and press **OK** .

Go back to the [Redemption](#) transaction.

6.8.9 Entering the Redemption Amount

The default text of this optional prompt is ENTER AMOUNT; however, the Moneris/Ernex Host may send a customized prompt. If this prompt has been customized, see the [Customized Prompt Example](#) below.

When the ENTER AMOUNT entry screen appears:

- a. Key in the dollar amount (key in \$0.00 to process coupons) that will be used to calculate the number of points to be deducted from the card to pay for the goods/services, and press **OK** .

Go back to the [Redemption](#) transaction.

Customized Prompt for Redemption Amount Example

If this prompt has been customized, e.g. "Dollars Redeemed PRESS OK" appears, an additional prompt appears:

When the "Dollars Redeemed PRESS OK prompt appears:

- a. Press **OK** .
The ENTER DATA entry screen appears.
- b. Key in the dollar amount to be deducted (as points) from the card (or key in \$0.00 to process coupons), and press **OK**.

Go back to the [Redemption](#) transaction.

6.8.10 Entering the Bonus Code

When the "Bonus Code PRESS OK" prompt appears:

Note: The configuration of your loyalty program determines whether or not this prompt will appear during a transaction.

- 1. Press **OK**.
The ENTER DATA entry screen appears.
- 2. Depending on the loyalty transaction being processed, do one of the following:

| | |
|--------------------------------|---|
| for loyalty Activation: | Press OK . |
| for loyalty Deactivation: | Press OK . |
| for loyalty Purchase: | To award Bonus points, key in the appropriate Bonus code, and press OK . OR To bypass awarding Bonus points, simply press OK without entering a value. |
| for Void (of loyalty Purchase) | To remove Bonus points, key in the Bonus code that is printed on the original loyalty Purchase receipt, and press OK . OR To leave the Bonus points on the card, simply press OK without entering a value. |
| for Void (of loyalty Refund) | To return Bonus points, key in the Bonus code that is printed on the original loyalty Refund receipt, and press OK . OR To do the transaction without returning the Bonus points to the card, simply press OK without entering a value. |
| for loyalty Refund: | To remove Bonus points, key in the Bonus code that is printed on the original loyalty Purchase receipt, and press OK . OR To leave the Bonus points on the card, simply press OK without entering a value. |
| for loyalty Pre-Auth: | To award Bonus points, key in the appropriate Bonus code, and press OK . OR To bypass awarding Bonus points, simply press OK without entering a value. <i>Note: Bonus points are awarded when the Pre-Auth is completed</i> . |

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| | |
|----------------------------------|--|
| for loyalty Pre-Auth Completion: | To award the Pre-Auth Bonus points, press OK without entering a value. (This awards the Bonus points printed on the loyalty Pre-Auth receipt.) OR To award a different number of Bonus points, key in the appropriate Bonus code, and press OK . |
|----------------------------------|--|

3. Continue the transaction procedure.

6.8.11 Entering the Pre-Tax Amount

When the "Pre-Tax Amount PRESS OK" prompt appears:

Note: The configuration of your loyalty program determines whether or not this prompt will appear during a transaction.

1. Press **OK**.

The ENTER DATA entry screen appears.

2. Depending on the loyalty transaction being processed, do one of the following:

| | |
|----------------------------------|---|
| for loyalty Purchase: | Key in the dollar amount excluding tax and tip for which regular points are to be awarded, and press OK . OR If the amount for which points are to be awarded is the same as the total dollar amount of the Purchase, press OK . |
| for Void (of loyalty Purchase): | Key in the dollar amount excluding tax and tip for which regular points are to be removed, and press OK . OR If the amount for which points are to be removed is the same as the total dollar amount of the Purchase, press OK . |
| for Void (of loyalty Refund): | Key in the dollar amount excluding tax and tip for which regular points are to be returned, and press OK . OR If the amount for which points are to be returned is the same as the total dollar amount of the Refund, press OK . |
| for loyalty Refund: | Key in the dollar amount excluding tax and tip for which regular points are to be deducted, and press OK . OR If the amount for which points are to be deducted is the same as the total dollar amount of the Refund, just press OK . |
| for loyalty Pre-Authorization: | Key in the dollar amount excluding tax and tip for which regular points are to be awarded, and press OK . OR If the amount for which points are to be awarded is the same as the total dollar amount of the Pre-Auth, press OK . <i>Note: Points are not actually awarded until the loyalty Pre-Auth is completed.</i> |
| for loyalty Pre-Auth Completion: | If the Pre-Auth amount has changed, key in the dollar amount excluding tax and tip for which regular points are to be awarded, and press OK . OR If the Pre-Auth amount has not changed, press OK to award points based on the currently displayed dollar amount (which excludes tax and tip). |

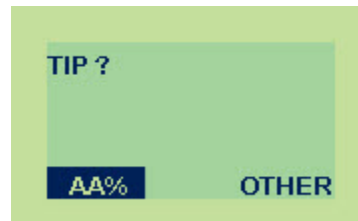
3. Continue the transaction procedure.

6.8.12 Cardholder Prompts - Gift

1. Follow the prompt that appears:
 If CUSTOMER PRESS OK TO CONTINUE appears, pass the terminal to the cardholder without pressing the **OK**. The cardholder presses **OK**.
2. When the PURCHASE \$#.##-OK? prompt appears, the cardholder presses the **OK**.
 If the [TIP? AA% OTHER](#) prompt appears, refer to the "Entering a Tip: Preset Percentage Enabled - Gift" procedure.
 If the [ENTER TIP % \\$](#) prompt appears, refer to the "Selecting Percentage or Dollar Amount Tip - Gift" procedure.
3. When the cardholder returns the terminal (RETURN TO CLERK appears), press **OK**.
4. Refer back to the "[Gift Purchase](#)" procedure.

6.8.13 Entering a Tip : Preset Percentage Enabled - Gift

The cardholder follows the terminal prompt shown here:

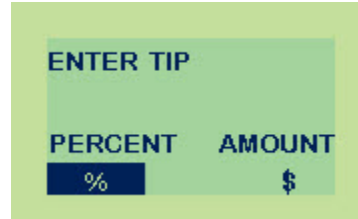


| To enter the preset Tip Percentage: | To enter a different percentage or dollar amount Tip: | To bypass entering a Tip: |
|--|--|---|
| 1. The cardholder presses the F1 key (AA%). The PURCHASE \$#.##-OK? prompt appears (amount includes the Tip) . 2. The cardholder presses OK . 3. When the RETURN TO CLERK prompt appears, the cardholder returns the terminal to you. 4. Continue the "Cardholder Prompts - Gift" procedure. | 1. The cardholder presses the F3 key (OTHER). The ENTER TIP % \$ prompt appears. 2. Continue in the "Selecting Percentage or Dollar Amount Tip - Gift" procedure. | 1. The cardholder presses the Can/Ann key . The PURCHASE \$#.##-OK? prompt appears. 2. The cardholder presses OK . 3. When the RETURN TO CLERK prompt appears, the cardholder returns the terminal to you. 4. Continue the "Cardholder Prompts - Gift" procedure. |

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6.8.14 Selecting Percentage or Dollar Amount Tip - Gift

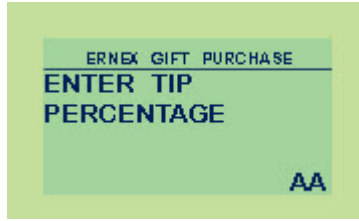
The cardholder follows the terminal prompt shown here:



| To select "enter-Tip-as-percentage" option: | To select "enter-Tip-as-dollar-amount" option: | To bypass entering a Tip: |
|---|---|---|
| <ol style="list-style-type: none">1. The cardholder presses the F1 key (%). <p>The ENTER TIP PERCENTAGE entry screen appears.</p> <ol style="list-style-type: none">2. Continue in the "Entering a Percentage Tip - Gift" procedure. | <ol style="list-style-type: none">1. The cardholder presses the F3 key (\$). <p>The ENTER TIP AMOUNT entry screen appears.</p> <ol style="list-style-type: none">2. Continue in the "Entering a Dollar Amount Tip - Gift" procedure. | <ol style="list-style-type: none">1. The cardholder presses the Can/Ann key. <p>The PURCHASE \$#.#-OK? prompt appears.</p> <ol style="list-style-type: none">2. The cardholder presses OK.3. When the RETURN TO CLERK prompt appears, the cardholder returns the terminal to you.4. Continue the "Cardholder Prompts - Gift" procedure. |

6.8.15 Entering a Percentage Tip- Gift

The cardholder follows the terminal prompt shown here:

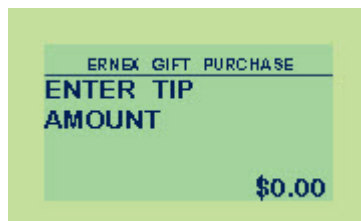


| To enter a percentage Tip: | To bypass entering a Tip: |
|--|--|
| <ol style="list-style-type: none"> 1. The cardholder keys in a percentage value (replaces displayed value, AA) and presses OK. <p>The PURCHASE \$#.##-OK? prompt appears (amount includes the Tip) .</p> <ol style="list-style-type: none"> 2. The cardholder presses OK. 3. When the RETURN TO CLERK prompt appears, the cardholder returns the terminal to you. 4. Continue the "Cardholder Prompts - Gift" procedure. | <ol style="list-style-type: none"> 1. The cardholder presses the Can/Ann key. <p>The PURCHASE \$#.##-OK? prompt appears.</p> <ol style="list-style-type: none"> 2. The cardholder presses OK. 3. When the RETURN TO CLERK prompt appears, the cardholder returns the terminal to you. 4. Continue the "Cardholder Prompts - Gift" procedure. |

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6.8.16 Entering a Dollar Amount Tip - Gift

The cardholder follows the terminal prompt shown here:



| To enter a dollar amount Tip: | To bypass entering a Tip: |
|---|--|
| <ol style="list-style-type: none">1. The cardholder keys in a dollar amount and presses OK. The PURCHASE \$#.##-OK? prompt appears (amount includes the Tip) .2. The cardholder presses OK.3. When the RETURN TO CLERK prompt appears, the cardholder returns the terminal to you.4. Continue the "Cardholder Prompts - Gift" procedure. | <ol style="list-style-type: none">1. The cardholder presses the Can/Ann key. The PURCHASE \$#.##-OK? prompt appears.2. The cardholder presses OK .3. When the RETURN TO CLERK prompt appears, the cardholder returns the terminal to you.4. Continue the "Cardholder Prompts - Gift" procedure. |

6.9 The Loyalty/Gift (Ernex) Menu

6.9.1 The ERNEX Menu

The ERNEX Menu (see ERNEX below) gives you access to gift and loyalty transactions and sub-menus that allow you to print loyalty/gift reports and set up your terminal to perform loyalty/gift transactions.

The transactions and sub-menus are listed in the order they appear on the menu.

| ERNEX | Function |
|---------------|---|
| PURCHASE | Starts a gift Purchase or loyalty Purchase |
| REFUND | Starts a gift Refund or loyalty Refund |
| REDEMPTION | Starts a loyalty card Redemption |
| ACTIVATE/LOAD | Starts a gift card Activation/Load or loyalty card Activation |

| ERNEX | Function |
|--------------|--|
| DEACTIVATE | Starts a gift card Deactivation or loyalty Card Deactivation |
| CARD INQUIRY | Starts a loyalty/gift card Balance Inquiry |
| VOID | Starts a loyalty/gift Void |
| REPRINT | Starts the gift/loyalty Reprint function |
| REPORT FUNCS | Opens the gift/loyalty REPORT FUNCTIONS menu |
| SETUP | Opens the loyalty/gift SETUP menu |

To access the ERNEX menu, from the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX and press **OK**.
The ERNEX menu appears.

6.9.2 The Loyalty/Gift SETUP Menu

The loyalty/gift Configuration menu (see SETUP below) contains a list of parameters that can be enabled and configured on the Mobile 8200 terminal.

IMPORTANT: **The Loyalty/Gift program requires an additional agreement between the merchant and Moneris Solutions. Please ensure that the necessary agreements are in place before attempting to configure those programs on the terminal.**

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

| SETUP | Function |
|--------------------------------|---|
| INITIALIZATION | Initializes the terminal to the Moneris/Ernex Host |
| GENERAL PARAMS | <p>Sets the format of the date printed on loyalty/gift receipts.</p> <p>Press OK to select DATE FORMAT. The DATE FORMAT menu appears.</p> <p>Select the date format, and press OK. The GENERAL PARAMETERS menu reappears.</p> <p>Press the Can/Ann key to return to the Ernex SETUP menu.</p> <p>Press the Can/Ann key to return to the ERNEX menu.</p> |
| PRINTER CONFIG | <p>Sets up the Ernex voucher messages printed on the loyalty/gift receipts.</p> <p>Press OK to select VOUCHER HEADER. The VOUCHER HEADER menu appears.</p> |

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| SETUP | Function |
|-----------------------|---|
| ENABLE ERNEX | <p>Allows the terminal to process loyalty/gift card transactions. (Default = YES)</p> <p>The ENABLE ERNEX? prompt appears.</p> <p>To allow the terminal to process loyalty/gift card transactions, press the F1 key.</p> <p>The SETUP menu reappears.</p> |
| DISABLE ERNEX | <p>Stops the terminal from processing loyalty/gift transactions. (Default = YES)</p> <p>The DISABLE ERNEX? prompt appears.</p> <p>To stop the terminal from processing loyalty/gift card transactions, press the F1 key.</p> <p>The SETUP menu reappears.</p> |
| PAYMENT APPL | <p>Allows the terminal to process debit and credit card transactions.</p> <p>The PAYMENT APPL ENABLED? prompt appears.</p> <p>To allow the terminal to process debit and credit card transactions, press the F1 key.</p> <p>The SETUP menu reappears.</p> |
| ROUTING CODE | <p>Directs the loyalty/gift transactions within the Moneris/Ernex Host.</p> <p>The ENTER ERNEX ROUTING CODE entry screen appears.</p> <p>To accept the default code, press OK.</p> <p>To change the default code, key in the 2-digit routing code provided by Moneris, and press OK.</p> <p>The SETUP menu reappears.</p> |
| COMMUNICATION | <p>Tests the communication link between the terminal and the Moneris/Ernex Host</p> <p>The terminal begins to communicate with the Moneris/Ernex Host to test the connection.</p> <p>If the test is successful, the COMMUNICATION WITH ERNEX OK message appears.</p> <p>Press OK to return to the ERNEX menu.</p> |
| <u>TIP ENTRY</u> | <p>Enables Tip prompting during gift Purchase transactions.</p> |
| <u>TIP PERCENTAGE</u> | <p>Configures default percentage value by which the Tip amount may be calculated for gift Purchases. Tip Entry for gift cards (see above) must be enabled.</p> |

To access the loyalty/gift SETUP menu, from the [READY screen](#):

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX and press **OK**.
The ERNEX menu appears.
3. Scroll down to SETUP and press **OK**.
The SETUP menu appears.

6.9.3 The Loyalty/Gift VOUCHER HEADER Menu

The terminal can be configured to print vouchers on loyalty/gift receipts. Use this menu to set up the loyalty and gift voucher-related messages printed on the loyalty/gift receipts.

The text can be bold, double height and double width., i.e. more than one format can be applied to the voucher text.

| VOUCHER HEADER | Instructions |
|-----------------------|--|
| ENABLED | Turn vouchers off or on Press the F1 key to select YES, press the F3 key to select NO. |
| BOLD | print the voucher in bold text Press the F1 key to select YES, press the F3 key to select NO. |
| DOUBLE HEIGHT | print the voucher in text that is 2 lines high Press the F1 key to select YES, press the F3 key to select NO. |
| DOUBLE WIDTH | print the voucher in text that is 2 characters wide Press the F1 key to select YES, press the F3 key to select NO. |
| INITIAL TEXT | If you have changed a pre-programmed voucher header, use this menu item to reset the voucher header to the original pre-programmed text. Press the F1 key to select YES, press the F3 key to select NO. |
| HDR ENGLISH | To use the displayed text, press OK . To change the text, begin keying in the new text (Refer to " Entering alphabetic characters and punctuation ") and press OK . |
| HDR FRENCH? | To use the displayed text, press OK . To change the text, begin keying in the new text (Refer to " Entering alphabetic characters and punctuation ") and press OK . |

Press the **Can/Ann** key to return to the loyalty/gift PRINTER CFG menu.

Press the **Can/Ann** key to return to the loyalty/gift [SETUP menu](#).

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To access the Ernex VOUCHER HEADER menu, from the [READY screen](#):

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX and press **OK**.
The ERNEX menu appears.
3. Scroll up to SETUP and press **OK**.
The SETUP menu appears.
4. Scroll down to PRINTER CONFIG and press **OK**.
The PRINTER CFG menu appears.
5. Press **OK** to select VOUCHER HEADER.
The VOUCHER HEADER menu appears.

6.9.4 The Loyalty/Gift REPORT FUNCTIONS Menu

This menu allows you to produce a variety of reports on loyalty/gift transactions and perform a close batch to the Moneris/Ernex Host.

The reports are listed in the order they appear on the menu.

| REPORT FUNCTIONS | Allows you to print: |
|--------------------------------|--|
| CLOSE BATCH | close the current loyalty/gift batch on the Moneris/Ernex Host and print a Batch Totals report of all loyalty/gift transactions |
| OPEN BATCH TOT | retrieve the gift and loyalty card batch totals by gift and loyalty IDs that were processed since the last Close Batch request |
| TRANS LIST | a list of all loyalty/gift transactions stored in the terminal by date or by batch |
| TRANS INQUIRY | a list of loyalty/gift transactions based on selected criteria and transaction details for individual loyalty/gift transactions |
| CLERK INQUIRY | a report listing totals for a specific clerk , a group of clerks or all clerks This item appears only if Clerk Subtotalling is enabled in the Moneris (debit/credit) application. |
| CONFIG LIST | a report listing the current settings for each loyalty/gift parameter |
| HELP LIST | a list of the loyalty/gift functions and transactions with their Shortcut codes |
| TIP TOTALS | a report listing gift Tip totals |

To access the loyalty/gift Reporting Functions menu, from the [READY screen](#):

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll down to REPORT FUNCS, and press **OK**.
The REPORT FUNCTIONS menu appears.

6.10 Loyalty/Gift Admin Transactions

6.10.1 Loyalty/Gift Card Inquiry

Use this transaction to check the value remaining on the card as well as the status (active or deactivated) and the expiry date of a Moneris loyalty or gift card.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll down to CARD INQUIRY, and press **OK**.
The SWIPE OR ENTER CARD prompt appears.
4. For a gift card: swipe the card on the terminal.
For a loyalty card: swipe the card on the terminal OR key in the card number and press **OK**.

If the ENTER CVC entry screen appears, key in the Card Validation Code (CVC), and press **OK**.

***Note:** The CVC is found on the back of the card after the card number. It may be located under a scratch-off panel. If the ENTER CVC entry screen appears, this code must be keyed in to ensure that the card is authentic.*

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

The terminal communicates with the Moneris/Ernex Host and the PROCESSING prompt appears then the INQUIRY COMPLETE message appears.

5. Press **OK**.
The CARD BALANCE ##### PRESS OK prompt appears. The card balance is displayed for 20 seconds or until **OK** is pressed.
6. Press **OK**.
The PRINT RECEIPT? prompt appears.
7. To print a customer copy of the Card Inquiry receipt, press the **F1** key for YES.

***Note:** This transaction does NOT print a Merchant copy of the receipt.*

To return to the ERNEX menu without printing a receipt, press the **F3** key for NO.

The ERNEX menu appears.

8. Press the **Can/Ann** key to return to the READY screen.

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6.10.2 Voiding a Loyalty/Gift Transaction

Use this transaction to cancel a loyalty/gift transaction that was started from the [ERNEX menu](#). The loyalty/gift transaction that matches the Ernex Reference number entered during this Void transaction will be cancelled.

To cancel loyalty transactions that were started at the end of a financial transaction, you must start the void transaction at the [financial TRANSACTIONS menu](#).

Both loyalty and gift transactions can be cancelled using this transaction including:

Loyalty Transactions (including Loyalty transactions on a Combo Card)

Purchase
Refund
Redemption
Activation

Gift Transactions

Purchase
Refund
Activation/Load

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll down to VOID, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The SWIPE OR ENTER CARD prompt appears.

4. Swipe the loyalty/gift card on the terminal
OR Key in the loyalty/gift card number, and press **OK**.

If the ENTER CVC entry screen appears, key in the Card Validation Code (CVC), and press **OK**.

Note: *The CVC is found on the back of the card after the card number. It may be located under a scratch-off panel. If the ENTER CVC entry screen appears, this code must be keyed in to ensure that the card is authentic.*

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Tracking Code PRESS OK"), refer to the "Entering Optional Information" procedure.

If the "[Bonus Code PRESS OK](#)" prompt appears, refer to the "Entering the Bonus Code" procedure.

Loyalty only: One of the following Benefit prompts may appear depending on your loyalty program's configuration:

If the "[Pre-Tax Amount PRESS OK](#)" prompt appears, refer to the "Entering the Pre-Tax Amount" procedure.

If the [ENTER BENEFIT AMOUNT](#) prompt appears, refer to the "Entering the Benefit Amount" procedure.

If the "[Info Data PRESS OK](#)" prompt appears (prompt text is variable, e.g., it could be customized to display "Food Amount PRESS OK" or "Amount PRESS OK"), refer to the "Customized Prompt for Benefit Amount Example" procedure.

The ERNEX REFERENCE NUMBER entry screen appears.

5. Key in the REF # that appears on the loyalty/gift card transaction receipt, and press **OK**. The PROCESSING prompt appears, and then the APPROVED PRESS OK prompt appears.

6. Press **OK** to return to the READY screen.

6.10.3 Loyalty/Gift Close Batch

From the READY screen:

1. Press the **Admin** key.

The MAIN MENU appears.

2. Scroll down to ERNEX, and press **OK**.

The ERNEX menu appears.

3. Scroll down to REPORT FUNCS, and press **OK**.

The REPORT FUNCS menu appears.

4. Press **OK** to select CLOSE BATCH.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

Note: If this prompt appears, you must enter the Clerk ID even if the Default Clerk ID feature has been enabled.

The terminal communicates with the Moneris/Ernex Host, then prints the CURRENT BATCH TOTALS report, and then returns to the ERNEX menu.

5. Press the **Can/Ann** key to return to the READY screen.

6.10.4 Loyalty/Gift Initialization

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

This function **MUST** be performed after completing the set up of the Moneris Loyalty/Gift program in order for you to use your terminal to process loyalty/gift transactions.

From time to time, the Moneris/Ernex Host may ask you to initialize your terminal again if changes have been made to your terminal or your merchant account. Follow the [Re-initialization](#) instructions below.

The handheld terminal does not need to be sitting on a base (communications or charge-only) during initialization, however it is recommended.

Note: Before attempting this transaction, ensure that :

- the [communications parameters](#) have been configured.
- the terminal has been [registered](#) to a communications base.
- the terminal has been [initialized](#) to the Moneris Host

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First Initialization

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll up to SETUP, and press **OK**.
The SETUP menu appears.
4. Press **OK** to select INITIALIZATION.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The ENTER ERNEX TERMINAL ID entry screen appears.

5. Key in the Ernex Terminal ID (min. 1, max. 8 digits), and press **OK**.

If the ENTER PHONE NUMBER prompt appears, key in the Ernex phone number and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)

Note: Acceptable non-digit characters include: P (for pulse line), T (for tone line), *, # and , (comma which causes a dialling pause).

The terminal begins communicating with the Moneris/Ernex Host.

6. When the initialization to the Ernex Host is complete, the ERNEX menu reappears.
7. Press the **Can/Ann** key to return to the READY screen.

Reinitialization

From the READY screen:

Note: If ERNEX INITIALIZATION REQUIRED is displayed on the screen, press the **Admin** key and start at step 3 of these instructions.

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll up to SETUP, and press **OK**.
The SETUP menu appears.
4. Press **OK** to select INITIALIZATION.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The ENTER ERNEX TERMINAL ID entry screen appears.

5. To keep the Ernex Terminal ID displayed on the screen, simply press **OK**.

To replace the displayed ID, key in a new Ernex Terminal ID (min. 1, max. 8 digits), and press **OK**.

If the ENTER PHONE NUMBER prompt appears, key in the Ernex phone number and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)

Note: Acceptable non-digit characters include: P (for pulse line), T (for tone line), *, # and , (comma which causes a dialling pause).

The terminal begins communicating with the Moneris/Ernex Host.

6. When the initialization to the Moneris/Ernex Host is complete, the ERNEX menu reappears.
The CLEAR TERMINAL STORAGE? prompt appears.

7. Press the **F3** key (NO).

IMPORTANT: Do NOT select YES unless instructed to do so by a Service Centre representative. Selecting YES will erase all the transaction information from the terminal memory.

8. Press the **Can/Ann** key to return to the READY screen.

6.11 Loyalty/Gift Reports

6.11.1 Printing a Loyalty/Gift Report after a Financial Report

After the terminal finishes printing a report started from the financial REPORT FUNCS menu, it provides the option of printing the same report for loyalty/gift transactions.

| This financial report... | ...prompts for the corresponding loyalty/gift report. |
|---|--|
| Close Batch | Loyalty/Gift Close Batch |
| Stored Transactions List | Loyalty/Gift Stored Transactions List |
| Transaction Inquiry | Loyalty/Gift Transaction Inquiry |
| Clerk Subtotals Inquiry | Loyalty/Gift Clerk Subtotals Inquiry |
| Configuration Parameters Report | Loyalty/Gift Configuration Parameters List |
| Help List | Loyalty/Gift Help List |

When the PRINT ERNEX REPORT? prompt appears:

To print the same report for loyalty/gift transactions:

Press the **F1** key to select YES.

The terminal communicates with the Moneris/Ernex Host, prints the report then returns to the READY screen.

Note: You may be prompted to enter criteria for the loyalty/gift report.

To return to the READY screen without printing the report:

Press the **F3** key to select NO.

To terminal returns to the READY screen.

Go back to the transaction.

6.11.2 Printing a Stored Transactions Report for Loyalty/Gift Transactions

This report contains information about the loyalty/gift transactions saved in the terminal's memory. It prints only the terminal totals (i.e. the number of loyalty/gift transactions and total dollar and points amounts by card type), or a list of all loyalty/gift transactions in the terminal's memory by date or by batch number followed by the terminal totals.

IMPORTANT: The POS Admin card is required if you wish to print unmasked Card numbers on this report.

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From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll down to REPORT FUNCS, and press **OK**.
The REPORT FUNCS menu appears.
4. Scroll down to TRANS LIST, and press **OK**.
The SWIPE ADMIN CARD prompt appears.
5. To print complete Card numbers on the report, swipe the POS Admin card OR
To print [masked Card numbers](#) on the report, simply press **OK**.

The PRINT DATE OR BATCH? prompt appears.

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

6. Select the sorting method for the report:
To print the transactions that occur on a specific date, press the **F1** key (DATE).
To print the transactions that occur in a specific batch, press the **F3** key (BATCH).

Note: If you are printing a Transactions List for the End-of-Day procedure, press the **F3** key (BATCH).

7. If you selected the **F1** key for Date, key in the date in YYMMDD format.
If you selected the **F3** key for Batch, key in the batch number.
OR simply press **OK** to include all transactions in the terminal memory.

The PRINT TOTALS ONLY? prompt appears.

8. If you wish to print only the totals for each card type on the report, press the **F1** key (YES).
If you wish to print information on each transaction individually as well as totals for the report, press the **F3** key (NO).

Note: If you are printing a Transactions List for the End-of-Day procedure, press the **F1** key (YES).

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

9. Press the **Can/Ann** key to return to the READY screen.

6.11.3 Printing a Loyalty/Gift Open Batch Totals Report

The Open Batch Totals request retrieves the gift and loyalty card batch totals by gift and loyalty IDs that were processed since the last Close Batch request.

IMPORTANT: The POS Admin card is required if you wish to print unmasked Card numbers on this report.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll down to REPORT FUNCS, and press **OK**.
The REPORT FUNCS menu appears.
4. Scroll down to OPEN BATCH TOT, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

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

5. Press the **Can/Ann** key to return to the READY screen.

6.11.4 Loyalty/Gift Transaction Inquiry Report

This report lists all transactions that match the criteria you select. If you do not select any criteria (i.e. you simply press **OK** as each criteria appears), all transactions in the terminal memory are listed.

IMPORTANT: **The POS Admin card is required if you wish to print unmasked Card numbers on this report.**

Criteria are:

- Clerk ID
- Card type
- Card number
- Amount
- Type of transaction
- Date of transaction

The results can be printed or displayed on the terminal screen.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.

2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.

3. Scroll down to REPORT FUNCS, and press **OK**.
The REPORT FUNCS menu appears.

4. Scroll down to TRANS INQUIRY, and press **OK**.
The SWIPE ADMIN CARD prompt appears.

5. To print complete Card numbers on the report, swipe the POS Admin card OR
To print [masked Card numbers](#) on the report, simply press **OK**.

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

The criteria appear in order:

6. The CARD TO SEARCH menu appears with a list of card plans, beginning with ALL CARDS.

To select all card plans, ensure ALL CARDS is highlighted, and press **OK**.

OR

To select a specific card plan, scroll down the list until the card plan description you wish to select is highlighted, and then press **OK**.

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Note: To determine the correct card plan description, refer to the list of the card names and their corresponding 14-character card plan description.

7. The CARD NUMBER entry screen appears.

To select all Card numbers, simply press **OK**.

OR

To select a specific card, key in the card number, and press **OK**.

8. The AMOUNT entry screen appears.

To select all transactions regardless of amount, simply press **OK**.

OR

To select transactions of a specific amount, key in the amount, and press **OK**.

If the TRANS TO SEARCH menu appears.

To select all transaction types including all loyalty/gift, debit and credit types, ensure ALL TRANS is highlighted, and then press **OK**.

OR

To select a specific debit or credit transaction type (e.g. Void-Refund), select FINANCL+ERNEX, and press **OK**.

OR

To select a specific loyalty/gift transaction type (e.g. Redemption), select ERNEX.

The TRANS TO SEARCH menu appears.

Scroll through the list until the transaction type you wish to select is highlighted, and then press **OK**.

9. The DATE (YY) MMDD entry screen appears.

To select all transactions regardless of the date they were processed, simply press **OK**.

OR

To select transactions processed on a specific date, key in the date in the format indicated on the screen (the 2-digit year is optional), and press **OK**.

10. The PRINT OR DISPLAY? prompt appears.

To print the list of matching transactions, press the **F1** key to select PRINT. The terminal searches its memory for matching transactions then displays PRINTING while the report is printed.

To [print a duplicate](#) of the Merchant Copy of a receipt, refer to "Transaction Inquiry - Reprint the Merchant Copy".

11. Press the **Can/Ann** key to return to the READY screen.

6.11.5 Clerk Subtotalling on Loyalty/Gift Transactions

This feature allows you to produce Clerk Subtotals reports tracking loyalty/gift totals and the number of loyalty/gift transactions performed using the Clerk Inquiry function.

The Clerk Inquiry function can be performed for [one clerk](#), a [group of clerks](#) or [all clerks](#) on one or more terminals.

Totals are calculated according to the [Clerk ID](#) entered during a transaction or the [default Clerk ID](#).

6.11.6 Loyalty/Gift Clerk Subtotals Report for All Clerks

Note: You can also perform a Clerk Subtotals Report for [one clerk](#) or a [group of clerks](#).

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll down to REPORT FUNCS, and press **OK**.
The REPORT FUNCS menu appears.
4. Scroll down to CLERK INQUIRY, and press **OK**.
The SINGLE/MULTIPLE CLERKS? prompt appears.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

5. Press the **F3** key (MULTIPLE).

If enabled, the ZERO CLERK TOTALS? prompt appears.

- a. Press the **F1** key (YES) to reset the totals for all Clerk IDs to zero.

The MULT CLERKS(00 PEND) prompt appears.

6. Scroll down to ALL CLERKS, and press **OK**.
The terminal communicates with the Moneris/Ernex Host then prints:

- a. The CLERK SUBTOTALS report for each Clerk ID
- b. The OVERALL TOTALS report for all Clerk IDs.

When the reports are finished printing, the terminal returns to the ERNEX menu.

7. Press the **Can/Ann** key to return to the READY screen.

6.11.7 Loyalty/Gift Clerk Subtotals Report for a Group of Clerks

Note: You can also perform a Clerk Subtotals Report for [all clerks](#) or [one clerk](#).

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll down to REPORT FUNCS, and press **OK**.
The REPORT FUNCS menu appears.
4. Scroll down to CLERK INQUIRY, and press **OK**.
The SINGLE/MULTIPLE CLERKS? prompt appears.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

5. Press the **F3** key (MULTIPLE).

If enabled, the ZERO CLERK TOTALS? prompt appears.

- a. Press the **F1** key (YES) to reset the totals for all selected Clerk IDs to zero.

The MULT CLERKS(00 PEND) prompt appears.

6. Scroll down to GROUP, and press **OK**.
The ENTER GROUP ID TO BE PROCESSED entry screen appears.

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7. Key in the Group Identifier, and press **OK**.
The MULT CLERKS(01 PEND) prompt appears.

To continue selecting Clerk ID Groups, repeat steps 6 and 7.

When all the Clerk IDs have been added:

8. Scroll down to PROCESS LIST, and press **OK**.
The terminal communicates with the Moneris/Ernex Host and then prints:

- a. The CLERK SUBTOTALS report for each Clerk ID that belongs to the Clerk ID Group
- b. The OVERALL TOTALS report for the Clerk ID Group.

When the reports are finished printing, the terminal returns to the ERNEX menu.

7. Press the **Can/Ann** key to return to the READY screen.

6.11.8 Loyalty/Gift Clerk Subtotals Report for One Clerk

Note: You can also perform a Clerk Subtotals Report for [all clerks](#) or a [group of clerks](#).

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll up to REPORT FUNCS, and press **OK**.
The REPORT FUNCS menu appears.
4. Scroll down to CLERK INQUIRY, and press **OK**.
The SINGLE/MULTIPLE CLERKS? prompt appears.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

5. Press the **F1** key (SINGLE).

If enabled, the ZERO CLERK TOTALS? prompt appears.

- a. Press the **F1** key (YES) to reset the totals for the Clerk ID to zero.

The ENTER CLERK ID entry screen appears.

6. Key in the Clerk ID, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)

Note: You must enter the Clerk ID even if the Default Clerk ID feature has been enabled.

The terminal communicates with the Moneris/Ernex Host then prints the CLERK SUBTOTALS report and returns to the ERNEX menu.

7. Press the **Can/Ann** key to return to the READY screen.

6.11.9 Printing Gift Tip Totals

This report contains a tip summary of gift transactions stored in the data capture for the current or a previous Batch that matches the selection criteria.

Note: If [Clerk Sub-totalling](#) is enabled, Tip amounts are summarized by Clerk ID.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.

2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.

3. Scroll down to REPORT FUNCS, and press **OK**.
The REPORT FUNCS menu appears.

4. Scroll down to TIP TOTALS, and press **OK**.

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

Note: If a Clerk ID is not entered, the totals for all gift Tips will be retrieved.

The PRINT BY DATE OR BATCH? prompt appears.

5. Press the **F1** key (for Tip totals by date) or the **F3** key (for Tip totals by batch)

| If you pressed the F1 key (Tip totals by date)... | If you pressed the F3 key (Tip totals by batch)... |
|---|--|
| <p>The START DATE (YY)MMDD entry screen appears.</p> <p>a. Key in the Start date (the year is optional), and press OK.</p> <p><i>Note:</i>The date format is year (YY), month (MM), and day (DD) (e.g., to enter Dec. 31, 2012, you would key in 121231).</p> <p>The START TIME [HHMM] menu appears.</p> | <p>The BATCH NUMBER entry screen appears.</p> <p>a. Key in the Batch number, or leave this field blank (for the current batch), and press OK.</p> <p>The terminal prints the report and then returns to the ERNEX screen.</p> <p>b. Continue at step 6.</p> |
| <p>b. Key in the Start time, and press OK.</p> <p><i>Note:</i>The time format is hours (HH) and minutes (MM) (e.g., to enter 1:00 AM, you would key in 0100).</p> <p>The END DATE (YY)MMDD entry screen appears.</p> | |
| <p>c. Key in the End date (year is optional), and press OK.</p> <p><i>Note:</i>The date format is year (YY), month (MM), and day (DD) (e.g., to enter Dec. 31, 2012, you would key in 121231).</p> <p>The END TIME [HHMM] entry screen appears.</p> | |
| <p>d. Key in the End time, and press OK.</p> <p><i>Note:</i>You must enter a valid End time value. The time format is hours (HH) and minutes (MM) (e.g., to enter 11:59 PM, you would key in 2359).</p> <p>The terminal prints the report and then returns to the ERNEX screen.</p> <p>e. Continue at step 6.</p> | |

6. Press the **Can/Ann** key to return to the READY screen.

6 Loyalty and Gift Card Programs

6.11.10 Printing the Loyalty/Gift Configuration Parameters List

When you have finished configuring Loyalty/Gift on your terminal, perform this function in order to have a printed record of the terminal's loyalty/gift parameters. Included on the print-out are:

- Ernex software version number (Ernex Core Version)
- terminal identification information (Ernex Term ID)
- Moneris Merchant ID (Merch ID)
- configuration details for each card type downloaded from the Moneris/Ernex Host (e.g., card description, whether Refunds are allowed for this card, etc.)

From the READY screen prompt:

Note: This will use quite a bit of paper, especially if there are a number of different loyalty/gift cards configured.

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll down to REPORT FUNCS, and press **OK**.
The REPORT FUNCS menu appears.
4. Scroll down to CONFIG LIST, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The terminal displays PRINTING while it prints the report. When the report is finished printing, the terminal returns to the ERNEX menu.

5. Press the **Can/Ann** key to return to the READY screen.

6.11.11 Printing a Loyalty/Gift Help List

This report lists all the loyalty/gift functions and transactions that are enabled on the terminal and the corresponding [Admin Shortcut Code](#).

From the READY screen prompt:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ERNEX, and press **OK**.
The ERNEX menu appears.
3. Scroll down to REPORT FUNCS, and press **OK**.
The REPORT FUNCS menu appears.
4. Scroll up to HELP LIST, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The terminal displays PRINTING while it prints the report. When the reports are finished printing, the terminal returns to the ERNEX menu.

5. Press the **Can/Ann** key to return to the READY screen.

7 The Air Miles Rewards Program

7.1 The Air Miles Rewards Program

The Air Miles rewards program allows you to offer your customers the opportunity to collect miles on a loyalty card based on the dollar value of Purchases they make. Some programs also provide miles based on the purchase of specific items or incentive calculations that can be implemented for a specific time period.

7.1.1 Configuring Air Miles

To enable an Air Miles rewards program on your terminal:

1. Contact Moneris Solutions.
2. [Plan how the program will calculate miles](#) .
3. [Configure Air Miles](#) on your terminal.
4. [Initialize your terminal](#) .

7.1.2 Air Miles Rewards Transactions

- [Reward Purchase](#)
- [Reward Refund](#)

7.1.3 Air Miles Rewards Administration

- [Reprint](#) the last Air Miles Reward receipt
- [Rewards Totals Report](#)
- [Rewards Transactions Report](#)
- [Rewards SAF Transactions Report](#)
- [Deleting Rewards SAF Transactions](#)
- [Completing Rewards](#) Transactions
- Printing the [Rewards Configuration Report](#)
- Printing the [Help List](#) of Rewards Transactions and Admin codes
- [Configuring](#) the Air Miles Rewards Program

7.2 Configuring the Air Miles Rewards Program

Air Miles rewards are awarded based on the formula you configure on the terminal as a Reward Program. After you have [planned how the program will award miles](#), the terminal must be configured to match the formula. This function allows you to configure the terminal to process Air Miles rewards transactions and produce reports on those transactions.

There are six main steps to be completed when configuring the terminal to process Air Miles Rewards transaction.

1. [Enable the Rewards Program](#).
2. [Select the Program Type](#).
3. Configure the Program:
 - i. [Configure the Calculator and Factors](#).

7 The Air Miles Rewards Program

- ii. [Configure the Incentive.](#)
 - iii. [Set the maximum number of rewards per transaction.](#)
 - iv. [Set the Rewards Totals Reset time of day.](#)
 - v. [Enable the Enter Reference Number prompt.](#)
4. [Configure the Bonus Offers](#) if you intend to offer them.
 5. [Configure the Tax setup.](#)
 6. [Set the SAF Upload Time Period.](#)

Note: The default is 5 minutes. If you wish to use this value you do not need to perform this step.

Note: If you wish to use both the Retail and the Wholesale Rewards programs, repeat steps 2 through 6 for each program.

The terminal is ready to process Air Miles Rewards transactions.

Moneris recommends printing an [Air Miles Configuration List](#) to have a record of the program configuration and an [Air Miles Help List](#) to have a list of transactions available and their [Admin Codes](#).

7.2.1 The Air Miles REWARDS SETUP Menu

IMPORTANT: Do NOT attempt to configure your terminal without assistance from the Moneris Merchant Service Centre.

The Air Miles Rewards configuration menu (see REWARD PROGRAM below) contains a list of parameters that can be enabled and configured on the Mobile 8200 terminal.

IMPORTANT: The Air Miles Rewards program requires an additional agreement between the merchant and Moneris Solutions. Please ensure that the necessary agreements are in place before attempting to configure those programs on the terminal.

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

| REWARD PROGRAM | Function |
|--------------------------------|--|
| ENABLE REWARD | Allows the terminal to process Air Miles Reward card transactions. (Default = NO) |
| PROGRAM TYPE | Identifies the Reward program type to be configured and used to calculate the number of Air Miles Reward miles to be assigned. |
| SAF UPD PERIOD | Sets the time period that must pass between the last SAF Upload attempt (automatic or manually prompted) and the next automatic SAF Upload attempt |
| RETAIL CONFIG | Identifies the parameters of the Retail Rewards program. |
| WHOLESALE CFG | Identifies the parameters of the Wholesale Rewards program. |
| BONUS OFR CGF | Identifies the parameters of the Bonus Offers. |
| TAX SETUP | Identifies the type of tax to be considered in the miles calculation. |

To access the Air Miles REWARD PROGRAM Set-up menu, from the [READY screen](#):

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REWARDS, and press **OK**.
The REWARD menu appears.
3. Scroll down to PROGRAM SETUP, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The REWARD PROGRAM Set-up menu appears.

7.2.2 Planning the Rewards Program Configuration

Air Miles rewards are awarded based on the formula you configure on the terminal as a Reward Program.

Rewards Program Calculation Overview

The Air Miles Rewards program applies the Calculator and Factor values to the Purchase amount to determine the number of Reward miles to be awarded.

If an Incentive value, Start date and End date have been configured and the Purchase occurs within the Start and End dates, the number of Rewards miles will be multiplied by the incentive value to determine the number of Incentive Rewards to be awarded.

If Bonus Offers have been configured, and the cardholder has purchased a qualifying item, the program will multiply the Bonus Offer value by the number of items purchased to determine the number of Bonus Offer miles awarded.

The program then totals all miles awarded and compares it to the Maximum Rewards value to ensure it is not over the maximum before applying the miles to the cardholder's Rewards account.

Rewards Program Components

There are three components that may be used in calculating the reward miles:

Purchase Amount

The terminal calculates the number of rewards miles based on the dollar value of the cardholder's purchase to which configurable variables are applied.

Incentives

The terminal automatically applies a multiplication factor to any Air Miles Rewards miles that have been awarded within a configurable time period.

Bonus Offers

If the cardholder's Purchases include items identified as Bonus Offer items, the terminal awards a configurable number of miles per item.

7 The Air Miles Rewards Program

Rewards Program Parameters

Before configuring an Air Miles Rewards program on your terminal, you will need to decide which parameters to use in creating your formula and what values those parameters will have. The parameters are:

- [Calculator and Factor values](#)
- [Incentive parameters](#)
- [Maximum Rewards value](#)
- [Bonus Offer parameters](#)
- [Tax Setup](#)

7.2.3 Rewards Program Planning Worksheet

Print this sheet and fill in the values you wish to use for each parameter in the Rewards Program. If the program has more than one Bonus Offer, print a copy of this worksheet for each Bonus Offer.

You will need to refer to these values when configuring the program.

Note: "POINTS" is displayed on terminal prompts while "miles" is printed on transaction receipts.

Step 1. Enable the Rewards Program:

Enable Reward Program?: YES

Step 2. Select the Program Type

Program Type (circle one): RETAIL or WHOLESALE

Step 3.i. Configure the Calculator and Factors

Calculator 1 _____

Factor 1 _____

Calculator 2 _____

Factor 2 _____

Step 3.ii. Configure the Incentive:

Description _____

Automatically applied? (circle one): YES or NO

Value ____

Incentive Start Date (YYYYMMDD): _____

Incentive End Date (YYYYMMDD): _____

Step 3.iii Set the maximum number of rewards per transaction:

Maximum Rewards per Transaction: _____

Step 3.iv Set the Rewards Totals Reset time of day:

Rewards Totals Reset Time (HHMM): _____

Step 3.v: Enable the Enter Reference Number prompt:

Enable Enter Reference Number prompt (circle one): YES or NO

Step 4. Configure the Bonus Offers:

Number: _____

Description: _____

Reward Type (circle one): MULTIPLIER or POINTS

If MULTIPLIER selected:

Value: _____

Multiplier Type (circle one): BASE POINTS or BONUS OFFERS

Program Type (circle one): RETAIL or WHOLESALE or BOTH

If POINTS selected:

Number of miles: _____

Program (circle one): RETAIL or WHOLESALE or BOTH

MLT Bonus Offer applicable: _____

Start Date (YYYYMMDD): _____

End Date (YYYYMMDD): _____

Step 5. Configure the Tax Setup:

Tax Type: NO TAX or HST or GST/PST

Tax Percentage: Type: _____ = _____% and Type: _____ = _____%

Tax Mode: TAX ON TAX or TAX AND TAX

Step 6. Set the SAF Upload Time Period:

SAF Upload Time Period: (MM) _____

7.2.4 Reward Program Components - Calculator and Factor Values

The Calculator and Factor values are the basic values for calculating Rewards miles based on a dollar amount. The Calculator amounts indicate the dollar value for which one reward unit is awarded. The Factor values indicate the number of times that the Calculator amount is applied (maximum is 99). If the Factor value is set to 99, that Calculator will be applied infinitely.

Some examples are provided below.

[Example 1](#): only one component value assigned (CALC 1) applied to a small amount (\$10.00)

[Example 2](#): only one component value assigned (CALC 1) applied to a large amount (\$300.00)

[Example 3](#): three component values assigned (CALC 1, FACTOR 1, and CALC 2) applied to a large amount (\$300.00)

[Example 4](#): four component values assigned (CALC 1, FACTOR 1, CALC 2 and FACTOR 2) applied to a large amount (\$300.00)

Example 1

Values:

CALC 1 = \$2.00 FACTOR 1 = 99

CALC 2 = 0 FACTOR 2 = 0

PURCHASE = \$10.00

Calculation:

PURCHASE ÷ CALC 1 = REWARDS

\$10.00 ÷ \$2.00 = 5

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Description:

Calculator 1 is applied to all sales of \$2.00 or more, so the cardholder will receive 5 rewards miles for their \$10.00 purchase.

Example 2

Values:

CALC 1 = \$2.00 FACTOR 1 = 99
CALC 2 = 0 FACTOR 2 = 0
PURCHASE = \$300.00

Calculation:

$\text{PURCHASE} \div \text{CALC 1} = \text{REWARDS}$
 $\$300.00 \div \$2.00 = 150$

Description:

Calculator 1 is applied to all sales of \$2.00 or more, so the cardholder will receive 150 rewards miles for their \$300.00 purchase.

Example 3

Values:

CALC 1 = \$2.00 FACTOR 1 = 50
CALC 2 = \$1.00 FACTOR 2 = 99
PURCHASE = \$300.00

Calculation:

$\text{PURCHASE} \div \text{CALC 1} = \text{REWARDS 1}$
 $\$300.00 \div \$2.00 = 150$

If (REWARDS 1 > FACTOR 1) then (CALC 1 x FACTOR 1) = MAX PURCHASE 1
(150 > 50) so ($\$2.00 \times 50$) = \$100.00

If (REWARDS 1 > FACTOR 1) then (MAX PURCHASE 1 ÷ CALC 1) = MAX REWARDS 1
(150 > 50) so $\$100.00 \div \$2.00 = 50$

$\text{PURCHASE} - \text{MAX PURCHASE 1} = \text{PURCHASE 2}$
 $\$300.00 - 100.00 = \200.00

$\text{PURCHASE 2} \div \text{CALC 2} = \text{REWARDS 2}$
 $\$200.00 \div \$1.00 = 200$

If FACTOR 2 = 99 then MAX REWARDS 1 + REWARDS 2 = TOTAL C/ F REWARDS
FACTOR 2 = 99 so $50 + 200 = 250$

Description:

Calculator 1 is applied to sales of more than \$1.99 and less than \$100.01, so the cardholder will receive 50 miles PLUS Calculator 2 will be applied to any remaining purchase value, so the cardholder will receive an additional 200 reward miles for a total of 250 miles

Example 4

Values:

CALC 1 = \$2.00 FACTOR 1 = 52
CALC 2 = \$1.00 FACTOR 2 = 98
PURCHASE = \$300.00

REWARDS 1 = 150
MAX PURCHASE 1 = \$104.00

MAX REWARDS 1 = 52
PURCHASE 2 = \$196.00
REWARDS 2 = 196

Calculation:

$\text{PURCHASE} \div \text{CALC 1} = \text{REWARDS 1}$
 $\$300.00 \div \$2.00 = 150$

If (REWARDS 1 > FACTOR 1) then
(150 > 52)

$(\text{CALC 1} \times \text{FACTOR 1}) = \text{MAX PURCHASE 1}$
 $(\$2.00 \times 52) = \104.00

$(\text{MAX PURCHASE 1} \div \text{CALC 1}) = \text{MAX REWARDS 1}$
 $\$104.00 \div \$2.00 = 52$

$\text{PURCHASE} - \text{MAX PURCHASE 1} = \text{PURCHASE 2}$
 $\$300.00 - \$104.00 = \$196.00$

$\text{PURCHASE 2} \div \text{CALC 2} = \text{REWARDS 2}$
 $\$196.00 \div \$1.00 = 196$

If FACTOR 2 < 99 then compare REWARDS 2 vs. FACTOR 2
(98 < 99) so (196 > 98)

If (REWARDS 2 > FACTOR 2) then
(196 > 98)

$(\text{CALC 2} \times \text{FACTOR 2}) = \text{MAX PURCHASE 2}$
 $(\$1.00 \times 98) = \98.00

$(\text{MAX PURCHASE 2} \div \text{CALC 2}) = \text{MAX REWARDS 2}$
 $(\$98.00 \div \$1.00) = 98$

$\text{MAX REWARDS 1} + \text{MAX REWARDS 2} = \text{TOTAL REWARDS}$
 $(52 + 98) = 150$

Description:

Calculator 1 is applied to sales of more than \$1.99 and less than \$104.01, so the cardholder will receive 52 miles PLUS Calculator 2 will be applied to an additional \$98.00 of purchase value, so the cardholder will receive an additional 98 reward miles for a total of 150 miles.

7.2.5 Reward Program Components - Bonus Offer Values

Within a program, Bonus Offers can be applied in one of three ways.

Note: "POINTS" is displayed on terminal prompts while "miles" is printed on transaction receipts.

1. As Miles ("points") - Specific items can qualify for additional Air Miles Rewards miles if they are defined as Bonus Offers in the Rewards configuration. Up to 20 items can be defined. See [Example 1](#).
2. As a multiplier applied to base miles (similar to an Incentive) - If a cardholder purchases a qualifying item, an incentive value is applied to their C/F rewards value. Only applicable if no other Incentive has been applied to the transaction. See [Example 2](#).
3. As a multiplier applied to other Bonus Offers - If a cardholder qualifies for a Bonus Offer, the miles from that Bonus Offer may be eligible for the application of an additional multiplier value. See [Example 3](#).

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Some examples are provided below.

[Example 1](#): Bonus Offers as Points

[Example 2](#): Bonus Offer as a Multiplier applied to base miles

[Example 3](#): Bonus Offer as a Multiplier applied to other Bonus Offers

Example 1

Values:

PURCHASE AMOUNT: \$438.55
TOTAL C/ F REWARDS: 115
BONUS OFFER configured as POINTS
BONUS OFFER 1: Points per BO Item - 12, Number of BO Items - 3
BONUS OFFER 2: Points per BO Item - 6, Number of BO Items - 7

Calculation:

Bonus Offer 1
Point per item x Number of Items = BO1 REWARDS
(12 x 3) = 36

Bonus Offer 2
Point per item x Number of Items = BO2 REWARDS
(6 x 7) = 42

BO1 REWARDS + BO2 REWARDS = TOTAL BO REWARDS
(36 + 42) = 78

TOTAL C/ F REWARDS + TOTAL BO REWARDS = TOTAL REWARDS
(115 + 78) = 193

Description:

The cardholder is awarded 115 miles for their Purchase. Then, because the cardholder purchased 3 of Bonus Offer item 1 with a value of 12 miles each and 7 of Bonus Offer item 2 with a value of 6 miles each, they qualify for an additional 78 miles for a grand total of 193 rewards miles.

Example 2

Values:

PURCHASE AMOUNT: \$438.55
TOTAL C/ F REWARDS: 115
BONUS OFFER configured as BASE POINTS MULTIPLIER
VALUE: 1.5

Calculation:

C/ F REWARDS X BO MULTIPLIER VALUE = TOTAL REWARDS
(115 x 1.5) = 172

Description:

The cardholder was awarded 115 miles for their Purchase and has qualified for the Bonus Offer. The miles for the purchase are multiplied by the Bonus Offer value of 1.5 for a grand total of 172 rewards miles.

Example 3

Values:

PURCHASE AMOUNT: \$438.55
TOTAL C/ F REWARDS: 115
BONUS OFFER 1: Points per BO Item - 12, Number of BO Items - 3
BONUS OFFER 3: MULTIPLIER applicable to Bonus Offer 1
BO3 MULTIPLIER VALUE: 1.5

Calculation:

Bonus Offer 1
Point per item x Number of Items = BO1 REWARDS
 $(12 \times 3) = 36$

Bonus Offer 3
BO1 REWARDS x MULTIPLIER VALUE = BO3 REWARDS
 $(36 \times 1.5) = 54$

BO3 REWARDS + TOTAL C/ F REWARDS = TOTAL REWARDS
 $(54 + 115) = 169$

Description:

The cardholder was awarded 115 miles for their Purchase. Then, because the cardholder purchased 3 of Bonus Offer item 1 with a value of 12 miles each, they qualify for an additional 36 miles. The cardholder has also qualified for Bonus Offer 3 so the Bonus Offer 1 miles are multiplied by the Bonus Offer 3 multiplier value of 1.5 for a grand total of 169 rewards miles.

7.2.6 Reward Program Components - Incentive Values

If the Incentive value is greater than one, the rewards program awards additional rewards miles to a cardholder's account based on the Incentive value.

The Incentive value is multiplied by the Total Standard Rewards (calculated using the [Calculator and Factor values](#)) to determine the Total Incentive Rewards. The Incentive value will only be applied during the period identified by the Incentive Start date and Incentive End date.'

An example including calculations and a description is provided below.

Values:

PURCHASE AMOUNT: \$438.55
TOTAL STANDARD REWARDS: 115
INCENTIVE VALUE: 1.5

Calculation:

TOTAL STANDARD REWARDS x INCENTIVE VALUE = TOTAL INCENTIVE REWARDS
 $(115 \times 1.5) = 172$

TOTAL INCENTIVE REWARDS - TOTAL STANDARD REWARDS = INCENTIVE REWARDS
 $(172 - 115) = 67$

Note: *The Incentive Rewards value is printed on the Air Miles Purchase receipt rather than the Total Incentive Rewards.*

Description:

The cardholder is awarded 115 miles for their purchase. This number of miles is multiplied by the Incentive value of 1.5 to give the cardholder a rewards total of 172 miles.

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7.2.7 Order of Calculation

Note: "POINTS" is displayed on terminal prompts while "miles" is printed on transaction receipts.

Bolded items are defined in the [Calculation Table](#) below.

1. Calculate **Rewards 1**.

2. Review **Factor 1**:

If **Factor 1** = 99 then DONE

If **Factor 1** < 99 then:

3. Compare **Factor 1** to **Rewards 1**.

If **Factor 1** > **Rewards 1** then award **Rewards 1**.

If **Factor 1** < **Rewards 1** then:

4. Calculate **Max. Purchase 1**.

5. Calculate **Purchase 2**.

6. Calculate **Rewards 2**.

7. Calculate **Total Standard Rewards**.

8. Review **Incentive Value**:

If **Incentive Value** < 1.00 then go to step 9.

If **Incentive Value** > 1.00 then calculate **Incentive Rewards**.

9. Review **Bonus Offers**:

If no **Bonus Offers** are configured then go to step 10

If one or more **Bonus Offers** are configured as Points then calculate **Total Points Bonus Offer Rewards**.

If one or more **Bonus Offers** are configured as a Multiplier then calculate **Total Multiplier Bonus Offer Rewards**.

10. Calculate the total rewards to be awarded:

If **Incentive Value** < 1.00 and no **Bonus Offers** are configured then award **Total Standard Rewards**.

If **Incentive Value** < 1.00 and at least one **Bonus Offer** is configured then calculate the sum of **Total Standard Rewards** + **Total Bonus Offer Rewards** (multiplier or miles).

If **Incentive Value** > 1.00 and no **Bonus Offers** are configured then award **Total Incentive Rewards**.

If **Incentive Value** > 1.00 and at least one **Points Bonus Offer** is configured then calculate the sum of **Total Incentive Rewards** + **Total Points Bonus Offer Rewards**.

7.2.8 Rewards Calculation Table

| Value | Definition |
|--|--|
| Purchase | Dollar Amount after application of Tax Type values to amount keyed in at the ENTER AMOUNT entry screen |
| Calc 1 | Calculator 1 value |
| Factor 1 | Factor 1 value |
| Calc 2 | Calculator 2 value |
| Factor 2 | Factor 2 value |
| Rewards 1 | $\text{Purchase} \div \text{Calc 1}$ |
| Max. Purchase 1 | $\text{Calc 1} \times \text{Factor 1}$ |
| Max. Rewards 1 | $= \text{Factor 1}$ |
| Purchase 2 | $\text{Purchase} - \text{Max. Purchase 1}$ |
| Rewards 2 | $\text{Purchase 2} \div \text{Calc 2}$ |
| Max. Purchase 2 | $\text{Calc 2} \times \text{Factor 2}$ |
| Max. Rewards 2 | $= \text{Factor 2}$ |
| Total Standard Rewards | $\text{Max. Rewards 1} + \text{Rewards 2}$ |
| Max. Total Standard Rewards | $\text{Max Rewards 1} + \text{Max Rewards 2}$ <i>Note: This should not be greater than the value set for Maximum Rewards per transaction.</i> |
| Incentive Value | Incentive value |
| Incentive Rewards | Total Incentive Rewards - Total Standard Rewards. <i>Note: This value appears on Air Miles Purchase receipts.</i> |
| Total Incentive Rewards | Total Standards Rewards x Incentive Value |
| Bonus Offers | Bonus Offers configured |
| Points Bonus Offer # N Rewards (PBO#N) | (Points Bonus Offer # N value) x number of items |
| Total Points Bonus Offer Rewards | $\text{PBO\#1} + \dots + \text{PBO\#N}$ |
| Multiplier Bonus Offer # N Rewards (MBO#N) | Multiplier Value x (Points Bonus Offer # N Rewards) |
| Total Multiplier Bonus Offer Rewards | $\text{MBO\#1} + \dots + \text{MBO\#N}$ |
| Total Bonus Offer Rewards | (Total Points Bonus Offer Rewards) + (Total Multiplier Bonus Offer Rewards) |

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7.2.9 Enable the Rewards Program

You must enable the Rewards program on the terminal before you can process Air Miles Rewards card transactions.

From the [READY](#) screen:

- a. Press the **Admin** key.
The MAIN MENU appears.
- b. Scroll down to REWARDS, and press **OK**.
The REWARD PROGRAM menu appears.
- c. Scroll down to PROGRAM SETUP, and press **OK**.

Note: If the **PROGRAM SETUP** item does not appear on the **REWARD PROGRAM** menu, perform an [UPLOAD SAF](#) transaction to clear the **SAF Log** then access the **REWARD PROGRAM** menu and try again.

If the **SWIPE ADMIN CARD** prompt appears, swipe the POS Admin card.

The REWARD PROGRAM Set-up menu appears.

- d. Press **OK** to select **ENABLE REWARD**.
The **ENABLE REWARD PROGRAM?** prompt appears.
- e. Press the **F1** key to select **YES**.
The default is **NO**.
The REWARD PROGRAM menu reappears with additional options.

7.2.10 Select the Type of Rewards Program

This process identifies the Reward program type to be configured and used to calculate the number of Air Miles Reward miles to be assigned during transactions.

From the [REWARD PROGRAM](#) menu:

- a. Scroll down to PROGRAM TYPE, and press **OK**.
The PROGRAM TYPE menu appears.
- b. Select the Program Type you wish to enable.
The REWARD PROGRAM menu reappears with additional options.

If you selected:

- **RETAIL** then the **RETAIL CONFIG** option appears on the REWARD PROGRAM menu.
- **WHOLESALE** then the **WHOLESALE CFG** option appears on the REWARD PROGRAM menu.
- **BOTH** then both the **RETAIL CONFIG** option and the **WHOLESALE CFG** option appear on the REWARD PROGRAM menu.

Note: If you select **BOTH**, the [REWARD PURCHASE program selection prompt](#) will appear during Reward Purchases and the [REWARD REFUND program selection prompt](#) will appear during Reward Refund transactions.

7.2.11 Configure the Calculator and Factor Values

Refer to your [Rewards Program Planning worksheet](#) for the values to key in for each parameter.

The configuration steps are the same for both the RETAIL and the WHOLESale program types. The following instructions refer specifically to the Retail program. To configure the Wholesale program, follow these instructions substituting WHOLESale wherever you see RETAIL.

From the [REWARD PROGRAM menu](#):

a. Scroll down to RETAIL CONFIG, and press **OK**.
The REWRD CFG-RETAIL menu appears.

b. Press **OK** to select CALCULATOR 1.
The CALCULATOR 1 entry screen appears.

c. Key in the value of Calculator 1 without the decimal mile, and press **OK**.
(min. = 0.001, max. = 9,999.999)
The REWARD CFG menu reappears.

Note: The default value of Factor 1 is 99. If you wish to leave the value as 99, then this step is finished. Go back to the "[Configuring the Air Miles Rewards Program](#)" procedure.

d. Scroll down to FACTOR 1, and press **OK**.
The FACTOR 1 entry screen appears.

e. Key in the value of Factor 1, and press **OK**.
(min. = 01, max. = 99)
The REWARD CFG menu reappears.

f. Scroll down to Calculator 2, and press **OK**.
The CALCULATOR 2 entry screen appears.

g. Key in the value of Calculator 2 without the decimal mile, and press **OK**.
(min. = 0.001, max. = 9,999.999)
The REWARD CFG menu reappears.

Note: The default value of Factor 2 is 99. If you wish to leave the value as 99 then this step is finished. Return to [Configuring Rewards](#).

h. Scroll down to FACTOR 2, and press **OK**.
The FACTOR 2 entry screen appears.

i. Key in the value of Factor 2, and press **OK**.
(min. = 01, max. = 99)
The REWARD CFG menu reappears.

j. Press the **Can/Ann** key to return to the REWARD PROGRAM menu.

7.2.12 Configure the Incentive Values

Refer to your [Rewards Program Planning worksheet](#) for the values to key in for each parameter.

The configuration steps are the same for both the RETAIL and the WHOLESale program types. The following instructions refer specifically to the Retail program. To configure the Wholesale program, follow these instructions substituting WHOLESale wherever you see RETAIL.

From the [REWARD PROGRAM menu](#):

a. Scroll down to RETAIL CFG, and press **OK**.
The REWRD CFG-RETAIL menu appears.

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b. Scroll down to INCENTIVE, and press **OK**.

The INCENTIVE entry screen appears.

c. Key in the value of the Incentive, and press **OK**.

(min. 0.01, max. = 99.99, default = 1.00)

The REWRD CFG menu reappears.

To display a name for the incentive during Reward transactions:

d. Scroll down to INCEN DESCRIPT, and press **OK**.

e. Press **OK** to select DESCR ENGLISH.

The DESCRIPTION ENGLISH entry screen appears.

f. Key in the English description of the incentive, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)

Note: If you wish to display a French description when the terminal language is set to French, repeat steps e. (select DESCR FRENCH this time) and f.

g. Press the **Can/Ann** key to return to the REWRD CFG-RETAIL menu.

To apply the incentive automatically during Reward Purchases:

h. Scroll down to AUTO INCENTIVE, and press **OK**.

The AUTOMATIC INCENTIVE? prompt appears.

i. To have the incentive applied automatically to all qualifying Reward Purchases, press the **F1** key to select YES.

To display the [APPLY INCENTIVE? prompt](#) during Reward Purchases, press the **F3** key to select **OK**.

The REWRD CFG-RETAIL menu re-appears.

To restrict the Incentive to a specific time frame:

j. Scroll down to INCEN START DT, and press **OK**.

The INCENTIVE START DATE entry screen appears.

k. Key in the first date the Incentive will be applied (YYYYMMDD), and press **OK**.

The REWRD CFG-RETAIL menu reappears.

l. Scroll down to INCEN END DT, and press **OK**.

The INCENTIVE END DATE entry screen appears.

m. Key in the last date the Incentive will be applied (YYYYMMDD), and press **OK**.

The REWRD CFG-RETAIL menu reappears.

n. Press the **Can/Ann** key to return to the REWARD PROGRAM menu.

7.2.13 Configure the Maximum Rewards Allowed

If you wish to limit the number of miles that can be awarded for a single transaction, this process sets the maximum miles value to be considered in the miles calculation.

Refer to your [Rewards Program Planning worksheet](#) for the values to key in for each parameter.

The configuration steps are the same for both the RETAIL and the WHOLESale program types.

The following instructions refer specifically to the Retail program. To configure the Wholesale program, follow these instructions substituting WHOLESale wherever you see RETAIL.

From the [REWARD PROGRAM menu](#):

a. Scroll down to RETAIL CONFIG, and press **OK**.

The REWRD CFG-RETAIL menu appears.

- b. Scroll down to MAXIMUM REWRDS, and press **OK**.
The MAXIMUM REWARDS entry screen appears.
- c. Key in the maximum number of rewards that can be rewarded for one Rewards transaction, and press **OK**.
(min. 1, max. 99,999, default = 50).
The REWRD CFG-RETAIL menu re-appears.
- d. Press the **Can/Ann** key to return to the REWARD PROGRAM menu.

7.2.14 Set the Rewards Totals Reset Time of day

Refer to your [Rewards Program Planning worksheet](#) for the values to key in for each parameter.

The configuration steps are the same for both the RETAIL and the WHOLESale program types. The following instructions refer specifically to the Retail program. To configure the Wholesale program, follow these instructions substituting WHOLESale wherever you see RETAIL.

From the [REWARD PROGRAM menu](#):

- a. Scroll down to RETAIL CFG, and press **OK**.
The REWRD CFG-RETAIL menu appears.
- b. Scroll down to RESET TTL TIME, and press **OK**.
The RESET TOTALS TIME entry screen appears.
- c. Key in the time of day at which the Rewards Totals Log will be cleared, and press **OK**.
This should be set to occur while the location is closed.
(24-hour clock, e.g. 11:30 PM would be entered as 2330).
The REWRD CFG-RETAIL menu re-appears.
- d. Press the **Can/Ann** key to return to the REWARD PROGRAM menu.

7.2.15 Enable the Enter Reference Number Prompt

Refer to your [Rewards Program Planning worksheet](#) for the values to key in for each parameter.

The configuration steps are the same for both the RETAIL and the WHOLESale program types. The following instructions refer specifically to the Retail program. To configure the Wholesale program, follow these instructions substituting WHOLESale wherever you see RETAIL.

From the [REWARD PROGRAM menu](#):

- a. Scroll down to RETAIL CONFIG, and press **OK**.
The REWRD CFG-RETAIL menu appears.
- b. Scroll down to REFERENCE NO, and press **OK**.
The REFERENCE NUMBER? selection screen appears.
 - i. To display the [ENTER REFERENCE NUMBER entry screen](#) during Reward transactions, press the **F1** key to select YES.
To disable the entry screen, press the **F3** key to select NO.
The REWRD CFG-RETAIL menu re-appears.
- c. Press the **Can/Ann** key to return to the REWARD PROGRAM menu.

7.2.16 Configure the Bonus Offers

This process establishes the parameters of the Bonus Offers available in the Rewards program.

Note: "POINTS" is displayed on terminal prompts while "miles" is printed on transaction receipts.

Refer to your [Rewards Program Planning worksheet](#) for the values to key in for each parameter.

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The configuration steps are the same for both the RETAIL and the WHOLESale program types. The following instructions refer specifically to the Retail program. To configure the Wholesale program, follow these instructions substituting WHOLESale wherever you see RETAIL.

From the [REWARD PROGRAM menu](#):

a. Scroll down to BONUS OFR CFG, and press **OK**.

The BONUS OFFER REWARD menu appears with the list of 20 possible bonus offers.

Note: If this is the first bonus offer to be configured, the list displays the bonus offer numbers 001 to 020. When a bonus offer has been configured with a description, the first 14 characters of that description are displayed on this list.

b. Select a bonus offer number (e.g. 001), and press **OK**.

The Bonus Offer Setup menu appears with the bonus offer name as the menu title.

To display a name for the Bonus Offer during Reward transactions:

c. Press **OK** to select DESCR ENGLISH.

The DESCRIPTION ENGLISH entry screen appears.

d. Key in the English description of the incentive, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)

Note: If you wish to display a French description when the terminal language is set to French, repeat steps c. (select DESCR FRENCH this time) and d.

The Bonus Offer Setup menu re-appears with the bonus offer name as the menu title.

To set the type of Bonus Offer as MULTIPLIER:

e. Scroll down to REWARD TYPE, and press **OK**.

The REWARD TYPE menu reappears.

f. To use a multiplier to calculate Bonus Offer miles, select MULTIPLIER, and press **OK**.

The Bonus Offer Setup menu re-appears.

g. Scroll down to MULTIPLIER, and press **OK**.

The BONUS OFFER REWARD MULTIPLIER entry screen appears.

h. Key in the value of the multiplier (min. 1.00, max. 99.99), and press **OK**.

The Bonus Offer Setup menu re-appears.

i. Scroll down to MULTIPLIER TYPE, and press **OK**.

The MULTIPLIER TYPE menu appears.

j. Select BASE POINTS to have the multiplier behave as an incentive.

Select BONUS OFFERS to have the multiplier applied to another bonus offer.

The Bonus Offer Setup menu re-appears.

k. Scroll down to PROGRAM TYPE, and press **OK**.

The PROGRAM TYPE menu appears.

l. Select the Program type, and press **OK**.

To display the Bonus Offer prompt during:

- Retail program transactions, select RETAIL.

- Wholesale program transactions, select WHOLESale.

- transactions of either program type, select BOTH.

The Bonus Offer Setup menu re-appears.

To set the type of Bonus Offer as POINTS:

e. Scroll down to REWARD TYPE, and press **OK**.

The REWARD TYPE menu reappears.

- f. To set a specific number of miles for a Bonus Offer, select POINTS, and press **OK**.
The Bonus Offer Setup menu re-appears.
- g. Scroll down to NO. OF POINTS, and press **OK**.
The BONUS OFFER REWARDS entry screen appears.
- h. Key in the number of miles to be awarded to purchases that match the criteria for this bonus offer, and press **OK**.
The Bonus Offer Setup menu re-appears.
- i. Scroll down to PROGRAM TYPE, and press **OK**.
The PROGRAM TYPE selection screen appears.
- j. Select the Program type, and press **OK**.
To display the Bonus Offer during:
- Retail program transaction, select RETAIL.
- Wholesale program transactions, select WHOLESale.
- transactions of either program type, select BOTH.
The Bonus Offer Setup menu re-appears.
- If Multiplier Bonus Offers have also been configured with a Multiplier Type of "Bonus Offers", the MLT BONUS OFFER item appears on the Bonus Offer setup menu.
- To be able to apply a Multiplier Bonus Offer to a Points Bonus Offer:
- k. Scroll down to MLT BONUS OFFER, and press **OK**.
The BONUS OFFER REWARD menu appears.
- l. Scroll down to the Bonus Offer (listed by number or by description if it has one), and press **OK** to apply the Multiplier Bonus Offer to the Points Bonus Offer you selected.
The Bonus Offer Setup menu re-appears.
- To restrict the Bonus Offer to a specific time frame:
- m. Scroll down to BONUS START DT, and press **OK**.
The BONUS OFFR START DATE entry screen appears.
- n. Key in the first date the bonus offers will be available (YYYYMMDD), and press **OK**.
The Bonus Offer Setup menu reappears.
- o. Scroll down to BONUS END DATE, and press **OK**.
The BONUS OFFR END DATE entry screen appears.
- p. Key in the last date the bonus offers will be available (YYYYMMDD), and press **OK**.
The Bonus Offer Setup menu re-appears.
- q. Press the **Can/Ann** key twice to return to the REWARD PROGRAM menu.

7.2.17 Configure the Tax Type

If you wish to apply the Rewards calculation to the Purchase dollar value before taxes, this process identifies the type and amount of tax to be considered in the miles calculation.

Refer to your [Rewards Program Planning worksheet](#) for the values to key in for each parameter.

The configuration steps are the same for both the RETAIL and the WHOLESale program types. The following instructions refer specifically to the Retail program. To configure the Wholesale program, follow these instructions substituting WHOLESale wherever you see RETAIL.

From the [REWARD PROGRAM menu](#):

- a. Scroll down to TAX SETUP, and press **OK**.
The TAX SETUP menu appears.
- b. Select TAX TYPE, and press **OK**.
The TAX TYPE menu appears.

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c. Select the type of tax your business charges on Purchases.
The TAX SETUP menu reappears.

d. Scroll down to the tax type your business charges on Purchases, and press **OK**.
The TAX PERCENTAGE entry screen appears.

e. Key in the Tax percentage, and press **OK**.
(min. 0.01, max. 99.99)
The TAX SETUP menu reappears.

Note: If your business applies 2 types of tax, e.g. GST and PST, repeat steps d. and e. for each type of tax.

f. If the Tax Type was GST/PST, scroll down to TAX MODE, and press **OK**.
The TAX MODE menu appears.

g. Select the method used to calculate the tax, and press **OK**.
The TAX SETUP menu reappears.

h. Press the **Can/Ann** key to return to the REWARD PROGRAM menu.

7.2.18 Configure the SAF Upload Time Period

This function sets the time period that must pass between the last SAF Upload attempt (automatic or manually prompted) and the next automatic SAF Upload attempt.

Note: The default is 5. If you wish to use this value you do not need to perform this step.

From the [REWARD PROGRAM menu](#):

1. Select SAF UPD PERIOD.

The SAF UPLOAD TIME PERIOD entry screen appears.

2. Key in the number of minutes the terminal must wait before attempting an automatic SAF Upload transaction, and press **OK**. (min. 1 minute, max. 15 minutes, default is 5 minutes)
The REWARD PROGRAM menu re-appears.

7.3 Air Miles Transactions

7.3.1 Air Miles Rewards - Purchase

This transaction awards Air Miles Reward miles to an Air Miles cardholder for Purchases that they have made at your location.

Note: "POINTS" is displayed on terminal prompts while "miles" is printed on transaction receipts.

From the READY screen:

1. Press the **Admin** key.

The MAIN MENU appears.

2. Scroll down to REWARDS, and press **OK**.

The REWARD MENU appears.

3. Press **OK** to select PURCHASE.

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

If the REWARD PURCHASE menu appears, select the program (RETAIL or WHOLESALE) to be used for calculating miles and press **OK**.

If the ENTER REFERENCE NUMBER entry screen appears, key in the Reference number (min. 1, max. 4 digits), and press **OK**.

The ENTER AMOUNT entry screen appears.

4. Key in the dollar amount of the Purchase, and press **OK**.

If the [APPLY INCENTIVE?](#) prompt appears, refer to the "Applying the Incentive to Air Miles Rewards Purchase" procedure.

If the [ADD BONUS OFFERS](#) prompt appears, refer to the "Add Bonus Offers during a Rewards Purchase " procedure.

The ENTER COLLECTOR CARD prompt appears.

If the [ZERO POINTS AWARDED](#) message or the [REWARD EXCEEDS LIMIT](#) message appears, no miles are awarded. The transaction is cancelled, and the terminal returns to the READY screen automatically.

5. Swipe the Air Miles card on the terminal.

OR

Key in the Air Miles Card number, and press **OK**, and then select the language to be used on the cardholder receipt.

The Cardholder copy of the receipt is printed.

6. Press **OK**.

The Merchant copy of the receipt is printed.

7. Press **OK** to return to the READY screen.

7.3.2 Add Bonus Offers during a Rewards Purchase

If one or more Bonus Offers were enabled for the Rewards program used to calculate miles on this transaction, and the cardholder has purchased items that qualify as Bonus Offers, you must select those Bonus Offers in order to calculate the correct number of miles to be added to the cardholder's account.

The ADD BONUS OFFERS prompt appears.

- a. To select the Bonus Offers to be applied to this transaction, press the **F1** key to select YES.

To continue without applying Bonus Offers, press the **F3** key to select NO, and go to the ENTER COLLECTOR CARD prompt.

The list of Bonus Offers configured for this Rewards Program appears.

- b. Select a Bonus Offer, and press **OK**.

The ENTER QUANTITY entry screen appears.

- c. Key in the number of Bonus Offer items purchased, and press **OK**.

If the [APPLY MULTIPLIER?](#) prompt appears:

To apply the multiplier, press the **F1** key to select YES.

To continue without applying the multiplier, press the **F3** key to select NO.

If the [ADD BONUS OFFERS](#) prompt re-appears:

To select another Bonus Offer, repeat steps a. through c.

To continue without selecting additional Bonus Offers, press the **F3** key to select NO.

The ENTER COLLECTOR CARD prompt appears.

Continue the [Air Miles Reward Purchase](#).

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7.3.3 Applying the Incentive to an Air Miles Rewards Purchase

If an [Incentive was enabled](#) for the Rewards program used to calculate miles on this transaction:

The APPLY INCENTIVE? prompt appears with the incentive name on the second line.

- a. Press the **F1** key to select YES and apply the Incentive to the miles calculation.
Press the **F3** key to select NO to continue without applying the incentive.

The next prompt appears.

Continue the [Air Miles Reward Purchase](#).

7.3.4 Air Miles Rewards - Refund

This transaction removes Air Miles Reward miles from an Air Miles cardholder's account for items they have returned to your location.

Note: "POINTS" is displayed on terminal prompts while "miles" is printed on transaction receipts.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REWARDS, and press **OK**.
The REWARD MENU appears.
3. Scroll down to REFUND, and press **OK**.
The SWIPE ADMIN CARD prompt appears.
4. Swipe your MONERIS POS Admin card.

If the [ENTER CLERK ID](#) entry screen appears instead, refer to the "Entering the Clerk ID" procedure.

If the REWARD REFUND menu appears, select the program (RETAIL or WHOLESAL) to be used for calculating miles and press **OK**.

If the ENTER REFERENCE NUMBER entry screen appears, key in the REFERENCE number that appears on the Reward Purchase receipt and press **OK**.

The ENTER AMOUNT entry screen appears.

5. Key in the Reward Purchase Amount that appears on the Reward Purchase receipt, and press **OK**.
The ENTER STANDARD POINTS REFUNDED entry screen appears.
6. Key in the number of Standard Points that appear on the Reward Purchase receipt, and press **OK**.
The ENTER INCENTIVE POINTS REFUNDED entry screen appears.
7. Key in the number of Incentive miles that appear on the Reward Purchase receipt, and press **OK**.

If there are no incentive miles listed on the Purchase receipt, simply press **OK**.

If the [ADD BONUS OFFERS](#) prompt appears, refer to the "Add Bonus Offers during a Rewards Refund" procedure.

The ENTER COLLECTOR CARD prompt appears.

8. Swipe the Air Miles card on the terminal.
OR
Key in the Air Miles Card number, then press **OK**, and then select the language to be used on the Cardholder copy of the receipt.
The Cardholder copy of the receipt is printed.

9. Press **OK**.
The Merchant copy of the receipt is printed.
10. Press **OK** to return to the READY screen.

7.3.5 Add Bonus Offers during a Rewards Refund

If one or more Bonus Offers were enabled for the Rewards program used to calculate miles on the Air Miles Reward Purchase transaction, you must select those Bonus Offers in the Air Miles Refund transaction in order to calculate the correct number of miles to be removed from the cardholder's account.

Note: "POINTS" is displayed on terminal prompts while "miles" is printed on transaction receipts.

The ADD BONUS OFFERS prompt appears.

- a. To select the Bonus Offers to be applied to this transaction, press the **F1** key to select YES.

To continue without applying Bonus Offers, press the **F3** key to select NO and go to the ENTER COLLECTOR CARD prompt.

The ENTER BONUS OFFER entry screen appears.

- b. Key in the 3-digit Bonus Offer number, and press **OK**.

The Bonus Offer number appears on the Air Miles Reward Purchase receipt to the left of the first 14 characters of the bonus offer name (e.g. if bonus offer 001 is named "June and July Offer" then the receipt will display "001 JUNE AND JULY " and the Bonus Offer number to be entered here is 001).

The POINTS REFUNDED entry screen appears.

- c. Key in the number of Bonus Offer miles, and press **OK**. The number of miles appears on the Air Miles Reward Purchase receipt to the right of the Rewards Program type (e.g. RETAIL ##### or WHOLESALE #####).

If the ADD BONUS OFFERS prompt re-appears:

To select another Bonus Offer, repeat steps a. through c.

To continue without selecting additional Bonus Offers, press the **F3** key to select NO.

The ENTER COLLECTOR CARD prompt appears.

Continue the [Air Miles Reward Refund](#).

7.4 Air Miles Admin Transactions

7.4.1 Completing Air Miles Reward Transactions

Air Miles transactions are not complete until they have been uploaded to the Moneris Host for processing.

The terminal automatically connects to the Moneris Host to upload and complete the transactions in the Reward SAF Log (listed in the [Air Miles Reward SAF Log](#); refer to the "Printing the Air Miles Rewards SAF List" procedure). The message UPLOAD SAF appears at the top of the screen while the terminal communicates with the Moneris Host. The transactions are then cleared from the Reward SAF Log and saved in the Reward Transactions Log (listed in the [Air Miles Reward Transaction List](#); refer to the "Printing the Air Miles Rewards Transaction List" procedure).

If this process has not occurred or you wish to send the transactions in the Reward SAF Log before they are scheduled to be sent automatically, you can send them any time using the UPLOAD SAF function.

7 The Air Miles Rewards Program

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REWARDS, and **OK**.
The REWARD MENU appears.
3. Scroll up (it's faster) to UPLOAD SAF, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The terminal displays the communication status while it sends the SAF transactions to the Moneris Host, and then the terminal returns to the READY screen.

7.4.2 Printing the Air Miles Rewards SAF List

This report prints or displays a list of all Air Miles Rewards transactions in the Rewards SAF log. These are Air Miles transactions that have not been sent to the Moneris Host for completion.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REWARDS, and press **OK**.
The REWARD MENU appears.
3. Scroll down to SAF INQUIRY, and press **OK**.

If SAF INQUIRY does not appear on the menu, there are no transactions in Rewards SAF log. Press the **Can/Ann** key to return the READY screen.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The PRINT OR DISPLAY? prompt appears.



4. To print the list of Air Miles Rewards transactions, press the **F1** key to select PRINT.
The terminal displays PRINTING while it prints the report and then returns to the READY screen.

To [delete an Air Miles SAF](#) transaction, refer to "Deleting a transaction from the Air Miles Rewards SAF List".

7.4.3 SAF Log Status Icons

The SAF Log status icon appears in the top left corner of the terminal display on the following screens: [MAIN MENU](#), [TRANSACTIONS](#), [REPORT FUNCS](#), [ADMIN FUNCS](#), and [CONFIG FUNCS](#).

To display this icon from the [READY screen](#), press the **Admin** key to access the ADMIN FUNCTIONS menu.

| Icon | Description |
|---|---|
|  | The SAF log is nearly full and a manual SAF Upload transaction should be performed. |
|  | The SAF log is full. The next time the terminal returns to the READY screen, it will perform an automatic SAF Upload . No other transactions can be processed until the SAF Upload has been successfully completed. |

7.4.4 Deleting a transaction from the Air Miles Rewards SAF List

If an Air Miles Rewards transactions does not need to be sent to the Moneris Host for completion, e.g. if you wish to cancel the transaction before it is completed, you can delete the transaction from the Air Miles Rewards SAF Log in order to ensure that it is not completed accidentally.

Perform an [Air Miles Rewards SAF Inquiry](#) to find the transaction you wish to delete. When the PRINT OR DISPLAY? prompt appears:

A. Press the **F3** key to select DISPLAY.

The terminal searches its memory for Air Miles SAF transactions.

B. The TRANSAC TO DELETE Menu displays the matching transactions on the screen, one transaction per line.

To select a particular transaction, scroll through the list until the transaction is highlighted then press **OK**.

| | |
|---|---|
| TRANSAC TO DELETE | T = Transaction Type: P = Reward Purchase R = Reward Refund NNNN = last 4 digits of the Card number 999.99 = last 5 digits of the transaction amount |
| T NNNN \$999.99 T NNNN \$999.99 T NNNN \$999.99 | |

The DELETE TRANSACTION? screen appears.

C. Confirm that this is the correct transaction then press the **F1** key (YES) to remove it from the terminal memory.

IMPORTANT: Once deleted, the Air Miles Reward transaction can no longer be completed.

If the DELETE TRANS, SWIPE ADMIN CARD prompt appears, swipe the POS Admin card on the terminal to delete the transaction.

The terminal deletes the selected transaction from the terminal memory and returns to the TRANSAC TO DELETE menu.

D. To select another Air Miles Rewards transaction to delete, repeat steps B and C. To return to the READY screen, press the **Can/Ann** key.

7.4.5 Printing an Air Miles Rewards Totals Report

This report checks the Air Miles Reward Log and produces a list of

- the total dollar value of all Rewards Transactions
- the total number of Rewards miles awarded
- the total number of Rewards transactions performed

The Air Miles Reward Log contains all Rewards transactions performed since the log was last cleared (see [Reset Rewards Total Time](#)).

From the READY screen or the TERMINAL SETUP REQUIRED prompt:

1. Press the **Admin** key.

The MAIN MENU appears.

2. Scroll down to REWARDS, and press **OK**.

The REWARD MENU appears.

7 The Air Miles Rewards Program

3. Scroll down to REWARD TOTALS, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The terminal displays PRINTING while it prints the report and then returns to the READY screen.

7.4.6 Printing the Air Miles Rewards Transaction List

This report prints a list of all transactions that match the criteria you select. If you do not select any criteria (i.e. you simply press **OK** as each criteria appears), all transactions in the terminal memory are listed.

IMPORTANT: **The POS Admin card is required if you wish to print unmasked Card numbers on this report.**

Criteria are:

- Date of Transaction
- Card Number
- Number of Points

Note: *"POINTS" is displayed on terminal prompts while "miles" is printed on transaction receipts.*

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REWARDS, and press **OK**.
The REWARD MENU appears.
3. Scroll down to REWARD LIST, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The criteria appear in order.

4. The DATE (YY) MMDD entry screen appears.
To select all transactions regardless of the date they were processed, simply press **OK**.
OR
To select transactions processed on a specific date, key in the date in the format indicated on the screen (the 2-digit year is optional) and press **OK**.
5. The CARD NUMBER entry screen appears.
To select all Card numbers, simply press **OK**.
OR
To select a specific card, key in the Card number, and press **OK**.
6. The REWARD POINTS entry screen appears.
To select all transactions regardless of the number of miles awarded, simply press **OK**.
OR
To select transactions of a specific number of miles, key in the amount, and press **OK**.

The terminal displays PRINTING while it prints the report and then returns to the READY screen.

7.4.7 Printing an Air Miles Rewards Configuration List

When you have finished configuring the Air Miles Rewards program on your terminal, perform this function in order to have a printed record of the terminal's parameters. See printout example.

Each program (i.e. RETAIL and WHOLESale) has a separate section for program parameters including:

- Calculator values
- Factor values
- Incentive values, descriptions and dates
- Tax settings
- Bonus Offer parameters

From the READY screen or the TERMINAL SETUP REQUIRED prompt:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REWARDS, and press **OK**.
The REWARD MENU appears.
3. Scroll up (it's faster) to PRINT CFG, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The terminal displays PRINTING while it prints the report then returns to the READY screen.

7.4.8 Printing an Air Miles Rewards Help List

This report lists all the functions and transactions that are enabled on the terminal and the corresponding [Admin Shortcut code](#).

From the READY screen or the TERMINAL SETUP REQUIRED prompt:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REWARDS, and press **OK**.
The REWARD MENU appears.
3. Scroll up (it's faster) to HELP LIST, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The terminal displays PRINTING while it prints the report and then returns to the READY screen.

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7.4.9 Rewards - Reprint Last Receipt

This transaction prints a * DUPLICATE* cardholder copy of the last Rewards receipt printed.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REWARDS, and press **OK**.
The REWARD MENU appears.
3. Scroll down to REPRINT, and press **OK**.
A duplicate of the most recently printed Rewards receipt is printed.
The terminal returns to the REWARD MENU.
4. Press **OK** to return to the READY screen.

8 Admin Transactions

8.1 Log On

From the PLEASE LOGON prompt:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ADMIN, and press **OK**.
The ADMIN FUNCS menu appears.
3. Press **OK** to select LOGON.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

4. The terminal communicates with the Moneris Host.
5. The [READY screen](#) appears.

The terminal is now ready to process transactions.

If this is your first time using the terminal, use the [Training mode](#) to practise performing transactions.

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

8.2 Log Off

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ADMIN, and press **OK**.
The ADMIN FUNCS menu appears.
3. Scroll down to LOGOFF, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

4. The terminal communicates with the Moneris Host.
5. The PLEASE LOGON prompt appears.

The terminal can NOT process transactions while the PLEASE LOGON prompt is displayed although some reports can be processed and the terminal configuration can be changed.

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

8.3 Private Label Instant Credit Card Application

Allows for the instant processing of an applicant's Private Label Credit Card Application. If the application is approved, a receipt with a new Card number is issued to the applicant to use as a temporary card for any subsequent Purchase transactions.

From the [READY screen](#):

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ADMIN, and press **OK**.
The ADMIN FUNCS menu appears.

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3. Scroll down to CREDIT APP, and press **OK**.

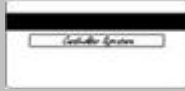
If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

The SELECT CARD TYPE menu appears.

4. Scroll down the list of card types, and press **OK** at your selection.
The SWIPE CARD prompt appears .

5. Choose a Card Entry method as indicated in the table below, and follow the appropriate instructions:

| swipe  | manually enter (credit and some debit chip cards) |
|--|---|
| <p>a. Swipe the card on the terminal .</p> <p>b. Continue below.</p> | <p>a. Key in the Card number, and press OK.</p> <p>The ENTER EXPIRY DATE entry screen appears .</p> <p>b. Key in the Expiry date, and press OK.</p> <p>c. Continue below.</p> |

The LAST NAME: prompt appears.

If the ENTER LAST NAME entry screen appears, edit/key in the applicant's Last name, and press **OK**.

6. Press the **F1** key (YES) to accept the displayed Last name.
OR Press the **F3** key (EDIT) to edit the Last name (and then key in the characters, and press **OK**).

The FIRST NAME: prompt appears.

If the ENTER FIRST NAME entry screen appears, edit/key in the applicant's First name, and press **OK**.

7. Press the **F1** key (YES) to accept the displayed First name.
OR Press the **F3** key (EDIT) to edit the First name (and then key in the characters, and press **OK**) .

If the MIDDLE INITIAL prompt appears, press the **F1** key (YES) to accept the displayed initial.

OR Press the **F3** key (EDIT) to edit/key in the Middle initial (and then key in a character, and press **OK**).

If the ENTER MIDDLE INITIAL entry screen appears, key in the applicant's Middle initial, or leave this field blank, and press **OK**.

The ENTER HOME TELEPHONE # entry screen appears.

8. Key in the applicant's Home Telephone number (10 digits, no spaces), and press **OK**.
The ENTER BUSINESS TELEPHONE # entry screen appears.

9. Key in the applicant's Business Telephone number (ten digits, no spaces), or leave this field blank, and press **OK**.

If the ENTER BUSINESS EXTENSION # entry screen appears, key in the applicant's Business Extension number (maximum of four digits), or leave this field blank, and press **OK**.

The ENTER DATE OF BIRTH entry screen appears.

10. Key in the applicant's Birth date (MMDDYYYY), and press **OK**.
The LANGUAGE PREF menu appears.
 11. Scroll down to select the applicant's Preferred Language, and press **OK**.
PROCESSING is displayed on the terminal as it communicates with the Moneris Host.

The Merchant copy of the receipt is printed.
 12. Have the applicant sign the Merchant copy.
 13. Press **OK**.
The Cardholder copy of the receipt is printed.
 14. Look for the Expiry date printed on the Merchant copy, and then write it down on the applicant's copy of the receipt (i.e., the Cardholder copy).
 15. Give the Cardholder copy of the receipt to the applicant.
- The successful applicant can then use the temporary receipt as a private label credit card and present it as payment during any subsequent Purchase transactions until the actual private label card has been issued.

8.4 Training Mode

Training mode allows you and your employees to practise operating the Moneris Mobile 8200 terminal without affecting your terminal total amounts, your financial accounts, and your customers' accounts.

***Note:** Once you enter Training mode you can not change the terminal language. If you wish to change the terminal language you must exit Training mode, [change the terminal display language](#), and then enter Training mode again.*

When using a chip card to perform chip transactions in Training mode, the card will prompt for a PIN even if the card requires a signature in normal processing mode. The terminal will then display PIN ENTERED BY CUSTOMER instead of allowing the PIN to be entered. After five seconds the terminal will continue the transaction.

8.4.1 Transactions Available in Training mode

Most transactions can be practised in [Training mode](#) on the terminal. Refer to the tables below for a complete list.

- [Financial Transactions by Card Type](#)
- [Reporting Functions](#)
- [Administrative Functions](#)
- [Loyalty/Gift Transactions and Reports](#)
- [Air Miles Rewards Transactions and Functions](#)

Transactions that cannot be performed do not appear on the terminal screen while in Training mode.

[Admin codes](#) can be used in Training mode if the transaction or function is available in Training mode.

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Note: Training transactions are limited to a maximum amount of \$1.00.
 If [Tip Entry](#) is enabled, the maximum tip amount in Training mode is \$1.00.
 If [Cashback](#) is enabled, the maximum Cashback amount in Training mode is \$1.00.
 The maximum final total amount (Purchase + Tip + Cashback) is \$3.00.

Financial Transactions by Card Type

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

| Description | CREDIT | DEBIT |
|-------------------------------|--|---|
| Purchase | Swipe or Insert | Swipe or Insert |
| Refund | Swipe or Insert | Swipe or Insert |
| Pre-Authorization | Swipe or Insert | - |
| Pre-Authorization Advice | With Sequence Number With Voice Auth Number | - |
| Pre-Authorization Advice List | X | - |
| Voids a Purchase | Swipe or Insert | Swipe or Insert |
| Voids a Refund | Swipe or Insert | Swipe or Insert |

Functions

| Reporting Functions | Admin Functions | Configuration |
|--------------------------------|----------------------------|-----------------------------|
| CLOSE BATCH | REPRINT | BASE CONFIG |
| TRANS LIST | BACKLIGHT | |
| TRANS INQUIRY | TRAINING | |
| DEPOSIT TOTALS | CREDIT APP | |
| MERCH SUBTOTAL | POWER OFF | |
| TIP TOTALS | | |
| CLERK INQUIRY | | |
| PRE-AUTH LIST | | |

Loyalty/Gift Transactions

| Gift Card Transactions | Loyalty card Transactions | Combo Card Transactions |
|---|--|--|
| Purchase using Gift Card | Purchase (awards points) | Purchase |
| Refund using Gift Card | Refund (removes points) | Refund |
| Activate/Reload Gift Card | Redemption (uses points) | Pre-Authorization |
| Deactivate Gift Card | Activate Loyalty card | Pre-Auth Advice: |
| Card Inquiry on Gift Card | Deactivate Loyalty card | with Sequence Number |
| Void of Gift Card Transaction | Card Inquiry on Loyalty card | with Voice Authorization |
| Reprint a Gift Card Receipt | Void of Points Transaction | Purchase Void |
| | Reprint a Loyalty card Receipt | Refund Void |

8.4.2 Loyalty/Gift Reports[Close Loyalty/Gift Batch](#)[Stored Loyalty/Gift Transactions](#)[Loyalty/Gift Transaction Inquiry](#)[Clerk Inquiry on Loyalty/Gift Transaction](#)[Loyalty/Gift Tip Totals](#)*Air Miles Rewards Transactions and Functions*[Purchase](#)[Refund](#)[Reprint](#)[Help List](#)**8.4.3 Entering Training Mode**

Note: can only be activated on terminals that have been configured, initialized and logged on.

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

From the READY screen:


1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ADMIN, and press **OK**.
The ADMIN FUNCS menu appears.
3. Scroll down to TRAINING, and press **OK**.
The CLEAR TRAINING TOTALS? prompt appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

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4. Select YES to clear the Training Totals amount to zero
OR
Select NO to leave the Training Total amounts as they are.

The [training screen](#) appears.

The training symbol  appears in the top left corner of the menu screens.

All transactions performed on the terminal will now be in Training mode until you [exit Training mode](#). All financial training transactions will be approved and stored in the terminal's memory in Training Totals.

All receipts for training transactions and reports on training totals will have a * TRAINING * TRAINING * TRAINING * banner printed on them at the top, middle and bottom.

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

8.4.4 Exiting Training Mode

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

From the [TRAINING screen](#):

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ADMIN, and press **OK**.
The ADMIN FUNCS menu appears.
3. Scroll down to TRAINING, and press **OK**.
The terminal returns to the [READY screen](#).

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

IMPORTANT: **All transactions performed on the terminal will now be in normal mode. They WILL affect your terminal totals, your financial accounts, and your customers' accounts.**

9 Reports

9.1 Clerk Subtotalling Reports

9.1.1 Clerk Subtotals Report for All Clerks

Note: You can also perform a Clerk Subtotals Report for [one clerk](#) or a [group of clerks](#).

Note: Visa Debit transactions are included in "VISA" totals on the report (i.e., there is no distinction between Visa credit and debit transactions).

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll down to CLERK INQUIRY, and press **OK**.
The SINGLE/MULTIPLE CLERKS? prompt appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

4. Press the **F3** key (MULTIPLE).

If enabled, the ZERO CLERK TOTALS? prompt appears.

- a. Press the **F1** key (Yes) to reset the totals for all Clerk IDs to zero.

The MULT CLERKS(00 PEND) prompt appears.

5. Scroll down to ALL CLERKS, and press **OK**.
The terminal communicates with the Moneris Host then prints:

- a. The CLERK SUBTOTALS report for each Clerk ID
- b. The OVERALL TOTALS report for all Clerk IDs.

When the reports are finished printing, the terminal returns to the READY screen.

If the [PRINT ERNEX REPORT?](#) appears, refer to the "Printing a Loyalty/Gift Report after a Financial Report" procedure.

9.1.2 Clerk Subtotals Report for One Clerk

Note: You can also perform a Clerk Subtotals Report for [all clerks](#) or a [group of clerks](#).

Note: Visa Debit transactions are included in "VISA" totals on the report (i.e., there is no distinction between Visa credit and debit transactions).

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll down to CLERK INQUIRY, and press **OK**.
The SINGLE/MULTIPLE CLERKS? prompt appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

4. Press the **F1** key (SINGLE).

If enabled, the ZERO CLERK TOTALS? prompt appears.

- a. Press the **F1** key (YES) to reset the totals for the Clerk ID to zero.

The ENTER CLERK ID entry screen appears.

5. Key in the Clerk ID, and press **OK**. (Refer to "[Entering alphabetic characters and punctuation](#)".)

Note: You must enter the Clerk ID even if the Default Clerk ID feature has been enabled.

The terminal communicates with the Moneris Host then prints the CLERK SUBTOTALS report and returns to the READY screen.

If the [PRINT ERNEX REPORT?](#) appears, refer to the "Printing a Loyalty/Gift Report after a Financial Report" procedure.

9.1.3 Clerk Subtotals Report for a Group of Clerks

Note: You can also perform a Clerk Subtotals Report for [all clerks](#) or [one clerk](#).

Note: Visa Debit transactions are included in "VISA" totals on the report (i.e., there is no distinction between Visa credit and debit transactions).

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll down to CLERK INQUIRY, and press **OK**.
The SINGLE/MULTIPLE CLERKS? prompt appears.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

4. Press the **F3** key (MULTIPLE).

If enabled, the ZERO CLERK TOTALS? prompt appears.

- a. Press the **F1** key (YES) to reset the totals for all selected Clerk IDs to zero.

The MULT CLERKS(00 PEND) prompt appears.

5. Scroll down to GROUP, and press **OK**.
The ENTER GROUP ID TO BE PROCESSED prompt appears.
6. Key in the Group identifier, and press **OK**.
The MULT CLERKS(01 PEND) prompt appears.

To continue selecting Clerk ID Groups, repeat steps 5 and 6

When all the Clerk IDs have been added:

7. Scroll down to PROCESS LIST, and press **OK**.
The terminal communicates with the Moneris Host then prints:
 - a. The CLERK SUBTOTALS report for each Clerk ID that belongs to the Clerk ID Group
 - b. The OVERALL TOTALS report for the Clerk ID Group.

When the reports are finished printing, the terminal returns to the READY screen.

If the [PRINT ERNEX REPORT?](#) appears, refer to the "Printing a Loyalty/Gift Report after a Financial Report" procedure.

9.2 Printing the Configuration Parameters Report

When you have finished configuring your terminal, perform this function in order to have a printed record of the terminal's parameters. Included on the printout are:

- software revision number (under Term Software Revision)
- terminal identification information (under Host Initialization Parameters)
- features enabled from the GENERAL PARAMS menu (under Terminal Configuration)
- printer setup (under Printer Configuration)
- all receipt trailer messages, pre-programmed and customized (under Trailer Message)
- communications parameters (under Dial Comms Parms and Ethernet Parms)
- communications base parameters (under Base Config)
- optional features if enabled (e.g., Purchasing Card Parms, Multi-Terminal Parms, Clerk Multi- Subtotals Parms)

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll up (it's faster) to CONFIG LIST, and press **OK**.
The PRINT TRAILER MESSAGES? prompt appears.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

4. Press the **F3** key (NO) to skip the trailer message text OR
Press the **F1** key (YES) to include the text of all receipt trailer messages (English and French) programmed on your terminal.

Note: This will use quite a bit of paper, especially if there are a number of trailer messages configured.

The terminal displays PRINTING while it prints the report then returns to the READY screen.

If the [PRINT ERNEX REPORT?](#) appears, refer to the "Printing a Loyalty/Gift Report after a Financial Report" procedure.

9.3 EMV Parameters list

This report shows the current values for the EMV parameters.

From the [READY screen](#):

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll down to EMV PARMS LIST, and press **OK**.
The EMV PARMS LIST screen appears.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The terminal prints out the EMV parameters list and then returns to the READY screen.

9.4 MasterCard Transaction Data

This function prints the DE55 data for the most recent MasterCard EMV transaction to go online.

The terminal stores the data of the last MasterCard EMV transaction to go online. That data is kept in memory until the next MasterCard EMV transaction is started, whereupon the previous data is erased. New data is saved only if the transaction goes online.

From the [READY screen](#):

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to ADMIN, and press **OK**.
The ADMIN FUNCS menu appears.
3. Scroll down to MC TRNS DATA, and press **OK**.

The terminal displays PRINTING while the report prints.

The ADMIN FUNCS menu appears.

4. Press the **Can/Ann** key twice to return to the READY screen.

9.5 Current Batch Totals Report

This report is printed as part of the Close Batch transaction; however, it can be printed without closing the batch.

***Note:** Visa Debit transactions are included in "VISA" totals on the report (i.e., there is no distinction between Visa credit and debit transactions).*

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll to CLOSE BATCH, and press **OK**.
The terminal communicates with the Moneris Host.

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

4. The terminal prints the report.
The CLOSE BATCH? prompt appears.
5. Press the **F3** key to select NO and print the report without closing the batch.

IMPORTANT: Do NOT press the **F3** key to select YES unless you want to close the batch at this time.

The terminal finishes printing the report and returns to the READY screen.

9.6 Deposit Totals Inquiry

The Deposit Totals Inquiry report provides transaction type totals by card type from the Moneris Host and grand totals by transaction type.

***Note:** Visa Debit transactions may appear under "VISA" totals on the report (i.e., there may be no distinction between Visa credit and debit transactions).*

From the [READY screen](#):

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll down to DEPOSIT TOTALS, and press **OK**.
If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.
If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.
4. The terminal communicates with the Moneris Host.
5. The report prints and the terminal returns to the READY screen.

9.7 Tip Totals Report

This function prints a summary of all Tip amounts entered on the terminal for Purchase and Pre-Auth Advice transactions stored in the current or a previous batch.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll down to TIP TOTALS, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

If the ENTER CLERK ID entry screen appears, refer to the "Entering the Clerk ID" procedure.

(If [Clerk Subtotalling](#) is enabled, tips are summarized by Clerk ID. If no Clerk ID is entered, the results for all Clerk IDs are printed.)

The PRINT DATE OR BATCH? prompt appears.

4. Press the **F1** key (for Tip totals by date) or the **F3** key
(for Tip totals by batch)

| If you pressed the F1 key (Tip totals by date)... | If you pressed the F3 key (Tip totals by batch)... |
|--|--|
| <p>The START DATE (YY)MMDD entry screen appears.</p> <p>a. Key in the Start date (the year is optional), and press OK.</p> <p><i>Note: The date format is year (YY), month (MM), and day (DD) (e.g., to enter Dec. 31, 2012, you would key in 121231).</i></p> <p>The START TIME [HHMM] menu appears.</p> | <p>The BATCH NUMBER entry screen appears.</p> <p>a. Key in the Batch number, or leave this field blank (for the current batch), and press OK.</p> <p>The terminal prints the report and then returns to the READY screen.</p> |

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| If you pressed the F1 key (Tip totals by date)... | If you pressed the F3 key (Tip totals by batch)... |
|--|---|
| <p>b. Key in the Start time, and press OK.</p> <p><i>Note: The time format is hours (HH) and minutes (MM) (e.g., to enter 1:00 AM, you would key in 0100).</i></p> <p>The END DATE (YY)MMDD entry screen appears.</p> | |
| <p>c. Key in the End date (year is optional), and press OK.</p> <p><i>Note: The date format is year (YY), month (MM), and day (DD) (e.g., to enter Dec. 31, 2012, you would key in 121231).</i></p> | |
| <p>The END TIME [HHMM] entry screen appears.</p> <p>d. Key in the End time, and press OK.</p> <p><i>Note: You must enter a valid End time value. The time format is hours (HH) and minutes (MM) (e.g., to enter 11:59 PM, you would key in 2359).</i></p> <p>The terminal prints the report and then returns to the READY screen.</p> | |

9.8 Printing a Help List

This report lists all the functions and transactions that are enabled on the terminal and the corresponding [Admin Shortcut Code](#).

From the READY screen or the TERMINAL SETUP REQUIRED prompt:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll up (it's faster) to HELP LIST, and press **OK**.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

The terminal displays PRINTING while it prints the report then returns to the READY prompt.

If the [PRINT ERNEX REPORT?](#) appears, refer to the "Printing a Loyalty/Gift Report after a Financial Report" procedure.

9.9 Merchant Subtotals Report

This function prints the merchant totals for the current batch from the Moneris Host.

Note: *Visa Debit transactions are included in "VISA" totals on the report (i.e., there is no distinction between Visa credit and debit transactions).*

From the [READY](#) screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll down to MERCH SUBTOTAL, and press **OK**.
The terminal communicates with the Moneris Host.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

4. The terminal displays PRINTING while it prints the report then returns to the READY screen.

9.10 Printing the Pre-Authorization List

This report lists all Pre-Authorization transactions in the terminal memory that match the criteria you select.

IMPORTANT: **The POS Admin card is required for this report because it includes unmasked Card numbers.**

Criteria are:

- Open or closed
- Transaction Date
- Batch Number

The results are printed.

Note: *Visa Debit transactions may appear under "VISA" on the report (i.e., there may be no distinction between Visa credit and debit transactions).*

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll down to PRE-AUTH LIST, and press **OK**.
The SWIPE ADMIN CARD prompt appears.
4. To print complete Card numbers on the report, swipe the [POS Admin card](#) OR
To print [masked Card numbers](#) on the report, simply press **OK**.
The PRE-AUTH LIST menu appears.

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

5. Select the type of Pre-Authorization transaction:

- To print only Pre-Authorizations that have NOT been completed (i.e. an Advice has NOT been processed for this Pre-Authorization), select OPEN.
- To print only Pre-Authorizations that have been completed (i.e. an Advice has been processed for this Pre-Authorization), select CLOSED.
- To print all Pre-Authorizations, Open and Closed, in the terminal memory, select BOTH.

The PRINT DATE OR BATCH? prompt appears.

6. Select the order in which you want the Pre-Authorization transactions to be listed in the report:

- To print the report by date, press the **F1** key (DATE).
The DATE (YY) MMDD entry screen appears.
Simply press **OK**.
- To print the report for a specific date, press the **F1** key (DATE).
The DATE (YY) MMDD entry screen appears.
Key in the date, and press **OK**.
- To print the report by Batch number, press the **F3** key (BATCH).
The BATCH NUMBER entry screen appears.
Simply press **OK**.
- To print the report for a specific Batch number, press the **F3** key (BATCH).
The BATCH NUMBER entry screen appears.
Key in the batch number and press **OK**.

7. The terminal displays PRINTING while it prints the report then returns to the READY prompt.

9.11 Delete a Pre-Authorization using Transaction Inquiry

You can delete a [Pre-Authorization transaction](#) that will not be completed (e.g. the cardholder choose another method of payment when the final amount was known) in order to ensure that it is not completed accidentally.

Perform a [Transaction Inquiry](#) function using the "Card Number" and "Trans to Search" criteria to find the Pre-Authorization transaction you wish to delete. When the PRINT OR DISPLAY? prompt appears:

A. Press the **F3** key to select DISPLAY.

The terminal searches its memory for matching transactions.

B. The Trans Inquiry Menu displays the matching transactions on the screen, one transaction per line.

To select a particular Pre-Authorization transaction, scroll through the list until the transaction is highlighted then press **OK**.

Note: Pre-Authorization transactions begin with 'PA'.

| | |
|-----------------|---|
| TRANS INQUIRY | TT = Transaction Type: P = Purchase R = Refund PA = Pre-Authorization A = Advice VP = Void Purchase VR = Void Refund Y = Payment VY = Void Payment NNNN = last 4 digits of the Card number 999.99 = last 5 digits of the transaction amount |
| TTNNNN \$999.99 | |
| TTNNNN \$999.99 | |
| TTNNNN \$999.99 | |

C. Detailed information about the selected transaction appears.

| | |
|------------------------------------|--|
| TRANS INQUIRY | CCCCCCCCCCC = last 11 digits of the Card number XXXX: - for Credit (and some debit chip cards)= transaction date - for Debit = CHQ or SAV TT = Transaction Type (see above) 999,999.99 = transaction amount |
| CCCCCCCCCCC | |
| XXXX | |
| TT \$999,999.99 NEXT REPRINT | |

D. Press the **F1** key (NEXT).
The DELETE PRE-AUTH? screen appears.

| |
|------------------|
| DELETE PRE-AUTH? |
| CCCCCCCCCCC |
| MMDD |
| TT \$999,999.99 |
| NEXT DELETE |

E. Confirm that this is the correct transaction then press the **F3** key (DELETE) to remove it from the terminal memory.

IMPORTANT: Once deleted, the Pre-Authorization transaction can no longer be completed using the Advice transaction.

F. The terminal deletes the Pre-Authorization from the terminal memory and returns to the Trans Inquiry Menu.

To select another Pre-Authorization transaction to delete, repeat steps **B** through **E**.

To return to the READY screen, press the **Can/Ann** key repeatedly.

9.12 Private Label Transactions on Reports

Private label transactions appear as a separate card type on all reports that include credit card transactions including:


- [Stored Transactions List](#)
- [Transaction Inquiry](#)
- [Deposit Total Inquiry](#)
- [Clerk Subtotals Inquiry](#)
- [Multiple Terminal Report](#)
- [Merchant Subtotals Report](#)
- [Current Batch Totals Report](#)
- [Tip Totals Report](#)

9.13 Printing a Stored Transactions Report

This report contains information about the transactions in the terminal's memory. It prints only the terminal totals (i.e. the number of transactions and total dollar amount by card type), or a list of all transactions in the terminal's memory by date or by batch number followed by the terminal totals.

Note: This is the only report that lists information about [Cashback](#) transactions. It includes the number of transactions utilizing Cashback and the total dollar amount of all Cashback transactions in the terminal memory.

Note: Visa Debit transactions are included in "VISA" totals on the report (i.e., there is no distinction between Visa credit and debit transactions).

Note: This is the only report that identifies chip card  transactions. See step 7.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll down to TRANS LIST, and press **OK**.
The SWIPE ADMIN CARD prompt appears.
4. To print complete Card numbers on the report, swipe the [POS Admin card](#) OR To print [masked Card numbers](#) on the report, simply press **OK**.
The PRINT DATE OR BATCH? prompt appears.

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

5. Select the sorting method for the report:
Press the **F1** key to print the transactions that occur on a specific date.
Press the **F3** key to print the transactions that occur in a specific batch.

Note: Select the **F3** key if you are printing a Transactions List for the End-of-Day procedure.

6. If you pressed the **F1** key for Date, key in the date in YYMMDD format.
 If you pressed the **F3** key for Batch, key in the Batch number.
 OR simply press **OK** to include all transactions in the terminal memory.

The PRINT TOTALS ONLY? prompt appears.

7. If you wish to print only the totals for each card type on the report, press the **F1** key (YES).
 If you wish to print information on each transaction individually as well as totals for the report, press the **F3** key (NO).

Note: Press the **F1** key if you are printing a Transactions List for the End-of-Day procedure.

Note: Select the **F3** key if you wish to determine which transactions were processed using a chip card. On the report, the word "CHIP" will appear on the same line as the card name if a chip card was inserted for that transaction.

The terminal prints the report then returns to the READY screen.

If the [PRINT ERNEX REPORT?](#) appears, refer to the "Printing a Loyalty/Gift Report after a Financial Report" procedure.

9.14 Transaction Inquiry Report

This report lists all transactions that match the criteria you select. If you do not select any criteria (i.e. you simply press **OK** as each criteria appears), all transactions in the terminal memory are listed.

IMPORTANT: The POS Admin card is required if you wish to print unmasked Card numbers on this report.

Criteria are:

- Clerk ID
- Card Type
- Card Number
- Amount
- Type of Transaction
- Date of Transaction

The results can be printed or displayed on the terminal screen.

Note: Visa Debit transactions may appear under "VISA" on the report (i.e., there may be no distinction between Visa credit and debit transactions).

From the READY screen:

1. Press the **Admin** key on the keypad.
The MAIN MENU appears.
2. Scroll down and select REPORTS.
The REPORT FUNCS menu appears.
3. Scroll down and select TRANS INQUIRY.
The SWIPE ADMIN CARD prompt appears.

4. To print complete Card numbers on the report, swipe the POS Admin card OR
To print [masked Card numbers](#) on the report, simply press **OK**.

If the [ENTER CLERK ID](#) entry screen appears , refer to the "Entering the Clerk ID" procedure.

The criteria appear in order:
 5. The list of card types appears, beginning with ALL CARDS.

To select all card types, ensure ALL CARDS is highlight then press **OK**.
OR
To select a specific card type, scroll down the list until the card type you wish to select is highlighted then press **OK**.
 6. The CARD NUMBER prompt appears.

To select all Card numbers, simply press **OK**.
OR
To select a specific card, key in the Card number and press **OK**.
 7. The ENTER AMOUNT entry screen appears.

To select all transactions regardless of amount, simply press **OK**.
OR
To select transactions of a specific amount, key in the amount and press **OK**.
 8. The list of transaction types appears, beginning with ALL TRANS.

To select all transaction types, ensure ALL TRANS in highlighted then press **OK**.
OR
To select a specific transaction type (e.g. Refunds), scroll through the list until the transaction type you wish to select is highlighted then press **OK**.
 9. The DATE (YY) MMDD prompt appears.

To select all transactions regardless of the date they were processed, simply press **OK**.
OR
To select transactions processed on a specific date, key in the date in the format indicated on the screen (the 2-digit year is optional) and press **OK**.
 10. The PRINT OR DISPLAY? prompt appears.

To [print the list](#) of matching transactions, refer to "Transaction Inquiry - Printed Report".
To [print a duplicate](#) of the Merchant copy of a receipt, refer to "Transaction Inquiry - Reprint the Merchant copy".
To [delete a Pre-Authorization](#) transaction, refer to "Transaction Inquiry - Delete a Pre-Authorization".

9.14.1 Printing a Transaction Inquiry Report

Begin a [Transaction Inquiry](#) then, when the PRINT OR DISPLAY? prompt appears:

A. Press the **F1** key to select PRINT.

The terminal searches its memory for matching transactions.

B. The terminal displays PRINTING while the report is printed.

If the [PRINT ERNEX REPORT?](#) appears, refer to the "Printing a Loyalty/Gift Report after a Financial Report" procedure.

The terminal returns to the READY prompt.

9.14.2 Transaction Inquiry - Reprinting the Merchant Receipt Copy

Begin a [Transaction Inquiry](#) then, when the PRINT OR DISPLAY? prompt appears:

A. Press the **F3** key to select DISPLAY.

The terminal searches its memory for matching transactions.

B. The Trans Inquiry Menu displays the matching transactions on the screen, one transaction per line.

To select a particular transaction, scroll through the list until the transaction is highlighted then press **OK**.

| | |
|---|---|
| TRANS INQUIRY | TT = Transaction Type: P = Purchase GP = Gift Purchase R = Refund RF = Loyalty/Gift Refund RD = Loyalty Redemption PA = Pre-Authorization A = Advice VP = Void Purchase VR = Void Refund V = Loyalty/Gift Void Y = Payment VY = Void Payment AL = Loyalty/Gift Activate/Load DA = Loyalty/Gift Deactivate NNNN = last 4 digits of the Card number 999.99 = last 5 digits of the transaction amount |
| TTNNNN \$999.99 TTNNNN \$999.99 TTNNNN \$999.99 | |
| | |

C. Detailed information about the selected transaction appears.

To print a duplicate of the Merchant copy of the receipt, press the **F3** key (REPRINT).

To return to the [Trans Inquiry Menu](#), press the **F1** key (NEXT) .

| | |
|--|---|
| TRANS INQUIRY | CCCCCCCCCC = last 11 digits of the Card number XXXX : - for Credit (including some debit chip cards) and loyalty/gift cards = transaction date - for Debit = CHQ or SAV TT = Transaction Type (see above) 999,999.99 = transaction amount |
| CCCCCCCCCC XXXX TT \$999,999.99 NEXT REPRINT | |

D. The terminal prints the Merchant copy of the receipt (with a signature line if it was present on the original receipt) and returns to the [Trans Inquiry menu](#).

To select another transaction to reprint, scroll through the list until the transaction is highlighted then press **OK**.

To return to the READY screen, press the **Can/Ann** key repeatedly.

10 End-of-Day Procedure

IMPORTANT: At the end of each business day you must process a Close Batch transaction in order to have the funds from your POS transactions deposited to your business account.

You will need to perform three tasks:

1. Perform a [Stored Transactions](#) report by batch on the terminal to be closed.
2. Perform a [Close Batch](#) for a single terminal OR
If [Multi-Terminal Reporting is enabled](#), a [Multi-Terminal Report](#) for a group of named terminals.
3. Compare the totals on the two reports.

If totals do not match, call the [Moneris Merchant Service Centre](#) for reconciliation assistance.

If Moneris Loyalty/Gift programs are enabled on your terminal, at the end of each report the [PRINT ERNEX REPORT?](#) prompt appears. Press the **F1** key to select YES and print the same report for the Ernex transactions.

These reports can also be started from the Ernex [REPORT FUNCS menu](#), however the report will contain only Moneris Loyalty/Gift transactions.

If the Air Miles Rewards program is enabled on your terminal, reward transactions are saved on the terminal then forwarded to the Moneris Host in small groups. You do not need to process an administrative transaction in order to close Air Miles transactions. It is recommended, however, that you check at the end of the day to ensure all Air Miles Rewards transactions have been forwarded to the Moneris Host.

A. Check the REWARDS MENU to see if the SAF INQUIRY transaction appears.

- If it does not, all transactions have been forwarded.
- If it does, perform an [UPLOAD SAF](#) transaction.

B. Print a [Reward Daily Totals report](#) for your records.

Note: You may wish to [enable the ARE TOTALS BALANCED? prompt](#) to appear during a Close Batch to remind you to perform step 3.

10.1 Close Batch

Chip card totals are rolled into the card totals, not a separate card type

Note: Refer to "[Multi-Terminal Reporting](#)" to close multiple terminals at one time.

Refer to "[Current Batch Totals Report](#)" to print the report without closing the batch.

Note: Visa Debit transactions are included in "VISA" totals on the report (i.e., there is no distinction between Visa credit and debit transactions).

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Press **OK** to select CLOSE BATCH.

If the SWIPE ADMIN CARD prompt appears, swipe the [POS Admin card](#).

10 End-of-Day Procedure

If the [ENTER CLERK ID](#) entry screen appears, refer to the "Entering the Clerk ID" procedure.

Note: *If this prompt appears, you must enter the Clerk ID even if the Default Clerk ID feature has been enabled.*

The terminal communicates with the Moneris Host then prints the CURRENT BATCH TOTALS report.

The CLOSE BATCH? prompt appears.

4. Press the **F1** key (YES) to close the current batch and have funds deposited to your account.

Note: *If you press the **F3** key (NO), the Close Batch will be cancelled and funds will not be deposited to your account. If you perform the Close Batch again later and press the **F1** key (YES), the funds will be deposited at that time.*

If [enabled](#), the ARE TOTALS BALANCED? prompt appears.

a. Confirm that the totals on the CURRENT BATCH TOTALS report match the totals on the TERMINAL BATCH TOTALS report (printed from the [Print Stored Transactions](#) report).

b. If the totals do not match, [contact the Moneris Merchant Service Centre](#) the next business day for reconciliation assistance.

5. The terminal communicates with the Moneris Host again, finishes printing the report, and returns to the READY screen.

If the [PRINT ERNEX REPORT?](#) appears, refer to the "Printing a Loyalty/Gift Report after a Financial Report" procedure.

10.2 Multi-terminal Reports

10.2.1 Multi-Terminal Report for All Terminals

This function does not compare totals stored in the terminal memory to totals stored on the Moneris Host. Therefore, ensure your receipts balance to the total of the Deposit Totals Report (selected in step 5) or print a [stored Transactions List report](#) on each of the terminals selected.

Note: *You can also perform a Multi-Terminal Report for a [group of terminals](#) or [one or more terminals by name](#).*

Note: *Visa Debit transactions are included in "VISA" totals on the report (i.e., there is no distinction between Visa credit and debit transactions).*

From the READY screen:

1. Press the **Admin** key.

The MAIN MENU appears.

2. Scroll down to REPORTS, and press **OK**.

The REPORT FUNCS menu appears.

3. Scroll down to MULTI TERM RPT, and press **OK**.

The CLOSE BATCHES? prompt appears.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

4. To close the batch on the selected terminal, press the **F1** key (YES).
To skip closing the batch for that terminal, press the **F3** key (NO).
The GET DEPOSIT TOTALS? prompt appears.

5. To print the Deposit Totals report for the selected terminal, press the **F1** key (YES).
To skip printing the report for that terminal, press the **F3** key (NO).

Note: If you press the F3 key (NO) for both the CLOSE BATCHES? and the GET DEPOSIT TOTALS? prompts, the terminal returns to the READY screen.

The MULT TERM menu appears.

6. Scroll down to ALL TERMINALS, and press **OK**.
The terminal communicates with the Moneris Host then, if the Deposit Totals report was requested in step 5, displays PRINTING while it prints the report and returns to the READY screen.

10.2.2 Multi-Terminal Report for One or More Terminals by Name

This function does not compare totals stored in the terminal memory to totals stored on the Moneris Host. Therefore, ensure your receipts balance to the total of the Deposit Totals Report (selected in step 5) or print a [stored Transactions List report](#) on each of the terminals selected.

Note: You can also perform a Multi-Terminal report for [all terminals](#) or a [group of terminals](#).

Note: Visa Debit transactions are included in "VISA" totals on the report (i.e., there is no distinction between Visa credit and debit transactions).

IMPORTANT: You must know the terminal name in order to perform this function for one terminal.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll down to MULTI TERM RPT, and press **OK**.
The CLOSE BATCHES? prompt appears.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

4. To close the batch on the selected terminal, press the **F1** key (YES).
To skip closing the batch for that terminal, press the **F3** key (NO).
The GET DEPOSIT TOTALS? prompt appears.

5. To print the Deposit Totals Report for the selected terminal, press the **F1** key (YES).
To skip printing the report for that terminal, press the **F3** key (NO).

Note: If you press the F3 key (NO) for both the CLOSE BATCHES? and the GET DEPOSIT TOTALS? prompts, the terminal returns to the READY screen.

The MULT TERM menu appears.

6. Press **OK** to select NAME.
The ENTER TERM NAME TO BE PROCESSED entry screen appears.

7. Key in the terminal name and press **OK**. (Refer to "[Entering Alphabetic Characters and Punctuation](#)" .)

The MULT TERM menu appears indicating that 1 terminal is pending (i.e. MULT TERM [01 PEND]).

10 End-of-Day Procedure

To select additional terminals by name, repeat steps 6 and 7.
When you have selected all the terminals you wish, go to step 8.

Note: You may select up to 20 terminals by name to process at one time.
When you enter the twentieth terminal name, the terminal automatically processes the list then returns to the [MULT TERM menu](#). You can then add additional terminals.

8. Scroll down to PROCESS LIST, and press **OK**.
The terminal communicates with the Moneris Host then, if the Deposit Totals report was requested in step 5, displays PRINTING while it prints the report and returns to the READY screen.

10.2.3 Multi-Terminal Report for One or More Groups of Terminals

This function does not compare totals stored in the terminal memory to totals stored on the Moneris Host. Therefore, ensure your receipts balance to the total of the Deposit Totals report (selected in step 5) or print a [stored Transactions List report](#) on each of the terminals selected.

Note: You can also perform a Multi-Terminal Report for [all terminals](#) or [one or more terminals by name](#).

Note: Visa Debit transactions are included in "VISA" totals on the report (i.e., there is no distinction between Visa credit and debit transactions).

IMPORTANT: You must know the Terminal Group ID in order to perform this function for a group of terminals.

From the READY screen:

1. Press the **Admin** key.
The MAIN MENU appears.
2. Scroll down to REPORTS, and press **OK**.
The REPORT FUNCS menu appears.
3. Scroll down to MULTI TERM RPT, and press **OK**.
The CLOSE BATCHES? prompt appears.

If the SWIPE ADMIN CARD prompt appears, swipe the POS Admin card.

4. To close the batch on the selected terminal, the **F1** key (YES).
To skip closing the batch for that terminal, press the **F3** key (NO).
The GET DEPOSIT TOTALS? prompt appears.
5. To print the Deposit Totals Report for the selected terminal, press the **F1** key (YES).
To skip printing the report for that terminal, press the **F3** key (NO).

Note: If you press the **F3** key (NO) for both the CLOSE BATCHES? and the GET DEPOSIT TOTALS? prompts, the terminal returns to the READY screen.

The MULT TERM menu appears.

6. Scroll down to GROUP, and press **OK**.
The ENTER GROUP ID TO BE PROCESSED entry screen appears.

7. Key in the Terminal Group ID, and press **OK**. (Refer to "[Entering Alphabetic Characters and Punctuation](#)" .)

The MULT TERM menu appears indicating that 1 Group ID is pending (i.e. MULT TERM [01 PEND]).

To select additional terminals by Group ID, repeat steps 6 and 7.
When you have selected all the groups you wish, go to step 8.

***Note:** You may select up to 20 Group IDs to process at one time. When you enter the twentieth Group ID, the terminal automatically processes the list then returns to the [MULT TERM menu](#). You can then add additional groups.*

8. Scroll down to PROCESS LIST, and press **OK**.

The terminal communicates with the Moneris Host then, if the Deposit Totals report was requested in step 5, displays PRINTING while it prints the report and returns to the READY screen.

11 Troubleshooting

Assistance can be accessed in a number of ways. You can:

- [refer to other Moneris Mobile 8200 documentation](#)
- [call the Moneris Merchant Contact Centre](#)
- [use the Merchant Direct Secure Message Centre](#)

11.1 Additional Documentation

To download a copy of the Moneris Mobile 8200 Quick Reference Guide:

- visit: moneris.com/8200
- and click on "Reference Guide"

To download a printable PDF file of this Operating Manual :

- visit: moneris.com/8200
- and click on "Operating Manual"

To download a copy of the Merchant Operating Manual:

- visit: www.moneris.com/en/Support/Downloads/MerchantManuals
- and click on "Merchant Operating Manual"

11.2 Telephone Assistance

| WHEN YOU NEED: | CONTACT: |
|---|---|
| <ul style="list-style-type: none">• to order stationery supplies , additional batteries and printer rolls• to resolve balancing issues• to solve problems with your terminal• to report a Code 10 situation• to change your terminal configuration• Voice Authorizations | <p>Moneris Merchant Service Centre</p> <p>1-866-319-7450 toll-free</p> <p>24 hours a day, 7 days a week</p> |

11.3 Merchant Direct

Log in to Merchant Direct, and use the Message Centre to send a secure message directly to the Moneris Merchant Service Centre. Visit moneris.com/merchantdirect for more information.

11 Troubleshooting

11.4 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: If you are using PUBLIC IP communication, you may need to contact your ISP 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.



11.5 Error Messages on the 8200 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: If you are using PUBLIC IP communication, you may need to contact your ISP 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 |
|---|--|
|  = Ethernet Connection Not Available Top of page | <p>This symbol appears in the top left corner of the terminal display when there is a problem with the Ethernet connection.</p> <p>Note: If the Ethernet connection was lost after the last transaction was performed, this icon will not appear until most of the information for the new transaction has been entered.</p> <p>If the terminal has a dial communications cable connected to a phone jack and dial communications have been configured, the terminal will attempt to use dial communications.</p> <p>Check that your Internet service is available.</p> <ul style="list-style-type: none">- If it is not available, contact your ISP.- If it is available, contact the Moneris Merchant Service Centre for assistance. |
|  = SAF Log 90% Full | <p>This symbol appears in top left corner of the terminal display when the SAF log is nearly full.</p> <p>A manual SAF Upload transaction should be performed as soon as possible.</p> |

| ERROR MESSAGE | PROBLEM & SOLUTION |
|---|---|
|  = SAF Log is 100% Full | <p>This symbol appears in top left corner of the terminal display when the SAF log is full.</p> <p>The next time the terminal returns to the READY screen, it will perform an automatic SAF Upload . No other transactions (Air Miles, debit, credit or Ernex) can be processed until the SAF Upload has been successfully completed.</p> <p>Wait while the terminal performs the SAF Upload .</p> <p>Do NOT cancel the SAF Upload . It must be completed before any other transactions can be performed.</p> |
|  = Training Mode | <p>This symbol appears when the terminal is in Training mode.</p> <p>Exit Training mode to remove the symbol from the display.</p> |
| AMOUNT EXCEEDED RETURN TO CLERK | <p>The Refund Amount entered exceeds the limit set on the terminal during Initialization.</p> <ul style="list-style-type: none"> - Ask the cardholder to return the terminal. - Press OK to display the merchant prompts. - The REFUND LIMIT EXCEEDED prompt appears. |
| APP CA06 | <p>Contact the Moneris Merchant Service Centre for assistance.</p> |
| ASSERT | <p>Contact the Moneris Merchant Service Centre for assistance.</p> |
| Authenticate xxx...Failed! | <p>xxx = the application name or "OS" or "Sec Data" or "SSA"</p> <p>See Code Authentication error messages.</p> |
| BASE BUSY PLEASE WAIT | <p>There may be more than five terminals registered to the same communications base.</p> <ul style="list-style-type: none"> -Ensure that there are no more than five terminals registered to the same communications base. <p>Another terminal is using the base.</p> <ul style="list-style-type: none"> - If the base becomes available, this transaction will start. If not, PLEASE WAIT disappears. Press OK and retry the transaction. |
| BASE NOT FOUND PRESS OK | <p>When registering a terminal to a base:</p> <ul style="list-style-type: none"> - the BASE ID entered does not exist. Press OK, check the BASE ID and re-enter it. - the BASE ID entered has the maximum number of terminals registered to it. Register to another base or turn off one of the other terminals. <p>When performing a transaction:</p> <ul style="list-style-type: none"> - the transaction was tried on a terminal that has not been |

11 Troubleshooting

| ERROR MESSAGE | PROBLEM & SOLUTION |
|--|--|
| | <p>registered. Register the terminal and retry the transaction.</p> <ul style="list-style-type: none"> - the terminal could not communicate with the base. - Ensure there are no walls or (metal) equipment between the communications base and the terminal. - Ensure the terminal is close enough to the communications base (max. range = 30m-50m). - If the icon is still not visible, place the terminal on the communications base and perform the transaction. <p>Note: This error message may include the text ETHERNET DOWN if the terminal determines Ethernet is unable then checks for the base and cannot find the base.</p> |
| <p>CANCELLED REMOVE CARD</p> | <p>The Can/Ann key was pressed during a chip card transaction:</p> <ul style="list-style-type: none"> - Remove the chip card from the chip card reader. The terminal will beep once per second until the card is removed. - If receipts had begun printing before the card was removed, CARD REMOVED and CANCELLED are printed on the receipt. - The READY screen appears. |
| <p>CANCELLED RETURN TO CLERK</p> | <p>The cardholder has pressed the Can/Ann key during the cardholder prompts.</p> <ul style="list-style-type: none"> - Ask the cardholder to return the terminal. - Press OK to display the merchant prompts. - Retry the transaction. |
| <p>CANNOT SWIPE CHIP CARD PRESS OK</p> | <p>A chip card was swiped on the Magnetic Stripe Card Reader; however, this is not allowed for this card.</p> <ul style="list-style-type: none"> - Press OK to return the READY screen. - Request another form of payment. |
| <p>Can't Read Certific File!</p> | <p>See Code Authentication error messages.</p> |
| <p>CARD BLOCKED REMOVE CARD</p> | <p>The chip card cannot be used. Request another form of payment.</p> |
| <p>CARD NOT SUPPORTED or CARD NOT SUPPORTED PLEASE RETRY</p> | <p>There are a number of possible problems:</p> <ul style="list-style-type: none"> - You have keyed in or swiped a credit or debit or loyalty/gift card that is not valid. Check that the cardholder has activated the card with their financial institution. - You have keyed in or swiped a card at the SWIPE ADMIN CARD prompt that is not a POS Admin card. Check the card to ensure that it is a POS Admin Card. - You have keyed in a credit card or debit chip card , loyalty/gift card number that is not valid. Check that you have keyed in the card number exactly as it appears on the card. - During a Payment or Payment Void transaction, you have |

| ERROR MESSAGE | PROBLEM & SOLUTION |
|--|---|
| | <p>keyed in or swiped a card at the SWIPE OR INSERT CARD prompt that is not a Private Label card. Check the card to ensure that it is a Private Label card.</p> <p>Check the card (or Card number) then:</p> <p style="padding-left: 40px;">If the READY screen appears, retry the transaction.</p> <p style="padding-left: 40px;">If the SWIPE OR INSERT CARD prompt appears, swipe (or key in) the card again.</p> <p>You may need to swipe the card more quickly or more slowly or from the front of the reader back to read it properly.</p> <p>If this message appears again:</p> <ul style="list-style-type: none"> - For a credit card that was swiped: try the transaction again, but key in the Card number - For a keyed in credit Card number or a debit card: cancel the transaction and request another form of payment. - For a private label card: cancel the transaction. <p>Direct the cardholder to report the problem to their card issuer.</p> |
| <p>CARD PROBLEM or CARD PROBLEM PLEASE RETRY</p> | <p>You have swiped a card on the terminal's magnetic stripe reader and the card stripe could not be read properly.</p> <p>If the READY screen appears, retry the transaction.</p> <p>If the SWIPE OR INSERT CARD prompt appears, try swiping the card more quickly or more slowly or from the front of the reader back.</p> |
| <p>CARD REMOVED RETURN TO CLERK</p> | <p>The chip card was removed from the chip card reader during the cardholder prompts, before the REMOVE CARD prompt was displayed.</p> <p>The transaction is cancelled.</p> <ul style="list-style-type: none"> - Retrieve the terminal from the cardholder. - Wait until the CARD REMOVED PRESS OK prompt appears. |
| <p>CARD REMOVED PRESS OK</p> | <p>The chip card was removed before the transaction was completed and has been cancelled.</p> <ul style="list-style-type: none"> - Press OK. - The CARD REMOVED prompt appears while the receipts are printed. - CARD REMOVED and CANCELLED are printed on the receipt. - The READY screen appears. |

11 Troubleshooting

| ERROR MESSAGE | PROBLEM & SOLUTION |
|---|---|
| CASH BACK EXCEEDS LIMIT OR CASH BACK LIMIT EXCEEDED | The Cashback amount requested exceeds the limit set on the terminal. Enter a lower amount for Cashback when the prompt re-appears. If this error message appears on a regular basis, consider increasing the Cashback limit set on the terminal. |
| Certific File Authenticate Failed! | See Code Authentication error messages . |
| CERTIFICATE FAILED - ### PRESS OK | This applies to Ethernet communications only. The SSL certificate failed verification. If dial backup is available: Press OK . The terminal will attempt to use dial backup to process the transaction. If dial backup is not available: - Press OK . The READY prompt appears. - Request an alternate form of payment. OR Contact the Moneris Merchant Service Centre for assistance. |
| CF00 IDLE | Contact the Moneris Merchant Service Centre for assistance. |
| CFS xxx can't open! | xxx = CFS name See Code Authentication error messages . |
| CFS xxx has no certific info! | xxx = application name or CFS name See Code Authentication error messages . |
| CFS xxx MAC Verification Failed! | xxx = CFS name See Code Authentication error messages . |
| CHECK PRINTER | A problem has been detected with the printer. Open the printer and check that: - there is paper in the printer - the paper feed is clear. - the paper roll is seated correctly. Close the printer lid and ensure that it is closed completely. If the problem is fixed: The printer will finish printing the receipt or report that was in progress and complete the transaction. If the problem is not fixed: |

| ERROR MESSAGE | PROBLEM & SOLUTION |
|---|---|
| | <p>Press OK. 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> |
| <p>CHIP NOT ALLOWED DO PURCHASE PRESS OK</p> | <ul style="list-style-type: none"> - Press OK again to return to the READY screen. - Process a Purchase using the Chip card OR - request another credit card and retry the Pre-Authorization. |
| <p>CHIP NOT ALLOWED DO PURCHASE REMOVE CARD</p> | <p>A chip card has been used to attempt a Pre-Authorization transaction and the terminal is not configured to allow this.</p> <p>If this appears during merchant prompts:</p> <ul style="list-style-type: none"> - You remove the chip card - Press OK to return to the READY screen. <p>If this message appears during the cardholder prompts:</p> <ul style="list-style-type: none"> - the cardholder removes the card. - The CHIP NOT ALLOWED DO PURCHASE RETURN TO CLERK prompt appears. |
| <p>CHIP NOT ALLOWED DO PURCHASE RETURN TO CLERK</p> | <p>The cardholder passes the terminal back to you.</p> <ul style="list-style-type: none"> - Press OK. The CHIP NOT ALLOWED DO PURCHASE PRESS OK prompt appears. - Press OK again to return to the READY screen. - Process a Purchase using the Chip card OR - request another credit card and retry the Pre-Authorization. |
| <p>CHIP TYPE NOT SUPPORTED REMOVE CARD</p> | <p>The chip on the chip card cannot be used on this terminal.</p> <ul style="list-style-type: none"> - Remove the chip card. - The SWIPE OR INSERT CARD prompt appears. - Swipe the chip card on the magnetic stripe card reader to start the transaction. |
| <p>CLERK ID NOT SETUP PRESS OK</p> | <p>The Default Clerk ID has not been set.</p> <p>Press OK to return to the READY screen.</p> <p>If you wish to use a Default Clerk ID, add the Default Clerk ID.</p> <p>OR</p> <p>If you wish to use a number of Clerk IDs, change the prompt for Clerk ID to YES.</p> |
| <p>COMMUNICATION PROBLEM WITH ERNEX</p> | <p>The Moneris/Ernex Host Communication Test failed.</p> <p>Press OK to return to the READY screen.</p> <p>Contact the Moneris Merchant Service Centre for assistance.</p> |

11 Troubleshooting

| ERROR MESSAGE | PROBLEM & SOLUTION |
|--|---|
| CUSTOMER - INSERT CARD INTO READER | A chip card was swiped on the Magnetic Stripe Card Reader instead of inserted into the chip card reader. Insert the card into the chip card reader to start the transaction. |
| DECLINED ... | See Declined Messages . |
| DO A PURCHASE WITH CHIP CARD | The chip card cannot be used for a Pre-Auth transaction because the terminal is not configured to allow this. Retrieve the terminal , remove the chip card, press OK , and perform a Purchase using the chip card. OK |
| DUPLICATE TERMINAL NAME | The terminal name you have attempted to assign to this terminal is already assigned to another one of your terminals. Try keying in another terminal name. OR To assign the terminal name to this terminal, first delete it from the other terminal then assign it to this one. |
| EMV DATA MAC FAILURE CHECK PINPAD | Contact the Moneris Merchant Service Centre for assistance. |
| ERNEX INITIALIZATION FAILED | There has been a terminal, host or communication problem during the Initialization to the Ernex Host. Press OK to return to the READY screen. IMPORTANT: The terminal must be initialized before any other transactions (loyalty/gift or debit or credit) can be performed. Try to re-initialize again. If this does not work, Contact the Moneris Merchant Service Centre for assistance. |
| ERNEX INITIALIZATION REQUIRED | The Moneris/Ernex Host is requesting a re-initialization of the terminal. Re-initialize for Ernex. |
| Err Authenticate CFS xxx | xxx = CFS name See Code Authentication error messages . |
| ERROR 401 COMM ERROR | An unknown communication error has occurred. Press OK to return to the READY screen and try the transaction again. If the message reappears, contact the Moneris Merchant Service Centre for assistance. |
| ERROR 402 HOST DISCONNECT | The Host has dropped the connection to the terminal during a transaction. Press OK to return to the READY screen and try the transaction again. |

| ERROR MESSAGE | PROBLEM & SOLUTION |
|--|---|
| | <p>If the message reappears, contact the Moneris Merchant Service Centre for assistance.</p> |
| <p>ERROR 403 CONNECTION LOST</p> | <p>The terminal has lost the connection to the Host during a transaction.</p> <p>Press OK to return to the READY screen and try the transaction again.</p> <p>If the message reappears, contact the Moneris Merchant Service Centre for assistance.</p> |
| <p>ERROR 405 NO ENQ FROM HOST</p> | <p>This applies to Dial Communications only.</p> <p>The terminal has connected to the Host but the Host has not responded with the ENQ to begin data transmission.</p> <p>Press OK to return to the READY screen and try the transaction again.</p> <p>If the message reappears, contact the Moneris Merchant Service Centre for assistance.</p> |
| <p>ERROR 406 NO NETWORK RESP</p> | <p>The terminal has sent the transaction request to the Host but the Host has not responded.</p> <p>Press OK to return to the READY screen and try the transaction again.</p> <p>If the message reappears, contact the Moneris Merchant Service Centre for assistance.</p> |
| <p>ERROR 407 ACK NOT SENT</p> | <p>The application did not send the final message to the Moneris Host. The transaction is considered cancelled.</p> <ul style="list-style-type: none"> - Press OK. - If a chip card was used in the transaction, remove the chip card. - Any receipts finish printing with CANCELLED on them. - The READY screen appears. |
| <p>ETHERNET COMMS ERROR-DIAL USED PRESS OK</p> | <p>The terminal was unable to communicate with the Moneris Host over the Ethernet connection and dial backup was used to process the transaction.</p> <p>Press OK to acknowledge the message and return to the READY screen.</p> <p>The terminal will revert to Ethernet communications for the next transaction.</p> |
| <p>ETHERNET DOWN PRESS OK</p> | <p>The terminal has checked the Ethernet connection and determined that it is unavailable for communication.</p> <p>Press OK to return the READY screen then check the following:</p> <ul style="list-style-type: none"> - Check all the cables to ensure everything is plugged in tightly. - Check that the router and hub/switch (if any) are functioning. |

11 Troubleshooting

| ERROR MESSAGE | PROBLEM & SOLUTION |
|--|---|
| | <p>If you use Public Internet: Contact your ISP (Internet service provider) for assistance.</p> <p>If you use Private Internet: Call the Moneris Merchant Service Centre.</p> <p>If you use Corporate WAN: Call your corporate help desk to confirm that the Corporate WAN is functioning properly.</p> <p>Note: This error message may include the text BASE NOT FOUND if the terminal determines Ethernet is unable then checks for the base and cannot find the base.</p> |
| File xxx Authentication Failed! | <p>xxx = path/ DFS file name</p> <p>See Code Authentication error messages.</p> |
| GIFT CARD MUST BE SWIPED | <p>You have tried to key in a gift card number.</p> <p>Swipe the gift card on the Magnetic Stripe Card reader to continue.</p> |
| HOST CONNECTION FAILED | <p>The terminal has attempted to connect to the Moneris Host via a dial line and has failed. The terminal will display this message for 3 seconds then return to the previous prompt.</p> <p>Wait for a few minutes then try the transaction again.</p> <p>If the message reappears contact the Moneris Merchant Service Centre for assistance.</p> |
| INCORRECT PIN -- LAST RETRY PRESS OK | <p>The cardholder has not entered the correct PIN, i.e. (the PIN entered does not match the PIN on the card). The cardholder can retry entering their PIN correctly one last time.</p> |
| INCORRECT PIN PRESS OK | <p>The PIN entered does not match the PIN on the card.</p> <ul style="list-style-type: none"> - The cardholder presses OK. - The ENTER PIN + OK prompt re-appears. - The cardholder re-enters their PIN correctly to continue the transaction. <p>For chip cards with PIN: If the cardholder cannot remember their PIN the card may approve the transaction or the terminal may prompt for a signature at the end of the transaction or the transaction may be cancelled. If the transaction was cancelled, request another form of payment.</p> <p>For debit cards: If the debit cardholder cannot remember their PIN, the transaction cannot be completed. Ask for another form of payment.</p> |
| INCREMENTS OF 10 DOLLARS, PLEASE | <p>The Cashback amount that was entered is not a rounded amount (i.e., there must be no cents included, and the dollar position must be zero).</p> <p>Key in a Cashback amount like \$10 or \$20 or \$30 or \$40, etc.</p> |

| ERROR MESSAGE | PROBLEM & SOLUTION |
|---|---|
| INITIALIZATION ERROR PLEASE WAIT | Please wait while the terminal is re-establishes an Ethernet connection to the Host in order to retry the initialization. When the connection is established, the INITIALIZATION ERROR RETRYING TRANSACTION prompt appears. |
| INITIALIZATION ERROR RETRYING TRANS | If the Initialization process is not successful because of a communication problem, the terminal will automatically retry the Initialization once. Please wait while the terminal retries the Initialization. This message is displayed until the Initialization retry is successfully under way or the retry fails and a new error message is displayed. |
| INITIALIZATION FAILED, CONTACT SERVICE CENTRE | There has been a terminal, host or communication problem during the Initialization. Press OK to return to the READY screen. Contact the Moneris Merchant Service Centre for assistance. |
| INITIALIZATION FAILED, MERCHANT ID ERROR | The Merchant ID entered during the Initialization was not correct. - Press OK to return to the READY screen - Check the Merchant ID. - Retry the Initialization. If the Merchant ID was entered correctly and the message re-appears, contact the Moneris Merchant Service Centre for assistance. |
| INITIALIZATION FAILED RETRYING TRANS | If the Initialization process is not successful, the terminal will automatically retry the Initialization once. Please wait while the terminal retries the Initialization. This message is displayed until the Initialization retry is successfully under way or the retry fails and a new error message is displayed. |
| INITIALIZE ERNEX | The Moneris/Ernex Host is requesting a re-initialization of the terminal. Re-initialize for Ernex. |
| INIT FAILED-### CALL HELP CENTRE PRESS OK | There has been a parameter error during the Initialization. ### indicates the specific error. - Record the 3-digit number that appears where the ### is in this example. - Press OK to return to the READY screen. Contact the Moneris Merchant Service Centre for assistance. |

11 Troubleshooting

| ERROR MESSAGE | PROBLEM & SOLUTION |
|----------------------------------|--|
| INIT REQ'D | <p>The Moneris Host is requesting a re-initialization of the terminal.</p> <p>Re-initialize the terminal.</p> |
| INVALID CARD NO. | <p>The swiped card failed the MOD 10 check.</p> <p>If the READY screen appears, retry the transaction.</p> <p>If the SWIPE OR INSERT CARD prompt appears, try swiping the card again.</p> <p>If this message reappears, contact the Moneris Merchant Service Centre for assistance.</p> |
| INVALID CARD TYPE | <p>The card that was swiped cannot be used for this transaction. Ask for another card (e.g. a credit card) and retry the transaction.</p> <p>Try swiping the card again. If this message reappears, press the Can/Ann key to cancel the transaction and retry the debit or credit transaction.</p> |
| INVALID DATE | <p>The date entered is not a valid date.</p> <p>The date must be entered in the MMDD or YYMMDD format and must be a valid calendar date, e.g. 0231 (Feb. 31) is not a valid date.</p> <p>Check the date and re-enter it when the prompt re-appears.</p> |
| INVALID ENTRY | <p>While in Training mode you have attempted to enter a transaction amount, a Cashback amount or a Tip amount greater than \$1.00.</p> <p>When the prompt reappears, key in an amount of \$1.00 or less and press OK to continue.</p> <p>OR</p> <p>The Air Miles Reward incentive you entered was greater than 0.99. Check the value and re-enter a value equal to or less than 0.99.</p> |
| INVALID EXPIRY DATE PLEASE RETRY | <p>The 4-digit Expiry date entered is not a valid date.</p> <p>Check the date and re-enter it when the prompt re-appears.</p> <p>The date must be entered in the MMDD format and must be a valid calendar date, e.g., 0231 (Feb. 31) is not a valid date.</p> |
| INVALID IP ADDRESS | <p>The IP address entered does not match the standard IP address format of #.#.#.# where each # can be a minimum of 1 and a maximum of 3 digits long with a minimum value of 0 and a maximum value of 255. For example: 0.10.127.255</p> <p>Check the IP Address and re-enter it when the prompt re-appears.</p> |
| INVALID PASSWORD | <p>The password entered does not match the password downloaded.</p> |

| ERROR MESSAGE | PROBLEM & SOLUTION |
|------------------------------|---|
| INVALID PHONE # | <p>The number that was keyed in is not the correct length.</p> <p>Key in a 10-digit phone number (including the area code but without any spaces).</p> |
| INVALID TAG LIST | <p>Contact the Moneris Merchant Service Centre for assistance.</p> |
| INVALID TIME | <p>The time entered is not a valid time.</p> <p>The time must be entered in the HHMM format and must be a valid time (HH must be from 00 to 23 and MM must be from 00 to 59.)</p> <p>Check the time and re-enter it when the prompt re-appears.</p> |
| Lose Certific File! | <p>See Code Authentication error messages.</p> |
| LOW BATTERY!!! DOCK TERMINAL | <p>The battery charge is too low. The terminal will beep 3 times then power down .</p> <p>To continue performing transactions:</p> <ul style="list-style-type: none"> - Place the terminal on a base (communications base or charge-only base) OR - Replace the battery with a fully charged one. <p>Note: The terminal must remain within range of the communications base to which it is registered, regardless of which base it is placed on for battery purposes. For example, if the terminal is registered to Comms Base 1 but placed on Charge-only Base A because of a low battery then Charge-only Base A must be located within range of Comms Base 1 to allow the terminal to communicate with Comms Base 1.</p> |
| MAC FAILURE PRESS OK | <p>The terminal was unable to initialize to the Moneris Host.</p> <p>Press OK. The terminal may automatically attempt another initialization or may simply return to the READY screen.</p> <p>Contact the Moneris Merchant Service Centre for assistance.</p> |
| MAXIMUM BONUS EXCEEDED | <p>The multiplier was applied to the 10th Bonus Offer selected for the transaction and this has resulted in an 11th Bonus Offer. There is a maximum 10 bonus offers per transaction so this exceeds the maximum.</p> <p>The terminal returns to the Bonus Offer menu screen.</p> <p>Select the Bonus Offer again, but press F3 to select NO at the APPLY MULTIPLIER prompt.</p> |
| MERCHANT ID ERROR | <p>The Merchant ID entered does not match the Merchant ID in the terminal's configuration.</p> <p>Check the ID, and re-enter it when the prompt re-appears.</p> <p>If the Merchant ID was entered correctly and the message re-appears, contact the Moneris Merchant Service Centre for assistance.</p> |

11 Troubleshooting

| ERROR MESSAGE | PROBLEM & SOLUTION |
|---------------------------------------|--|
| MISMATCHED | <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 prompt re-appears.</p> <p>If the prompt reappears, contact the Moneris Merchant Service Centre for assistance.</p> |
| NO ACTIVITY | <p>Clerk Subtotals are not available for that Clerk ID OR That Clerk ID does not exist.</p> <p>Check the Clerk ID and try the report again.</p> |
| NO LINE DETECTED | <p>The terminal cannot detect an available communications line so will not begin communicating.</p> <p>For dial communications, this may happen if the terminal shares the dial line with another device (e.g. a phone or a fax machine) or is using a line splitter or filter.</p> <ul style="list-style-type: none"> - Ensure that all communications cables are connected to the base and the wall jack correctly. - Check the phone line to ensure there is a dial tone. - If the line is shared with another device or uses a dial splitter or filter, ensure that the other device is not in use and has disconnected correctly. - Press OK to return to the READY screen. <p>For IP communications: the Internet service or the router may be down.</p> <ul style="list-style-type: none"> - Ensure that all communications cables are connected to the base and the wall jack correctly. - Check that the Internet service is functioning, e.g. access a website from a PC. <p>For wireless communications: the wireless connection may not be functioning properly.</p> <p>If the dial or IP communications seem to be working, reset the wireless communications:</p> <ul style="list-style-type: none"> - Power down the communications base then power it up again. - If the message appears again, remove the battery for 10 seconds then place it back on the handheld. |
| NO SUPPORTED APPLICATIONS REMOVE CARD | <p>The applications available on the terminal do not match any of the applications on the chip card.</p> <ul style="list-style-type: none"> - Remove the chip card. - The SWIPE OR INSERT CARD prompt appears. - Swipe the chip card on the magnetic stripe card reader to continue the transaction. |

| ERROR MESSAGE | PROBLEM & SOLUTION |
|--|--|
| <p>NOT ACCEPTED REMOVE CARD</p> | <p>The chip card inserted cannot be read OR A card-to-terminal communication error occurred.</p> <ul style="list-style-type: none"> - Remove the chip card. <p>If the SWIPE OR INSERT CARD prompt appears:</p> <ul style="list-style-type: none"> - re-insert the chip card to retry the transaction. <p>If the PURCHASE Ready screen appears:</p> <ul style="list-style-type: none"> - restart the transaction <p>If the SWIPE CARD prompt appears:</p> <ul style="list-style-type: none"> - Swipe the chip card on the Magnetic Stripe Card reader to continue <p>If the NOT ACCEPTED message reappears:</p> <ul style="list-style-type: none"> - Remove the chip card. - Request another form of payment. |
| <p>NOT COMPLETED PLEASE TRY AGAIN</p> <p>or</p> <p>NOT COMPLETED RETURN TO CLERK</p> | <p>The terminal has encountered a communication error during the cardholder prompts.</p> <p>If the cardholder is swiping or inserting the card:</p> <ul style="list-style-type: none"> - Ask the cardholder to return the terminal. - Press OK to display the merchant prompts. - A communication error message appears. - Find the communication error message in this table and follow the instructions. |
| <p>OPTION NOT AVAILABLE</p> | <p>The Admin code entered does not exist or the function has not been configured on this terminal.</p> <p>Check the Admin Shortcut Code and try again.</p> |
| <p>PERFORM ADM 60 PRINT CASHBACK INFO, PRESS OK</p> | <p>The terminal is about to erase from its memory a transaction that includes a Cashback amount and has not been printed on a Stored Transactions List.</p> <ul style="list-style-type: none"> - Press OK. - Print a Stored Transaction List. - Retry the transaction. |
| <p>PIN MUST BE 4 TO 12 DIGITS</p> | <p>The cardholder has entered a PIN that was too short (less than 4 digits) or too long (more than 12 digits).</p> <p>When the ENTER PIN prompt reappears:</p> <ul style="list-style-type: none"> - Ask the cardholder to enter the PIN again. - Remind them that they must key in at least four digits (i.e. at least four asterisks **** appear on the display) but no more than 12 digits before pressing OK. |

11 Troubleshooting

| ERROR MESSAGE | PROBLEM & SOLUTION |
|--|---|
| PIN TRIES EXCEEDED REMOVE CARD | The cardholder keyed in an incorrect PIN too many times in a row for this transaction. The transaction is declined. - If the REMOVE CARD message appears under the PIN RETRIES EXCEEDED message, remove the chip card from the chip card reader. - Press the Can/Ann key. - Request an alternate form of payment. |
| PLEASE LOGON | The terminal has been logged off to protect it from attempts to perform unauthorized transactions. Perform a Logon transaction. |
| REFER CALL | Contact the Moneris Merchant Service Centre to obtain a voice authorization. Once authorized, process an Advice Transaction . |
| REFUND LIMIT EXCEEDED PRESS OK | The total value of Refunds performed today is greater than your daily Refund limit. Contact the Moneris Merchant Service Centre for a temporary increase. Please have the original Purchase receipt available for reference . |
| REINITIALIZATION REQUIRED | The First Initialization attempt failed OR The Moneris Host has sent a Re-initialization request to the terminal OR An item of the Host Setup for Ethernet communications has been changed on the terminal. Try to re-initialize again. |
| REMOVE CARD | A chip card has been left in the chip card reader after the transaction was completed. The terminal will beep once per second until the card is removed. Remove the chip card from the chip card reader. The Idle prompt will appear on the screen. |
| RETRY - SYSTEM PROBLEM ### | The Moneris Host was unable to process the transaction. Retry the transaction. If problem persists, contact the Moneris Merchant Service Centre for assistance. |
| RETRY - SYSTEM TIME OUT ### | The Moneris Host or the Third Party Host was unable to process the transaction. Retry the transaction. If the problem persists, contact the Moneris Merchant Service Centre for assistance. |
| RETRY TERMINAL TIME-OUT PRESS OK | The customer has taken too long to enter their PIN. - Press OK . - The terminal will print the receipt(s) including a NOT COMPLETED message then the RETRY TRANSACTION? prompt appears. |

| ERROR MESSAGE | PROBLEM & SOLUTION |
|--|---|
| <p>RETRY TRANSACTION?</p> <p>YES NO</p> | <p>Press the F1 key to select YES and retry the transaction. The CUSTOMER PRESS OK TO CONTINUE prompt appears. Pass the terminal back to the customer and ask them to press OK then re-enter their debit card information.</p> <p>Press the F3 key to select NO and return to the READY screen.</p> |
| <p>REWARD EXCEEDS LIMIT</p> | <p>The total awards calculated for this Air Miles Rewards Purchase or Air Miles Rewards Refund are greater than the maximum reward limit configured on the terminal.</p> <p>The READY screen re-appears.</p> <p>Check the values entered during the Rewards transaction and retry the transaction.</p> |
| <p>SAF UPLOAD FAILED</p> | <p>The SAF Upload attempt (automatic during a transaction or manually started from the terminal menus) was not completed.</p> <p>Press the Can/Ann key.</p> <p style="padding-left: 40px;">If this was an automatic SAF upload attempted during a transaction (Close Batch or Multi-terminal Reporting), the transaction is cancelled then the READY screen appears.</p> <p style="padding-left: 40px;">If this was a manual SAF upload attempt, the READY screen appears.</p> <p>Wait a moment then retry the upload.</p> <p>If the problem persists, contact the Moneris Merchant Service Centre for assistance.</p> |
| <p>SAF UPLOAD REQUIRED</p> | <p>The function you have attempted to process (enter Training mode or Initialization) is not available until a SAF upload of the Air Miles transactions in the SAF log has been processed.</p> <p>Perform a manual SAF Upload then retry the function.</p> |
| <p>SSA Security Mode MLDT</p> | <p>See Code Authentication error messages.</p> |
| <p>SYSTEM PROBLEM PLEASE RETRY</p> | <p>One or more of the messages sent between the terminal and the Moneris Host are missing data or have incorrect data.</p> <p>Wait for a few minutes then try the transaction again.</p> <p>If the message reappears, contact the Moneris Merchant Service Centre for assistance.</p> |
| <p>SYSTEM PROBLEM RETRYING</p> | <p>The terminal is automatically retrying the transaction.</p> <p>Please wait until the terminal returns to the READY screen or another message appears.</p> |

11 Troubleshooting

| ERROR MESSAGE | PROBLEM & SOLUTION |
|--|--|
| SYSTEM PROBLEM SECURITY LIMIT PLEASE RETRY | <p>The terminal limits the number of PINs that can be entered in a specific time frame.</p> <p>This message appears if the number of PINs entered exceeds that limit. The current transaction is cancelled and debit and Chip-with-PIN transactions cannot be performed for a period of up to 10 minutes.</p> <p>After 3 seconds the last line of this message changes to "RETURN TO CLERK".</p> <ul style="list-style-type: none"> - Retrieve the terminal from the cardholder. - Press OK twice. - Request an alternate form of payment. |
| SYSTEM PROBLEM SECURITY LIMIT RETURN TO CLERK | <p>This message appears 3 seconds after the "SYSTEM PROBLEM SECURITY LIMIT PLEASE RETRY" message appears.</p> <ul style="list-style-type: none"> - Retrieve the terminal from the cardholder. - Press OK twice. - Request an alternate form of payment. |
| 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 CONNECTION FAILED | <p>The terminal has tested the Ethernet connection and was unable to establish a connection. The terminal will display this message for 3 seconds then return to the previous prompt.</p> <p>Wait for a few minutes then try the transaction again.</p> <p>If the message reappears, contact the Moneris Merchant Service Centre for assistance.</p> |
| TERMINAL DATA ERROR, CONTACT SERVICE CENTRE | <p>If the Initialization retry is not successful, contact the Moneris Merchant Service Centre for assistance.</p> <p>Press OK to return to the READY screen.</p> |
| TERMINAL SETUP REQUIRED | <p>The terminal has not been configured.</p> <p>Contact the Moneris Merchant Service Centre for assistance with configuring the terminal.</p> |
| TIME-OUT RETURN TO CLERK or TIME-OUT RETURN PINPAD | <p>The cardholder has taken too long to respond to their prompts.</p> <ul style="list-style-type: none"> - Ask the cardholder to return the PINpad/terminal. - Press OK. - The RETRY TERMINAL TIME-OUT PRESS OK prompt appears. |

| ERROR MESSAGE | PROBLEM & SOLUTION |
|-------------------------------|---|
| TIME-OUT REMOVE CARD | <p>The cardholder has taken too long to respond to their prompts.</p> <p>- Ask the cardholder to remove their card. The TIME-OUT RETURN TO CLERK (or RETURN PINPAD) prompt appears.</p> |
| TRANSACTION DATA NOT FOUND | <p>- MasterCard Transaction Data:</p> <p>No data could be found. Wait until the terminal returns to the ADMIN FUNCS menu.</p> |
| TRANSACTION NOT ALLOWED | <p>The terminal has incorrectly interpreted a Maestro debit card as a credit card.</p> <p style="text-align: center;">and</p> <p style="text-align: center;">A Maestro debit card with non-debit Service code has been swiped for any non-debit supported transaction type (i.e., a transaction type other than Purchase, Refund, Purchase-Void or Refund-Void).</p> <p style="text-align: center;">or</p> <p style="text-align: center;">A Maestro card has been manually entered.</p> <p>Retry the transaction with a credit card.</p> |
| TRANSACTION NOT FOUND | <p>Purchase Void; Refund Void;</p> <p>No Original Authorization number was found in the current Batch that matches the one that was keyed in. Wait until the ENTER ORIGINAL AUTHORIZATION # entry screen reappears, and then check your criteria, and try again. OR Press Can/Ann to return to the READY screen.</p> <p>-Credit Refund Void:</p> <p>No Original Authorization number was found in the current Batch that matches the one that was keyed in. Wait until the ENTER ORIGINAL AUTHORIZATION # entry screen reappears, and then check your criteria, and try again. OR Press Can/Ann to return to the READY screen.</p> <p>Debit Purchase Void:</p> <p>No transactions were found that match the criteria you entered during one of the following reports:</p> <p>- debit/credit Stored Transactions or loyalty/gift Stored Transactions :</p> <p>Wait until the PRINT DATE OR BATCH? prompt OR the ENTER CLERK ID entry screen reappears then check your criteria and try again.</p> <p>- Pre-Authorization List:</p> <p>Wait until the PRE-AUTH LIST menu OR the ENTER CLERK ID entry screen reappears then check your criteria and try again.</p> <p>- Transaction Inquiry or loyalty/gift Transaction Inquiry :</p> <p>Wait until the CARD TO SEARCH menu OR the ENTER</p> |



11 Troubleshooting

| ERROR MESSAGE | PROBLEM & SOLUTION |
|--|---|
| | <p>CLERK ID entry screen reappears then check your criteria and try again.</p> <p>OR</p> <p>Press Can/Ann three times to cancel the report and return to the READY screen.</p> <p>- SAF Inquiry :</p> <p>There are no SAF transactions in the Air Miles log waiting to be uploaded.</p> <p>OR</p> <p>No transactions were found that match the Ernex reference number you entered during an loyalty/gift VOID. Check the Ernex reference number on the loyalty/gift receipt and re-enter it to continue the transaction.</p> <p>OR</p> <p>No matching transaction was found during a Pre-Auth Advice. Check the Sequence number of the transaction you are trying to find and re-enter it to continue the transaction.</p> |
| VALID VALUES ARE FROM 0.06 TO 5.00 SECONDS | <p>The Stabilization Timer time entered during Dial Communications configuration is not valid.</p> <p>Check the number of seconds entered and enter a valid value when the prompt re-appears.</p> |
| VALID VALUES ARE FROM 1 TO 15 MINUTES | <p>The value for the SAF upload time period was less than 1 or greater than 15.</p> <p>Check the value and enter a valid value.</p> |
| VALID VALUES ARE FROM 15 TO 999 SECONDS | <p>The Backlight delay time is not valid.</p> <p>Check the number of seconds entered and enter a valid value when the prompt re-appears.</p> |
| VALID VALUES ARE FROM 5 TO 90 SECONDS | <p>The Ethernet time-out or retry time is not valid.</p> <p>Check the number of seconds entered and enter a valid value when the prompt re-appears.</p> |
| VALID VALUES FROM 0 TO 30% PRESS OK | <p>This message is displayed if the preset Tip percentage is not in the right range.</p> <p>Enter a valid value.</p> |
| ZERO POINTS AWARDED | <p>No points were awarded for the Air Miles Rewards transaction.</p> <p>The READY screen appears after 3 seconds.</p> <p>Check the values that were entered at the ENTER AMOUNT, ENTER QUANTITY and the BONUS OFFER selected. They may not qualify the transaction for points OR may have been entered incorrectly.</p> |

11.6 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: If you are using PUBLIC IP communication, you may need to contact your ISP for assistance before contacting Moneris. Check the Hardware Problem resolution to determine if this is the case.

| HARDWARE PROBLEM | SOLUTION |
|--|---|
|  appears in the top right corner of the display | <p>The battery is almost empty. Printing will slow down, and the green backlight will turn off and can not be turned on again until a charged battery is attached to the terminal or the terminal is placed on a base (communications or charge-only).</p> <p><i>Note: The terminal must remain within range of the communications base to which it is registered, regardless of which base it is placed on for battery purposes. For example, if the terminal is registered to Comms Base 1 but placed on Charge-only Base A because of a low battery then Charge-only Base A must be located within range of Comms Base 1 to allow the terminal to communicate with Comms Base 1.</i></p> |
| Battery is not charging. | <p>If the battery is on a terminal, ensure the  icon is displayed on the terminal. If it is not, move the terminal or battery on the base until the battery contacts touch the base contacts.</p> <p>If the battery is not on a terminal, ensure the green Power Indicator light on the base is lit. If not, ensure that the power cable is firmly connected to the power port on the base and the wall jack.</p> <p>Gently clean the golden contact under the terminal with a damp cloth. Do not scratch or scrape the surface of the contacts.</p> |
| Card numbers are not masked properly on the Cardholder copy and/or the Merchant copy of the receipt | <p>Make sure that Merchant Receipt Card Masking is enabled, and Pre-Printing is disabled.</p> |
| Chip card reader won't read cards | <ul style="list-style-type: none"> - Try inserting a different card. If this card can be read, the problem is with the first card. Request another form of payment. - If the card reader still won't read cards, contact the Moneris Merchant Service Centre for assistance. |
| Display screen is blank | <p>The terminal may be in Stand-by Mode. Turn the terminal on by pressing OK.</p> <p>If the READY screen does not appear, check that the battery is properly attached to the handheld terminal.</p> <p>If it is, and the display is still blank, the battery may need to be charged. Place the handheld on a base.</p> <p>If the READY screen appears, the battery needs to be charged.</p> <p>If the display screen is still blank, ensure that the power cable is firmly</p> |

11 Troubleshooting

| HARDWARE PROBLEM | SOLUTION |
|---|--|
| | <p>connected to the power port on the base and the wall jack.</p> <p>If the display is still blank, contact the Moneris Merchant Service Centre for assistance.</p> |
| Display lighting is too bright or too dark | <p>The contrast setting is too high or too low.</p> <p>Check the contrast setting and increase or decrease it to work with the lighting at the terminal location.</p> |
| Ethernet communication problems are happening intermittently. | <p>Contact the Moneris Merchant Service Centre for assistance.</p> |
| The green Power Indicator on base is not on. | <p>Check the power cable on the base and ensure that the power cable is firmly connected to the power port on the base and the wall jack.</p> |
| Magnetic Stripe Card reader won't read cards. | <ul style="list-style-type: none"> - 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. |
| No transactions are being processed. Terminal is using Dial. | <ul style="list-style-type: none"> - Determine whether Call Waiting or Call Answer is activated on the phone line that the terminal is using. - If either one is activated, configure the dial Prefix on the terminal as: *70., (star, seven, zero, comma, comma). Refer to "Entering alphabetic characters and punctuation". |
| Nothing is possible on the terminal after initial communications configuration is completed: not initialization, not transactions | <p>Contact the Moneris Merchant Service Centre for assistance.</p> |
| Printer Jam | <p>Open the printer and check that:</p> <ul style="list-style-type: none"> - 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>When the problem is fixed, the printer will finish printing the receipt or report that was in progress. If necessary, reprint the transaction.</p> <p><i>Note: Most debit transactions cannot be performed until the printer problem is fixed. (Credit transactions and some debit chip transactions can be performed manually if necessary.)</i></p> |

| HARDWARE PROBLEM | SOLUTION |
|--|---|
| "CANCELLED" is printed on an Ernex Close Batch report. | If communications are interrupted during the Loyalty/Gift Close Batch leaving the Close Batch out of balance, the "CANCELLED" message appears on the terminal screen, "CANCELLED" is printed on the report, and the batch is NOT closed. Contact the Moneris Merchant Service Centre for assistance. |
| TOTALS NOT AVAILABLE is printed on a Close Batch report. | If a Close Batch transaction is sent to the Ernex Host when there are no transactions at the Host, the report prints only a header, footer, and the text "312 -- TOTALS NOT AVAILABLE." |
| Zero dollar values on an Ernex Stored Transactions report by batch . | No Ernex transactions have been performed since the last Loyalty/Gift Stored Transactions report (a.k.a. a Loyalty/Gift Batch Totals report) was printed. |

11.7 Understanding DECLINED Messages

A transaction can be declined for a number of reasons. (Decline receipts print in "reverse print.")

Check the table below for the full Declined message and follow the resolution instructions.

If [configured do so](#), the terminal will beep for each of these messages:

| DECLINED MESSAGE | RESOLUTION |
|------------------------------|--|
| DECLINED | Return the card to the cardholder, and advise them to contact their card issuer. Request another form of payment. |
| DECLINED 4x HOLD CARD - CALL | Retain the card if possible and contact Moneris Merchant Contact Centre for further instructions. |
| DECLINED BY CARD PRESS OK | The chip card has declined the transaction. - Press OK . - The DECLINED BY CARD REMOVE CARD message appears. |
| DECLINED BY CARD REMOVE CARD | The chip card has declined the transaction. - The terminal beeps once per second until the chip card is removed. - The receipts are printed with DECLINED BY CARD on them. - Request another form of payment. |
| DECLINED CARD CANCELLED | The debit transaction has not been approved. If the problem persists, advise the debit cardholder to contact their branch. Request another form of payment. |
| DECLINED CARD NOT SETUP | The terminal has not been set up on the Moneris Host to process that card type. Call the Moneris Merchant Contact Centre for assistance. |

11 Troubleshooting

| DECLINED MESSAGE | RESOLUTION |
|---|---|
| DECLINED CARD NOT SUPPORTED | Call the Moneris Merchant Contact Centre for assistance. |
| DECLINED EXCEEDS REFUND AMT/LIMIT | The amount of this transaction is greater than your Refund limit. Provide the cardholder with the amount of the refund using an alternate payment method or contact Moneris Merchant Contact Centre for a temporary increase. Contact your Moneris Solutions Sales representative if you wish to increase your limit permanently. |
| DECLINED EXCESS PIN TRIES | The cardholder has entered their PIN number incorrectly too many times in a row. Refer the cardholder to their branch, and request another form of payment. |
| DECLINED EXPIRED CARD | Examine the Expiry date embossed on the card: If the date is in the future, retry the transaction. OR If the embossed date on the card is in the past, return the card to the cardholder, and advise them to contact their card issuer for renewal. |
| DECLINED HOLD CARD - CALL | Retain the card if possible and call the Moneris Merchant Contact Centre for further instructions. |
| DECLINED INVALID CARD | A debit card has been swiped, and the terminal does not process debit transactions. Return the card to the cardholder and request another form of payment. |
| DECLINED PLEASE TRY AGAIN REMOVE CARD | A chip transaction could not be completed because it was declined by the Host. Remove the card, and retry the transaction. |
| DECLINED RE-TRY EDIT ERROR ### PRESS OK | The transaction was not completed. Press OK or wait 3 seconds for the READY screen to reappear then try the transaction again. |
| DECLINED - RETRY TRANSACTION? YES NO | A non-chip transaction could not be completed because it was declined by the Host. Try again by pressing the F1 key, or return to the READY screen by pressing the F3 key. |

11.8 Error Messages during Code Authentication

After [powering up](#), the terminal performs a self-test then checks, or authenticates, the applications on the terminal.

If an application fails this authentication process, one of the following messages will be displayed. The message will appear for 2 seconds. It may appear by itself or with one or more of these Code Authentication messages then the [SSA menu](#) appears.

If any of these error messages appears, [contact the Moneris Merchant Service Centre](#) for assistance.

| ERROR MESSAGE | DESCRIPTION & ACTION |
|------------------------------------|--|
| Authenticate xxx...Failed! | <p>xxx = the application name or "OS" or "Sec Data" or "SSA"</p> <p>This message will appear for 2 seconds. It may appear by itself or with one or more of these Code Authentication messages then the SSA menu appears.</p> <p>Do NOT touch the keys on the terminal. Do NOT power down the terminal. Contact the Moneris Merchant Service Centre for assistance.</p> |
| Can't Read Certific File! | <p>This message will appear for 2 seconds. It may appear by itself or with one or more of these Code Authentication messages then the SSA menu appears.</p> <p>Do NOT touch the keys on the terminal . Do NOT power down the terminal. Contact the Moneris Merchant Service Centre for assistance.</p> |
| Certific File Authenticate Failed! | <p>This message will appear for 2 seconds. It may appear by itself or with one or more of these Code Authentication messages then the SSA menu appears.</p> <p>Do NOT touch the keys on the terminal . Do NOT power down the terminal. Contact the Moneris Merchant Service Centre for assistance</p> |
| CFS xxx can't open! | <p>xxx = CFS name</p> <p>This message will appear for 2 seconds. It may appear by itself or with one or more of these Code Authentication messages then the SSA menu appears.</p> <p>Do NOT touch the keys on the terminal . Do NOT power down the terminal. Contact the Moneris Merchant Service Centre for assistance.</p> |
| CFS xxx has no certific info! | <p>xxx = application name or CFS name</p> <p>This message will appear for 2 seconds. It may appear by itself or with one or more of these Code Authentication messages then the SSA menu appears.</p> <p>Do NOT touch the keys on the terminal . Do NOT power down the terminal. Contact the Moneris Merchant Service Centre for assistance.</p> |
| CFS xxx MAC Verification Failed! | <p>xxx = CFS name</p> <p>This message will appear for 2 seconds. It may appear by itself or with one or more of these Code Authentication messages then the SSA menu appears.</p> <p>Do NOT touch the keys on the terminal .</p> |

11 Troubleshooting

| ERROR MESSAGE | DESCRIPTION & ACTION |
|---|---|
| | <p>Do NOT power down the terminal. Contact the Moneris Merchant Service Centre for assistance.</p> |
| <p>Err Authenticate CFS xxx</p> | <p>xxx = CFS name</p> <p>This message will appear for 2 seconds. It may appear by itself or with one or more of these Code Authentication messages then the SSA menu appears.</p> <p>Do NOT touch the keys on the terminal . Do NOT power down the terminal. Contact the Moneris Merchant Service Centre for assistance.</p> |
| <p>File xxx Authentication Failed!</p> | <p>xxx = path/ DFS file name</p> <p>This message will appear for 2 seconds. It may appear by itself or with one or more of these Code Authentication messages then the SSA menu appears.</p> <p>Do NOT touch the keys on the terminal . Do NOT power down the terminal. Contact the Moneris Merchant Service Centre for assistance.</p> |
| <p>Lose Certific File!</p> | <p>This message will appear for 2 seconds. It may appear by itself or with one or more of these Code Authentication messages then the SSA menu appears.</p> <p>Do NOT touch the keys on the terminal . Do NOT power down the terminal. Contact the Moneris Merchant Service Centre for assistance.</p> |
| <p>SSA Security Mode MLDT</p> | <p>This special SSA menu appears when the terminal has finished authenticating the applications and one or more applications have failed.</p> <p>Do NOT touch the keys on the terminal . Do NOT power down the terminal. Contact the Moneris Merchant Service Centre for assistance.</p> |