



## ***TRANSELECT TERMINAL***

## ***MERCHANT OPERATING MANUAL***

***For Terminal Software Version 7.48 and Greater***

***March 22, 2001***

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# Merchant & Terminal Information

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MERCHANT NAME \_\_\_\_\_

MERCHANT LOCATION: \_\_\_\_\_

**MONERIS SOLUTIONS MERCHANT NUMBER: 0030\_**

Initialization telephone number: \_\_\_\_\_  
(keyed in ADMIN 01)

DATAPAC 3201 (POLLED) COMMUNICATION INFORMATION:

- MONERIS SOLUTIONS POLL CODE: \_\_\_\_\_  
(keyed in ADMIN 08)
- 3RD PARTY POLL CODE \_\_\_\_\_  
(keyed in ADMIN 10)

**CONTACT MERCHANT SERVICES 1-800-268-8644  
FOR INFORMATION OR ASSISTANCE WITH:**

- balancing your terminal
- problems with equipment
- processing financial transactions
- processing non financial transactions
- security features - merchant responsibility or liability concerns
- settlement processing
- terminal set-up
- VISA Merchant supplies

**AVAILABLE 24 hours a day, 7 DAYS A WEEK.**

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CONTACT VISA AUTHORIZATION FOR THE FOLLOWING:

-voice authorizations      **Central Canada: 1-800-268-8281**  
-code 10                      **Eastern Canada: 1-800-361-8720**  
                                     **Western Canada: 1-800-663-3631**

**TERMINAL SUPPLIES**

To order Paper Rolls, Ribbons and Cleaning Cards (used to clean the Magnetic Stripe Reader on terminal), contact one of the following AUTHORIZED suppliers:

<b>MAINTECH INDUSTRIES</b>	<b>1-800-268-5120</b>
<b>MAXWELL MEDIA PRODUCTS</b>	<b>1-800-561-6406</b>
<b>SHERATON ROLL PRODUCTS</b>	<b>1-800-661-1425</b>
<b>WEDGE PAPER PRODUCTS LTD</b>	<b>1-888-933-4336 (ENGL.)</b>
	<b>1-888-933-4337 (FREN.)</b>
<b>JL PAPER ROLLS AND RIBBONS</b>	<b>1-800-363-4873</b>

# CHAPTER 1: About Your Terminal

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This section of the manual will introduce you to your terminal. It tells you about the components of the terminal, how to care for the terminal, terminal keyboard, and Pin Pad key functions. The Transelect terminal connects to the POINT OF SALE (POS) payment service provided by Moneris. Your “**TRANSELECT**” refers to a terminal, a printer, and a PIN Pad (if you process Interac Direct Payment/Debit transactions)

**Note:** *Throughout this document Interac Direct Payment or IDP will be referred to as “Direct Card Transaction”.*

The **Terminal** can be set-up to accept and process:

- o Credit Cards - VISA, MasterCard, American Express (AMEX), JCB, and Diners Club/enRoute
- o Interac Direct Payment/Debit Cards
- o Cheque verification (e.g. TeleCheque, Telecredit, Veri-Cheque, etc.)
- o Ernex Gift and Loyalty Cards

The **Printer** connects to the terminal and to a power outlet. The printer provides:

- o Transaction records on two-part paper or one part double copy paper; one copy is for your customer and the second copy is for your records.
- o Journal listings of transactions, totals, etc.

**Note:** *Retain your copy of all approved credit and debit receipts for one year.*

If you accept Debit Cards, a **PIN Pad** is required with your Transelect Terminal. The PIN Pad consists of a display window for prompts and messages, and a keypad.

**Note:** Since your customers PIN (the Personal IDentification Number) is required for all Debit transactions and is confidential, it will not appear on the display on either your PIN Pad or terminal. Please respect your customer’s privacy when they key in their PIN.

## 1.1: Equipment Care

- Avoid spilling liquids on components
- Do not expose components to extreme temperatures
- To ensure the warranty on equipment, use only Authorized Paper Suppliers listed in the front of this manual for your Paper rolls and Printer ribbons

## About Your Terminal

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- For instructions on changing paper and ribbons refer to your printer manual
- For equipment failure contact Moneris Solutions Merchant Services
- Avoid unnecessary movement of the terminal to prevent accidental disconnection of any of the cables

**Note:** *Misuse of equipment could result in replacement liability.*

## 1.2: Terminal Key Board

KEY	EXPLANATION
1) A, B, C	Use these keys to respond to prompts for various (including Credit and Debit Card) transactions. The arrows below the keys allow you to <b>scroll</b> up and down or sideways when additional information is available.
2) ADMIN	Press this key before all administrative functions.
3) ADVICE	To complete a Pre-Authorized or Voice Authorized Credit transaction.
4) ALPHABETIC	To access an alphabetic character, press the number key that contains the desired letter and then the SHIFT (t) key; continue pressing the SHIFT (t) key until the desired letter displays on the terminal.
5) CANCEL/EXIT	To reset the terminal to the ready state after completing a transaction, or to cancel a transaction already in progress.
6) CHQ AUTH	To obtain an authorization on a cheque.
7) DELETE	To delete the last character keyed on the keyboard.
8) ENTER	Press on completion of input and in response to the display on the terminal.
9) NUMERIC KEYS 0-9	To key in a numeric response to a prompt. The decimal automatically inserts on dollar amount keyed. Example: \$145.27 – key in 14527
10) PP LANG	Press the SHIFT (t) key and then the PP LANG key to change the language on the PIN Pad from English to French or vice versa.
11) PRE-AUTH	Press this key to obtain authorization only on Credit Card Transaction.
12) PURCHASE	If the magnetic strip is not working on a Credit Card transaction, press the PURCHASE key before manually keying the Credit Card Number. Also used for e-commerce and mail/ tel order transactions.
13) PUR CORR/ VOID	Use this key to reverse a purchase transaction processed incorrectly on a Credit or Debit card.
14) REFUND	Use this key to refund Credit and Debit Card transactions.
15) REF CORR/ VOID	Use this key to reverse a REFUND transaction processed incorrectly on a Credit or Debit Card.

<b>KEY</b>	<b>EXPLANATION</b>
16) RETRY	To re-try certain declined transactions. This key is only available when the Retry prompt, displays.
17) SHIFT (t)	To access alphabetic characters on the keyboard and the functions listed below the keys.
18) T LANG	Press the SHIFT (t) key and then the T LANG key to change the language on the terminal from English to French or vice versa.

### **1.3: PINPad Key Functions**

<b>KEYS</b>	<b>EXPLANATION</b>
1) CHQ	To select chequing account.
2) SAV/EP	To select savings account.
3) NUMERIC AND ALPHABETIC KEYS	To key in a confidential Personal IDentification Number (PIN).
4) CANCEL/ANNUL	To cancel a transaction.
5) CORR	To clear the display of data so the customer may re-key information or if no data has been input, to revert to the previous prompt.
6) OK	To approve the transaction, amount, and PIN.



# ***CHAPTER 2: Terminal Features and Procedures***

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## **2.1: Standard Features**

### **2.1.1: POS Administrative (Admin) Card**

The POS Administrative (ADMIN) Card allows personnel to access various terminal functions and complete various financial transactions against the merchant's deposit account. If you (the merchant) accept only credit cards, a POS Administrative Card may not be required.

The merchant is solely responsible for the care, security, and safe preservation of each POS Administrative Card at all times. If a POS Administrative Card is lost or stolen (or if the merchant suspects it is lost or stolen) the merchant must call Moneris Solutions, Merchant Services right away.

All financial transactions completed with a POS Administrative Card are subject to the guidelines of the "Debit Card Merchant Agreement" with Moneris. The Agreement contains important provisions regarding merchant's responsibility for POS Administrative Card security etc. and the merchant's liability for financial transactions made with a POS Administrative Card.

### **2.1.2: Cardholder Conflicts**

Merchants should not attempt to resolve or compensate Debit Cardholder disputed transactions. Direct the Cardholder to their Financial Institution.

### **2.1.3: Code 10 Authorization**

If you feel that a customer, card or transaction is suspicious and needs investigating call the Visa Authorization Centre and ask for a Code 10. This will immediately alert the operator without alarming your customer. The operator will ask you some "Yes/No" questions and then provide instructions. Here are some examples of situations in which you would call for a Code 10.

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

### 2.1.4: Credit Transaction Pre-Authorization

Use the Pre-Authorization transaction to obtain an authorization “only” against a Credit Card’s “open to buy”. This transaction does not result in a charge to the cardholder or a deposit to your account. Traditionally Pre-authorization transactions are used in hotels, restaurants and car rental environments where the final amount of the sale is unknown.

To **process** a Pre-Authorization transaction, refer to Processing Pre-Authorized Credit Transaction in Section 3 of this manual.

To **complete** a Pre-Authorized or Voice Authorized transaction and process a charge against a Credit Card, refer to Completing A Pre-Authorized Credit Transaction or Processing Credit Card Advice Transaction in Section 3.

**Note:** *If the amount of the final transaction is substantially less than the Pre-Authorization amount. Contact the Voice Authorization Department of the appropriate Credit Card Company and ask them to release the amount previously authorized against the cardholder “Open To Buy”.*

### 2.1.5: Printer Problems

If your printer is not working and you are unable to print a customer receipt, contact Moneris Solutions Merchant Services to report the problem and process the transaction as follows:

**For Debit transactions** - process the transaction through your terminal and manually prepare a receipt (in duplicate) with full details including:

- Date of the transaction
- Amount of transaction
- Cardholder’s Card number
- The account type selected (Chequing or Savings)

Provide one copy of the receipt to your customer and retain one copy for your records or reverse the transaction and accept another form of payment.

**For Credit transactions** - Process the transaction through your terminal and manually prepare a Sales Draft with full details, including:

- in **imprint** of the Credit Card (Account number, Issue/Expiry Date and Cardholder Name must be legible)
- date of transaction
- amount of transaction
- cardholder signature
- authorization number

Provide one copy of the receipt to your customer and retain one copy for your records.

**Note:** If you processed transaction through your terminal when your printer was not working, **do not** process them again when your printer is back in operation.

### 2.1.6: Securing Your Terminal

To minimize the risk of unauthorized transactions being processed through your (the merchant's) terminal after business hours, log the terminal OFF at the end of each business day (after a "Closed Batch" transaction) refer to Logging Off (ADMIN 03) in Section 8.

At the start of the next business day, Log your terminal ON - refer to Logging On (ADMIN 02) in Section 8.

Your POS ADMIN Card is required to "LOGON" to your terminal.

### 2.1.7: Stored Credit & Debit Transactions

Your Transelect terminal can store 500 APPROVED Credit and Debit transaction records. The oldest transaction will drop off, once the memory of the terminal reaches capacity. If your terminal is replaced, the memory cannot be transferred to the replacement terminal and is therefore lost. Refer to Printing Stored Transactions (ADMIN 60) and Performing Transaction Inquiry (ADMIN 66) in Section 8. To clear your terminals stored transaction memory, refer to Initializing The Terminal (ADMIN 01) in Section 8.

### 2.1.8: Training Mode

Your Transelect terminal is able to simulate **CREDIT and DEBIT CARD** financial transactions in Training Mode. Transactions processed in Training Mode will not affect your customer's accounts or your business accounts. Financial settlement does **NOT** occur for transactions processed while your terminal is in training mode. For how to initiate the Training Mode (ADMIN 05), refer to Section 8.

## 2.2: Optional Features

The following features are optional and can be activated in each of your terminals.

### 2.2.1: Balance Prompt

This feature enables you to "flag" your Closed Batch Transaction (ADMIN 99) with an "Out of Balance" condition. This feature is used solely for your "in house" record keeping and is not reported to Moneris.

This feature is activated in the ADMIN 08 –Configuring The Terminal.

### **2.2.2: Invoice Number**

This feature enables you to key in an INVOICE number with every Credit and Debit financial transaction. An Invoice number can be from 1 to 7 numbers or letters. If this feature is activated, you have the option of keying an INVOICE NUMBER with every transaction or bypassing it by pressing ENTER when prompted. This feature is activated while Configuring The Terminal (ADMIN 08); refer to Section 8.

### **2.2.3: Optional Signature Line On Credit Card Transactions**

This feature enables you to turn off/on the Cardholder Signature Line for all Credit Transactions. This option can only be turned OFF in business environments where a Credit Card is not presented e.g. Mail Order Businesses. This feature is activated while Configuring The Terminal (ADMIN 08); refer to Section 8.

### **2.2.4: Purchasing Card**

If this feature is activated and programmed in your terminal, the Customer Reference Number (if keyed) will be printed on every Purchasing Card Receipt. The terminal will prompt for tax amount, if you do not wish to key in the amount of tax key in 0 when prompted. This feature is activated while Configuring The Terminal (ADMIN 08); refer to Section 8.

### **2.2.5: Reprint Transaction**

To reprint the last transaction after the terminal has returned to the "READY" prompt, press SHIFT (t) key and then the RETRY key. The word \*DUPLICATE\* will be printed on the top and bottom lines of the Receipt.

You can also print a duplicate of the last financial transaction by pressing ENTER on the terminal prior to pressing the CANCEL/EXIT key.

### **2.2.6: Third Party Card Processing**

This feature enables you to process 3rd Party transactions (e.g. JCB). Contact your Moneris Solutions Sales Representative for further details. 3rd Party processing parameters are keyed in ADMIN 10 and ADMIN 11; refer to Section 8 for using administrative functions.

### **2.2.7: Tip Processing**

This feature enables you to customize your terminal to process tip amount on all card purchase (Credit, Debit, Third Party cards) transactions traditionally used in restaurant environments. You must have a PINSmart PIN-

Pad to enable your terminal process tip on Debit card transactions. The feature is enabled in ADMIN 08, Configuring The Terminal; see Chapter 8.

### 2.2.8: Clerk Subtotalling

This feature provides you with the option of obtaining Subtotals of an individual or group of employees on one or more terminals. This feature is activated using ADMIN functions 81, 82, 83 and 84; refer to Section 8.

Clerk ID's are keyed in the terminal and retained on Moneris' Host Computer. This enables you to obtain financial totals and the number of transactions processed on all of your terminals by a specific Clerk or group of Clerks.

### 2.2.9: Clerk ID

While setting up Clerk Subtotalling, you will select how the Clerk ID is to be keyed. You can set the Clerk ID to Default on a specific terminal, or you may choose the option of keying the Clerk ID at the start of every transaction either manually or by swiping a magnetic stripe card. In the Clerk ID field, you can key in 1 - 6 characters using numbers or letters. It is the employer's responsibility to obtain Magnetic Stripe Card - refer Guidelines below.

**Note:** The Addition and deletion of Clerk ID's is controlled by the Merchant and may have direct impact on Clerk Subtotal reports. Therefore, Moneris is unable to guarantee accurate reporting between Clerk Subtotals and totals reported in your Close Batch transactions. Also note that the terminal can be configured to ask for Clerk ID for every transaction performed (see ADMIN 83 in Section 8 for how to do this)

A total of two hundred and fifty five (255) clerk ID's can be attached to your Merchant Location.

The following are guidelines for Magnetic Stripe Cards with Clerk ID's:

- The Clerk ID field can be extracted from the magnetic stripe data on a card.
- The standard for these cards is "ISO/IEC 7813 IDentification cards - Financial Transaction Cards"
- The ID can be extracted from either Track 1 or Track 2 and your terminal will need to be set up accordingly; refer to Setting Up Clerk Subtotalling (ADMIN 83) in Section 8.

There are several Manufactures of Magnetic Stripe Cards, the following are just a few; SCS-Security Card Systems Inc., NBS-National Business Systems, B. A. Custom Cards and Bicybec.

Provide the card Manufacturer with the following information:

- Track 1 & 2: Uses the last 6 digits of the first field on the track
- Name: Uses the first 6 characters of the name field on track 1

### 2.2.10: Clerk Subtotals Reported As Group

More than one Clerk ID can be defined as a “GROUP” (GRP). A group represents more than one Clerk ID that shares a common starting characters (Pre-fix). The number of common starting characters in a group can vary from 1 to 5. For example, Clerk ID’s 1, 11, 111, can be keyed as a GRP PRE-FIX with the number 1. All Clerk ID's that begin with the number 1 will be reported.

### 2.2.11: Multiple Terminal Reporting

**Multiple Terminal Closing** - through one transaction, at any of your terminals, you can close one terminal, a group of terminals or all of your terminals (attached to the same merchant number). This feature is activated in ADMIN 80 and 85; refer to Section 8.

**Multiple Deposit Totals** - Use this transaction if you close your terminals more than once per day. This transaction provides you with the grand totals of all closed batches for the day.

The Multiple Terminal Close transaction (ADMIN 85) **does not** compare totals stored in the terminals memory with totals stored in Moneris’ Host Computer. Therefore, ensure that your receipts balance to the total of your Multiple Closed Batch.

**Note:** The standard Terminal Close transaction (ADMIN 99) compares terminal totals stored in the terminals memory with totals stored in Moneris’ Host Computer.

### 2.2.12: Terminal Name

Key in your terminal name, 1 - 6 characters using numbers or letters. The same terminal name cannot be used on more than one terminal. You can identify up to 100 different Terminal Names (this would require 100 different Terminals).

### 2.2.13: Multiple Terminal Reporting In Group

More than one terminal can be defined as a "GROUP" (GRP). A group represents more than one Terminal ID that shares a common starting characters (Pre-fix). The number of common starting characters in a group can vary from 1 to 5. For example, Terminal names, “FRONT 1, FRONT 2”, can be keyed as GRP PRE-FIX with the letter F. All Terminals that begin with the letter “F” will then report Deposit totals and / or will be closed as a group.

# CHAPTER 3: Processing Credit Transaction

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This section outlines how to process credit card transactions. Before you can process any transaction, you must first configure your terminal. Refer to Section 8 for how to do this.

## 3.1: Processing Credit Card Purchase Transaction

This transaction electronically authorizes and captures credit card purchases. Settlement to your business account occurs electronically for all closed batches. **If your terminal's e-commerce and mail/tel order functions are configured, see Section 6 of the manual.**

When a Credit Card is swiped through the terminal's magnetic stripe reader, the card number encoded on the magnetic stripe appears on the terminal display. To avoid charge-backs, ensure that the number displayed on the terminal is the same as the number embossed on the card. Contact Moneris Solutions Authorization Department immediately if there is a discrepancy between the two numbers.

TERMINAL DISPLAY:	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Swipe customer card
##### PRESS ENTER TO CONT	Press ENTER
<p><b>Note:</b> <i>If the card reader in the terminal cannot read the magnetic stripe on the customer card, manually key in the details of the Credit card. Ensure you have a signed imprint of the Credit card and the account # and expiry date must be legible. Use this procedure every time the card reader fails to read the magnetic stripe.</i></p>	
READY SWIPE CUSTOMER CARD	Press the PURCHASE Key
PURCHASE SWIPE CUSTOMER CARD	Manually key in card number and press ENTER
ENTER EXPIRY DATE MMYY	Key in expiry date MMY and press ENTER
<p><b><i>If there is no problem reading the stripe on the customer card, continue here:</i></b></p>	
PURCHASE# ENTER AMOUNT	Key in amount of Purchase (without the decimal point) and press ENTER

TERMINAL DISPLAY:	OPERATOR'S ACTION
DIALLING/CALL ANSWERED SENDING / RECEIVING PROCESSING	Please wait
APPROVED ##### PROVIDE TRANS RECORD	(Authorization number is displayed)
	Customer must sign both copies of receipt. Give one copy to your customer and retain one copy for your records. Press CANCEL/ EXIT key to return to READY prompt

### 3.2: Processing Credit Card Purchase Transactions (Back Up Procedure)

Use the following procedure to complete a purchase transaction when you are unable to process the transaction through your terminal due to System or Hardware Problems.

1. Prepare a paper Sales Draft with full details, including:
  - An **imprint** of the Credit Card (Account number, Issue/Expiry Date and Cardholder Name must be legible)
  - date of transaction
  - cardholder signature
  - authorization number \*

\*If the amount of the transaction exceeds your “Downtime floor limit” established by the applicable Credit Card Company, obtain a “Voice Authorization” by calling the appropriate Credit Card Authorization Centre (e.g. Contact MasterCard Authorization Centre for MasterCard transactions etc.).

2. Once the cardholder has signed the Sales Draft, compare the signature to that located on the signature panel of the card. (Immediately report discrepancies in signature and name to the Voice Authorization Department of the applicable Credit Card Company).
3. Provide the cardholder with their copy of the receipt and retain the “Merchant copy” for your records.
4. Contact Moneris Solutions Merchant Services to report the problem (telephone number listed in the front of this manual).
5. Once your Transelect terminal is operational, the purchase transactions, which occurred while your terminal was not available, must be manually processed through the Transelect terminal as “ADVICE” transactions. For processing Advice transactions, refer to Processing Credit Card Advice Transaction in this Section.

### 3.3: Correcting/Voiding Credit Card Purchase

Use this transaction to correct a purchase transaction that was keyed incorrectly. Process this transaction for the entire amount of the original incorrect purchase and then re-key the purchase correctly. This transaction cancels the original purchase if both transactions were processed in the same batch.

**Note:** Your Administrative (ADMIN) Card is required to complete a Purchase Correction/Void transaction.

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press PUR CORR/VOID key
PURCHASE VOID SWIPE ADMIN CARD	Swipe POS ADMIN Card
PURCHASE VOID SWIPE CUSTOMERS CARD	Swipe Customer Card
##### PRESS ENTER TO CONT	Press ENTER
ENTER ORIGINAL AUTHORIZATION NUMBER	Key in original Authorization Number from the Purchase transaction ENTER AUTH NUMBER and press ENTER.
PURCHASE VOID ENTER AMOUNT	Key in the entire amount of the purchase transaction to be voided/corrected (without the decimal point) and press ENTER.
DIALLING/CALL ANSWERED SENDING / RECEIVING PROCESSING	Please Wait
APPROVED PROVIDE TRANS RECORD	Merchant to sign receipt, provide one copy to your customer, and retain signed copy for your records
	Press CANCEL/EXIT key to return to READY prompt

### 3.4: Processing Credit Card Refund

Use this transaction to refund the full or partial value of a Purchase transaction.

**Note:** *Your Administrative (ADMIN) Card is required to complete a Refund transaction.*

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press REFUND key
REFUND SWIPE ADMIN CARD	Swipe POS ADMIN Card
REFUND SWIPE CUSTOMER CARD	Swipe Customer Card
<b>Note:</b> <i>If the card reader in the terminal cannot read the magnetic stripe on the customer card, manually key in the details of the Credit card and press ENTER. Ensure you have a signed imprint of the Credit card and the account # and expiry date must be legible.</i>	
PRESS ENTER TO CONT.	To continue, press ENTER
CARD HOLDER #	Key in original Authorization number from the Purchase transaction or keyed 9's if ENTER AUTH NUMBER original Auth.# is not available and press ENTER.
REFUND ENTER AMOUNT	Key in amount of the transaction being refunded (without the decimal point) and press ENTER.
DIALLING /CALL ANSWERED SENDING / RECEIVING PROCESSING	Please wait
APPROVED PROVIDE TRANS RECORD	Sign receipt, provide one copy to your Customer, and retain signed copy for your records
	Press CANCEL/EXIT key to return to READY prompt

### 3.5: Correcting/Voiding Credit Card Refund

Use this transaction to correct a refund transaction that was keyed incorrectly. Process this transaction for the entire amount of the original refund and then re-process the refund correctly. This transaction cancels the original refund if both transactions were processed in the same batch.

**Note:** *Your Administrative (ADMIN) Card is required to complete a Refund Correction/Void transaction.*

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press REF VOID key
REFUND VOID SWIPE ADMIN CARD	Swipe POS ADMIN Card
REFUND VOID SWIPE CUSTOMER CARD	Swipe Customer Card
<b>Note:</b> <i>If the card reader in the terminal cannot read the magnetic stripe on the customer card, manually key in the details of the Credit card and press ENTER. Ensure you have a signed imprint of the Credit card and the account # and expiry date must be legible.</i>	
PRESS ENTER TO CONT.	To continue, press ENTER
ENTER ORIGINAL AUTHORIZATION NUMBER	Key in the Original Authorization Number from the Refund transaction and press ENTER
REFUND VOID ENTER AMOUNT	Key in the entire amount of the Refund transaction being Voided and press ENTER.
DIALLING /CALL ANSWERED SENDING / RECEIVING PROCESSING	Please wait
APPROVED PROVIDE TRANS RECORD	Sign receipt, provide one copy to your Customer, and retain signed copy for your records
	Press CANCEL/EXIT key to return to READY prompt

### 3.6: Processing Pre-Authorized Credit Transaction

Use this transaction to obtain authorization for a purchase transaction where the final dollar value of the transaction is unknown. E.g. In a restaurant environment, a tip may be added.

This function **ONLY** provides authorization and **does not** capture the transaction for deposit. Refer to Completing A Pre-Authorized Credit Transaction to complete and capture the transaction.

**Note:** To print a *TIP LINE* on the Customer Receipt - refer to Section 8 - ADMIN 08.

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press PRE AUTH key
PRE-AUTHORIZATION SWIPE ADMIN CARD	Swipe POS ADMIN Card
REFUND SWIPE CUSTOMER CARD	Swipe Customer Card
<b>Note:</b> <i>If the card reader in the terminal cannot read the magnetic stripe on the customer card, manually key in the details of the Credit card and press ENTER. Ensure you have a signed imprint of the Credit card and the account # and expiry date must be legible.</i>	
PRESS ENTER TO CONT.	To continue, press ENTER
PRE-AUTHORIZATION ENTER AMOUNT	Key in amount to be authorized (without the decimal point) and press ENTER.
DIALLING /CALL ANSWERED SENDING / RECEIVING PROCESSING	Please wait
APPROVED ##### PROVIDE TRANS RECORD	Customers must sign both copies of receipt, provide one copy PROVIDE of receipt to your customer and retain one copy for your records
	Press CANCEL/EXIT key to return to READY prompt

### 3.7: Completing A Pre-Authorized Credit Transaction

Use this transaction to complete a Pre-Authorized transaction previously processed on your terminal. This transaction captures the transaction for settlement.

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press ADVICE key
FIND ORIGINAL? YES - A NO - C	Press A
ENTER SEQUENCE NO OF ORIGINAL TRANS	Key in the last 6 digits of the receipt number and press ENTER. Do not include the dash from the Pre-Authorized Transaction Receipt.
##### PRESS ENTER TO CONT	To continue, press ENTER.
OLD AMT. ###.## ENTER NEW AMOUNT	Press ENTER to accept original authorized amount or key in new amount and press ENTER
SENDING CALL ANSWERED SENDING/RECEIVING PRINTING	Please wait
APPROVED ##### PROVIDE TRANS RECORD	If your customer signed original Pre-Authorized transaction receipt, then your customer is not required to sign the "ADVICE" receipt. However, you must retain one copy of each receipt.
	Press CANCEL/EXIT key to return to the READY prompt

### 3.8: Processing Credit Card Advice Transaction

Use this transaction to complete Credit Purchase transactions that you were unable to process at the time of the Sale due to System or Terminal problems. This transaction captures the transaction for settlement.

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press ADVICE key
FIND ORIGINAL? YES - A NO - C	Press C
ADVICE SWIPE CUSTOMER CARD	Key in Cardholder number manually and press ENTER
ENTER EXPIRY DATE MMYY	Key in the card's expiry date and press ENTER
ENTER ORIGINAL AUTHORIZATION NUMBER	Key in Authorization obtained from "Voice Authorization" and press ENTER. In the ENTER AUTH NUMBER event that the original Purchase transaction was not authorized (transaction was below your floor limit), key in the date when the original transaction was made (DDMMYY) as your authorization number and press ENTER.
ADVICE ENTER AMOUNT	Key in amount of the transaction (without the decimal point) and press ENTER.
DIALLING/CALL ANSWERED SENDING / RECEIVING PROCESSING	Please wait
APPROVED ##### PROVIDING TRAN RECORD	Retain copy of receipt.
	Press the CANCEL/EXIT key to return to READY prompt

# CHAPTER 4: Processing Debit Transactions

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This section outlines how to process debit card transactions. Before you can process any transaction, you must first configure your terminal. Refer to Section.8 for how to do this.

**Note:** *The debit cardholder must be present for all debit transactions and the card must be swiped.*

## 4.1: Processing Debit Card Purchase

This transaction electronically authorizes and captures debit card purchases. Settlement to your business account occurs electronically for all “closed batches”.

TERMINAL DISPLAY	OPERATOR'S ACTION	CUSTOMER ACTION
READY SWIPE CUSTOMER CARD	Swipe Customer Card	
PURCHASE ENTER AMOUNT	Key in the amount of the Purchase (without decimal point) and press ENTER	
PURCHASE CONTINUE ON PIN PAD	Give PIN Pad to customer	Press OK to approve transaction type & amount of transaction. Select CHEQUING or SAVING Key in PIN # & press OK
SENDING RECEIVING PROCESSING	Return Card to customer	
APPROVED ##### (AUTH #)	Provide one copy of the receipt to your Customer and retain copy for your record.	APPROVED is displayed on the PIN Pad.
	Press CANCEL/EXIT key to return to READY prompt	

## Processing Debit Transactions

### 4.1.1: Processing Tip with Debit Purchase

TERMINAL DISPLAY	OPERATOR'S ACTION	CUSTOMER ACTION
READY SWIPE CUSTOMER CARD	Swipe Customer Card	
PURCHASE ENTER AMOUNT	Key in the amount of the purchase (without decimal point) and press ENTER	
PURCHASE CONTINUE ON PIN PAD	Give PINSmart PINPad to customer*	
On PINSmart PINPad		
PURCHASE \$\$\$\$ — OK ?		Confirm purchase amount (\$\$\$\$) and press OK to accept.
TIP AMOUNT 00.00		Enter tip amount and press <b>OK</b> ; OR To bypass tip, press <b>OK</b> (you can also press 0 and <b>OK</b> )  <b>Note:</b> You can press <b>CORR</b> key to return to the previous prompt. You can press <b>CANCEL</b> to abort the transaction.
PURCHASE \$\$\$\$ — OK ?		Confirm purchase amount plus tip (\$\$\$\$) and press <b>OK</b> to accept. Select either <b>CHQ</b> or <b>SAV/EP</b> , depending on your account type, and press <b>ENTER</b> . Enter your PIN number and press <b>ENTER</b>
On the Transelect Screen:		
DIALING RETURN CARD	Take PINSmart PINPad from the customer and return Debit card to the customer.	
SENDING RECEIVING PROCESSING		
APPROVED ##### (AUTH #)	Provide one copy of the receipt to your Customer and retain copy for your record.	APPROVED is displayed on the PINSmart PINPad

## 4.2: Correcting/Voiding Debit Card Purchase

Use this transaction to correct a purchase transaction that was keyed incorrectly. Process this transaction for the entire amount of the original purchase transaction and then re-key the purchase correctly.

**Note:** *Your POS Administrative Card (ADMIN) is required to complete a Purchase Correction/Void transaction*

TERMINAL DISPLAY	OPERATOR'S ACTION	CUSTOMER ACTION
READY SWIPE CUSTOMER CARD	Press PUR VOID key	
PURCHASE VOID SWIPE ADMIN CARD	Swipe POS ADMIN Card	
PURCHASE VOID SWIPE CUSTOMER CARD	Swipe Customer Card	
ENTER ORIGINAL AUTHORIZATION NUMBER	Key in Authorization # from purchase transaction being corrected/voided and press ENTER	
PURCHASE VOID ENTER AMOUNT	Key in the entire amount of the purchase transaction being Corrected/Voided (without the decimal) and press ENTER	
PURCHASE VOID CONTINUE ON PIN PAD	Give PIN Pad to customer	Press OK to approve transaction type & amount of transaction Select CHEQUING or SAVINGS Key in PIN # & Press OK
DIALLING CALL ANSWERED SENDING / RECEIVING PROCESSING	Return Card to Customer	
APPROVED##### PROVIDE TRANS RECORD	Provide one copy of the receipt to your Customer and retain copy for your records.	
	Press CANCEL/EXIT key to return to READY prompt.	

### 4.3: Processing Debit Card Refund

Use this transaction to refund full or partial value of a Purchase transaction.

**Note:** *Your POS Administrative Card (ADMIN) is required to complete a Refund Transaction*

TERMINAL DISPLAY	OPERATOR'S ACTION	CUSTOMER ACTION
READY SWIPE CUSTOMER CARD	Press REFUND key	
REFUND SWIPE ADMIN CARD	Swipe POS ADMIN Card	
REFUND SWIPE CUSTOMER CARD	Swipe customer card	
REFUND ENTER AMOUNT	Key in the amount of the transaction being Refunded (without the decimal point) and press ENTER (Partial amount of original purchase may be refunded)	
REFUND CONTINUE ON PIN PAD	Give PIN Pad to customer	Press OK to approve transaction type & amount of transaction Select CHEQUING or SAVINGS Key in PIN # & Press OK
DIALING CALL ANSWERED SENDING/RECEIVING PROCESSING	Return card to customer	
APPROVED#####	Provide one copy of the receipt to your customer and retain copy for your records.	
	Press CANCEL/EXIT key to return to READY prompt	

## 4.4: Correcting/Voiding Debit Card Refund

Use this transaction to correct a Refund transaction that was keyed incorrectly. Process this transaction for the entire amount of the original Refund and then re-process the Refund correctly.

**Note:** *Your POS Administrative Card (ADMIN) is required to complete a Refund Correction/ Void transaction.*

TERMINAL DISPLAY	OPERATOR ACTION	CUSTOMER'S ACTION
READY SWIPE CUSTOMER CARD	Press REF VOID key	
REFUND VOID SWIPE ADMIN CARD	Swipe POS ADMIN Card	
REFUND VOID SWIPE CUSTOMER CARD	Swipe customer card	
ENTER ORIGINAL AUTHORIZATION NUMBER	Key in the Authorization # from the refund transaction being Voided/Corrected and press ENTER	
REFUND VOID ENTER AMOUNT	Key in the entire amount of the refund transactions being Voided/Corrected (without the decimal point) and press ENTER being	
REFUND VOID CONTINUE ON PIN PAD	Give PIN Pad to customer	Press OK to approve the transaction type & amount of the transaction Select CHEQUING or SAVINGS Key in PIN # & Press OK
DIALLING CALL ANSWERED SENDING/ RECEIVING PROCESSING	Return card to customer	
APPROVED ##### PROVIDE TRANS RECORD	Provide one copy of the receipt to your customer and retain copy for your records.	
	Press CANCEL/EXIT key to return to READY prompt	



# CHAPTER 5: Processing Cheque Authorization

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This section outlines how you can use your terminal to authorize cheques.

## 5.1: Obtaining Authorization

If you subscribe to cheque authorization service you may use this transaction to electronically obtain approval from the Cheque Authorization Company. Your terminal must be configured in "ADMIN 09" before this transaction is available.

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press CHQ AUTH key
LICENCE - A CARD NUMBER - C	To key in a driver's licence number, press A OR To key in a major credit card number, press C
<b>If A -Drivers Licence was selected</b>	
ENTER DRIVERS LICENCE NUMBER	Key in drivers licence number and press ENTER
ENTER PROVINCE / STATE CODE	Key in two digit Province Code and press ENTER Use Shift Key (t) for Alpha characters
ENTER AMOUNT	Key in cheque amount and press ENTER
DIALING	Please wait.
APPROVED ###	Record Authorization number on the back of the cheque being authorized and press CANCEL/EXIT
<b>If C - Card Number was selected above</b>	
ENTER ACCOUNT NO.	Swipe credit card or manually key in credit card number and press ENTER
ENTER ID TYPE	If card number is manually keyed in, then key in two digit card ID type or expiry date and press ENTER If the card is not manually keyed in, go to the next screen.  <b>Note:</b> <i>Your Cheque Authorization service provides you with the various card ID's that are accepted.</i>
ENTER AMOUNT	Key in cheque amount and press ENTER
DIALING	Please wait
APPROVED ###	Record Authorization number on the back of the cheque being authorized and press CANCEL/EXIT to return to READY prompt



# CHAPTER 6: Processing E-commerce And Mail / Telephone Order Transactions

Your terminal can process e-commerce and mail/ telephone order transactions. It has to be enabled, using ADMIN 08 function, to do this (see Section 8: Using Administrative Functions). This section outlines the procedure for processing e-commerce and mail/ telephone order transactions. To process e-commerce and mail/ telephone order transaction follow the following steps depending on your terminal configuration:

**Note:** *You can change the terminal language at any point in the transaction by pressing t and T LANG key.*

## 6.1: Processing E-Commerce And Mail/Tel Order Transactions

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press PURCHASE key
PURCHASE SWIPE CUSTOMER CARD	Manually key in card number and press ENTER
ENTER EXPIRY DATE	Key in expiry date (MMYY) and press ENTER
REGULAR – A      E-COMM – B MAIL/TEL ORDER - C	To select regular transaction, press A (regular transaction as in "Processing Credit Card Purchase" will continue). To select e-commerce processing, press B To select mail/ tel order processing, press C
<b>If B (E-COMM) is selected</b>	
PURCHASE ENTER AMOUNT	Key in purchase amount and press ENTER
DIALING PLEASE WAIT	Please wait
APPROVED ###	
<b>If C (MAIL/ TEL) is selected:</b>	
SINGLE – A    RECURRING – B MORE OPTIONS - C	To go to other options, press C  <b>Note:</b> <i>Pressing A or B will make the terminal to continue with normal transaction procedures as in "If B is (E-COMM) selected" above.</i>

## Processing E-commerce And Mail / Telephone Order Transactions

TERMINAL DISPLAY	OPERATOR'S ACTION
<b>If C (MORE OPTIONS) is selected</b>	
INSTALMENT – A OTHER TYPE – B MORE OPTIONS - C	To go to more options, press C  <b>Note:</b> Pressing A or B will make the terminal to continue with normal transaction procedures as in "If B is selected" above.
<b>If C (MORE OPTIONS) is selected</b>	
SINGLE – A    RECURRING – B MORE OPTIONS – C	Pressing A or B will make the terminal to continue with normal transaction procedures as in "If B is selected" above  Pressing C will make the terminal repeat the "mail/tel" options once again and as many times as C is pressed.
<b>If A or B (SINGLE or RECURRING) is selected</b>	
PURCHASE ENTER AMOUNT	Key in purchase amount and press ENTER
DIALING PLEASE WAIT	Please wait
APPROVED ###	

## 6.2: Processing Only E-Commerce Transactions

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press PURCHASE key
PURCHASE SWIPE CUSTOMER CARD	Manually key in card number and press ENTER
ENTER EXPIRY DATE	Key in expiry date (MMYY) and press ENTER
E-COMMERCE TRANS? YES – A    NO - C	To select e-commerce transaction, press A To reject e-commerce transaction, press C  <b>Note:</b> Pressing C (NO) will make the terminal start normal transaction processing. Pressing CANCEL will abort transaction.
<b>If A (YES) is selected</b>	
PURCHASE ENTER AMOUNT	Key in purchase amount and press ENTER
DIALING PLEASE WAIT	Please wait
APPROVED ###	

### 6.3: Processing Only Mail/ Tel Order Transactions

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press PURCHASE key
PURCHASE SWIPE CUSTOMER CARD	Manually key in card number and press ENTER
ENTER EXPIRY DATE	Key in expiry date (MMYY) and press ENTER
MAIL/ TELEPHONE ORDER? YES – A      NO - C	To select mail/ tel order transaction, press A To reject mail/ tel order transaction, press C  <b>Note:</b> Pressing C (NO) will make the terminal start normal transaction processing. Pressing CANCEL will abort transaction.
<b>If A (YES) is selected</b>	
SINGLE – A    RECURRING – B MORE OPTIONS – C	To go to more options, press C.  <b>Note:</b> Pressing A or B will make the terminal start normal transaction processing. Pressing CANCEL will abort transaction
<b>If A or B (SINGLE or RECURRING) is selected</b>	
PURCHASE ENTER AMOUNT	Key in purchase amount and press ENTER
DIALING PLEASE WAIT	Please wait
APPROVED ###	
<b>If C (MORE OPTIONS) is selected</b>	
INSTALLMENT – A OTHER TYPE – B MORE OPTIONS – C	Pressing A or B will make the terminal to continue with normal transaction procedures as in “If B is selected” above Pressing C will make the terminal repeat the “mail/ tel” options once again and as many times as C is pressed.

**Note:** E-commerce and Mail/ Tel transactions can only be performed without swiping a card. It is assumed that the cardholder will not be there. If a card is swiped, the features cannot be used.



# CHAPTER 7: *Balancing & Closing Your Terminal*

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This section outlines how to balance and close your terminal at the end of the business day or whenever you wish to do so

## 7.1: Deposit Procedures

Your terminal has been set up to **close and deposit funds** electronically into your business account in one of the following two ways: (most merchants use Option 1; to change options, contact your Moneris Solutions Sales Representative).

**Note:** In the event of a missing deposit or a transaction error/dispute, contact Moneris Solutions, Merchant Services within 30 days.

### 7.1.1: Option 1: Batch Closing

Merchant should process a close batch transaction at least once per day upon your business' end of day

- ADMIN 99 - Close batch Transaction;
- **OR**
- ADMIN 85 - Multiple Terminal Batch Reporting.

The first part of a Close Batch Transaction - ADMIN 99 compares approved transaction totals held in the memory of your terminal with totals stored in Moneris' Host Computer. If the two totals do not match, the terminal prints "MONERIS' AND TERMINAL' TOTAL DO NOT MATCH".

If this happens, follow the procedures below to balance your terminal before closing your batch.

- Print the Stored Transaction Journal (ADMIN 60); select by batch and compare all copies of your (approved) receipts with your journal print out
- For Credit Card transactions Only - If you have a paper copy of an APPROVED Credit Transaction (Purchase, Refund, or Correction) that is not appearing on the Stored Transaction Journal, repeat the transaction manually keying Card and Transaction details. For purchase (only) transactions use the ADVICE function - refer to Processing Credit Card Advice Transaction in Section 3.
- If a Credit transaction has been duplicated by the system, proceed to close the batch and contact Moneris Solutions, Merchant Services on the next business day for assistance in correcting this problem.

- Debit Card transactions cannot be corrected in your terminal once the cardholder has left your premises: For problems balancing Debit transactions, contact Moneris Solutions, Merchant Services on the next business day for assistance in correcting the problem.

### **7.1.2: Option 2: Non-Batch Closing**

Moneris automatically closes your terminal's batch at the end of each business day.

At any time during the day and at the end of your business day (before 11:00 P.M. local time) you can obtain your terminal's Sub-totals by performing an ADMIN 95. To print a detailed listing of all approved transactions processed in your terminal for the day, refer to Section 8 - ADMIN 60.

**Note:** *If using a 3<sup>rd</sup> Party this option of closing the batch will NOT close out the third party.*

# CHAPTER 8: Processing Administrative Functions

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Your terminal has about 23 administrative functions that enable its configuration. This section lists and explains how you can set up the various administrative functions available in your terminal. You have to configure your terminal before you can use it to perform transactions.

## 8.1: Initializing Your Terminal (Initialization - ADMIN 01)

ADMIN 01 establishes the initial communication link between your terminal and Moneris. It is not necessary to perform this function on a daily basis, however, from time to time you may be requested to INITIALIZE your terminal by Moneris Solutions, Merchant Services.

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 01 and press ENTER
RETAIN CURRENT MERCH SETTINGS? YES - A NO - C	Press A - to retain values previously keyed, terminal will process an initialization. Press C - to change or view values previously keyed and initialize the terminal.
<b>If you select C, continue</b>	
ENTER TERMINAL ID	Key in terminal ID (# is located on the under- side of your Transelect terminal, prefixed with 80#####) and press ENTER. To retain displayed Terminal ID press ENTER.
ENTER MERCHANT ID	Key in merchant number (supplied to you by Moneris, see inside cover of this manual) and press ENTER. To retain displayed Merchant ID press ENTER.
ENTER PRINTER ID	Key in printer ID (# is located on the bottom of the Printer, prefixed with 92.....) and press ENTER. To retain displayed Printer ID press ENTER.

## Processing Administrative Functions

TERMINAL DISPLAY	OPERATOR'S ACTIONS
ENTER PHONE NUMBER	Key in Moneris Solution's Host phone number and press ENTER (refer "Initialization number" listed in the front of this manual). To retain displayed phone number press ENTER  <b>Note:</b> <i>This prompt will not appear if the terminal is connected to a 3201 line.</i>
DIALLING CALL ANSWERED SENDING RECEIVING/PROCESSING	Transaction in progress, Please wait
DO YOU WISH TO CLEAR STORAGE? YES - A NO -C	To clear financial transaction stored in terminal's memory, press A. To retain financial transaction stored in terminal's memory, press C.

**Note:** *A maximum of 500 Approved financial transactions can be retained in the terminal's memory.*

### 8.2: Logging On (ADMIN 02)

ADMIN 02 is required in the following instances;

- When your terminal is first set up
- To logon to your terminal when it has been "logged off" - refer to ADMIN 03
- Whenever your terminal is re-initialized

**Note:** *Your POS ADMIN Card is required to process this transaction if your terminal has been set up to accept Debit Cards.*

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 02 and press ENTER
LOGON SWIPE ADMIN CARD	Swipe POS ADMIN Card
DIALLING, CALL ANSWERED SENDING, RECEIVING, PROCESSING	Transaction in progress, Please wait

### 8.3: Logging Off (ADMIN 03)

Use ADMIN 03 to log off from your terminal. Financial transactions cannot be processed on your terminal when it has been logged off. Therefore, for security reasons, each terminal should be “logged off” at the end of each business day (after a “Closed Batch” transaction).

Your POS ADMIN Card is required to LOG ON to your terminal to refer - ADMIN 02.

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 03 and press ENTER
DIALING, CALL ANSWERED SENDING, RECEIVING PROCESSING	Transaction in progress, Please wait
READY PLEASE LOG ON	

### 8.4: Processing Transactions In Training Mode (ADMIN 05)

Use ADMIN 05 to train employees in a simulated environment on Credit and Debit Card Transactions. Training mode can only be accessed on terminals, which have been configured, initialized and logged on.

**Note:** *Ensure that you exit Training Mode prior to processing actual customer transactions.*

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 05 and press ENTER
CLEAR TRAINING TOTALS? YES - A NO - C	To clear Training Memory, press A To retain Training Memory, press C
READY FOR TRAINING SWIPE CUSTOMER CARD	The device may now be used to simulate live Credit and Debit transactions. The transactions will not be captured and there will <u>not be any financial impact to your account.</u>

### 8.4.1: Exiting Training Mode

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY FOR TRAINING SWIPE CUSTOMER CARD	Press ADMIN
ENTER ADMIN CODE	Key in 05 and press ENTER

Transactions processed in training mode will not effect customer or merchant accounts. Once training has been completed, TRAINING MODE must be “exited” or real customer transactions will not be validated. The terminal is ready for regular customer transactions ONLY when the terminal display reads “READY SWIPE CUSTOMER CARD”

## 8.5: Configuring Your Terminal (ADMIN 08)

Use ADMIN 08 to set general terminal prompts and 3201 Communication parameters.

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 08 and press ENTER
ENTER LAN ID*	<ul style="list-style-type: none"> <li>If using dial communication, press ENTER</li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>If terminal is LAN connected (using a Quatro), key in the terminals LAN ID.</li> </ul> <p>The first terminal connected to the LAN ID is 20. This terminal is known as the “MASTER”. All other terminals connected are referred to as SLAVES. The next terminal ID after the MASTER would be 21. You can have up to 16 terminals connected to a LAN. The numbering system used is as follows;            MASTER: 20            SLAVES: 21, 22, 23, 24, 25, 26, 27, 28, 29, 2A, 2B, 2C, 2D, 2E, 2F.</p>
<b>Note:</b> *LAN refers to Local Area Network in house wiring used to support certain types of Datapac 3201 communication	
ENTER # OF LAN TERMINALS	Key in the number of terminals to be connected to the LAN. This prompt only appears on the MASTER terminal.

## Processing Administrative Functions

TERMINAL DISPLAY	OPERATOR'S ACTIONS
<p><b>Note:</b> <i>**For terminals connected to a LAN, the IVI QUATRO (Q1000) device must be used. Ensure the QUATRO is powered up and connected to the DataPac (3201) line prior to powering up the terminals. If a LAN ID is keyed in duplicate (in error), the QUATRO will not operate. In this situation, re-initialize the terminal and key in the correct LAN ID.</i></p>	
ENTER POLL CODE	<ul style="list-style-type: none"> <li>• If using dial communication, press ENTER.</li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>• If using a DATAPAC 3201 line, key in the applicable POLL CODE (provided by Moneris) and press ENTER.</li> </ul>
PRE-AUTH TIP LINE? YES - A    NO - C	<ul style="list-style-type: none"> <li>• If you want a Tip line to be printed on Pre-authorized transaction receipts, press A</li> <li>• If you do not want a Tip line, press C -</li> </ul> <p>Factory default is set to YES</p>
CR SIGNATURE LINE? YES - A    NO - C	<ul style="list-style-type: none"> <li>• If you want a Signature Line to be printed on Credit Purchase Transactions, press A -</li> <li>• If you operate a Mail Telephone Order business, press C.</li> </ul> <p>Factory default is set to YES</p>
INVOICE NUMBERS? YES - A    NO - C	<ul style="list-style-type: none"> <li>• If you want the option of keying an invoice number with financial transactions, press A -</li> <li>• If you do not want the option of keying an invoice number financial transactions, press C -</li> </ul> <p>Factory default is set to NO</p>
BALANCED PROMPT? YES - A    NO - C	<ul style="list-style-type: none"> <li>• If you want the option to identify a Closed Batch as out of balance for internal (in store) reporting purposes only, press A.</li> <li>• If you do not want the terminal to prompt "Balanced?" at the end of each, press C -</li> </ul> <p>Closed Batch transaction factory default is set to NO</p>
PURCHASING CARD ON? YES - A        NO - C	<p>To Capture and Send Purchasing Card information, press A</p> <p>To exit press C</p>
<b>Using the C key, scroll the four various tax options</b>	
SALES TAX TYPE PST YES - A   NO - C	<p>When applicable tax collected is displayed on the terminal, press A</p> <p>Select HST if you collect Harmonized Sales Tax</p> <p>Select PST if you collect Provincial Sales Tax and Goods and Services Tax</p> <p>Select GST ONLY if you collect Goods and Services Tax only</p> <p>Select QST if you collect Provincial Sales Tax and Goods and Service Tax in the province of Quebec</p>
HST YES - A   NO - C	
GST ONLY YES - A   NO - C	
QST YES - A   NO - C	

## Processing Administrative Functions

TERMINAL DISPLAY	OPERATOR'S ACTIONS
<b>If PST was selected above</b>	
MERCHANT GST NUMBER	Key in applicable GST number and press ENTER
MERCHANT PST NUMBER	Key in applicable PST number and press ENTER to return to READY SWIPE CUSTOMER CARD
<b>If HST was selected above</b>	
MERCHANT HST NUMBER	Key in applicable GST number and press ENTER.
<b>If GST was selected above</b>	
MERCHANT GST NUMBER	Key in applicable GST number and press ENTER to return to READY SWIPE CUSTOMER CARD
<b>If QST was selected above</b>	
MERCHANT GST NUMBER	Key in applicable GST number and press ENTER
MERCHANT QST NUMBER	Key in applicable QST number and press ENTER to return to READY SWIPE CUSTOMER CARD
ACCEPT E-COMMERCE TRANS? YES - A NO - C	To select e-commerce, press A To reject e-commerce, press C  <b>Note:</b> Pressing the ENTER key retains the current setting. Pressing the CANCEL key at any time will abort the transaction. The factory default is NO.
<b>If YES was selected above</b>	
ENCRYPTED TRANS - A NON-ENCRYPTED - C	To select encrypted transaction, press A To select non encrypted transaction, press C The factory default is NON-ENCRYPTED
ACCEPT MAIL / TEL ORDERS? YES – A NO - C	To select mail order and telephone transaction, press A To reject mail order and telephone transaction, press C  <b>Note:</b> Pressing the ENTER key retains the current setting.
<b>Note:</b> The card number must be manually keyed in for the e-commerce and mail / telephone order transactions	
PRINTER TYPE SCRIBE YES - A NO – C STAR YES - A NO - C EPSON YES - A NO – C	To select Scribe Printer, press A To select another type of printer, press C Moneris Solutions printers are usually the P250 (Scribe, Thermal printer) or Epson (Impact printer) Factory default is set to EPSON

## 8.6: Setting Up Cheque Authorization (ADMIN 09)

Use ADMIN 09 to set up communication information if you subscribe to a Cheque Authorization Service.

Information provided by Cheque Authorization Company.

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 09 and press ENTER
ENTER TERMINAL ID	Key in terminal ID provided by Cheque Authorization Service and press ENTER
ENTER CHEQUE SERVICE TYPE	For TeleCheque, key in T For VeriCheque and other services, key in V
PRIMARY PHONE NUMBER	Key in telephone (including area code) number provided by Cheque Authorization Service and press ENTER
PRIMARY NETWORK ID	Key in ID provided by Cheque Authorization Service and press ENTER
PRIMARY LINE SPEED 300 - A      1200 - C	If you operate on a 300 baud line, press A If you operate on a 1200 baud line, press C (Majority of terminals operate on a 1200 baud line)
BACKUP PHONE NUMBER	Key in backup phone number provided by Cheque Authorization provider and press ENTER. Press ENTER if not applicable.
BACKUP NETWORK ID	Key in ID provided by Cheque Authorization Service and press ENTER  <b>Note:</b> <i>This prompt only displays if a backup phone number was keyed.</i>
BACKUP LINE SPEED 300 - A      1200 - C	If you operate on a 300 baud line, press A If you operate on a 1200 baud line, press C  <b>Note:</b> <i>This prompt only displays if a backup phone number was keyed.</i>

## 8.7: Setting Up Third Party Host Communication Parameters (ADMIN 10)

Use this function to set up communication parameters for processing transactions to a 3rd party host.

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 10 and press ENTER
ENTER HOST NUMBER	Key in 1 when setting up details for the 1st host, 2 for setting up details for 2nd host etc, press ENTER. The terminal can accept 9 different host numbers (1-9).
HOST TYPE YES - A NO - B  SNS YES - A NO - B VISA1 YES - A NO - B	Using the C key, scroll the two host formats When the applicable host format is displayed on the terminal (provided by the 3 <sup>rd</sup> party processor), press A  Select SNS if your 3 <sup>rd</sup> party operates with SNS format  Select VISA1 if your 3 <sup>rd</sup> party operate with VISA1 format
ENTER MERCHANT ID	Key in Merchant ID provided by 3rd party processor and press ENTER
ENTER POLL CODE	If using DataPac3201 line, key in the 3rd Party Host Poll Code and press ENTER If Poll Code was keyed, skip to "ENTER BACKUP PHONE NUMBER" prompt If using dial communication, press ENTER to continue.
PRIMARY PHONE NUMBER	Key in dial phone number (with area code if applicable) for 3rd party Host and press ENTER.
PRIMARY NETWORK ID	Key in DataPac 3101 Public access number and press ENTER The Primary ID is provided by the 3rd Party Processor, if not applicable, press ENTER to continue.
PRIMARY LINE SPEED 300 - A 1200 - C	Press A - if you operate on a 300 baud line Press C - if you operate on a 1200 baud line (Majority of terminals operate on a 1200 baud line)
BACKUP PHONE NUMBER	Key in backup phone number (with prefix if required) and press ENTER The backup phone number is provided by the 3rd Party Processor, if not applicable, press ENTER to continue.
TERMINAL DISPLAY	OPEARTOR'S ACTION

TERMINAL DISPLAY	OPERATOR'S ACTION
BACKUP NETWORK ID	Key in ID provided by 3rd party host and press ENTER. The Backup Network ID is provided by the 3rd Party Processor, if not applicable, press ENTER to continue
BACKUP LINE SPEED 300 - A    1200 - C	If you operate on a 300 baud line, press A If you operate on a 1200 baud line, press C Note: This prompt is only displayed if a Backup Phone number was keyed.
REGULAR PRE-AUTH – A HOTEL/RENTAL - C	If you operate a Restaurant or do not process Pre-authorized transactions. press A If you operate a Hotel or Car Rental, press C
ENTER NEXT HOST NUMBER	Key in next host number to continue or press CANCEL/EXIT to return to READY prompt

### 8.8: Setting Up Third Party Card (ADMIN 11)

This function is used to input specific card parameters to be processed by a 3rd Party host

**Note:** ADMIN 10 must be set-up prior to proceeding with setting ADMIN 11.

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 11 and press ENTER
ENTER CARD NAME	Key in the name of the 3rd Party Card being accepted using the numeric keyboard, scroll the alpha characters with the $\uparrow$ (beside the 0) and press ENTER. The exact name to be keyed is provided by the 3rd Party Processor. This field will be Printed on the Customer Receipt. To change or view previously keyed card names - press A or C on keyboard
ENTER HOST NUMBER	Key in 1 digit host number and press ENTER (1-9) This field identifies which host number processes the card <b>Note:</b> This number coincides with the Host number previously keyed in ADMIN 10
BIN RANGE 1 - LOW	Key in the lowest limit of BIN range #1 and press ENTER The 3rd Party Processor provides this information

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TERMINAL DISPLAY	OPERATOR'S ACTION
BIN RANGE 1 - HIGH	Key in the highest limit of BIN range #1 and press ENTER The 3rd Party Processor provides this information
BIN RANGE 2 - HIGH	Key in 2nd BIN range if applicable or press ENTER to continue.  <b>Note:</b> <i>This is only required if 3rd Party Processor advises of multiple BIN ranges for the same card type</i>
VERIFY MOD - 10? YES – A NO - C	Press A if Mod 10 check is required Press C if Mod 10 check is not required The 3rd Party Processor provides this information
DRAFT CAPTURE? YES - A NO - C	If you have arranged for electronic deposit with the 3rd Party Provider, press A If you have arranged for “authorization only” with the 3rd Party Provider, press C If NO is selected a receipt will not be printed on the terminal.
ENTER NEXT CARD NAME	Key in next 3rd Party Card name to be accepted or press CANCEL/EXIT to return to READY prompt

### 8.9: Setting Up Printer Transaction (ADMIN 14)

This is a new administrative function for setting up printer functions. It enables trailer messages in printouts as well as the selection of number of copies to be printed.

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 14 and press ENTER
TRAILER MESSAGE? YES – A NO – C	To enable printing trailer on receipts, press A. To avoid printing trailer on receipt, press C  <b>Note:</b> <i>Pressing A will allow you to input desired message. Pressing C will take you to the number of receipt copies prompt in case you don't want to display any trailer message.</i>
<b>If A is selected</b>	
ENG TRAILER MSG 1	Using the keyboard and the Shift key (t) to access the alphabets, write the message that you want to be printed on the receipt and press ENTER.

TERMINAL DISPLAY	OPERATOR'S ACTION
ENG TRAILER MSG 2	Press ENTER three times to continue OR Using the keyboard and the Shift key (t) write the second message (if necessary) that you want to be printed on the receipt and press ENTER three times.
NUMBER OF COPIES?	Key in 1, 2, or 3 and press ENTER. This will return you to READY prompt The factory default is 2 copies.

### 8.10: Setting Up Dial Communications (ADMIN 15)

Use this administrative function to configure communication parameters when using Dial communication.

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key 15 and press ENTER
ENTER LOCAL PBX PREFIX	If your telephone system requires a prefix to dial out, key in the pre-fix and press ENTER (e.g. 9)
ENTER LONG DISTANCE PBX PREFIX	If your telephone system requires a prefix when dialing long distance, key in the pre-fix and press ENTER (e.g. 9)
PRIMARY LINE SPEED 300 - A    1200- C	If line speed is 300. press A If line speed is 1200, press C To retain existing setting, press ENTER (Majority of terminals operate with 1200) Factory default is set to 1200
BACKUP LINE SPEED 300 - A    1200- C	If line speed is 300. press A If line speed is 1200, press C To retain existing settings, press ENTER (Majority of terminals operate with 1200) Factory default is set to 1200
LINE AVAILABLE CHECK YES - A        NO - C	For the terminal to check for an available line prior to attempting the call, press A For the terminal not to check for an available line prior to attempting the call, press C To retain existing setting, press ENTER Factory default is set to YES

TERMINAL DISPLAY	OPERATOR'S ACTION
TONE DIAL SPEED	0 = 10 tones per second, press ENTER to continue 1 = 7.7 tones per second 2 = 4 tones per second Factory default is 0 and should only be changed if instructed by Moneris Solutions
STABILIZATION TIMER	0.06 is the standard setting, press ENTER to continue. Range is 0.06 - 5.00 seconds. Factory default is 0.06 and should only be changed if instructed by Moneris Solutions.
CALL PROGRESS CHECK YES - A NO - C	To enable the verification of the signal quality on the phone line, press A To disable this feature, press C <b>Note:</b> Set to YES unless otherwise instructed. Factory default is set to YES
READY SWIPE CUSTOMER CARD	

### 8.11:Printing Configuration Parameters (ADMIN 16)

Use this function to print a listing of all set parameters in ADMIN functions 01, 08, 09, 10, 11, 15, 50, 80 and 83 in your terminal.

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 16 and press ENTER
PRINTING	

**Note:** As a precaution should your terminal ever require replacing we suggest you perform an Admin 16 once your terminal is set up. Staple the print out of your parameters to the inside manual for future reference.

## 8.12: Printing A List Of Terminal Functions (ADMIN 40)

Use this function to print a list of all transaction types and administrative functions available in your terminal.

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 40 and press ENTER
PRINTING	

## 8.13: Printing Stored Transactions (ADMIN 60)

Use ADMIN 60 to print a listing of all APPROVED Credit & Debit financial transactions by **batch** or by **date**.

The terminal's memory retains up to 500 transactions. When capacity is reached, the oldest transaction drops from memory.

**Note:** If your terminal is replaced, its memory is NOT transferred to the replacement terminal. This will have no financial impact on your Business Bank Account.

TERMINAL DISPLAY	OPERATOR'S ACTION
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 60 and press ENTER
ENTER CLERK ID	If you wish to obtain a list of stored transactions for a specific clerk, key in the clerk's ID and press ENTER (This prompt only appears if Clerk Subtotalling has been configured) <b>OR</b> To report transactions for all Clerk IDs, press ENTER.
SELECT BY BATCH – A SELECT BY DATE - C	For a listing of transactions in a specific batch, press A For a listing of transactions on a specific date, press C
<b>If A was selected</b>	
ENTER BATCH NUMBER	Key in BATCH # and press ENTER For the current open Batch, <u>just press ENTER.</u>

TERMINAL DISPLAY	OPERATOR'S ACTION
<b>If C was selected</b>	
ENTER DATE (YY)MMDD	Key in DATE (YY)MMDD (YY is optional) and press ENTER.  For the current date, just press ENTER
PRINTING	

### 8.14: Performing Transaction Inquiry (ADMIN 66)

Use ADMIN 66 to review APPROVED Credit and Debit Card financial transactions held in the terminal memory. You can review (or print) a specific transaction or several transactions at a time by using the scroll keys (A and C). The terminal's memory retains up to 500 transactions. When capacity is reached, the oldest transaction drops from memory.

**Note:** *If your terminal is replaced, its memory is NOT transferred to the replacement terminal. This will have no financial impact on your Business account.*

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 66 and press ENTER
ENTER CLERK ID (This prompt only appears if Clerk Subtotalling has been configured)	If you wish to obtain a list of stored transactions for a specific clerk ID, key in clerk's ID and press ENTER, or to report transactions for all clerk IDs press ENTER.
ENTER CARD TYPE	Press the card type you wish to select: D=Debit, V=VISA, DI=Diners, M=MasterCard, A=American Express, JC =JCB and press ENTER or press ENTER to select all card types.
ENTER CARD NUMBER	Key in the card number to list transactions processed for a particular card number and press ENTER or just press ENTER to select all card numbers processed.
ENTER AMOUNT	Key in the amount of the transaction to list all transactions processed for a specific amount and press ENTER or just press ENTER to select all transaction amounts.

TERMINAL DISPLAY	OPERATOR'S ACTIONS
ENTER CODE FOR TRANS	Key in the transaction code to select a particular type of transaction processed and press ENTER or just press ENTER to select all transaction types. P=Purchase, PC=Purchase Correction/Void, R=Refund, RC=Refund Correction/Void A=Advise, PA=Pre-Authorization
ENTER TRANSACTION	Key in date (YY)MMDD (YY is optional) to list transactions processed on a particular date and press ENTER OR Press ENTER for all dates stored
PRINT – A DISPLAY - C	To print listing of transactions selected above, press A  To display the selected transactions by using the A (9) or C (8) keys on your terminal. press C

## 8.15: Performing Credit & Debit Deposit Totals Inquiry (ADMIN 77)

Use ADMIN 77 if you close your Batch more than once per day. This function reports a Grand Total of all closed Batches processed throughout the day on the same terminal.

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN
ENTER ADMIN CODE	Key in 77 and press ENTER
DIALING PRINTING	

## 8.16: Setting Up Multiple Terminal Transaction (ADMIN 80)

This transaction is used to enable or disable Multiple Terminal Reporting on each terminal and to set the Terminal Name.

**Note:** *Your POS Administrative Card is required to process this transaction*

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN
ENTER ADMIN CODE	Key in 80 and press ENTER

TERMINAL DISPLAY	OPERATOR'S ACTIONS
SWIPE ADMIN CARD	Swipe POS ADMIN Card
MULTIPLE TERM TRANS YES - A NO - C	To enable Multiple Terminal Reporting, press A To disable Multiple Terminal Reporting, press C
<b>If A above was selected</b>	
MERCHANT TERM NAME	Key in 1 - 6 alpha/number characters to name your terminal and press ENTER If you have previously keyed a terminal name and want to change the name, key over existing name in the terminal and press ENTER.
CLOSE BY ADMIN 99 ALLOWED? YES - A NO - C	If you want the option to close the terminal individually, press A If you want to restrict the terminal from closing individually (the only way to close the terminal would be by ADMIN 85), press C
DIALING CALL ANSWERED SENDING RECEIVING PROCESSING	Transaction processing, Please wait

### 8.17: Setting Up Multiple Terminal Reporting (ADMIN 85)

This function is used to process a Multiple Terminal Transaction:

- Multiple Terminal Batch Close
- Multiple Deposit Totals

This function may be accessed from any terminal that has been set up for Multiple Terminal Reporting (ADMIN 80). This function does not compare financial totals held on Moneris Solution's Host Computer with those held in each terminal's memory.

The terminal must be logged on and cannot be in Training Mode to process these transactions. Terminals can continue to operate while this function is in progress.

**Note:** Your POS Administrative Card is required to process this transaction

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 85 and press ENTER
SWIPE ADMIN CARD	Swipe POS ADMIN Card
CLOSE BATCHES? YES - A NO - C	To Close one or more terminals, press A To obtain Deposit totals, press C

TERMINAL DISPLAY	OPERATOR'S ACTIONS
GET DEPOSIT TOTALS? YES - A            NO - C	To print Grand Totals of all previously closed batches for the day, press A To continue and Close terminals, press C
<b>Note:</b> <i>If your terminal(s) has been closed more than once per day, select "A" to report The grand total of the closed batches. In most instances, Merchants selection would be "C – NO"</i>	
SELECT NAME - A GRP – B ALL - C	To close a specific terminal, press A To close a group of terminals, press B To close all terminals attached to your Merchant number, press C
<b>If A was selected</b>	
MERCHANT TERM NAME	Key in name of terminal and press ENTER (name previously keyed in ADMIN 80).
NEXT NAME - A    GRP – B OR PROCESS LIST - C	To continue closing terminals, key in next terminal or group name and press ENTER Once you have keyed all Terminal names that you wish to Close, press C to Process
DIALING CALL ANSWERED SENDING RECEIVING/ PROCESSING	Transaction processing, Please wait

### 8.18: Setting Up Clerk Subtotalling (ADMIN 83)

This transaction is used to set up and change Clerk Subtotalling parameters.

Your terminal must be logged on before you can access this function.

**Note:** *Your POS Administrative Card is required to process this transaction*

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 83 and press ENTER
SWIPE ADMIN CARD	Swipe POS ADMIN Card
ENTER MERCHANT ID	Key in 13 digit merchant number provided by Moneris and press ENTER The first 7 digits of your merchant number reflect Moneris' Processing Centre you are attached to, IE Eastern Processing Centre 0030100 Western Processing Centre 0030400 Central Processing Centre    0030200

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TERMINAL DISPLAY	OPERATOR'S ACTIONS
CLERK SUBTOTALLING ON? YES - A NO - C	To activate Clerk Subtotalling, press A To deactivate Clerk Subtotalling, press C
PROMPT FOR CLERK ID A - YES NO - C	For the terminal to prompt for Clerk ID entry prior to every transaction, press A For the terminal not to prompt for Clerk ID entry prior to every transaction, press C
<b>Note:</b> If you have selected C, proceed to set the DEFAULT CLERK ID in ADMIN 81	
CLERK ENTRY? CARD – A MANUAL - B EITHER - C	To key in Clerk ID by Card (with Magnetic Stripe), press A To key in Clerk ID Manually, press B To key in Clerk ID by Card or Manually, press C
<b>*If A - Card is selected</b>	
CARD DATA LOCATION? TRK2 - A TRK1 - B NAME - C	Depending on the location of the Clerk ID data, press A, B or C Card manufacturer provides this information
ALLOW CLERK TO ZERO TOTALS? YES - A NO - C	To allow Clerk's to reset their subtotals to zero, press A To disallow Clerks from resetting their subtotals to zero, press C This field directly relates to Clerks that print out their own Subtotals in ADMIN 82. <b>Note: VERY IMPORTANT:</b> Please, be sure to clear your totals at least once a week as Moneris Host will clear it automatically when it reaches 10, 000.
<b>Note:</b> If C was keyed for a particular Clerk ID, this Clerk ID's subtotals could only be reset to zero via ADMIN 82 with the use of the POS ADMIN Card.	

### 8.19: Maintaining Clerk ID (ADMIN 84)

Use this function to ADD or DELETE Clerk ID's. As Clerk ID's are maintained on Moneris' Computer, once a CLERK ID has been added, all terminals attached to the same Merchant ID number can access any Clerk ID. If a terminal is replaced, the Clerk ID's do NOT have to be re-keyed.

**Note:** Your POS Administrative Card is required to process this transaction

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 84 and press ENTER
SWIPE ADMIN CARD	Swipe POS ADMIN Card

TERMINAL DISPLAY	OPERATOR'S ACTIONS
ADD CLERK ID? YES - A NO - C	To add a Clerk ID, press A* To delete a Clerk ID, press C
<b>*If A is selected, continue</b>	
ENTER CLERK ID	Key in Clerk ID to be added and press ENTER
ADD CLERK ID? YES - A NO - C	To add additional Clerk ID's, press A To proceed to next prompt, press C To continue adding Clerk ID's, press A Once all required ID's have been added, press C
REMOVE CLERK ID? YES - A NO - C	To remove a Clerk ID Press A To process request Press C To continue removing Clerk IDs, press A. Once all desired ID's have been removed, press C
DIALING, CALL ANSWERED SENDING, RECEIVING PROCESSING	Transaction processing, Please wait

## 8.20:Setting Default Clerk ID (ADMIN 81)

Use this ADMIN to set up default CLERK ID. Prior to keying default Clerk ID ensure:

- the ID was previously keyed in Admin 84 - CLERK ID MAINTENANCE TRANSACTION
- your terminal was set up to accept a default CLERK ID - ADMIN 83 - CLERK SUBTOTALLING SET UP

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN
ENTER ADMIN CODE	Key in 81 and press ENTER
ENTER CLERK ID	Key in Default Clerk ID and press ENTER

### 8.21: Processing Clerk Subtotalling Inquiry (ADMIN 82)

This function is used to obtain Clerk Subtotals individually or by a group.

**Note:** Your POS Administrative Card is required to process this transaction if you are inquiring on more than one Clerk ID.

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN
ENTER ADMIN CODE	Key in 82 and press ENTER
SINGLE CLERK – A MULTIPLE CLERKS - C	To obtain a subtotal listing for an individual CLERK, press A* To obtain subtotal listings for multiple CLERKS or a GROUP of CLERKS, press C*
<b>*If A was selected</b>	
ZERO CLERK TOTALS? YES - A NO - C	To set Clerk subtotals to zero Press A* To accumulate Clerk Subtotals Press C*
<b>*If Multiple Clerks - C was selected</b>	
SWIPE ADMIN CARD	Swipe POS ADMIN Card
ZERO CLERK TOTALS? YES - A NO - C	To set Clerk subtotals to zero, press A To accumulate Clerk Subtotals, press C
SELECT CLERK - A GRP – B ALL - C	To obtain a printout of subtotals for an individual Clerk, press A To obtain a printout of subtotals for a selected Group of Clerks, press B To obtain a printout of subtotals for All Clerks, press C
ENTER CLERK or GROUP PREFIX (dependent on selection)	Enter Clerk ID or Group ID and press ENTER
NEXT CLERK - A GRP – B OR PROCESS LIST - C	To enter an additional Clerk ID, press A To continue to key in an additional Group of Clerks, press B To process listing, press C
DIALING, CALL ANSWERED SENDING/RECEIVING PRINTING	Transaction processing and printing, Please wait
<b>Note:</b> 1. The terminal can process a request for 20 Subtotals at one time. When the 20 <sup>th</sup> ID is keyed, the terminal will process the transaction and will return to the ENTER CLERK/ GROUP ID prompt for you to continue keying additional Clerk or Group ID's.	
<b>Note:</b> 2. When printing a listing of ALL Clerk ID, ensure that you have sufficient paper in your printer. Clerk ID that has been added to your Merchant ID will be reported with this request, including Clerks that have .00 subtotals.	
<b>Note:</b> 3. If the printer was unable to print Clerk totals due to printer failure and the Clerks totals were zero out, refer to ADMIN 60 which will print every transaction from that day, indicating the Clerk ID. An ADMIN 60 would have to be performed on each terminal.	

## 8.22: Processing Credit & Debit Transaction Sub Totals (ADMIN 95)

Use this inquiry to obtain the number and dollar value of **Credit and Debit** financial transactions processed through your terminal since the last closed batch. This transaction reports totals stored on Moneris' Host Computer.

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 95 and press ENTER
DIALING, CALL ANSWERED SENDING, RECEIVING	Transaction processing, Please wait
PRINTING	Transaction printing, Please wait

## 8.23: Closing Batch Transaction [Close Batch] (ADMIN 99)

Use this function to close your batch of transactions and obtain the number and dollar value of Debit and Credit transactions processed through your terminal since the last closed batch. Batches closed prior to your daily closing time are processed by Moneris Solutions that day.

This transaction compare totals stored in the terminal's memory to totals held on Moneris' Host Computer. If a discrepancy is found, your terminal will report MONERIS AND TERMINAL TOTALS DO NOT MATCH, if this occurs, contact Moneris Solutions, Merchant Services on the next business day for assistance.

**Note:** *Deposits to your business account are dependant on this function being performed and it is recommended that you close your batch at least once per day to receive value for processed transactions.*

TERMINAL DISPLAY	OPERATOR'S ACTIONS
READY SWIPE CUSTOMER CARD	Press ADMIN key
ENTER ADMIN CODE	Key in 99 and press ENTER
DIALING, CALL ANSWERED SENDING, RECEIVING PROCESSING	Transaction processing, Please wait
PRINTING	
CLOSE – A EXIT – C	Press A - to Close your batch and deposit to your business account Press C - to exit without Closing your batch.

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TERMINAL DISPLAY	OPERATOR'S ACTIONS
<b>If A is selected</b>	
DIALING, CALL ANSWERED SENDING, RECEIVING PROCESSING	Transaction processing, Please wait
<b>Note:</b> <i>If the total of Refund Correction/Void or Purchase Correction/Void is greater than the total of Purchases then the "Net Total" will include a minus sign.</i>	

# CHAPTER 9: Troubleshooting

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Listed below are possible messages that may be displayed on the Transelect Terminal. For error messages, possible solutions for specific problems are provided and should be reviewed prior to contacting Moneris Solutions, Merchant Services for assistance.

**Note:** *Please have your Moneris Merchant number available before calling the Merchant Services.*

## 9.1: Error Messages

TERMINAL MESSAGE	RESOLUTION
MONERIS AND TERMINAL TOTALS DON'T MATCH	<p>The totals stored in the Host Computer of Moneris do not match the totals of your terminal (printed on Close batch transaction).</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Contact Moneris Solutions, Merchant Services on the next business day for assistance.</li></ul>
BLANK DISPLAY	<ul style="list-style-type: none"><li><input type="checkbox"/> Unplug and re-plug the power cord from the electrical outlet.</li><li><input type="checkbox"/> Try plugging the device into a different electrical outlet.</li><li><input type="checkbox"/> Ensure all power connections are plugged in tightly</li><li><input type="checkbox"/> Contact Moneris Solutions, Merchant Services for assistance.</li></ul>
CDLL REBOOT REQUIRED	<ul style="list-style-type: none"><li><input type="checkbox"/> Terminal must be replaced, contact Moneris Solutions, Merchant Service.</li></ul>
CHECK PRINTER	<ul style="list-style-type: none"><li><input type="checkbox"/> Check all connections on both the printer and terminal, ensure the ready light is ON; if not, press the ONLINE button. Ensure the paper is not jammed.</li><li><input type="checkbox"/> Ensure the printer ribbon is not jammed. Try testing the printer by holding the line feed button down and powering the printer off/on.</li></ul>

TERMINAL MESSAGE	RESOLUTION
COMM ERROR ### (### = Numeric)	<ul style="list-style-type: none"> <li><input type="checkbox"/> Check all the connections. If your terminal is connected to a regular “dial” telephone line, ensure there is a dial tone by plugging in a telephone.</li> <li><input type="checkbox"/> Ensure there is no other equipment sharing the phone line that could cause interference with your terminals’ communication (i.e.: modem/fax/extension).</li> <li><input type="checkbox"/> Phone features that may cause communications problems, such as call waiting, message waiting etc. may have to be removed. Contact your Communications provider to remove feature(s).</li> <li><input type="checkbox"/> Re-try transaction. If problem persists, contact Moneris Solutions, Merchant Services for assistance.</li> </ul>
TERMINAL MESSAGE	<input type="checkbox"/> RESOLUTION
DECLINED	<ul style="list-style-type: none"> <li><input type="checkbox"/> Return card to the customer and advise them to contact their Card Issuer. Accept another form of payment.</li> </ul>
DECLINED ADMIN	<ul style="list-style-type: none"> <li><input type="checkbox"/> The card swiped through the terminal is not recognized by Moneris’ Host Computer CARD NOT FOUND as a valid POS Administrative Card, try again. If problem continues, contact Moneris Solutions, Merchant Services for assistance.</li> </ul>
DECLINED CARD CANCELLED	<ul style="list-style-type: none"> <li><input type="checkbox"/> Transaction has not been approved. If problem persists, advise Debit Cardholder to contact their branch of account. Accept another form of payment.</li> </ul>
DECLINED CARD NOT SETUP	<ul style="list-style-type: none"> <li><input type="checkbox"/> Contact Moneris Solutions Merchant Services for assistance.</li> </ul>
DECLINED CARD NOT SUPPORTED	<ul style="list-style-type: none"> <li><input type="checkbox"/> Contact Moneris Solutions, Merchant Services for assistance.</li> </ul>
DECLINED EXCEEDS REFUND AMT/LIMIT	<ul style="list-style-type: none"> <li><input type="checkbox"/> The amount of this transaction will exceed your refund limit, provide the cardholder with the amount of the refund in an alternate manner or contact Moneris Solutions Merchant Services for a temporary increase. Contact your Moneris Solutions Sales representative if you wish to increase your limit permanently.</li> </ul>

TERMINAL MESSAGE	RESOLUTION
DECLINED EXCESS PIN TRIES	<ul style="list-style-type: none"> <li><input type="checkbox"/> The Cardholder has exceeded the amount of re-tries on keying their PIN number.</li> <li><input type="checkbox"/> Refer cardholder to their branch of account and accept another form of payment.</li> </ul>
DECLINED INVALID CARD	<ul style="list-style-type: none"> <li><input type="checkbox"/> Debit card is not accepted for use, return card to cardholder and accept another form of payment.</li> </ul>
DECLINED RE-TRY COMM ERROR or EDIT ERROR	<ul style="list-style-type: none"> <li><input type="checkbox"/> A problem has occurred with the communication link to Moneris' computer, re-try transaction. If problem persists, contact Moneris Solutions, Merchant Services for assistance.</li> </ul>
DECLINED RE-TRY SYSTEM PROBLEM ### or SYSTEM TIME OUT ###	<ul style="list-style-type: none"> <li><input type="checkbox"/> Moneris' Host Computer was unable to process the transaction, re-try transaction.</li> <li><input type="checkbox"/> If problem persists, contact Moneris Solutions, Merchant Services for assistance</li> </ul>
DECLINED RE-TRY TERMINAL TIME OUT	<ul style="list-style-type: none"> <li><input type="checkbox"/> The transaction was not completed within the time limit established for the terminal.</li> <li><input type="checkbox"/> Re-try transaction. If problem persists, contact Moneris Solutions, Merchant Services for assistance.</li> </ul>
DECLINED EXPIRED CARD	<ul style="list-style-type: none"> <li><input type="checkbox"/> Examine the expiry date embossed on the card.</li> <li><input type="checkbox"/> If the date is in the future, re-try the transaction.</li> <li><input type="checkbox"/> 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.</li> </ul>
DECLINED HOLD CARD-CALL	<ul style="list-style-type: none"> <li><input type="checkbox"/> Retain card if possible and call the Credit Card Authorization department for further instructions.</li> </ul>
DECLINED 41 HOLD CARD-CALL	<ul style="list-style-type: none"> <li><input type="checkbox"/> Retain card if possible and call the Credit Card Authorization department for further instructions.</li> </ul>
DECLINED 43 HOLD CARD- CALL	<ul style="list-style-type: none"> <li><input type="checkbox"/> Retain card if possible and call the Credit Card Authorization department for further instructions.</li> </ul>
DECLINED RE-TRY SYSTEM	<ul style="list-style-type: none"> <li><input type="checkbox"/> Moneris' Host Computer or 3rd Party Host is experiencing problems; re-try PROBLEM transaction. If problem persists contact Moneris Solutions, Merchant Services to report the problem.</li> </ul>
DUPLICATE TERMINAL NAME	<ul style="list-style-type: none"> <li><input type="checkbox"/> This message is displayed on the terminal when attempting to key in a Terminal Name that has already been used. Try keying another name in ADMIN 8; see Section 8.</li> </ul>

TERMINAL MESSAGE	RESOLUTION
FAILED TO INITIALIZE CONTACT HELP CENTRE	<ul style="list-style-type: none"> <li><input type="checkbox"/> Confirm information keyed in ADMIN 01 (refer to Section 8) is correct. If problem persists, contact Moneris Solutions, Merchant Services for assistance.</li> </ul>
FAILED TO INITIALIZE MERCHANT ID ERROR	<ul style="list-style-type: none"> <li><input type="checkbox"/> Problem was found with the Merchant ID number, confirm Merchant ID number keyed in ADMIN 01 (refer Section 8) is correct. If problem persists, contact Moneris Solutions, Merchant Services for assistance.</li> </ul>
FAILED TO INITIALIZE POLL CODE ERROR	<ul style="list-style-type: none"> <li><input type="checkbox"/> If using 3201 Communication, confirm Poll Code keyed in ADMIN 08 (refer Section 8) is correct. If problem persists, contact Moneris Solutions, Merchant Services for assistance.</li> </ul>
FAILED TO INITIALIZE PRINTER ID ERROR	<ul style="list-style-type: none"> <li><input type="checkbox"/> Printer ID does not match the number keyed in the terminal, confirm Printer ID PRINTER ID ERROR keyed in ADMIN 01 (refer to Section 8) is correct. If problem persists, contact Moneris Solutions, Merchant Services for assistance.</li> </ul>
INVALID CLERK ID	<ul style="list-style-type: none"> <li><input type="checkbox"/> Re-key in transaction and/or re-key the Clerk ID in ADMIN 84 (refer to Section 8).</li> </ul>
LINE NOT AVAILABLE	<ul style="list-style-type: none"> <li><input type="checkbox"/> When using a dial line, confirm that the phone cord is plugged in tightly at both ends and that no other equipment is using the same phone line (i.e.: modem/fax/ extension)</li> <li><input type="checkbox"/> Plug in a regular phone into the phone jack to ensure there is a dial tone</li> <li><input type="checkbox"/> Verify telephone number keyed in the terminal in ADMIN 01 (refer to Section 8) to the telephone number listed in the front of this manual.</li> <li><input type="checkbox"/> Contact Moneris Solutions, Merchant Services for assistance.</li> </ul>
NO ACTIVITY	<ul style="list-style-type: none"> <li><input type="checkbox"/> This message is displayed when a request for Clerk Subtotals has been processed on a Clerk ID that has zero totals.</li> </ul>
NO MATCH ON PIN PAD CONTACT HELP CENTRE	<ul style="list-style-type: none"> <li><input type="checkbox"/> Serial Number in PIN Pad does not match Serial Number held on Moneris Solutions computer; check PIN Pad connection.</li> <li><input type="checkbox"/> If problem persists, contact Moneris Solutions, Merchant Services for PIN Pad replacement</li> </ul>

TERMINAL MESSAGE	RESOLUTION
REFER CALL	<input type="checkbox"/> Contact the appropriate Authorization Department for the Card Plan, example, VISA, to obtain a voice authorization. Once authorized, process an Advice Transaction; see Section 3.
TABLE FULL	<input type="checkbox"/> This terminal can retain 255 different Clerk ID's and 100 different Terminal Names. This message is displayed when either limit is reached.
TERMINAL DATA ERROR CONTACT HELP CENTRE	<input type="checkbox"/> Contact Moneris Solutions, Merchant Services for assistance
TERMINAL TIMEOUT	<input type="checkbox"/> The PIN Pad was waiting for a response, which was not keyed within the time allotted. Re-try transaction.
***** ON PRINTER	<input type="checkbox"/> Turn printer off (power switch), unplug and re-plug and turn the printer back on.

## 9.2: Helpful Hints On Balancing Problems

### 9.2.1: Batch Not Balanced

Close the batch that is out of balance and contact Moneris Solutions, Merchant Services on the next business day for assistance.

### 9.2.2: Clerk Subtotalling And Multiple Terminal Reporting

1. CLERK SUBTOTAL INQUIRY (ADMIN 82), does not zero out the Clerk's totals until the next financial transaction for that clerk is processed. This is to prevent any problems if the printer did not print the inquiry, the information is not deleted. This may be confusing if you regularly performs an inquiry on "ALL" CLERKS, as the totals for "ALL" Clerks (if they had activity for that day or not) continue to report. If the Clerk(s) only work part time or they are on vacation, a way to zero out their totals would be to re-key that Clerk ID via ADMIN 84.

**Note:** *Keying a Clerk ID that was already keyed sets that Clerk's Subtotals to zero.*

2. When printing either a multiple Clerk Subtotals report or a Multiple Terminal Reporting report ensure that there is sufficient paper in the printer as these reports may be quite long.
3. When/if the Terminal Name is changed in ADMIN 80, the previously keyed Name is deleted.
4. If your terminal is replaced, you must re-key the TERMINAL NAME in ADMIN 80.

### 9.2.3: Warning Messages For Clerk Subtotalling And Multiple Terminal Reporting

1. When performing a Multiple Terminal Batch Close and a financial transaction is in progress on a terminal that is part of the Multiple Terminal Batch Close Group, the following message will be printed on the ADMIN 85 printout:

TERMINAL 80##### (NNNNNN) CANNOT BE CLOSED AT THIS TIME. PLEASE TRY AGAIN.

2. When performing a Multiple Terminal Deposit Totals inquiry and a financial transaction is in progress on a terminal that is part of that Multiple Terminal Deposit Total Group, the following message will be printed on the ADMIN 85 printout:

TERMINAL 80XXXXX (NNNNNN) CANNOT BE ACCESSED AT THIS TIME. PLEASE TRY AGAIN

## 9.3: Helpful Hints On Communication Problems

### 9.3.1: Communication Problem Using A Datapac 3201 Line

If you operate **with a Quatro (LAN)** for communication:

- you know your terminal is polling if the word “**READY**” is continuously flashing on your terminal display window. If “**READY**” is not flashing, check all connections including Quatro. If problem persists, contact Moneris Solutions, Merchant Services for assistance.

If you operate **without a Quatro (LAN)** for communication:

- you know your terminal is polling Moneris Solutions when there is a solid \_ (dot) on the top line, left side of the terminal display window.
- you know your terminal is polling a 3rd Party Host when there is a solid \_ (dot) on the bottom line, left side of the terminal display window.

If your terminal is not polling, verify that the “LEASED LINE” cable in your terminal and the leased line cable at the outlet is plugged in securely. If problem persists, contact Moneris Solutions, Merchant Services for assistance.

### 9.3.2: Quatro Is Not Working

If the QUATRO has lost power, unplug and plug back in. The QUATRO will reset itself within 5-10 minutes.

### **9.3.3: Communication Problem Using A Datapac 3101 Dial Line**

Verify information keyed in ADMIN 01 and ADMIN 15 has been keyed correctly - refer to Section 8.

## **9.4: Helpful Hints On Hardware Problems**

### **9.4.1: Changing Terminal's Language Between French And English**

To change the terminal's operating language, press SHIFT(t) key and the T LANG key. The language may be changed at any time.

### **9.4.2: Forwarding Printer Paper**

The printer must be off line (ready light must be off) before the line feed will work.

For Scribe 612 thermal printer, press FEED/COPY to forward paper.

### **9.4.3: Printer Lights Not On**

Check power connections on the printer Check if there is power in the electrical outlet, ensure power switch is on.

### **9.4.4: Printer Paper-Low Light On**

Check paper roll, if not low, contact Moneris Solutions, Merchant Services as the printer may require replacement.

### **9.4.5: Pin Pad Display Screen Blank**

Unplug and plug back in the PIN Pad cable from the PIN Pad and ensure the cable is plugged in securely in the slot labelled "PIN PAD" in the terminal.

### **9.4.6: Printer Ready Light Flashing**

Remove and reset the printer ribbon and check for paper jams.

### **9.4.7: Reprint A Transaction**

Press ENTER while the approval number is still on the terminal display or Press SHIFT (t) & RETRY to print the last transaction.

### **9.4.8: Rotary To Touch Tone**

Unplug the power cord from the terminal and plug it back in **or** press the "ENTER" & "7" key at the same time. In remote sites you may be required to key in a "T" in "ENTER LOCAL PBX PREFIX" in ADMIN 08 - refer to Section 8.

### **9.4.9: Touch Tone To Rotary**

Unplug the power cord from the terminal and plug it back in **or** press the "ENTER" & "7" keys at the same time. In remote sites you may be required to key in a "P" in "ENTER LOCAL PBX PREFIX" in ADMIN 08; refer to Section 8.