

# MAIN MENU

TRANSACTION CODE	FUNCTION	USE
1	<b>PURCHASE</b>	Used to process a Purchase transaction with a credit card
2	<b>REFUND</b>	Used to credit your customer's credit card for a transaction previously charged to his/her account.
3	<b>PURCHASE CORRECTION</b>	Used to cancel a sale/post that has been performed in the current batch.
4	<b>REFUND CORRECTION</b>	Used to cancel a return that has been performed in the current batch.
5	<b>PRE-AUTHORIZATION</b>	A request to the card issuer to verify the availability of credit on that credit card. It is useful in restaurants, hotels, beauty salons, and rental agencies. The pre-authorization response provides an authorization number but does not charge the customer's account until a credit advice/pre-authorization completion (see below) transaction is performed.
6	<b>CREDIT ADVICE</b> <b>1 PRE-AUTH COMPLETION</b>  <b>2 CREDIT ADVICE</b>	<p>Is keyed to finalize the pre-authorization transaction and charges the customer's account. Input the total amount of the transaction (example: the price of a meal plus the tip).</p> <p>Is used to complete a credit purchase transaction you were unable to process at the time of the sale.</p>
7	<b>MERCHANT SUBTOTALS INQUIRY</b>	<p>Enables you to find out about the transactions you have processed with IVR. The information provided includes:</p> <ul style="list-style-type: none"> <li>a) the types of cards processed</li> <li>b) types of transactions processed</li> <li>c) totals of transactions processed for each card type</li> <li>d) grand total of all transactions processed.</li> </ul>



## Instalink<sup>®</sup> IVR

### Quick Reference Guide

Your Merchant Number is

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Your Device ID Number is

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# INSTALINK IVR – QUICK REFERENCE GUIDE

## BEFORE DIALING

Before dialing the Instalink IVR telephone number, imprint or record the credit card number and expiry date on the sales draft or customer invoice.

**Dial the Instalink IVR telephone number.  
1-877-619-4241**

### 1. PROMPT

Welcome to the Instalink IVR.

Please enter your merchant number and then press the number sign <#>.

#### YOU ENTER

When the system prompts you to key in your merchant number, please key in '0030' and then your 9-digit merchant number. Then press <#>.

My Moneris Merchant Number is  
0030 \_\_\_\_\_

### 2. PROMPT

Please enter your 8-digit Device number and press <#>.

#### YOU ENTER

Key in your Instalink 8-digit device number that has been provided to you by Moneris' Activation and Training Department.

My Moneris Device Number is  
\_\_\_\_\_

### 3. PROMPT

**Select a transaction (see reverse side) from the main menu.**

For a purchase, press <1>

For a refund, press <2>

For a purchase correction, press <3>

For a refund correction, press <4>

For pre-authorization, press <5>

For credit advice, press <6>

For merchant subtotals inquiry, press <7>

You may return to this menu at any time by pressing <\*>

#### YOU ENTER

Enter the transaction code and press <#>.

### 4. PROMPT

Enter Card number and press the number sign <#> key.

#### YOU ENTER

Key the credit card number, then press the <#> key.

### 5. PROMPT

Enter the 4-digit expiry date, month followed by year, and press the number sign <#>.

#### YOU ENTER

Enter 4-digit expiry date and press the <#> key. (example: 01/02 to be entered as 0102)

### 6. PROMPT

Enter the amount in dollars and cents, without a decimal point and press the number sign <#>.

#### YOU ENTER

Enter Amount (dollars and cents without a decimal point), then press the <#> key (example \$50.00 entered as 5000)

### 7. PROMPT

Amount entered is ... [eg. \$2.00].

If the amount is correct, press <1>

If the amount is incorrect, press <2>

#### YOU ENTER

Press 1 or 2 as appropriate, and press the <#> key.

### 8. PROMPT

If this is an e-commerce transaction, press <1>.

If this is a mail/telephone order, press <2>.

Otherwise, press <3>.

#### YOU ENTER

Key in 1, 2, or 3 as appropriate.

The transaction has been approved.

The authorization number is ..... OR

The transaction has been declined.

### 9. PROMPT

- To repeat the authorization number, press <1>
- For another transaction, press <2>.
- To end this call, press <3>

## IMPORTANT

- Be sure to verify totals after each transmission *AND* at the end of each business day (if transactions are processed).
- Press <7> for merchant subtotals inquiry for current totals. Compare your totals with this amount.

## HINTS AND TIPS

- Transactions processed on the IVR are deposited to your bank account within 48 hours.
- File and retain bank and merchant copies by date for 1 year. Failure to produce a requested copy could mean a chargeback to your account.

To download additional copies of this Quick Reference Guide go to [www.moneris.com/merchant/qrguides](http://www.moneris.com/merchant/qrguides)

For **Technical Assistance** Contact  
Merchant Customer Service  
toll free **1-866-319-7450**.  
For more information, please visit us  
at [www.moneris.com](http://www.moneris.com).