



BE PAYMENT READY

Moneris® Desk/5000

Reference Guide



(Apr 2019)



BE PAYMENT READY

Need help?

Web: www.moneris.com/support-desk5000


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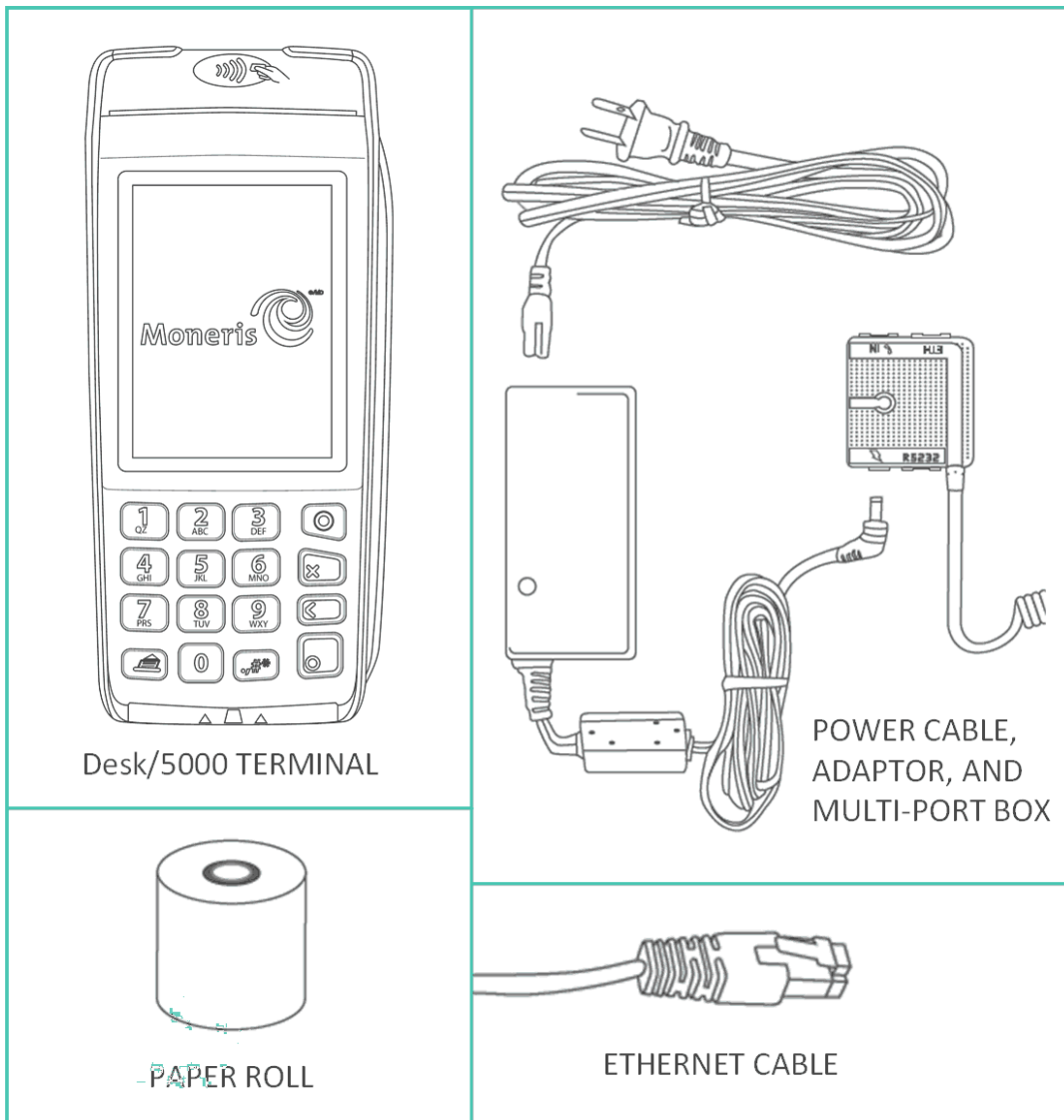


Setting up Your Terminal

In this section, we go over everything you need to know to set up your Desk/5000.

Before you get started

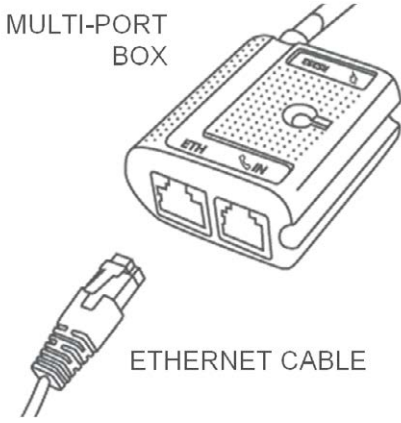
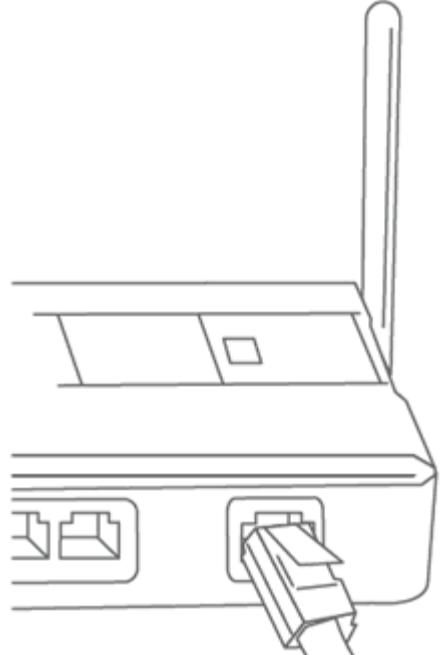
1. Confirm you have received the required hardware.



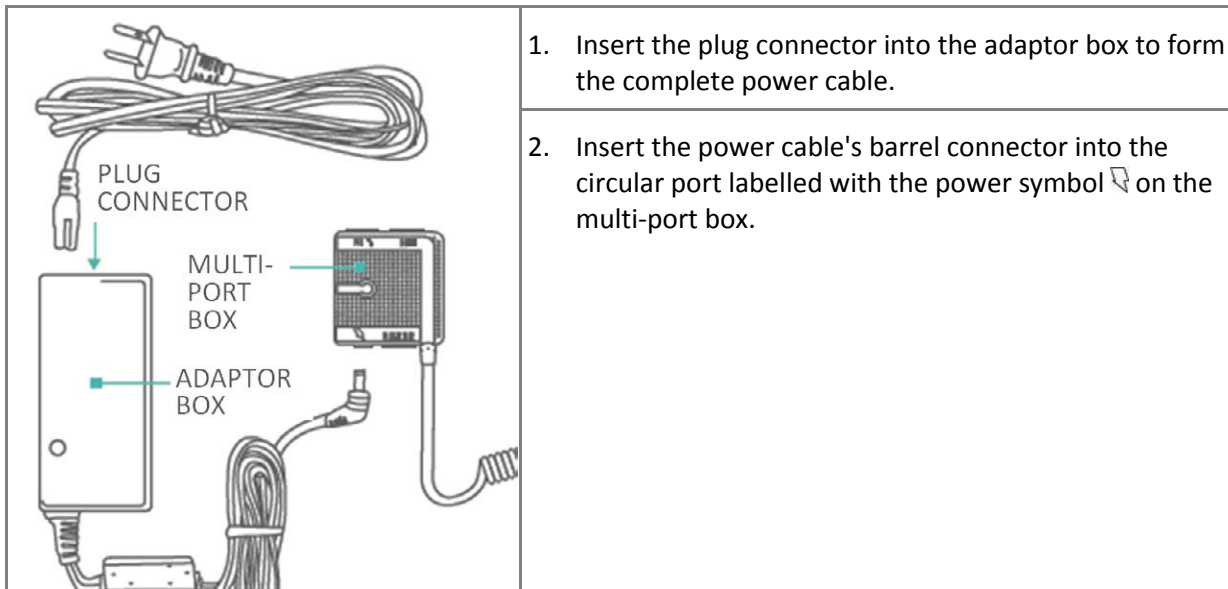
2. Review the **Moneris Ethernet Readiness Checklist** to ensure that your Ethernet service is ready to support your terminal. The checklist is available online at moneris.com/support-desk5000.
3. Go to Hardware setup on page 5.

Hardware setup

Connect the Ethernet cable

 <p>MULTI-PORT BOX</p> <p>ETHERNET CABLE</p>	<ol style="list-style-type: none">1. Plug one end of the Ethernet cable into the port labelled ETH on the multi-port box.
	<ol style="list-style-type: none">2. Plug the other end of the Ethernet cable into the router/switch/hub/internal wiring — whatever is applicable to the high-speed Internet service at your location. (If necessary, please refer to the Moneris Ethernet Readiness Checklist).

Connect the two-part power supply cable



3. Plug the other end of the power cable into a power source. The terminal will power on.

Recommendations: Always plug the power cable into the power source last to avoid power surges. Use a power bar equipped with surge protection if possible. Do not use the power cable from your existing terminal, as it may damage your new terminal.

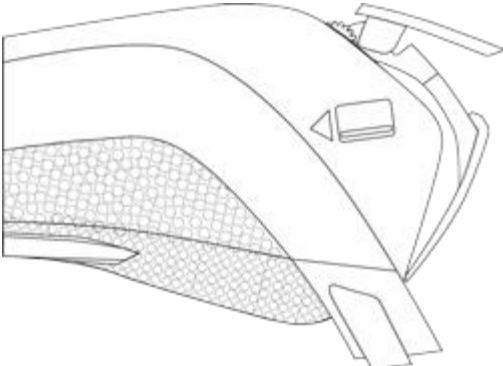
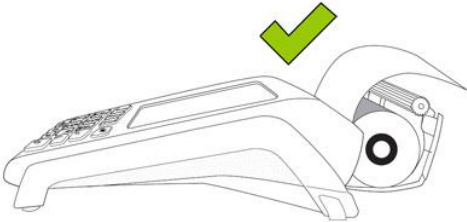
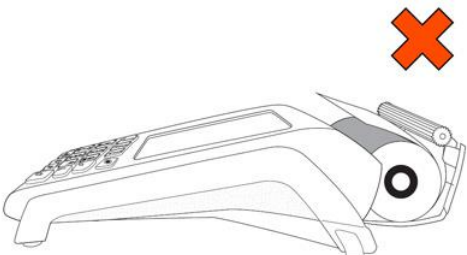
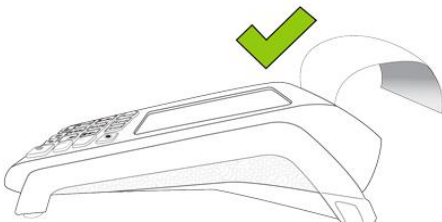
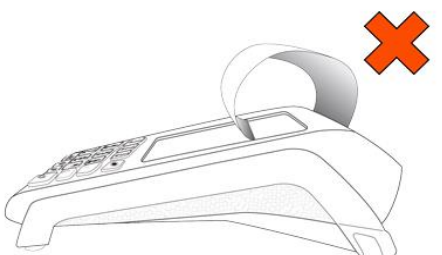

IMPORTANT! You must use the exact power adaptor and cables provided by Moneris to work with your terminal. Failure to do so may affect the operability of, or cause damage to, the equipment.

Remove the protective film (if applicable)

If your Desk/5000 terminal has a protective film covering the display screen, peel the film off.

Hint: Peel from the top right to the bottom left corner.

Install the paper roll

	<ol style="list-style-type: none">1. Lift the printer latch up, and then pull back to open the lid and expose the paper well.
 	<ol style="list-style-type: none">2. Insert the paper roll into the paper well with the loose end unrolling from the top of the roll toward the back of the terminal. Note: If the paper is installed backward, your printouts will be blank.3. Unroll enough paper to extend at least one inch (2.5 cm) over the top of the lid.
 	<ol style="list-style-type: none">4. Close the lid, and press down to snap it back into place so that the extended paper is pressed securely against the closed lid and the faceplate. Note: The paper should unroll back over the top of the printer, not unroll over the faceplate. Note: To advance the paper from the printer when the lid is closed, you must press and hold down the paper feed  key when the terminal is powered on. DO NOT attempt to manually advance the paper by pulling it as this will damage the printer.

5. Your hardware setup is complete. Go to [Software setup](#) on page 8.

Software setup

To set up your terminal software quickly and start processing transactions, simply respond to the prompts on screen. If you need help, follow these step-by-step instructions.

1. At the “Welcome! Let’s get you payment ready” screen, tap **OK**.

The terminal displays the message “Please wait while your device syncs with Moneris”.

- If the “Please make sure your device is connected to the Internet” message appears, the terminal is not able to connect to the Internet. Make sure your terminal is connected to your network by Ethernet cable. If needed, refer to the ***Moneris Ethernet Readiness Checklist*** to make sure your terminal is ready for Internet communication.
2. Wait while the terminal connects to Moneris to obtain your account settings.
 - If the “We’re unable to connect” message appears, the terminal is unable to connect to Moneris. See *Connection setup* below.
 3. The next step is to set up a high security user ID and password. Go to the Securing your terminal section below on page 9.

Connection setup

The terminal is unable to connect to Moneris and requires information about your network to establish the connection settings. If you are not sure how your network is set up, contact your network administrator.

Note: When entering IP addresses, use the terminal's keypad. To enter a period, press the **⌵#*** key.

1. Tap the **Select IP Address Type** field and select the type of IP addressing used by your network.
 - If you selected **Dynamic IP**, the screen shows the Automatic DNS setting with the toggle set to ON. Go to step 2.
 - If you selected **Static IP**, the screen shows the fields required for static IP. Go to step 3.
2. Review the **Automatic DNS** setting.
 - If your network uses automatic DNS, tap **OK** to accept the setting and continue. Go to step 4.
 - If your network does not use automatic DNS, tap the toggle to change it to the OFF position, then tap **OK**.
 - i. Tap the **Primary DNS** field and enter the IP address of your primary DNS server.
 - ii. Tap the **Secondary DNS** field and enter the IP address of your secondary DNS server.
 - iii. Tap **OK** at the bottom of the screen then go to step 4.
3. At the static IP setup screen, tap each field and enter the requested IP address, then tap **OK**.

Note: The automatic DNS toggle (set to off) is shown for information only and cannot be changed at this screen.

4. The terminal displays: “Please wait while your device syncs with Moneris”.
5. Go to the Securing your terminal section on the next page.

Securing your terminal

A high security user ID and passcode are required to protect the terminal. Use this user ID/passcode to perform protected transactions and to set up other users/clerks on the terminal.

Note: *If you already have a Desk/5000 terminal, the user ID/passcode setup prompt will not appear. Moneris will download the high security user ID/passcode you created when setting up your first terminal.*

1. At the “Let's secure this device” screen, tap the **User ID** field and enter a user ID consisting of 1 to 4 digits, then tap **OK**.
2. Tap the **Passcode** field and enter a passcode consisting of 4 to 10 digits, then tap **OK**.
 - You cannot use 3 or more consecutive numbers such as **1236**, **65439**, or 3 or more repeating numbers such as 9996, **1113**.
3. Tap the **Personal Identifier** field and enter a name, then tap **OK**.
 - This field is optional.
 - It can be letters or numbers.
 - It could be your name or employee number, or other descriptor such as Manager or Supervisor.
4. Tap **OK** at the bottom of the screen to accept the information you entered.

The “Congratulations, you're payment ready!” message appears.
5. Go to the [Editing your settings](#) section below to review the most common settings on your terminal to ensure they match the needs of your business.

Editing your settings

The Quick Setup menu appears after you tap **1 Edit your Settings** or you press 1 on the keypad.

1. Tap each menu item to view the settings. You can edit them, if needed.

Menu	Instructions
Tip	Use this screen to turn <u>tip entry</u> on or off. Once tipping is on, you can set the options that your customers will see when leaving a tip. See <u>Tip settings</u> page 13 for more information.
Multi-terminal	Use this screen to enable <u>multi-terminal settings</u> , in order to use multi-terminal batch close. See Multi-terminal settings on page 14 for more information.
Clerks	Use this screen to turn clerk IDs on or off. Once clerk IDs are on, you can create new clerk IDs and display clerk IDs. See <u>Clerk settings</u> page 15 for more information.
Receipts	<p>Use this <u>receipt settings</u> screen to:</p> <ul style="list-style-type: none">▪ enable the options for how a customer can receive their receipt (email, text, and no receipt, in addition to printing which is always available)▪ enable or disable specific options for customer receipts (for example, enable print and text only)▪ set the print delay (in seconds) between the customer and merchant copies being printed▪ specify the number of merchant receipt copies▪ set up or modify a header on your receipts▪ set up or modify a footer on your receipts <p>See page 16 for more information.</p>

2. When finished reviewing or editing your settings, tap **Next**.

The **Congratulations, you're payment ready!** message appears.

3. Tap **OK**.
4. Go to the *Enroll in Merchant Direct* section below.

Enroll in Merchant Direct

Merchant Direct is the Moneris online tool for accessing all of your merchant reports, including end-of-day reports. To sign up for Merchant Direct, follow these steps.

Note: *If you have already enrolled for Merchant Direct, you do not have to enroll again.*

1. Go to moneris.com
2. In the top, right area of the screen, click **Login** and select **Merchant Direct**.
3. Click **Online Enrolment**.
4. Fill in the fields in the online form to complete your enrolment.
5. Go to *Choose what to do next* on the next page.

Choose what to do next

- To process a Purchase transaction, refer to [Purchase – debit/credit](#) on page 31.
- To process another transaction: From the [Main menu](#) (see page 27), tap **Transactions** then select the transaction you wish to perform.
- To change settings: From the [Main menu](#) (see page 27), tap **Settings**.
- For an overview of the terminal, refer to [Moneris Desk/5000](#) (see page 23).

If you are experiencing issues with setting up your terminal to communicate with Moneris, go to [Communications troubleshooting](#) (see page 12).

Communications troubleshooting

Error messages

Click on each error message link to see troubleshooting solutions.


[Please make sure your device is connected to the Internet.](#)

[We're unable to connect.](#)

[Cannot connect to cloud / host.](#)

Additional settings

If you change a setting and save it, the terminal displays “Settings Saved” or a similar message. To clear the message, you have 3 options:



- Tap it;
- Press the green  key; or
- Simply wait for 3 seconds for the message to disappear.

Language settings

Use this screen to set the language of the terminal to English or French.

1. From the Main menu, tap **Settings > Application > Language**
 - Respond to any security prompts (see page 28) that appear.
2. To change the language, tap the **Language** field, then tap English or French.
3. When you are finished, tap **Save**.

The screen returns to the Application Settings menu in case you wish to change other settings.

4. When “Settings Saved” appears, press the green  key to clear the message.
5. Press the red  key to return to the Main menu.

Tip settings

This screen allows you to:



- turn tip entry on or off
 - choose which options your customers will see when entering a tip
1. From the Main menu, tap **Settings > Application (or Quick Setup) > Tip**.
 - Respond to any security prompts (see page 28) that appear.
 2. To change the settings, follow the instructions in the table.

Menu option	Instructions
Tip Support	Tap the toggle to turn this setting on or off. Turn this setting on if you want your customers to be prompted to leave a tip.
Tip by Dollar	Tap the toggle to turn this setting on or off. Turn this setting on if you want your customers to be able to enter a tip as a dollar amount.
Tip by Percent	Tap the toggle to turn this setting on or off. Turn this setting on if you want your customers to be able to enter a tip as a percentage of the bill.

Menu option	Instructions
Tip Preset 1	<p>Tap the toggle to turn this setting on or off.</p> <p>Tap the preset value field and key in a percentage value (for example, 15).</p> <p>Turn this setting on if you want your customers to be able to enter a tip as a pre-set percentage.</p>
Tip Preset 2	<p>Tap the toggle to turn this setting on or off.</p> <p>Tap the preset value field and key in a percentage value (for example, 20).</p> <p>This value must be greater than Tip Preset 1.</p> <p>Turn this setting on if you want your customers to be able to enter a tip as a pre-set percentage.</p>
Tip Preset 3	<p>Tap the toggle to turn this setting on or off.</p> <p>Tap the preset value field and key in a percentage value (for example, 25).</p> <p>This value must be greater than Tip Preset 2.</p> <p>Turn this setting on if you want your customers to be able to enter a tip as a pre-set percentage.</p>
Tip Warning	<p>Tap the toggle to turn this setting on or off.</p> <p>Tap the preset value field and key in a percentage value (for example, 40).</p> <p>This value must be greater than Tip Preset 3.</p> <p>Turn this setting on if you want your customers to see a notification on screen when they enter a tip as a large percentage of the purchase amount. It protects customers from data entry errors. The notification will allow customers to change the amount or to proceed.</p>

- When you are finished setting the tip options, tap **Save**.

The screen returns to the **Application Settings** menu (or the **Quick Setup** menu if you accessed it from there).

- When “Settings Saved” appears, press the green  key to clear the message.
- Press the red  key to return to the Main menu.

Multi-terminal settings

This screen allows you to:



- enable multi-terminal support, such as multi-terminal batch close and multi-terminal reports;
 - assign a name to a terminal so that you can easily select it for multi-terminal operations.
- From the Main menu, tap **Settings > Application** or **Quick Setup > Multi-terminal**.
 - Respond to any security prompts (see page 28) that appear.
 - To change these settings, follow the instructions in the table.

Menu option	Instructions
Multi-Terminal Support	<p>Tap the toggle to turn this setting on or off.</p> <p>When this setting is on, the next two fields appear.</p>

Menu option	Instructions
Single Terminal Support	When multi-terminal support is enabled, this setting allows you to close the batch or generate reports for just one terminal. Tap the toggle to turn this setting on or off.
Terminal Name	To assign a name to the terminal, tap Terminal Name, enter a descriptive name (for example, Bar1), then tap OK.

- When you are finished setting the multi-terminal options, tap **Save**.

The screen returns to the **Application Settings** menu (or the **Quick Setup** menu if you accessed it from there).

- When “Settings Saved” appears, press the green  key to clear the message.
- Press the red  key to return to the Main menu.

Clerk settings

Follow these steps to:

- turn clerk IDs on or off
- create a new clerk ID
- manage clerk IDs


Turning on clerk IDs allows you to identify which clerk processed a transaction. You can then generate reports such as transaction totals by clerk and tip totals by clerk.


- From the Main menu, tap **Settings > Application** or **Quick Setup > Clerk**
 - Respond to any security prompts (see page 28) that appear.
- To change the settings, follow the instructions in the table.

Menu option	Instructions
Clerk IDs	Tap the toggle to turn this setting on or off. Turn this setting on if you want the terminal to prompt for a clerk ID.
Display Clerk IDs	Tap the toggle to display the current list of clerk IDs. The terminal connects to Moneris to retrieve the list of clerks. Note: Your terminal must be connected to Moneris.
+ Add Clerk ID	Tap this menu item to add a clerk ID. Key in a new clerk ID (minimum 1 and maximum 6 characters, using any combination of numbers and letters), then tap OK .

- When you are finished setting the Clerk ID options, tap **Save**.

The screen returns to the **Application Settings** menu (or the **Quick Setup** menu if you accessed it from there).

- When “Settings Saved” appears, press the green  key to clear the message.

5. Press the red  key to return to the Main menu.

Receipt settings

Follow these steps to:

- enable the options for how a customer can receive their receipt (email, text, none, in addition to Print which is always available). If Cardholder Choice is turned off, the receipt will be printed by default.
- enable or disable specific options for customer receipts (for example, print and text only)
- set the print delay (in seconds) between the customer and merchant copies being printed
- specify the number of merchant receipt copies
- set up or modify a header on your receipts
- set up or modify a footer on your receipts



1. From the Main menu, tap **Settings > Application** or **Quick Setup > Receipt**
 - Respond to any security prompts (see page 28) that appear.
2. To change the settings, follow the instructions in the table.

Menu option	Instructions
Cardholder Choice	<p>Tap the toggle to turn this setting on or off.</p> <p>Turn this feature on to give your customers a choice of how to receive their receipts.</p> <p>The following options can be set only when Cardholder Choice is turned on. Tap the toggle beside each option to turn the option on or off.</p> <p>Note: <i>The option to print the receipt does not appear on the list since a printed receipt must always be available to the customer.</i></p> <ul style="list-style-type: none">▪ Email Receipt: Turn this option on if you wish to allow your customers to receive their receipt by email.▪ Text Receipt: Turn this option on if you wish to allow your customers to receive their receipt by text.▪ No Receipt: Turn this option on to allow your customers to choose not to receive a receipt. <p>If you turn off these three options, the terminal will automatically print the customer receipt without prompting.</p>
Print Delay	<p>The print delay determines how long the terminal pauses between printing the customer receipt and printing the merchant receipt.</p> <p>To change the default of 3 seconds, tap the Print Delay field, enter a new value (in seconds), then tap OK.</p>

Menu option	Instructions
Number of Merchant Receipts	<p>This setting determines how many copies of the merchant receipt are printed. To change the default, tap the field, select a new value, then tap OK.</p> <p>Note: A merchant receipt is always printed for transactions that require a customer signature, even when Number of Merchant Receipts is set to zero.</p>
Header Settings	<p>The header settings allow you to print information at the top of your receipts, such as your website address or other social media contacts. You do not need to enter the name of your business or your address in the header. This information will be included automatically on your receipts.</p> <p>Note: Information you enter in the header will only appear on the receipt when printed from the terminal. It will not appear on the receipt if it is sent by text or email to the customer.</p> <p>To set up a header for your receipts, tap Header Settings, choose a language, tap each field you want to fill out, enter the text you wish, then tap OK.</p>
Footer Settings	<p>The footer settings allow you to print information at the end of your receipts, such as a holiday greeting (for example, Happy Mother's Day) or a message of appreciation (for example, Thank you for your business).</p> <p>Note: Information you enter in the header will only appear on the receipt when printed from the terminal. It will not appear on the receipt if it is sent by text or email to the customer.</p> <p>To set up a footer for your receipts, tap Footer Settings, choose a language, tap each field you want to fill out, enter the text you wish, then tap OK.</p>


- When you are finished setting the receipt options, tap **Save**.

The screen returns to the **Application Settings** menu (or the **Quick Setup** menu if you accessed it from there).

- When "Settings Saved" appears, press the green  key to clear the message
- Press the red  key to return to the Main menu.

Communication settings

This screen allows you to set up your terminal to communicate with your network. You can choose dynamic IP or static IP addressing.

Note: When entering IP addresses, use the terminal's keypad. To enter a period, press the punctuation  key.

- From the Main menu, tap **Settings > Communication > Communication Setup**
 - Respond to any security prompts (see page 28) that appear.
- Tap the **IP Address Type** field, and select Static IP or Dynamic IP.
 - If you selected Dynamic IP, go to step 3

- If you selected Static IP, complete the rest of the fields on the screen as described in this table. If you need assistance with these fields, contact your network administrator.

Static IP fields	Instructions
IP Address	Tap the field, key in the IP address to be assigned to the terminal, and tap OK .
Subnet Mask	Tap the field, key in the subnet mask, and tap OK .
Gateway	Tap the field, key in your gateway address, and tap OK .
Primary DNS	Tap the field, key in your primary DNS address, and tap OK .
Secondary DNS	Tap the field, key in your secondary DNS address, and tap OK .
Connection Timeout (seconds)	This field indicates the number of seconds the terminal will try to connect to the network before timing out. If the default value is acceptable, go to step 4. If you wish to change the value, tap the field, key in a new value, and tap OK . Go to step 4.



3. After selecting **Dynamic IP**, complete the rest of the fields on the screen as described in this table. If you need assistance with these fields, contact your network administrator.

Dynamic IP fields	Instructions
Automatic DNS	Tap the toggle to turn this setting on or off. If you turn it on, go to the Connection Timeout field below. If you turn it off, complete the next two fields: primary DNS and secondary DNS.
Primary DNS	Tap the field, key in your primary DNS address, and tap OK .
Secondary DNS	Tap the field, key in your secondary DNS address, and tap OK .
Connection Timeout (seconds)	This field indicates the number of seconds the terminal will try to connect to the network before timing out. If the default value is acceptable, go to step 4. If you wish to change the value, tap the field, key in a new value, and tap OK . Go to step 4.

4. When you are finished setting the Communication options, tap **Save**.

If you changed the IP Address Type (from static IP to Dynamic IP or vice versa), the terminal will reboot, as indicated by the notification on screen "The terminal will now reboot. Please wait". After the terminal reboots, continue at *Security Settings* below.

If you changed one of the other fields, the screen returns to the **Communication Settings** menu. Go to the next step.

5. When "Settings Saved" appears, press the green  key to clear the message
6. Press the red  key to return to the Main menu.

Security settings

Follow these steps to add, change, or delete a passcode:



1. From the Main menu, tap **Settings > Application > Security**
 - Respond to any security prompts (see page 28) that appear.
2. To view or change settings, tap each menu item and follow the instructions in the table.

Menu option	Instructions
Security Access	Tap each field to set the security access level for specific transactions and functions. Tap Save when done.
Temporary Lockcode	To lock the terminal, enter a lock code of your own choosing, then tap OK . If needed, review the passcode rules directly below. To unlock the terminal, re-enter the lock code.
Add New Passcode	Tap each field and enter a value then tap Save . Passcode: <ul style="list-style-type: none">▪ The passcode must be 4 to 10 digits.▪ You cannot use 3 or more consecutive numbers, such as 12358, 654975,▪ You cannot repeat a number 3 times or more, such as 99975, 85111 Personal Identifier: <ul style="list-style-type: none">▪ This field is optional.▪ It can be letters or numbers.▪ It could be the person's name or employee number, or other descriptor such as Day Shift or Night Shift.▪ It does not have to be unique — it can be assigned to more than one passcode. User ID: The User ID must be 1 to 4 digits long, for example, 0001. Access Level: The access level can medium security or high security. <ul style="list-style-type: none">▪ High security passcodes have access to all terminal functions.▪ The first passcode you set up on the terminal must be high security. This passcode will have the ability to assign medium level or high level passcodes to other users.
Change Passcode	Tap each field and enter the required information, then tap Save . <ul style="list-style-type: none">▪ User ID▪ Existing passcode▪ New passcode If needed, review the <u>passcode rules</u> above.

Menu option	Instructions
Forgot Passcode	<p>Resetting a medium security passcode.</p> <p>A user with a high security passcode can reset a medium security passcode.</p> <ol style="list-style-type: none"> 1. Tap Medium Sec. Passcode. <p><i>Note: If all your user IDs are at the same security level, you will not see this screen.</i></p> <ol style="list-style-type: none"> 2. Enter the user ID of the medium security user who forgot their passcode, then tap Next. 3. Tap the New Passcode field, enter a new passcode for the user who forgot their passcode. If needed, review the passcode rules on page 19. 4. Tap the User ID and Passcode fields, enter your high security user ID and passcode, then tap Save. <p>The terminal saves the new passcode, and then displays “Passcode Saved”.</p> <ol style="list-style-type: none"> 5. Tap Passcode Saved to clear the message. 6. Give the new passcode to the medium security user who can then change it to a confidential passcode using the Change Passcode function on page 19. <p>Resetting a high security passcode</p> <p>A high security passcode user can allow another high security user to reset their passcode using this screen, with assistance from Moneris.</p> <ol style="list-style-type: none"> 1. Tap High Security Passcode. <p><i>Note: If all your user IDs are at the same security level, you will not see this screen.</i></p> <ol style="list-style-type: none"> 2. Enter the user ID of the high security user who forgot their passcode, then tap Next. 3. Tap the New Passcode field, enter a new passcode, re-enter the passcode, then tap OK. If needed, review the passcode rules on page 19. 4. Call Moneris to obtain an unlock code. We will ask you for the unlock token found at the top of the screen. 5. Tap the Unlock Code field and enter the unlock code provided by Moneris, then tap OK. 6. Tap Save. 7. Tap Passcode Saved.
Delete Passcode	<p>Tap each field and enter the required information, then tap Delete:</p> <ul style="list-style-type: none"> ▪ User ID ▪ Existing passcode

3. When you are finished setting the passcode options, tap **Save**.

The screen returns to the **Security Settings** menu.

4. When “Settings Saved” appears, press the green  key to clear the message.
5. Press the red  key to return to the Main menu.

Processing purchase transactions when your Internet connection is down

If your Internet connection is down, you can still process some credit card purchase transactions on your terminal using an optional feature called Store and Forward (SAF). Store and Forward processing allows you to continue to accept purchase transactions even when the terminal is unable to connect to the Moneris host. SAF purchases are stored securely on the terminal and are automatically forwarded to Moneris once the host connection is available.

To request Store and Forward, [contact Moneris](#) in order to understand the risks and restrictions around this feature. Carefully review the statement below before requesting and using SAF.

Please note that Store and Forward is an optional feature which will allow you to process transactions which are not authorized by the issuing bank at the time you submit the transaction for acceptance by the bank. For that reason, SAF carries increased risks and if you enable the feature you will be agreeing to assume these risks, including that you may not receive settlement funds for some of these transactions because the cards may not have sufficient funds available, the cards may be blocked, stolen or fraudulently used, the stored transactions data on the terminals may be lost or damaged, you may exceed the capacity of the terminals to store transactions, etc. Additionally, many safety features cannot be used for such transactions and this increases the risk of chargebacks with limited or no remedies available for the merchant, even if chip and PIN are used. You should only use store and forward if you are prepared to assume these risks and you are allowed to do so by the Card Brand Rules and Regulations. It is your responsibility to monitor how your terminals are used and you are fully liable for all transactions processed using store and forward.

Notification before performing a SAF purchase transaction

The steps for performing a SAF purchase are the same as a [regular credit purchase](#), with two additional steps. The terminal will prompt you before performing a SAF transaction. At the prompt, you can cancel the transaction or proceed. Before deciding to proceed with performing the SAF transaction, Moneris advises you to exercise caution in considering the customer’s credit card, the customer’s behavior, and the transaction amount, among other factors in order to identify and minimize potential fraud. If you decide to proceed, you must enter your user ID and passcode each time you perform a SAF purchase.

To view the terminal prompt associated with the SAF feature, go to Merchant prompts (“[Your terminal is currently offline! You can...](#)”) on page 38.



Using Your Terminal

In this section, we go over everything you need to know to use your Desk/5000, including how to perform transactions and end-of-day processes.







Moneris Desk/5000

Use this handheld, all-in-one terminal and PINpad to process transactions at the point of sale (POS).

Both you and your customer will enter information and respond to prompts on the terminal. When directed on screen, pass the terminal to the customer. When the customer has finished, they will pass the terminal back to you as directed on screen. Respond to the prompts to complete the transaction.









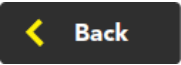



Terminal keys and hardware

Label	Terminal key or hardware	Use this key or hardware element to:
1	Menu key 	Go to the Main menu.
2	Red key 	Cancel a transaction or function. (Same as tapping the Cancel button on the display screen)
3	Yellow key 	Delete one or more characters in a data field. (Same as tapping the Delete button on the display screen)
4	Green key 	Accept or submit data. (Same as tapping the OK button on the display screen)
5	Paper feed key 	Advance the receipt paper.
6	Printer	Print receipts and reports.
7	Keypad	Enter numerical data. To enter a period or other punctuation, use the punctuation  key.
8	Magnetic stripe reader	Read card information when a card is swiped.
9	Chip reader	Read card information when a chip card is inserted.
10	Display screen	Displays information.
11	Contactless reader (internal)	Read card information when a card is tapped.

On-screen buttons

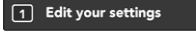
The screen of your terminal is touch sensitive, like a smartphone. You can move around the application and choose options by touching the appropriate element on screen. Here are the most common icons and buttons that you should be familiar with.

Screen element	Action performed:
 Main menu icon	Go to the Main menu. Note: You can also touch the  key on the terminal keypad to perform the same action.
 Cancel	Cancel a transaction and return to the Purchase screen. Note: You can also press the red  key on the terminal keypad to perform the same action.
 Delete	Delete one or more characters in a data-entry field. Note: You can also press the yellow  key on the terminal keypad to perform the same action.
 OK	<ul style="list-style-type: none">▪ Submit the data shown on-screen. For example, tap OK to indicate the transaction amount is correct.▪ Accept/confirm the choice or information displayed on-screen. Note: You can also press the green  key on the terminal keypad to perform the same action.
 Back	Go back to the previous screen/menu.
 Help icon	To view the website address of the Moneris support page for your terminal.

Navigating the terminal

Touch screen interaction

Your Moneris terminal features a color touch screen.



- To access a function displayed on screen (for example, a button, a menu, a field), simply use your finger to tap the item on the screen, or if a number is displayed beside the button text (for example ) press that number on the terminal keypad.
- To view content (for example, a menu or report) that extends past the bottom of the screen, swipe up. Swipe down to go back to the top of the screen.
- The Main menu includes two screens. Swipe left to view screen 2. Swipe right to go back to screen 1.

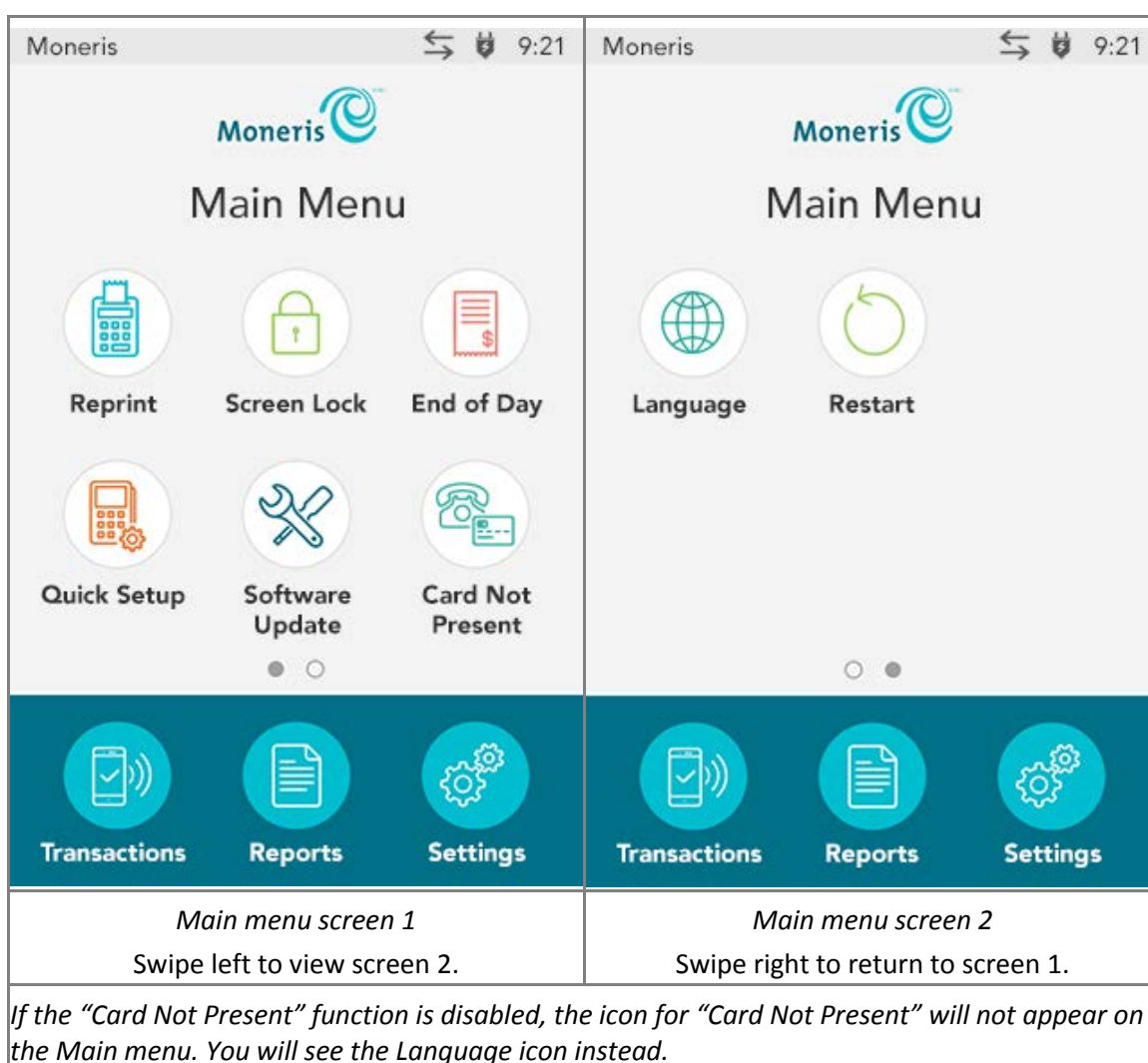
Start up

When the terminal starts up (after your initial setup), it will go directly to the Purchase screen. However, there may be one or more security prompts (see page 28) that appear before you see the Purchase screen.

Getting to the Main menu











You can access all of the terminal functions from the Main menu. To get to the Main menu, use one of these methods:

- tap the Main Menu  icon on the screen (if it is available)
- press the Menu  key on the keypad



Main menu

To navigate to the Main menu, see [Getting to the Main menu](#) on page 25.

Menu item	Use this menu to:
 Reprint	Reprint the last receipt or another receipt. Go to Reprinting receipts on page 45.
 Screen Lock	Lock the screen using a temporary lock code. Go to Locking the screen on page 28.
 End of Day	Close your batch and print batch reports. Go to End of day process on page 52.
 Quick Setup	Launch the Quick Setup procedure to set up your terminal. Go to Software setup on page 8 and review each sub-section.
 Software Update	Display the Software Update menu. You can check for software updates, sync your settings with the Moneris cloud, or sync all functions with the Moneris host. For more information, go to the Desk/5000 Online Operating Manual available at moneris.com/support-desk5000 .
 Card Not Present	<p>Turn on or off the ability to process financial transactions when the customer's card is not present; for example, email and telephone orders. For more information, go to the Desk/5000 Online Operating Manual at moneris.com/support-desk5000.</p> <p><i>Note: If this function is off, the icon will not appear on the main menu.</i></p>
 Language Settings	Set the language of the terminal to French or English. Go to Language settings on page 13.
 Transactions	Display the Transactions menu. Go to the Transactions section on pages 31-43 for transaction guidelines and instructions for each procedure.
 Reports	Display the Reports menu to run reports on transactions or on settings. Go to Reports on page 48.
 Settings	Display the Settings menu. When setting up the terminal, you may have set some settings (such as tip and clerk ID). To review the most common settings, go to Additional settings on page 13.

Security prompts

You may see various security prompts before you are able to process transactions and access functions. Some examples include the screen saver (idle screen), the temporary lockcode prompt, the user ID/passcode prompt, and the Clerk ID prompt.

Review the table below on how to respond to each prompt.

Prompt	Action
Screen saver showing the date and time (idle screen)	The application has timed out. Tap the screen or press any key to continue.
Enter Temporary Lock code	This screen appears if you locked the terminal using a temporary lock code. To unlock, enter your temporary lock code. You can also tap Use a User ID and Passcode instead . See below.
Please enter your User ID and Passcode	To use protected menus and transactions, you must identify yourself by user ID and passcode. <ol style="list-style-type: none">1. Tap the User ID field and enter your user ID.2. Tap the Passcode field and enter your passcode.3. Tap OK.
Enter Clerk ID	If clerk IDs are turned on (see page 15), you must identify yourself by entering your clerk ID. Key in your clerk ID, then tap OK.

Locking the screen

In order to prevent unauthorized use, Moneris recommends locking the terminal screen when:

- your terminal is unattended, for example, when you are away from the cash register area;
- your business is closed. Leave the terminal powered on and lock the screen.

To lock the screen:

1. Think of a lock code you will remember (using 4 to 10 digits).
 - You cannot use 3 or more consecutive numbers (such as **1236**) or 3 or more repeating numbers (such as **11125**).
2. On the Main menu, tap **Screen Lock**.
The “Please enter a temporary lock code for this device” prompt appears.
3. Enter the lock code you determined in step 1, then tap **OK**.
The screen is locked.

To unlock the screen:

- enter the same lock code you used to lock the screen, or
- enter your user ID and passcode.

Card entry options

Insert: Chip cards



1. The screen displays “Tap, insert, or swipe”.
2. The customer inserts the card into the terminal’s chip reader.

Note: Unless the device prompts otherwise, do not swipe a chip card even if the card has a magnetic stripe.

3. The customer may be prompted to key in a PIN.
4. The chip card must remain inserted until the screen displays “Please remove your card”.

Wave/Tap: Contactless cards



1. The screen displays “Tap, insert, or swipe”.
2. The customer taps their card over the contactless reader icon which is located above the display screen.

Note: The card must be tapped or waved by itself (the customer cannot leave the card in their wallet and wave it over the contactless reader).

Note: If the customer is using a mobile device, they may be directed to enter a passcode on their smartphone or tablet.

3. Note the following:
 - Your merchant account must be configured for contactless functionality.
 - Only Purchases, Refunds, and Balance Inquiries can be processed using a contactless card.
 - The transaction amount must be equal to or less than the contactless transaction limit set for the card. If the amount is greater than the contactless limit for the card, when the customer taps their card, the terminal displays “Limit exceeded” followed by “Insert or swipe”. To complete the transaction for the same amount, the customer inserts or swipes their card.

Swipe: Magnetic stripe cards




1. The screen displays "Tap, insert, or swipe".
2. The customer swipes the card on the terminal's magnetic stripe reader.

Note: *If the card has a chip, the card must be inserted into the terminal's chip reader.*

Transactions

Transaction guidelines

To process financial transactions, follow these general guidelines.

1. Make sure you are connected to Moneris. Look for **LAN** or the network connection icon  in the notification area at the top of the screen. If the connection icon is **red**, refer to the [connection error messages](#) on page 54.
2. Determine which transaction you want to process (for example, Purchase, Refund, Void, Pre-authorization, Completion, among others).
3. Start the transaction on the terminal and follow the prompts on screen. For instructions, see pages 31-37.
 - If prompted, pass the terminal to your customer so they can respond to the customer prompts (see pages 40).
 - If card entry is required to complete the transaction, the customer enters their card using tap, insert, or swipe.
 - The merchant prompts and the customer prompts may vary depending on:
 - the transaction type (for example, Purchase or Refund)
 - the payment type (for example, credit or debit)
 - the method of card entry (for example, insert, swipe, or tap)
 - any features you have turned on (for example, tipping or cashback)
4. [Process any printed receipts](#) (see page 44).

Purchase - debit/credit

Follow these steps to process a Purchase transaction when the customer pays with a debit or credit card.

1. Start at the **Purchase - Enter amount** screen. This is the terminal's default screen.
 - Respond to any [security prompts](#) (see page 28) that appear.
 - If your terminal is at a different screen, go to the [Main menu](#), tap **Transactions**, then tap **Purchase**.
2. Key in the amount of the purchase and tap **OK**.
 - Respond to any [merchant prompts](#) (see page 38) that appear. The terminal may ask for an invoice number and other information.
3. When prompted, pass the terminal to your customer so they can respond to the customer prompts.
 - If [tip entry](#) is turned on (see page 13), the customer enters a tip (or no tip).
The "Tap, insert or swipe" prompt appears, showing the final total and the cards you accept.
4. The customer enters their card on the terminal. Depending on the type of card, they can tap, insert, or swipe it.

- The customer responds to any additional customer prompts, including prompts related to cashback, foreign exchange, and PIN entry among others (see page 40).


The “Processing your request” message appears.

5. Once the transaction is approved, the “How would you like your receipt?” prompt appears, showing the customer the available options for receiving a receipt: **1 Email, 2 Text, 3 Print, and 4 None.**

Note: You can choose which receipt options customers will see (see page 16).

6. The customer selects a receipt format (or no receipt) by tapping one of the options on screen or by pressing the corresponding number on the keypad.

The “Transaction Complete/Please pass terminal back to clerk” prompt appears.

7. The customer passes the terminal back to you. Press the green  key to continue, if needed.
8. When “Transaction Approved” appears, tap **OK**.
9. Process any printed receipts (see page 44).

Note: A customer signature is always required for UnionPay transactions, so the merchant copy of the receipt is always printed. Ask the customer to sign the merchant copy of the receipt.

Partially approved Purchase

A Partial Approval of a purchase transaction occurs when the customer pays for a purchase with a pre-paid credit card but the value on the pre-paid card is less than the purchase amount.

Pre-paid cards include:

- A credit card (such as Visa or Mastercard) loaded with a specific value.
- A gift card from a specific store.

When presented with a pre-paid card:

1. Follow the Purchase transaction (see page 31).

IMPORTANT! Process any pre-paid cards first -- the customer may have more than one.

2. The terminal approves the partial amount tendered on the pre-paid card, then displays to the customer and to the merchant the amount still owing. For example:

Amount approved \$10.00

Amount due \$20.50

3. Tap **OK** to accept the partial approval.

The amount due can be paid by another tender type, e.g. another pre-paid card, a credit card, a debit card, or cash.

4. Follow the merchant prompts on screen for each tender type offered by the customer until the full purchase amount is paid.
5. Process any printed receipts (see page 44).

Balance inquiry on pre-paid credit cards

Use the Balance Inquiry procedure to allow customers to check the balance on a pre-paid credit card.

1. From the Main menu, tap **Transactions**, then tap **Balance Inquiry**.
2. As prompted on screen, pass the terminal to your customer so they can respond to the customer prompts.

The “Tap, insert or swipe” screen appears.

3. The customer enters their card on the terminal. Depending on the type of card, they can tap, insert, or swipe as described in Card entry options on page 29).
4. The customer responds to any customer prompts, such as PIN entry.

The terminal displays the card balance on the screen.

5. The customer views the balance on screen.

To print the balance, the customer taps **Print** or presses 1 on the keypad.

Note: *Respect the customer's privacy. Do not look at the balance, whether printed or on screen. The terminal prints only one copy of the receipt, the customer copy.*

6. After viewing or printing the balance, the customer taps **OK** to end the balance inquiry.
7. The screen prompts the customer to return the terminal to you.

The customer passes the terminal to you.

8. Tap **OK** to continue.

Refund - debit/credit

A refund credits a customer's account. You can refund the whole amount of a purchase transaction or a portion of the amount.

1. From the Main menu, tap **Transactions**, then tap **Refund**.
 - Respond to any security prompts (see page 28) that appear.

The Refund screen appears.

2. Key in the amount of the refund and tap OK.
 - Respond to any merchant prompts (see page 39) that appear. The terminal may ask for an invoice number and other information.

The terminal prompts you to “Enter the authorization number of the transaction that is to be refunded”.

3. Key in the 6-digit authorization number found on the Purchase receipt, and tap **OK**. See original receipt example on page 46.
 - If you do not have the receipt or the authorization number, simply tap **OK** to continue without entering a value.
4. Pass the terminal to your customer so they can respond to the customer prompts.


The “Tap, insert or swipe” prompt appears, showing the total refund and the cards you accept.

5. The customer enters their card on the terminal. Depending on the type of card, they can tap, insert, or swipe it.
 - The customer responds to any customer prompts (see page 42).

The “Processing your request” message appears.

6. Once the transaction is approved, the “How would you like your receipt?” prompt appears, showing the customer the available options for receiving a receipt: **1 Email, 2 Text, 3 Print, and 4 None.**
7. The customer selects a receipt format (or no receipt) by tapping one of the options on screen or by pressing the corresponding number on the keypad.

The “Transaction Complete/Please pass terminal back to clerk” prompt appears.

8. The customer passes the terminal back to you. Press the green  key to continue, if needed.
9. When “Transaction Approved” appears, tap **OK**.
10. Process any printed receipts (see page 44).

Note: A customer signature is always required for UnionPay transactions; therefore the merchant copy of the receipt is always printed. Ask the customer to sign the merchant copy of the receipt.

Void

Perform a void when a transaction has been entered incorrectly and needs to be cancelled and re-done.

- The whole transaction will be voided -- you cannot perform a partial void.
- Only transactions in the current batch can be voided. For example, if the purchase transaction that you want to void is in a batch that is already closed, perform a refund instead.
- To void a pre-authorization, perform a completion for \$0 (see page 37).

1. From the Main menu, tap **Transactions**, then tap **Void**.

- Respond to any security prompts (see page 28) that appear.

The **Void** menu appears.

2. Follow the instructions in **one** of the columns in the table below.

Void last transaction	Search for transaction to void
a. Tap Void last transaction . The terminal displays the last completed transaction that can be voided.	a. Tap Search for transaction to void . b. When prompted, enter the sequence number of the transaction you want to void. To locate the sequence number, see receipt sample on page 46. The terminal searches the current batch and displays the transaction(s) that match the sequence number you entered.
b. Tap OK to void the transaction. <ul style="list-style-type: none">▪ To cancel the Void operation, tap Cancel.	c. Tap the appropriate transaction on the screen to proceed with voiding it. If there is only one transaction, simply tap OK . <ul style="list-style-type: none">▪ To enter a different sequence number, tap Back.▪ To cancel the Void operation and return to the Purchase - Enter amount screen, tap Cancel.

3. When prompted, pass the terminal to your customer so they can respond to the customer prompts.

The “Insert or swipe” prompt appears, showing the total void amount and the cards you accept.

4. The customer enters their card on the terminal.


- The customer responds to any customer prompts (see page 42).

The “Processing your request” message appears.

5. Once the transaction is approved, the “How would you like your receipt?” prompt appears, showing the customer the available options for receiving a receipt: **1 Email**, **2 Text**, **3 Print**, and **4 None**.

6. The customer selects a receipt format (or no receipt) by tapping one of the options on screen or by pressing the corresponding number on the keypad.

The “Transaction Complete/Please pass terminal back to clerk” prompt appears.

7. The customer passes the terminal back to you. Press the green  key to continue, if needed.

8. Process any printed receipts (see page 44).

Pre-authorization

Perform a credit card pre-authorization if the final Purchase amount is unknown (for example, car rental or hotel stay).

1. From the Main menu, tap **Transactions**, then **Pre-Authorized Transactions**, then **Pre-authorization**.
 - Respond to any security prompts (see page 28) that appear.
2. Key in the amount you want to pre-authorize and tap **OK**.
 - Respond to any merchant prompts (see page 38) that appear. The terminal may ask for an invoice number and other information.
3. Pass the terminal to your customer so they can respond to the customer prompts.
4. At the “Insert or swipe” prompt, the customer visually confirms the pre-authorization amount.
5. The customer enters their card on the terminal. Depending on the type of card, they can insert or swipe it.


Note: *Tapping the card is not allowed for pre-authorization.*

- The customer responds to any additional customer prompts, including prompts related to foreign exchange and PIN entry among other scenarios (see page 40).

The “Processing your request” message appears.

6. Once the transaction is approved, the “How would you like your receipt?” prompt appears, showing the customer the options for receiving a receipt: **1 Email, 2 Text, 3 Print, and 4 None**.
7. The customer selects a receipt format (or no receipt) by tapping one of the options on screen or by pressing the corresponding number on the keypad.

The “Transaction Complete/Please pass terminal back to clerk” prompt appears.

8. The customer passes the terminal back to you. Press the green  key to continue, if needed.
9. When “Transaction Approved” appears, tap **OK**.
10. Process any printed receipts (see page 44).

Note: *A customer signature is always required for UnionPay transactions; therefore the merchant copy of the receipt is always printed. Ask the customer to sign the merchant copy of the receipt.*

If the customer swiped their card, obtain the customer signature on the merchant copy of the receipt, then tap **OK** as indicated on screen.

Completion

Perform this transaction to:

- complete a pre-authorization when the final purchase amount is known (for example, at the end of a hotel stay, or when a rental car is returned);
- cancel a pre-authorization that is no longer needed.

1. From the Main menu, tap **Transactions**, then **Pre-Authorized Transactions**, then **Completion**.

- Respond to any security prompts (see page 28) that appear.

The terminal prompts you to “Please enter the sequence number of the pre-authorized transaction you would like to complete”.

2. Enter the 6-digit sequence number from the receipt of the pre-authorization transaction (see page 46), then tap **OK**.

The terminal displays any matching transactions.

3. Tap the pre-authorization transaction you wish to complete or cancel. If only one pre-authorization was found, go directly to step 4.

- If there are no matching transactions:
 - Tap **Back** to re-enter the sequence number; or
 - Tap **Cancel** to cancel the completion process.

4. The terminal prompts you to “Please enter the completion amount”.

5. Do one of the following:

- To complete the pre-authorization, enter the final purchase amount and tap **OK**.
- To cancel the pre-authorization and release the pre-authorized funds, enter a single zero then tap **OK**.

The “Processing your request” message appears.

6. When “Transaction Approved” appears, tap **OK**.


7. Process any printed receipts (see page 44).

Merchant prompts

For security related screens, including clerk ID, refer to security prompts (see page 28).

Purchase and pre-authorization

This table shows, in order of appearance, the merchant prompts that you would see on the terminal during a financial transaction if the applicable feature is enabled. Only some of the prompts will appear for any single transaction.

Merchant prompt	Merchant action
Your terminal is currently offline! You can cancel this transaction or press OK to proceed and we will store the details and send the transaction once the terminal is online	<p>This prompt appears if your account is set up for store and forward (SAF) processing and if your terminal is unable to connect to the Moneris host. For more information, go to Processing transactions when your Internet connection is down.</p> <ul style="list-style-type: none">▪ Tap Cancel to cancel the transaction. You will need to re-establish a connection to Moneris in order to process transactions. Go to “Cannot connect to host” in the Troubleshooting section on page 54. <p>Tap OK to proceed with SAF processing. If the transaction is eligible for SAF, the terminal will store it and then send it to Moneris once the connection is restored.</p>
Please enter invoice number, if applicable.	<p>This prompt appears if your terminal is set up to ask for an invoice number.</p> <ul style="list-style-type: none">▪ To enter a numeric invoice number, use the number keys on the terminal's keypad.▪ To enter an alphanumeric invoice number, tap the invoice number field. A virtual keyboard appears. Use the virtual keyboard to enter the number and letters, then tap the Enter icon.▪ To bypass the invoice prompt, simply tap OK without entering a value.
Please pass the terminal to your customer	<p>Pass the terminal to your customer so they can respond to the customer prompts.</p>
Amount due \$NN.NN Tender type?	<p>This screen appears during a partial approval transaction where the customer used a pre-paid card to pay for a portion of the total amount. The terminal prompts you to ask the customer for their next form of payment to complete the purchase.</p> <ul style="list-style-type: none">▪ If the customer offers another card, tap Cards.▪ If the customer offers cash, tap Cash.▪ If the customer is unable to pay, tap Cancel to cancel the transaction.
Please pass terminal back to the clerk	<p>You may see this prompt when the customer passes the terminal back to you. Press the green  key to continue.</p>

Refund

Merchant prompt	Merchant action
Please enter invoice number, if applicable.	<p>This prompt appears if your terminal is set up to ask for an invoice number.</p> <ul style="list-style-type: none">▪ To enter a numeric invoice number, use the number keys on the terminal's keypad.▪ To enter an alphanumeric invoice number, tap the invoice number field. A virtual keyboard appears. Use the virtual keyboard to enter the number and letters, then tap the Enter icon.▪ To bypass the invoice prompt, simply tap OK without entering a value.
Enter the authorization number of the transaction that is to be refunded	<p>Enter the authorization number of the transaction you want to void.</p> <p>To locate the authorization number, refer to the original receipt sample (see page 46).</p>
Please pass the terminal to your customer	<p>Pass the terminal to the customer. The customer will respond to the customer prompts then pass the terminal back to you.</p>

Void

Merchant prompt	Merchant action
Enter the sequence number of the transaction that is to be voided	<p>This screen appears if you selected Search for transaction to void from the Void menu.</p> <p>Enter the sequence number of the transaction you want to void.</p> <p>To locate the sequence number, refer to the original receipt sample (see page 46).</p>
Please pass the terminal to your customer	<p>Pass the terminal to the customer. The customer will respond to the customer prompts then pass the terminal back to you.</p>
Transaction Approved	<p>Tap OK to print any receipts.</p>


Customer prompts


If the “Please pass the terminal to your customer” prompt appears, pass the terminal to your customer so they can respond to their prompts.

This table shows, in order of appearance, the prompts that a customer would see on the terminal during a financial transaction. The prompts will depend on the transaction being processed and on the features you have enabled.


Purchase and Pre-authorization


Customer prompt	Customer action
Would you like to leave a tip?	<p>This screen appears when the tip feature is turned on.</p> <p>There are 4 possible tip options the customer can choose, depending on how you have set up tip entry (see page 13).</p> <ul style="list-style-type: none"> ▪ Pre-set tip percentages. For example, 15%, 20%, 25%. Customer taps the desired percentage. ▪ No tip. Customer taps the No Tip button on screen or presses 1 on the keypad. ▪ Tip as a specific dollar amount. The customer taps the \$ button or presses 2 on the keypad, then enters the tip amount in dollars and cents. ▪ Tip as a specific percentage amount. The customer taps the % button or presses 3 on the keypad, then enters the tip amount as a percentage of the bill.
Ready to pay? Tap, insert or swipe	<p>The customer taps, inserts, or swipes their card. The customer may also tap their mobile device (a smartphone, for example) or other mobile format.</p>
Which language would you like to proceed in? Dans quelle langue souhaitez-vous continuer?	<p>This screen appears after the customer enters their credit or debit card on the terminal.</p> <p>The customer taps 1 English or 2 Français on screen, or presses the corresponding number on the keypad.</p> <p>The language they select will be used on screen for the rest of the customer prompts and on the customer copy of the receipt.</p> <p>If the language code on the card is not readable, or the language code is neither English nor French, the terminal will display the customer prompts in the same language as the merchant prompts.</p>
Which application would you like to use?	<p>This screen appears for chip cards when more than one card is available on the chip. Each card is considered an application.</p> <ol style="list-style-type: none"> The customer taps one of the applications from the list of available applications. <p>The Confirm application screen appears with two options, No and OK.</p> <ol style="list-style-type: none"> The customer responds to the confirmation screen. <ul style="list-style-type: none"> ▪ To proceed with the selected application, the customer taps OK. ▪ To return to the list of applications, the customer taps No.

Customer prompt	Customer action
Would you like cashback?	<p>This screen appears when the cashback feature is turned on and the customer pays with a supported debit card or pre-paid credit card.</p> <p>Note: For Visa and Mastercard, the card must be inserted into the terminal.</p> <p>There are 5 possible cashback options the customer can choose, depending on how you have set up cashback.</p> <ul style="list-style-type: none"> ▪ Up to 3 pre-set cashback amounts. For example, \$40, \$60, \$100. The customer taps the desired cashback amount. ▪ No cashback. The customer taps the No Cashback button or presses 1 on the keypad. ▪ A different dollar amount. The customer taps the \$ icon or presses 2 on the keypad, then enters the desired cashback amount in dollars then taps OK. The dollar amount must in increments of \$10.
There is a surcharge for this transaction. Would you like to proceed?	<p>This screen appears when the customer uses an <i>Interac</i> debit card and you have turned on surcharge fees on the terminal. The customer responds to the two choices:</p> <ul style="list-style-type: none"> ▪ To accept the surcharge, the customer taps Yes. ▪ To cancel the transaction, the customer taps No.
Which account would you like to use?	<p>This screen appears when the customer uses an <i>Interac</i> debit card.</p> <p>The customer taps 1 Chequing or 2 Savings on screen, or presses the corresponding number on the terminal keypad.</p>
Which currency would you like to pay in?	<p>This screen appears when the Dynamic Currency Conversion (DCC) feature is turned on and the customer swiped or inserted a foreign Visa or Mastercard debit or credit card.</p> <p>The screen displays the exchange rate and the fee for DCC service, as well as the purchase total in two currencies, Canadian dollars and the currency of the card, for example:</p> <p style="text-align: center;">1 \$ N.NN CAD 2 £ N.NN GBP</p> <p>The customer taps their preferred currency on screen, or presses the corresponding number on the terminal keypad.</p>
Please enter your PIN	<p>This prompt appears if the customer inserts their card into the terminal's chip reader.</p> <p>The customer enters their PIN, then taps OK on screen. They can also key in their PIN on the terminal's keypad and then press the green  key.</p> <p>Note: Please respect the cardholder's privacy, and encourage them to protect their PIN.</p>
Processing your request. Please do not remove your card	<p>This message appears when the terminal is processing the payment request.</p> <p>The sentence "Please do not remove your card" appears only if the customer inserted a chip card into the terminal.</p>



Customer prompt	Customer action
Approved. Please remove card	The transaction has been approved. The customer removes their chip card from the card reader.
Amount Approved \$NN.NN Amount due \$NN.NN	This screen appears when the customer used a pre-paid card to pay for a portion of the total amount. <ul style="list-style-type: none"> ▪ To accept the partial approval, tap OK. ▪ To cancel the transaction, tap Cancel.
How would you like your receipt? 1 Email, 2 Text, 3 Print, and 4 None	The customer selects a receipt format by tapping one of the options on screen or by pressing the corresponding number on the keypad.
Payment approved	Moneris has approved the payment.
Please pass terminal back to clerk	The customer passes the terminal back to you. Press the green  key to continue.

Refund

Customer prompt	Customer action
Refund total \$NN.NN Tap, insert or swipe	The customer taps, inserts, or swipes their card. The customer may also tap their mobile device (a smartphone, for example) or other mobile format. For UnionPay cards, only swipe is allowed.
Which currency would you like your refund in?	This screen appears when the Dynamic Currency Conversion feature is turned on and the customer paid for the original purchase using a foreign Visa or Mastercard debit or credit card. The screen displays the refund total in two currencies, Canadian dollars and the currency of the card, for example: 1 \$ N.NN CAD 2 £ N.NN GBP The customer taps their preferred currency on screen, or presses the corresponding number on the terminal keypad.
Please enter your PIN	This prompt appears for Refunds only if the customer is using an <i>Interac</i> debit card or a UnionPay debit card. The customer enters their PIN, then taps OK on screen. They can also key in their PIN on the terminal's keypad and then press the green  key. Note: Please respect the cardholder's privacy, and encourage them to protect their PIN.
How would you like your receipt? 1 Email, 2 Text, 3 Print, and 4 None	The customer selects a receipt format by tapping one of the options on screen or by pressing the corresponding number on the keypad.

Customer prompt	Customer action
Please pass the terminal back to the clerk	The customer passes the terminal back to you. Press the green  key continue.

Void

Customer prompt	Customer action
Insert or swipe	The customer inserts or swipes their card. Tap is not allowed.
Which account would you like to use?	The customer taps 1 Chequing or 2 Savings , or presses the corresponding number keys on the keypad.
Please enter your PIN	The customer uses the keypad to enter their PIN, then presses the green  key.
Please pass terminal back to clerk	The customer passes the terminal back to you. Press the green  key continue.

Receipts

Processing receipts from a transaction

Customer copy

The customer has up to 4 options for receiving a receipt: **1 Email**, **2 Text**, **3 Print**, and **4 None**, depending on how you have set up the receipt options (see page 16).

Customer option	Merchant action
1 Email	No action required. Moneris does not store the customer's email address. This means the customer will have to enter their email address each time they wish to receive a receipt by email.
2 Text	No action required. Moneris does not store the customer's cell phone number. This means the customer will have to enter their cell phone number each time they wish to receive a receipt by text.
3 Print	The customer copy of the receipt will print on the terminal, followed by a 3-second pause which you can change (see Print Delay on page 16). The pause allows you time to tear off the receipt before the merchant copy begins printing. Give the customer copy to the customer, but note: <ul style="list-style-type: none">▪ If a merchant signature line is printed, sign this copy before giving it to the customer.
4 None	No action required.

Merchant copy

The merchant copy of the receipt prints after the cardholder copy. Always keep the merchant copy for your records, but note:

- If indicated on screen, ask the customer to sign your copy of the receipt, then tap OK.
Note: For UnionPay transactions, always obtain the customer's signature on the merchant copy of the receipt.
- You do not need to obtain a signature if any of these messages are printed:
 - VERIFIED BY PIN
 - NO SIGNATURE REQUIRED

Reprinting receipts

Reprint both customer and merchant receipt for the last transaction

1. From the Main menu, tap **Reprint**.
 - Respond to any security prompts (see page 28) that appear.
 - The Reprint menu appears.
2. Tap **Reprint last receipt**.

The terminal prints the customer copy of the receipt, then pauses (to allow you to tear off the customer copy) before printing the merchant copy.

Reprint both customer and merchant receipt for a previous transaction

1. From the Main menu, tap **Reprint**.
 - Respond to any security prompts (see page 28) that appear.

The Reprint menu appears.
2. Tap **Search for receipt to reprint**.

The Reprint search screen appears.
3. Tap one or more of the three search fields and key in a value to search for a transaction:
 - sequence number;
 - last 4 digits of the card number;
 - transaction date.
4. After entering your search term(s), tap **OK** to continue.

The terminal displays all transactions that match your search criteria.

 - If the results extend past the screen, swipe up to see more.

To perform another search, tap **Back**.

To cancel the search and return to the idle screen, tap **Cancel**.
5. Tap the transaction for which you want to print the receipts.

The terminal prints the customer copy of the receipt, then pauses (to allow you to tear off the customer copy) before printing the merchant copy.

Receipt examples

These example receipts will help you to locate the authorization number (for refunds) or the sequence number (for Void and Completion).

Original receipt

MERCHANT NAME
MERCHANT ADDRESS
CITY PROV

Purchase — **A**

MMM DD,YYYY HH:MM:SS

CARD *****0000 — **B**

INVOICE # 0A0A0A0A0A

TID: 00000000 Entry: Chip (C)

Sequence: 000 000 — **C**

Authorization: 000000 Response: 00-000

Batch: 000 Clerk: 000

D —

Amount \$000,000.00 — **E**

F — Tip \$000,000.00

Total **\$000,000.00** — **G**

< EMV DATA LINE 1 >
< EMV DATA LINE 2 >

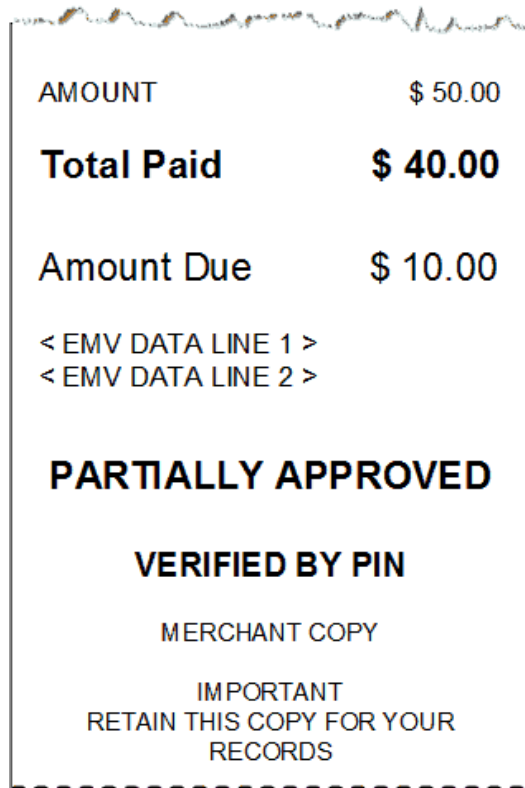
Approved
VERIFIED BY PIN

Important: Retain this copy for your record

Merchant copy

Item	Description
A	Transaction type. For example, Purchase, Refund, Pre-authorization.
B	Card type and card number. Examples of card type include Visa, Mastercard, and American Express. The card number is masked — an asterisk is printed in place of the card number except for the last four numbers.
C	Sequence number. Use this number to process a Void or a Completion.
D	Authorization number. Use this number to process a Refund.
E	Amount. This is the dollar amount of the transaction.
F	Tip. This line appears if you have tipping turned on.
G	Total. This is the total sale amount including any tip.

Partial approval receipt



AMOUNT \$ 50.00

Total Paid \$ 40.00

Amount Due \$ 10.00

< EMV DATA LINE 1 >
< EMV DATA LINE 2 >

PARTIALLY APPROVED

VERIFIED BY PIN

MERCHANT COPY

IMPORTANT
RETAIN THIS COPY FOR YOUR
RECORDS

Signing a credit card receipt



Total \$000,000.00

Approved – Thank You

X _____
CARDHOLDER WILL PAY CARD ISSUER
ABOVE AMOUNT PURSUANT TO
CARDHOLDER AGREEMENT

MERCHANT COPY

Card masking

When printed on receipts, all card numbers are masked except for the last 4 digits. Masking replaces a card's numbers with asterisks (e.g., *****1234). The expiry date is not printed on any copy of any receipt. These measures help to prevent fraud.

Reports

There are many reports that can be viewed (and printed) on your terminal. These reports contain:

- transaction details and transaction totals by various search criteria;
- terminal settings and logs.

To view the Reports menu: From the Main menu, tap **Reports**, then **Transactions** or **Settings**.

Merchant Direct reporting

In addition to viewing reports on your Moneris terminal, you can also view reports online by logging into Merchant Direct. (Refer to page 10 for enrolment instructions.) Merchant Direct allows you to view and download transaction reports by batch, date, clerk ID, and device number. You can also view and download standard monthly merchant reports and special reports. To login:

1. Go to **Moneris.com**.
2. In the top, right area of the screen, click **Login**.
3. From the dropdown list, select **Merchant Direct**.
4. Enter your user ID and password.

Transaction reports

When card numbers are printed on reports, the card numbers are masked or truncated. Masking replaces a card's numbers with asterisks (e.g., *****1234). Truncation prints only the last 4 digits of a card (e.g., 1234). The expiry date is not printed on reports. These measures help to prevent fraud.

Clerk totals report

Generate this report to see transaction totals for one or more individual clerks or for all clerks.

Note: Clerk totals are cleared when your batch is closed. If you need the clerk totals report, be sure to print it before batch close.

1. On the Main menu, tap **Reports > Transaction Reports > Clerk Totals**.
 - Respond to any security prompts (see page 28) that appear.The terminal may display **Processing your request, please wait** while it connects to the Moneris host to retrieve the list of clerks.
2. Select the clerks to be included in the report:
 - For one or more individual clerks, tap the associated toggle to include them; OR
 - For all clerks, tap the toggle for **All Clerks**. This will deselect the individual clerks.
3. Tap **OK** to generate the report.
4. The terminal displays the report on screen.
 - If the report extends past the screen, swipe up to see more.

To print the report, tap **Print**, or press 1 on the terminal keypad.

To view the report for a different clerk or set of clerks, tap **Back**.

To clear the screen and return to the **Transactions Reports** menu, tap **OK**.

Terminal totals report

Generate this report to see transaction totals for the current batch or for a specific date. The totals are broken down by card brand with a grand total at the end.

Note: *Transaction totals are cleared when your batch is closed. If you need the transaction totals report, be sure to print it before batch close.*

1. On the Main menu, tap **Reports > Transaction Reports > Terminal Totals**.
 - Respond to any security prompts (see page 28) that appear.The **Terminal Totals** search screen appears.
2. Tap the **Select Type** field to display the drop-down list, then tap the type of search you wish to perform.
 - By date: Tap **Date** to see totals for a specific date.
To enter or change the date, tap the date field, key in a new date using the terminal keypad, then tap **OK**.
 - By batch: Tap **Entire Batch** to see totals for the current batch.
3. Tap **OK** to generate the report.
4. The terminal displays the report on screen.
 - If the report extends past the screen, swipe up to see more.
 - If no totals or transactions are displayed, there were no transactions approved on the date specified or the current batch may be empty.

To print the report, tap **Print**, or press 1 on the terminal keypad.

To change the type of search, tap **Back**.

To clear the screen and return to the **Transaction Reports** menu, tap **OK**.

Transaction Details report

Generate this report to see details for all transactions stored on the terminal in the current batch or all transactions processed on a specific date.

Note: *Transaction details are cleared when your batch is closed. If you need the transaction report, be sure to print it before batch close.*

This report also prints the transaction totals at the end of the transaction details. If you wish to see the totals only, generate the Terminal Totals report (see page 49).

1. On the Main menu, tap **Reports > Transaction Reports > Transaction Details**.
 - Respond to any security prompts (see page 28) that appear.The **Transaction Details** search screen appears.

2. Tap the **Select Type** field to display the drop-down list, then tap the type of search you wish to perform.
 - By date: Tap **Date** to see transaction details for a specific date.
To enter or change the date, tap the date field and key in a new date using the terminal keypad, then tap **OK**.
 - By batch: Tap **Entire Batch** to see details for all the transactions in the current batch.
3. Tap **OK** to generate the report.
4. The terminal displays the report on screen.
 - If the report extends past the screen, swipe up to see more.
 - If no transactions are found, there were no transactions approved on the date specified or the current batch may be empty.

To print the report, tap **Print**, or press 1 on the terminal keypad.

To change the type of search, tap **Back**.

To clear the screen and return to the **Transaction Reports** menu, tap **OK**.

Pre-Authorization report

Generate this report to view open pre-authorization transactions. These pre-authorizations have not yet been completed or cancelled.

1. On the Main menu, tap **Reports > Transaction Reports > Pre-Authorizations**.
The terminal displays any open pre-authorizations found.
 - If the report extends past the screen, swipe up to see more.

To print, tap **Print** or press 1 on the terminal keypad.

To clear the screen and return to the **Transactions Reports** menu, tap **OK**.

Tip totals report

Generate this report to see tip totals in the current batch for a specific date or for the entire batch. You can request tip totals for one or more individual clerks or for all clerks.

Note: *Tip totals are cleared when your batch is closed. If you need the tip totals report, be sure to print it before batch close.*

1. On the Main menu, tap **Reports > Transaction Reports > Tip Totals**.
 - Respond to any security prompts (see page 28) that appear.

The **Tip Totals** search screen appears.
2. Tap the **Select Type** field to display the drop-down list, then tap the type of search you wish to perform.
 - Tap **Date** to see tip totals for transactions processed on a specific date in the current batch.
To enter or change the date, tap the date field, key in a new date using the terminal keypad, and tap **OK**.

- Tap **Entire Batch** to see tip totals for all transactions in the current batch.
- 3. Tap **OK** to continue.
The terminal displays the list of all clerks.
- 4. Select the clerks to be included in the report:
 - For one or more individual clerks, tap the associated toggle to include them; OR
 - For all clerks, tap the toggle for **All Clerks**.
- 5. Tap **OK** to generate the report.
The terminal displays the report on screen.
 - If the report extends past the screen, swipe up to see more.To print the report, tap **Print**, or press 1 on the terminal keypad.
To view the report for a different clerk or set of clerks, tap **Back**.
To clear the screen and return to the “Transactions” reports menu, tap **OK**.

Settings reports

View or print these reports to identify the settings on your terminal.

Basic terminal report

Use this report to find out basic information about your terminal, including the terminal ID, merchant ID, and the version of the software.

1. On the Main menu, tap **Reports, Settings Reports**, then **Basic Terminal**.
 - Respond to any security prompts (see page 28) that appear.The terminal displays the Basic Terminal report.
2. View the report and print it if you wish.
To print, tap **Print** or press 1 on the keypad.
To clear the screen and go back to the **Settings Reports** menu, tap **OK**.

Enhanced report

Use this report to find out detailed information about your terminal settings.

1. On the Main menu, tap **Reports, Settings Reports**, then **Enhanced Terminal**.
 - Respond to any security prompts (see page 28) that appear.The terminal displays the Terminal Configuration report.
2. View the report and print it if you wish.
To print, tap **Print** or press 1 on the keypad.
To clear the screen and go back to the **Settings Reports** menu, tap **OK**.

End of day process

Debit and credit transactions processed on your terminal are stored in a batch. In order for Moneris to transfer the funds from those transactions into your business account, the batch must be closed. There are two ways to close a batch: system close and merchant close.

System close

If your account is set up for system close, Moneris automatically closes your batch for you at the end of each day. You must verify transaction totals on a daily basis. Here's how.

1. Print the Host Totals report.

Note: *The Host Totals report must be printed before 11:00 p.m. local time, that is, before Moneris closes your batch. You can also view (and download) the host totals report online starting at 7 a.m. the next day by logging into the Merchant Direct web portal and selecting Daily Transaction Report Menu, then Daily Batch Summary Report.*

- a. From the Main menu, tap **End of Day**, then **Host Totals**.

The terminal communicates with the Moneris Host to obtain the batch totals recorded on the host.

- b. Tap **Print** or press 1 on the keypad to print the report.
- c. Tap **OK** to return to the End of Day menu.

2. Print the Terminal Totals report.

- a. On the **End of Day** menu, tap **Terminal Totals**.
- b. Tap **Select Type**, then **Entire Batch**, then tap **OK**.
- c. Tap **Print** or press 1 on the keypad to print the report.
- d. Tap **OK** to return to the End of Day menu.

3. Compare the Host Totals report (printed in step 1) with the Terminal Totals report (printed in step 2).

- If the totals on the host agree with the totals on the terminal, no further action is required.
- If the totals on the host are different from the totals on the terminal, continue with the rest of this procedure.

4. Compare the 2 reports again to determine which transaction type is missing from the Moneris host. For example, the Visa section may show 5 Purchases on the terminal totals but only 4 Purchases on the host totals.

5. View the Transaction Details report to find the missing transaction(s).

- a. On the End of Day menu, tap **Transaction Details**.


The Transaction Details search screen appears.

- b. Tap **Select Type**, then **Entire Batch**, then tap **OK**.

The terminal displays the details of all transactions in the current batch, together with transaction totals, as recorded on the terminal.

- c. For each missing transaction, locate the date, time, dollar amount, and the last 4 digits of the card number. Print the report if you wish.

If requested, the terminal prints the transaction details and totals, and returns to the Transactions Details screen.

6. Call Moneris Customer Care toll-free at 1-866-319-7450, now or the next business day, to obtain assistance with reconciling your out-of-balance batch.
 - a. When listening to the options on the telephone menu, select “Financial Inquiry”. We will ask you for the information gathered in step 5c. You can read it from the Transaction Details report screen or from the printed report.
 - b. After speaking to Moneris, if the terminal still displays the Transaction Details report, press the yellow  key twice to return to the End of Day menu.

Merchant close

If you do not wish to have your batch closed automatically each day, contact Moneris Customer Care to discuss merchant close. If your account is set up for merchant close, you must verify transaction totals and close the batch yourself using the terminal.


To find out more about merchant close, go to the ***Desk/5000 Online Operating Manual*** available at moneris.com/support-desk5000.

Troubleshooting

Error messages on the Desk/5000 terminal

A message will appear on the screen if an error occurs. In the table below, find the error message that appears on the terminal and try the solution. If the error message re-appears, contact Moneris Customer Care for assistance at 1-866-316-7450.

All error messages are listed in alphabetical order.

Error message	Problem and solution
Cannot connect to host	<p>The terminal cannot establish a connection to the Moneris host or cloud.</p> <ol style="list-style-type: none">1. Tap OK or press the green  key to clear the error message.2. Make sure that the Ethernet cable is securely plugged into the ETH port on the multi-port box. If needed, refer to Hardware setup.3. Make sure that the router and hub/switch (if any) are working. Refer to the Moneris Ethernet Readiness Checklist to confirm that messages from the terminal to the Moneris host can pass through your firewall.4. Confirm that your network is working:<ul style="list-style-type: none">▪ Public Internet: Contact your Internet Service Provider (ISP) for help.▪ Corporate network: Contact your corporate help desk to make sure your terminal can access the Moneris host.
Cannot connect to cloud	<p>Go to error message "Cannot connect to host" above.</p>
No clerks configured	<p>You attempted to generate a report organized by clerk ID, but the terminal did not find any clerks to report on.</p> <p>Tap Back to revise your search.</p> <p>Tap Cancel to cancel the report.</p> <p>Refer to clerk ID set up to see if you have created any clerk IDs (see Display Clerk IDs on page 15).</p>
Please make sure your device is connected to the Internet.	<p>Go to error message "Cannot connect to host" above.</p>
Sorry, we're unable to close your batch. / Batch Close Fail Please try again at another time.	<p>This message appears if you tried to close your batch but the terminal was unable to reach the Moneris host.</p> <p>Try closing the batch later. If the error message re-appears, refer to error message "Cannot connect to host" (see above).</p>

Error message	Problem and solution
Sorry, we're unable to obtain your Clerk list. Please try again at another time.	<p>This message appears if you requested a report organized by clerk ID but the terminal was unable to reach the Moneris host to obtain the clerk information.</p> <p>Try generating the report later. If the error message re-appears, refer to error message "Cannot connect to host" (see above).</p>
Sorry, we're unable to obtain your totals. Please try again at another time.	<p>This message appears if you tried to close your batch or tried to generate a totals report but the terminal was unable to reach the Moneris host.</p> <p>Try closing the batch or generating the report later. If the error message re-appears, refer to error message "Cannot connect to host" (see above).</p>
There were no clerks found based on your criteria.	<p>Select another clerk ID or select all clerks to complete the operation.</p>
We're unable to connect.	<p>Go to error message "Cannot connect to host" above.</p>

Equipment issues

If the terminal does not display an error message but is not functioning correctly, review this list of equipment issues to find suggested solutions.

Issues are shown in alphabetical order.

Issue	Solution
Blank receipts and reports The terminal appears to be printing receipts and reports but the paper is blank.	The paper roll is installed backward. To re-install the paper roll, refer to <u>Install the paper roll</u> on page 7.

Other issues

Issue	Solution
Terminal does not allow you to manually enter card numbers.	The option to manually key in the card number is not available for card present (face-to-face) transactions. If tapping, inserting, and swiping the card all fail, ask the customer for another card or other form of payment. If the customer is not present at your business location (for example, Internet orders, telephone orders), you can perform a card-not-present transaction. To find out more, go to the <i>Desk/5000 Online Operating Manual</i> available at moneris.com/support-desk5000 .



Merchant support

At Moneris, help is always here for you 24/7.

If you need assistance with your payment processing solution, we're here to help, 24/7.

We're only one click away.

- Visit www.moneris.com/support-desk5000 to:
 - download additional copies of this guide and other resources;
 - consult the **Moneris Desk/5000 Online Operating Manual** in WebHelp format to understand all the options on your terminal and how to use them.
- Visit shop.moneris.com to purchase point-of-sale supplies and receipt paper
- Visit insights.moneris.com for business and payment news, trends, customer success stories, and quarterly reports & insights

Need us on-site? We'll be there.

One call and a knowledgeable technician can be on the way. Count on minimal disruptions to your business as our Field Services provide assistance with your payment terminals.

Can't find what you are looking for?

Call Moneris Customer Care (available 24/7) toll-free at [1-866-319-7450](tel:1-866-319-7450). We'll be happy to help.

You can also send us a secure message 24/7 by logging in to Merchant Direct® at moneris.com/mymerchantdirect.



BE PAYMENT READY

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Your gift card processing is governed by your agreement for gift card services with Moneris Solutions Corporation. Your loyalty card processing is governed by your agreement for loyalty card services with Moneris Solutions Corporation. Your DCC processing is governed by your agreement for Dynamic Currency Conversion services with Moneris Solutions Corporation. Your credit and/or debit card processing is governed by the terms and conditions of your agreement(s) for merchant credit/debit card processing services with Moneris Solutions Corporation. It is your responsibility to ensure that proper card processing procedures are followed at all times. Please refer to the ***Moneris Merchant Operating Manual*** (available at: moneris.com/support) and the terms and conditions of your applicable agreement(s) for credit/debit processing or other services with Moneris Solutions Corporation for details.

(Apr 2019)