



BE PAYMENT READY

# Moneris Core® Restaurant

## Setting up Your Integration



(September 2020)

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## Before getting started

Before setting up your Moneris terminal for restaurant POS integration, you must do the following:

- Set up your terminal's hardware and software.
- Ensure you can process transactions in standalone mode in order to verify your terminal is connected to your own network and to the Moneris Host.

Consult the guides below for assistance, if needed.

### V400m wireless terminal

These guides are available at [moneris.com/support-v400m](https://moneris.com/support-v400m) :

***Moneris Core V400m Setting up Your Hardware***

***Moneris Core V400m Set up Your Software***

***Moneris Core V400m Using your terminal***

### V400c countertop terminal

These guides are available at [moneris.com/support-v400c](https://moneris.com/support-v400c) :

***Moneris Core V400c Setting up Your Hardware***

***Moneris Core V400c Set up Your Software***

***Moneris Core V400c Using your terminal***

### Move/5000 wireless terminal

These guides are available at [moneris.com/support-move5000](https://moneris.com/support-move5000):

***Moneris Core Move/5000 Setting up Your Hardware***

***Moneris Core Move/5000 Set up Your Software***

***Moneris Core Move/5000 Using your terminal***

### Desk/5000 countertop terminal

These guides are available at [moneris.com/support-desk5000](https://moneris.com/support-desk5000):

***Moneris Core Desk/5000 Setting up Your Hardware***

***Moneris Core Desk/5000 Set up Your Software***

***Moneris Core Desk/5000 Using your terminal***

# Moneris Core Restaurant

Moneris Core Restaurant is a function that allows you to easily integrate your Moneris terminal with your restaurant POS, creating efficiency for you and convenience for your customers. Multiple Moneris terminals can communicate with the restaurant POS at the same time.

## Features

With Moneris Core Restaurant, you can use your terminal or terminals to:

- retrieve a server's open tables and access receipt information from your restaurant POS with the ability to incorporate this information into various receipt formats, including e-receipts
- select one of the open tables and process payment from each customer at the table, including identifying the customer's tender type (debit, credit, gift card) at the card entry prompt
- remotely process cash payments to close out the cash portion of a bill on the restaurant POS (provided that the terminal is configured to integrate cash)
- allow customers to enter a tip on the terminal, including tipping on the final dollar amount or on the pre-tax subtotal (when configured)

## What to do next

- To review the different methods of integration (direct vs. cloud), refer to [Restaurant POS integration methods](#) on page 4.
- To see which integration methods and options are available for your terminal, refer to [Available integration options by terminal](#) on page 7.
- To enable restaurant POS integration on your Moneris terminal and configure the integration settings, proceed to [Setting up restaurant POS integration on your terminal](#) on page 8.

# Restaurant POS integration methods

There are two methods for integrating your Moneris terminal with your restaurant POS: direct and cloud.

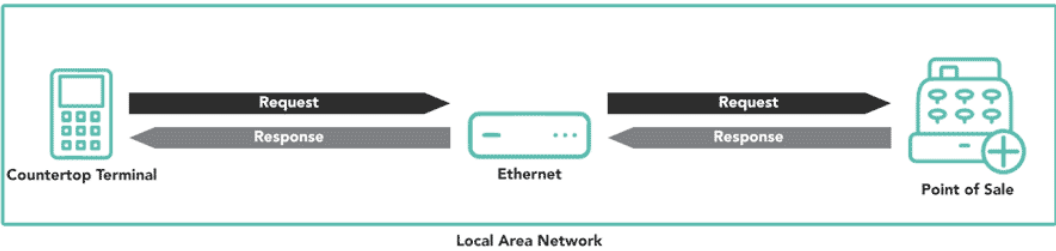
Integration method	Options
Direct	Direct integration through Ethernet on a common network
	Direct integration through Wi-Fi on a common network
Cloud	Moneris Cloud through Ethernet
	Moneris Cloud through Wi-Fi
	Moneris Cloud through cellular network

Review the information below to understand the communication path for each integration option and determine which one is best for your business.

## Direct integration

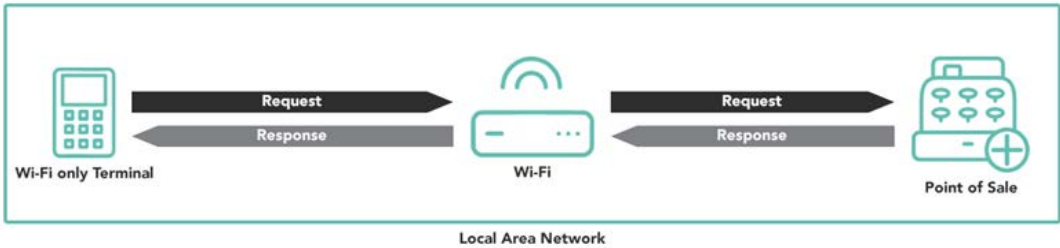
### Direct integration through Ethernet

If you use Direct integration through Ethernet, all communication between your Moneris terminal and your restaurant POS takes place within your Ethernet network.



### Direct integration through Wi-Fi

If you use the Direct integration method, all communication between your Moneris terminal and your restaurant POS takes place within your local Wi-Fi network.



## Cloud integration

To use the Cloud integration method, your restaurant POS must connect to the Moneris Cloud. You or your POS provider must establish a connection from your restaurant POS to the Moneris Cloud using your unique credentials.

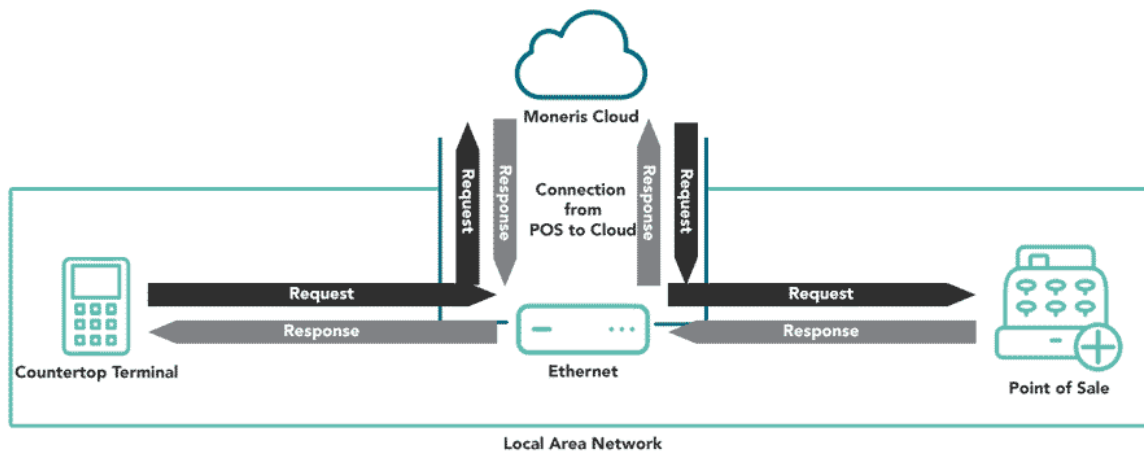
The outbound connection must include:

- your Merchant ID\*
- your API Token\*
- the URL/IP (patpos.moneris.com)
- the port number (443, the standard TLS port)

\* If you do not know your Merchant ID and API token, contact [Moneris Customer Care](#).

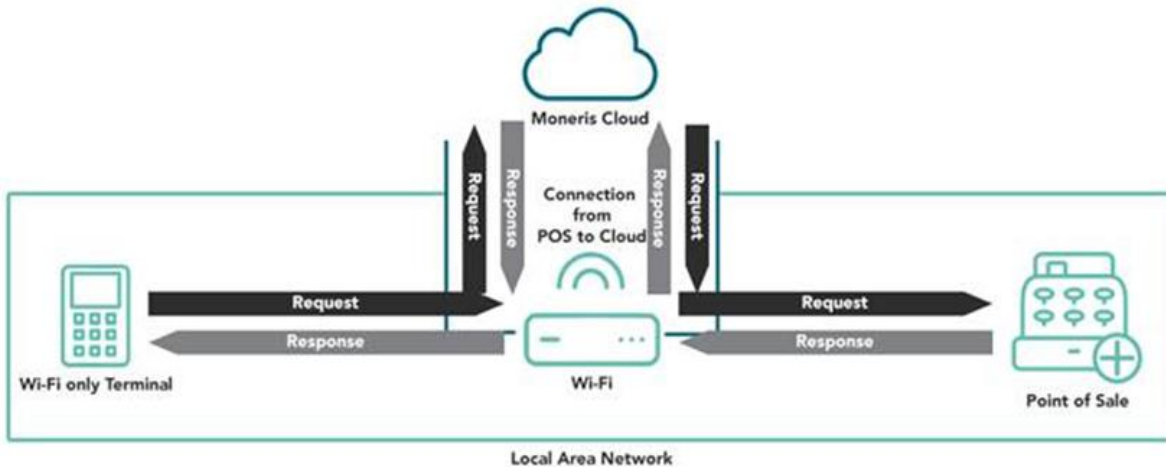
## Moneris Cloud through Ethernet

If you choose Cloud integration through Ethernet, the terminal uses your local Ethernet network to connect to the Moneris Cloud and from the Moneris Cloud to your restaurant POS. You are responsible for establishing the connection from the restaurant POS to the Moneris Cloud.



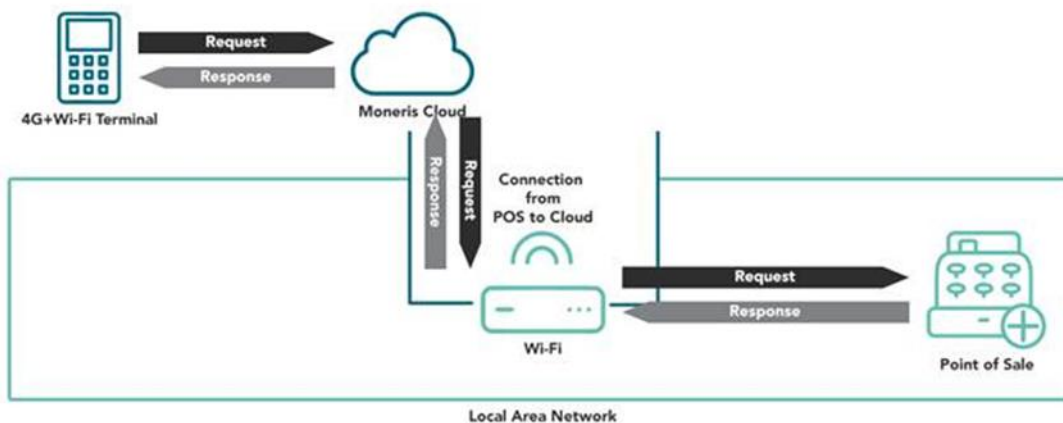
## Moneris Cloud through Wi-Fi

If you choose Cloud integration through Wi-Fi, the terminal uses your local Wi-Fi network to connect to the Moneris Cloud and from the Moneris Cloud to your restaurant POS. You are responsible for establishing the connection from the restaurant POS to the Moneris Cloud.



## Moneris Cloud through cellular

If you choose cloud integration through a cellular network, the terminal uses the cellular network to connect to the Moneris Cloud and then to the restaurant POS. You are responsible for establishing the connection from the restaurant POS to the Moneris Cloud.



## Available integration options by terminal

The available integration methods and the integration options vary according to your terminal as shown here.

Integration method	Options	V400c and Desk/5000 countertop terminals	V400m and Move/5000 wireless dual communication terminals (4G + Wi-Fi)	Move/5000 Wi-Fi only wireless terminal
Direct	Direct through Wi-Fi	✗	✗	✓
	Direct through Ethernet	✓	✗	✗
Cloud	Moneris Cloud through Wi-Fi	✗	✓	✓
	Moneris Cloud through Ethernet	✓	✗	✗
	Moneris Cloud through cellular network	✗	✓	✗

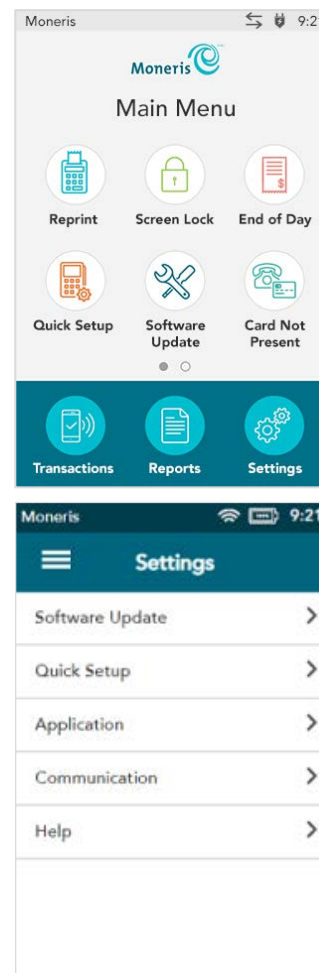


# Setting up restaurant POS integration on your terminal

Follow these steps to enable Moneris Core Restaurant on your Moneris terminal and to configure the integration settings to meet the needs of your business.

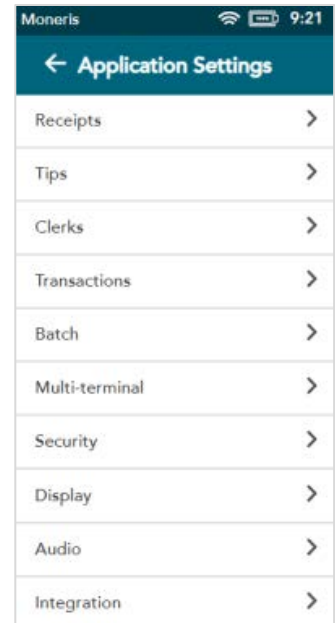
The instructions begin at the main menu. If you do not see the main menu, review the ***Using your Terminal*** guide (refer to [Before getting started](#) on page 2) to understand terminal navigation.

1. Tap **Settings**.

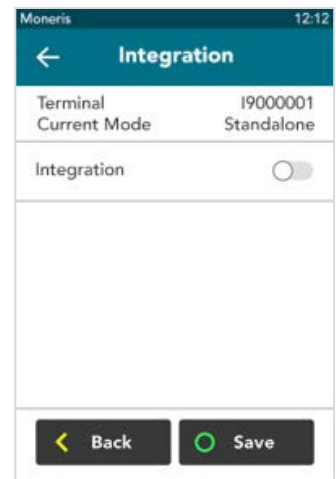


2. Tap **Application**.

3. Tap **Integration**.



4. Tap the **Integration** toggle to enable integration.



The Integration toggle becomes green and the Solutions Type field appears.

5. Tap the **Solution Type** field and select **Core Restaurant**.



6. Tap the **Integration Method** field, then tap **Direct** or **Cloud**.

For more information about these integration methods, refer to [Restaurant POS integration methods](#) on page 4, as well as [Available integration options by terminal](#) on page 7.

- If you are using the V400c, Desk/5000, or Move/5000 Wi-Fi only terminals, you may choose Direct or Cloud.
  - If you selected Direct, go to the next step.
  - If you selected Cloud, jump to step 8.
- If your terminal supports dual communication (4G and Wi-Fi), confirm that the integration method is Cloud, and jump to step 8.

7. You selected Direct. To implement Direct integration, your Moneris terminal and your restaurant POS must be on the same network. To complete the integration, follow these steps.

- a. Tap the **Destination IP** field and enter the IP address of your restaurant POS device.
- b. Tap the **Destination Port** field and enter the port number of your restaurant POS device.
- c. Tap the **Integrate Cash** toggle if you would like to enable cash transactions on your Moneris terminal.
- d. Tap the **Integrate Gift Manual Entry** toggle if you would like to enable manual entry of gift cards on your Moneris terminal.
- e. Tap **Save** to save your integration settings.
- f. Go to step 9.

8. You selected Cloud integration. Regardless of its location, the terminal will connect to your restaurant POS via the cloud. Follow these steps to complete the setup for restaurant POS integration :



- a. Tap the **Integrate Cash** toggle if you would like to enable cash transactions on your Moneris terminal.
- b. Tap the **Integrate Gift Manual Entry** toggle if you would like to enable manual entry of gift cards on your Moneris terminal.
- c. Tap **Save** to save your integration settings.
- d. Go to step 9.

The screenshot shows the 'Integration' screen on a Moneris terminal. At the top, it says 'Moneris' and '12:12'. Below the title bar, it displays 'Terminal Current Mode' as 'I9000001 Standalone'. The 'Integration' toggle is turned on. Under 'Solution Type', 'Core Restaurant' is selected. The 'Integration Method' dropdown is set to 'Select integration method'. At the bottom, there are 'Back' and 'Save' buttons.

This screenshot shows the 'Integration' screen with 'Direct' selected as the integration method. The 'Destination IP' and 'Destination Port' fields are present with placeholder text 'Enter destination IP' and 'Enter destination port'. The 'Integrate Cash' and 'Integrate Gift Manual Entry' toggles are currently turned off. The 'Back' and 'Save' buttons are at the bottom.

This screenshot shows the 'Integration' screen with 'Cloud' selected as the integration method. The 'Integrate Cash' and 'Integrate Gift Manual Entry' toggles are currently turned off. The 'Back' and 'Save' buttons are at the bottom.

After you tap **Save**, the terminal returns to the Application Settings menu. The “Settings Saved” notification also appears.

9. Press the menu key on the keypad to return to the main menu.
  - On the Desk/5000 and Move/5000 terminal, press the menu  key.
  - On the V400c and V400m terminal, press the pound  key.

The terminal returns to the Main menu.

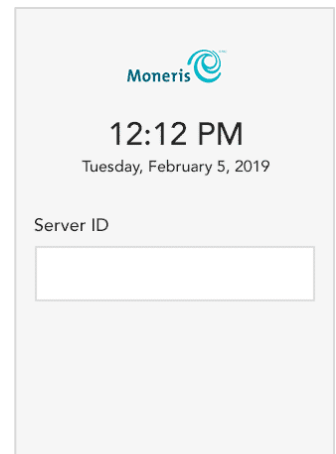
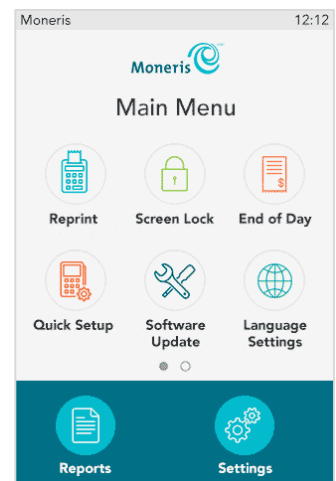
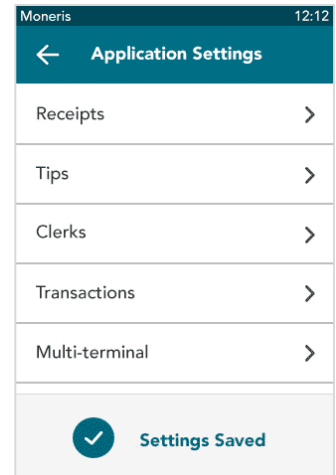
**Important: The Transactions icon no longer appears on the bottom of the Main menu screen. The only transaction available in restaurant integration mode is Purchase.**

10. To begin a restaurant Purchase, press the red X key on the keypad.

The terminal displays the Server ID screen.

11. Enter your server ID (or swipe your server card, if supported) to retrieve your open tables.

If you get an error message, refer to [Troubleshooting restaurant POS integration](#) on page 20.



## Performing a Purchase in restaurant mode

When you enable Core Restaurant on your terminal, the default transaction is Purchase. A Purchase allows the customers at a table to pay their bill. Here is a summary of the different ways in which you can handle the bill for a table:

- Process full amount in one payment
- Split by amount
  - Split by dollar amount (for example, there are 3 customers. The first 2 customers pay a specific dollar amount, and the third customer pays the remaining amount of the bill)
  - Split by number of people (for example, there are 4 customers and they split the bill equally, with each one paying 25% of the bill)
- Split by check/seat (each customer pays for their own order)

Follow the step by step instructions below.

The terminal displays the Server ID screen. If you do not see the Server ID screen, press the red X key.

1. Enter your server ID and tap **OK** (or swipe your server card, if supported) to retrieve your open tables.

The terminal displays your open tables.

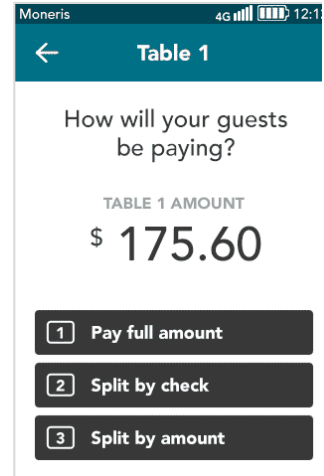
2. On the screen, tap the table you wish to process.
  - You can also search for a table by tapping the search field and entering the table name or number as appropriate.

The image shows two screenshots of the Moneris Core Restaurant app. The top screenshot is the 'Server ID' screen, displaying the Moneris logo, the time '12:12 PM', the date 'Tuesday, February 5, 2019', and a text input field for the 'Server ID'. The bottom screenshot is the 'Tables' screen, which has a dark blue header with a menu icon and the title 'Tables'. Below the header, it says 'Please select a table' and provides a search field labeled 'Search for a table'. A table lists open tables with columns 'TABLE' and 'AMOUNT'.

TABLE	AMOUNT
Alpha Table	\$100,000.00
1	\$100,000.00
Table 1	\$175.60

The terminal displays the dollar amount owed by the selected table, along with the options for payment:

3. Tap one of the following options (or press the corresponding number on the keypad):
  - **1 Pay full amount** (Refer to [Pay full amount](#) below)
  - **2 Split by check** (Refer to [Split by check](#) on page 14)
  - **3 Split by amount** (Refer to [Split by amount](#) on page 15)

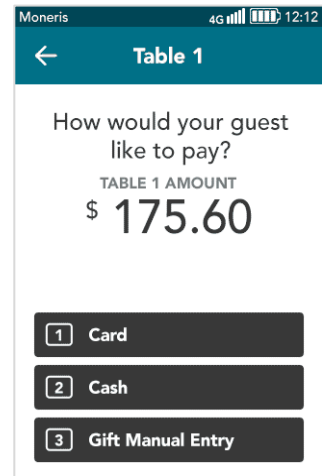


## Pay full amount

You selected **Pay full amount**. The terminal prompts you to ask the customer how they would like to pay.

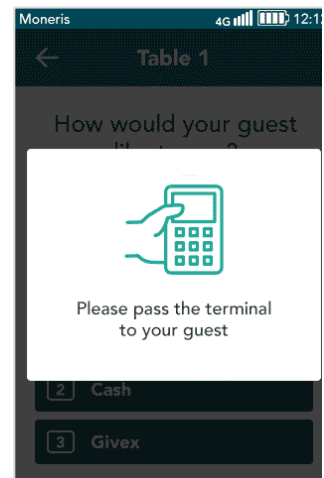
1. Select **Card**, **Cash**, or **Gift Manual Entry**.
  - Choose **Card** when the customer wants to pay by credit card, debit card, or gift card.

**Note:** If your integration settings are not configured for cash and gift card manual entry, the terminal will skip this screen.



2. Pass the terminal to your guest.

**Note:** This prompt appears only if configured to do.

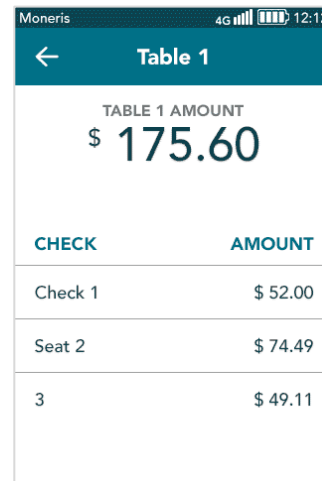


3. Go to [Customer enters tip and card](#) on page 18.

## Split by check

You selected **Split by check**. The terminal displays a list showing each seat/check and the amount owing.

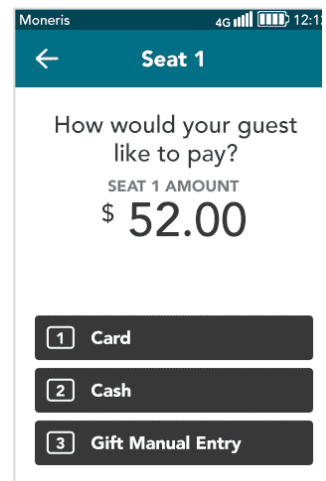
1. On the screen, tap the seat/check you wish to process.



The terminal prompts you to ask the customer how they would like to pay.

2. Select **Card**, **Cash**, or **Gift Manual Entry**.
  - Choose **Card** when the customer wants to pay by credit card, debit card, or gift card.

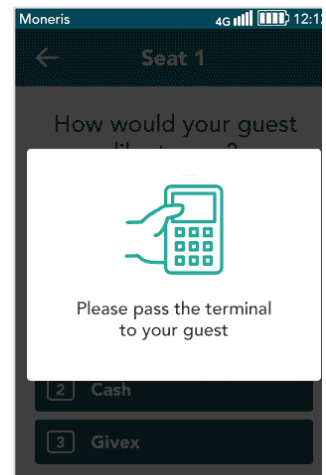
**Note:** If your integration settings are not configured for cash and gift card manual entry, the terminal will skip this screen.



3. Pass the terminal to your guest, as prompted on screen.

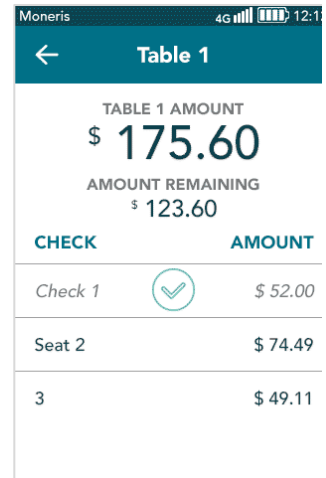
**Note:** This prompt appears only if configured to do.

4. Go to Customer enters tip and card on page 18.



After each customer pays, the terminal re-displays the list of seats/checks, indicating which ones are paid.

5. Select the next seat/check to process until all customers have paid their bill.



Moneris 4G 12:11

← Table 1

TABLE 1 AMOUNT  
\$ 175.60  
AMOUNT REMAINING  
\$ 123.60

CHECK	AMOUNT
Check 1	\$ 52.00
Seat 2	\$ 74.49
3	\$ 49.11

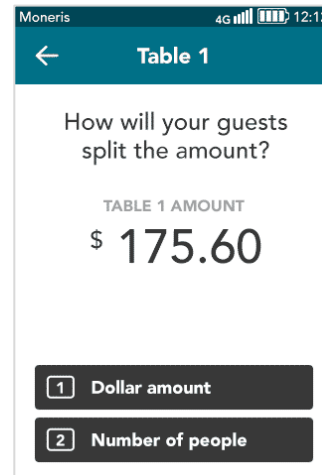
## Split by amount (dollar amount or number of guests)

You selected **Split by amount**. The terminal prompts you to ask your guests how they will be splitting the bill.

1. Select one of the following:

- **1 Dollar amount** (Go to step 2)
- **2 Number of people** (Go to [step 8](#))

To review what these options mean, refer to the [introduction to this section](#).



Moneris 4G 12:11

← Table 1

How will your guests split the amount?

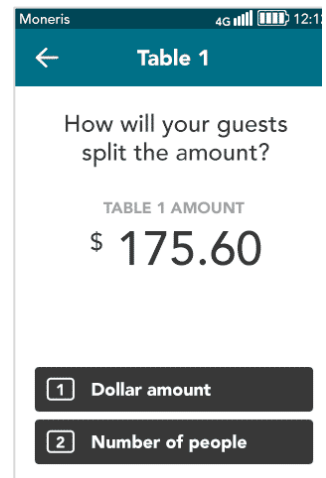
TABLE 1 AMOUNT  
\$ 175.60

1 Dollar amount

2 Number of people

You selected **Dollar amount**. The terminal prompts you to enter the dollar amount to be paid by the first customer.

2. Enter the dollar amount and tap **OK**.



Moneris 4G 12:11

← Table 1

How will your guests split the amount?

TABLE 1 AMOUNT  
\$ 175.60

1 Dollar amount

2 Number of people



The terminal prompts you to ask the customer how they would like to pay.

3. Select **Card**, **Cash**, or **Gift Manual Entry**.

- Choose **Card** when the customer wants to pay by credit card, debit card, or gift card.

**Note:** If your integration settings are not configured for cash and gift card manual entry, the terminal will skip this screen.

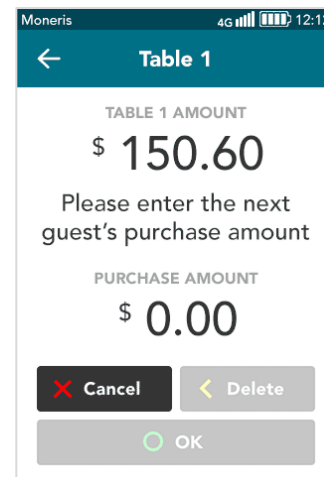
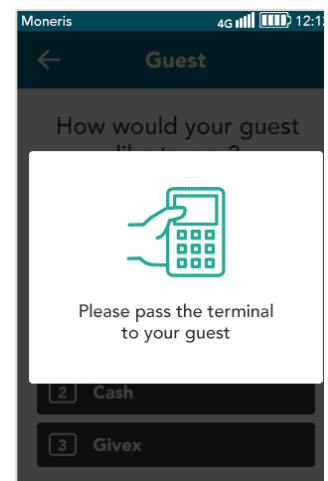
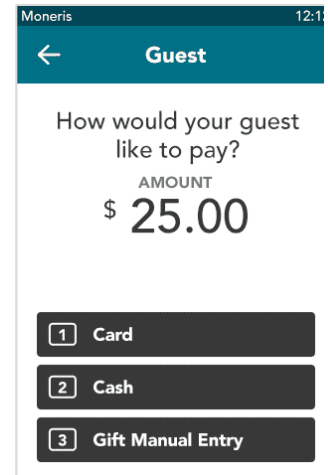
4. Pass the terminal to your guest, as prompted on screen.

**Note:** This prompt appears only if configured to do.

5. Go to Customer enters tip and card on page 18.

6. After the first customer pays, the terminal prompts you to enter the dollar amount for the second customer. Continue with the next customer until all customers have paid their bill.

7. Go to All checks closed on page 19.



You selected **Number of people**. The terminal prompts you to enter the number of guests that will be splitting the bill.

8. Enter the number of guests and tap **OK**.

The terminal prompts you to ask the first customer how they would like to pay.

9. Select **Card**, **Cash**, or **Gift Manual Entry**.

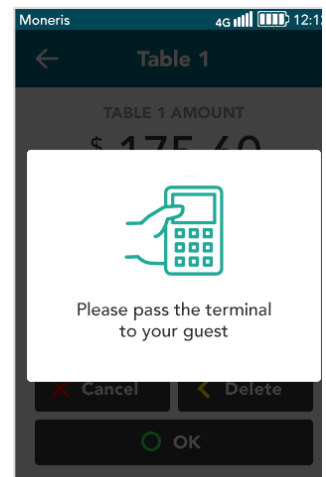
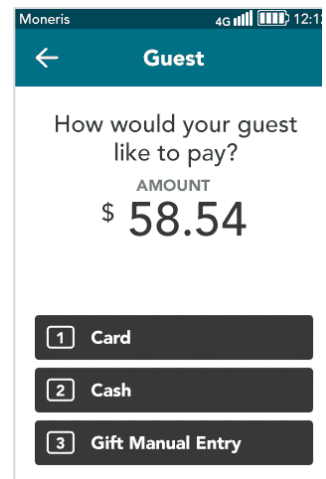
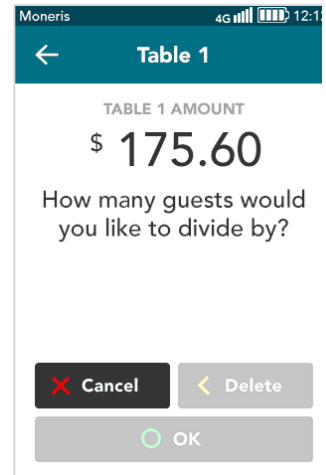
- Choose **Card** when the customer wants to pay by credit card, debit card, or gift card.

**Note:** *If your integration settings are not configured for cash and gift card manual entry, the terminal will skip this screen.*

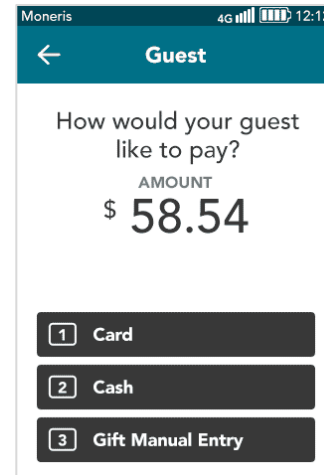
10. Pass the terminal to the guest, as prompted on screen.

**Note:** *This prompt appears only if configured to do.*

11. Go to Customer enters tip and card on page 18.



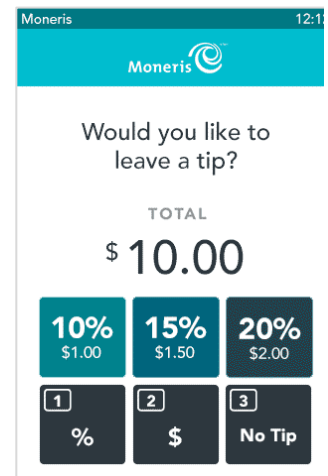
12. After the first customer pays, the terminal prompts you to process payment for the next customer. Continue until all customers have paid their bill.



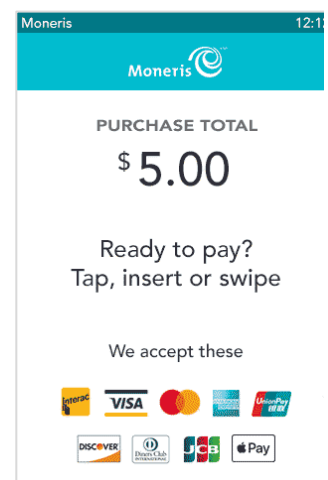
## Customer enters tip and card

The terminal displays the tip entry screen (if tipping is enabled).

1. The customer enters a tip amount or chooses no tip.



2. The terminal displays the final purchase amount and prompts the customer to **tap, insert, or swipe** their card.
3. Do one of the following:
  - If there are more guests for the selected table, continue to process payments.
  - If this is the last guest for the selected table, go to All checks closed on page 19.

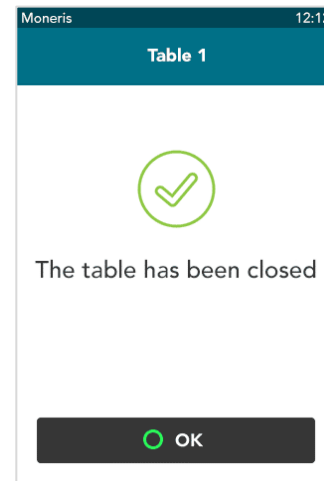


## All checks closed

This is the final step when all seats/checks have been closed for the selected table, regardless of how the bill was split among the seats/checks.

1. When the terminal displays “The table has been closed,” tap **OK**.

The terminal returns to the Server ID screen.



# Troubleshooting restaurant POS integration

Your Moneris terminal obtains table information by sending request messages to your restaurant POS. For example, the terminal sends the “getTables” request to obtain table information for an individual employee or server. If you experience problems related to table information, review the request and response messages in the table below and contact the appropriate team.

## Request and response messages

Request message	Details
<b>getTables</b>	<p>Retrieves the open tables for an employee when they log on to the terminal to process a purchase.</p> <ul style="list-style-type: none"><li>▪ An integrator can choose to have table numbers, table names or a mix of both via the “tableName” element on the getTables response message. “tableName” can be any value provided by the restaurant POS, such as table numbers, invoice/receipt numbers, or table names</li><li>▪ If a table has a name (for example, a customer named Jordan ordered take out) the employee will see a table with the name Jordan in the table list.</li><li>▪ Moneris Core Restaurant will display tables in the order they are provided in the “getTables” response message</li></ul> <p>If the terminal is unable to communicate with the restaurant POS, check your terminal configuration settings. Refer to <a href="#">Setting up restaurant POS integration on your terminal</a> on page 8.</p> <p>If the terminal does not receive a valid response message, review any error messages sent from the restaurant POS, and contact your restaurant POS provider or your integrator as applicable.</p>
<b>getTable</b>	<p>Retrieves information for a specific table selected by the employee. The response message can include various optional elements:</p> <ul style="list-style-type: none"><li>▪ Receipt element: sends receipt information to the terminal; this can be incorporated into e-receipts.</li><li>▪ “preTaxAmount” element: sends the pre-tax subtotal to the terminal. This allows a customer to tip on the pre-tax amount as long as this feature is enabled in the terminal’s integration settings</li></ul> <p>If your terminal fails to display information for a specific table, or fails to retrieve a specific element, contact your restaurant POS provider or your integrator as applicable.</p>

Request message	Details
<b>applyPayment</b>	<p>After a successful payment on the Moneris terminal, the terminal sends an “applyPayment” request to the restaurant POS to apply payment information to the check and ensure both systems are in sync.</p> <ul style="list-style-type: none"> <li>• If the restaurant POS does not respond, contact your restaurant POS provider or your integrator as applicable.</li> <li>• If the restaurant POS responds with an error message, the terminal resends the “applyPayment” request. If the restaurant POS responds with an error message again, the terminal stops retrying and requires an employee to manually sync the restaurant POS with the payment data.</li> </ul>

## Other issues

Issue	Solution
<b>Terminal does not allow you to manually enter gift card numbers.</b>	<p>In order to manually key in gift card numbers when the terminal is in restaurant mode, you must enable the “Integrate Gift Manual Entry” option.</p> <p>Refer to <a href="#">Setting up restaurant POS integration on your terminal</a> on page 8, and review the instructions.</p>
<b>Terminal does not allow you to process cash transactions.</b>	<p>In order to process cash transactions when the terminal is in restaurant mode, you must enable the “Integrate Cash” option.</p> <p>Refer to <a href="#">Setting up restaurant POS integration on your terminal</a> on page 8, and review the instructions.</p>

# Moneris Merchant support

## Restaurant POS integration

For help with integration issues, contact your restaurant POS provider.

## Financial and operational support

Call Moneris Customer Care (available 24/7) toll-free at **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](https://moneris.com/mymerchantdirect).



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**BE PAYMENT READY**

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