



BE PAYMENT READY

MONERIS® VX 820 DUET



Reference Guide



Need help?

Web: moneris.com/support

Toll-free: **1-866-319-7450**

Record your Moneris merchant ID here:

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Setting up Your Terminal



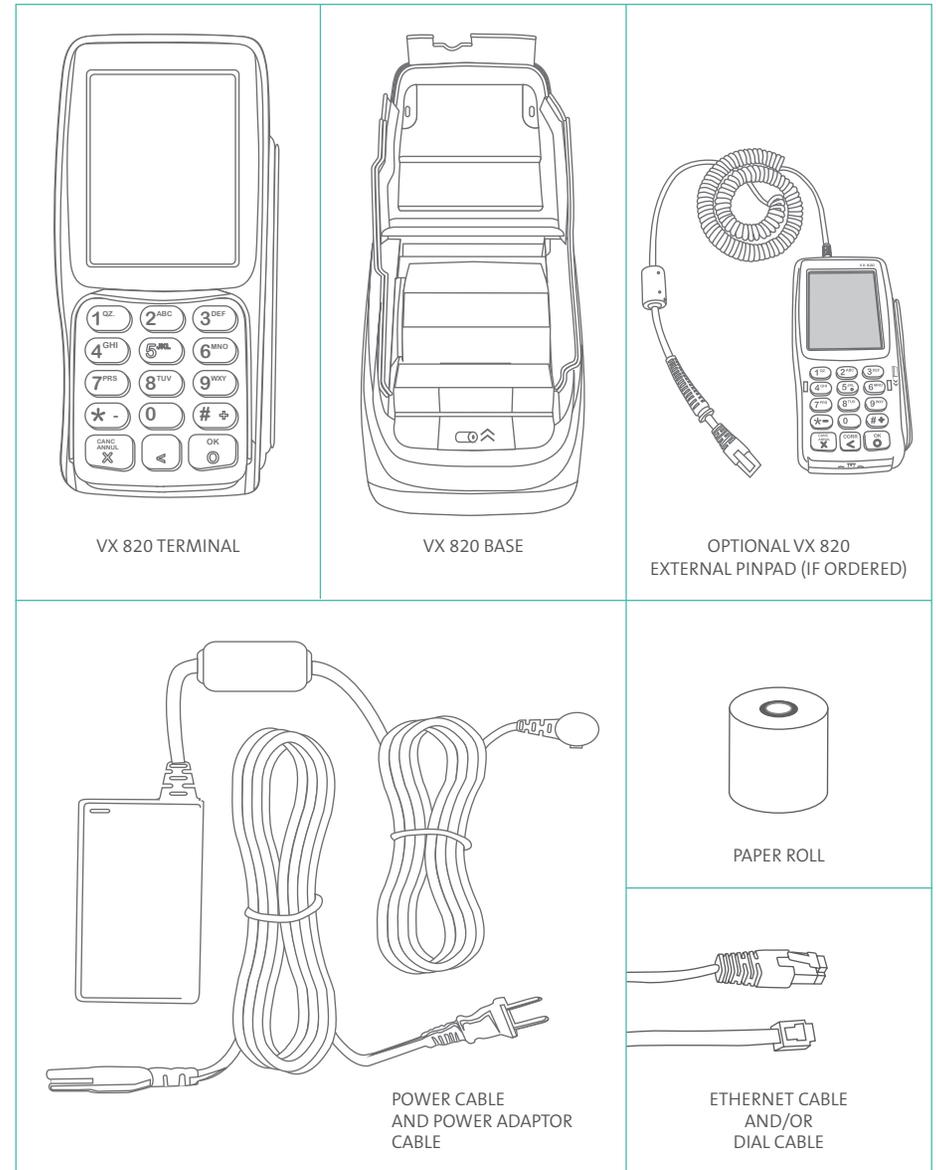
In this section, we go over everything you need to know to set up your VX 820 Duet terminal.

You can also view our setup videos online at moneris.com/support.

Before you get started

1. Depending on the solution you ordered from Moneris, please confirm that you received all the necessary items in your Welcome Kit. See page 7.
2. If your terminal will be communicating with the Moneris host over high-speed Ethernet, please review the **Moneris IP Readiness Checklist** (available at moneris.com/checklist) to ensure that your Ethernet service is ready to support your terminal.
3. Make sure you have the following information:
 - Your **13-digit Moneris Merchant ID** (found in your Welcome Email).
 - Settlement responsibility (found in your Welcome Email): **System Close** (Moneris automatically closes your batch at the end of each day) or **Merchant Close** (you are responsible for closing your batch at the end of each day).
 - Optional features e.g. **gift cards, loyalty cards, Ernex Terminal ID** (found in your Moneris Gift & Loyalty Welcome Letter).

If any of the above required elements are missing, please call Moneris Customer Care toll-free at **1-866-319-7450**.

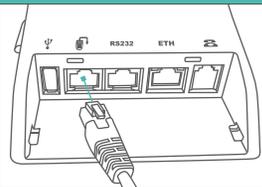


Hardware setup

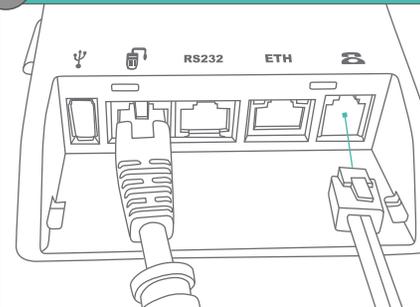
Follow these instructions to set up your terminal hardware.

1 Connect the VX 820 terminal to the Duet base

- Locate the terminal cable (attached to the terminal).
- Plug the RS232 connector into the  port on the Duet base.



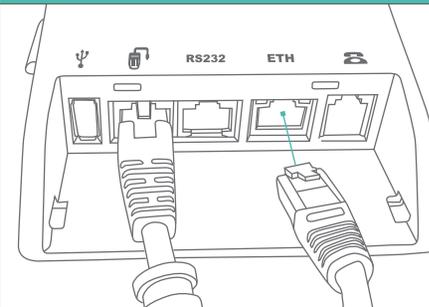
2 Dial setup



- Plug one end of the dial cable into the dial port on the back of the base (below the  icon).
- Plug the other end of the dial cable into an analog phone jack.

Recommendation: Use a dedicated phone line for the terminal. Sharing the line with another device can cause communication problems on the terminal. If using a splitter, test both devices and note that the terminal and the other device cannot use the phone line at the same time.

High-Speed Ethernet setup



- Plug one end of the Ethernet cable into the **ETH** port on the back of the base.
- 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 specific location (please refer to the **Moneris IP Readiness Checklist** if necessary; available at moneris.com/checklist).

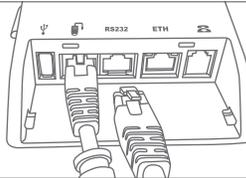
- If you are using an external PINpad, go to step 3. If you are not using the external PINpad, proceed to step 4.

3 Connecting the external PINpad cable to the Duet base (optional)

- a. Locate the PINpad cable (attached to the external PINpad).



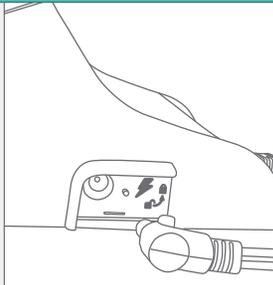
- b. Plug the RS232 connector into the **RS232** port on the base.



4 Connecting the power cable

- a. Locate the power cable and the power adaptor cable, plug the power cable into the power adaptor cable, then plug the other end of the power adaptor cable into the power port (⚡) on the side of the Duet base.

Note: When plugging the power adaptor cable into the power port on the side of the base, turn the power adaptor cable connector **counter-clockwise** to lock it into place.



- b. Plug the other end of the power cable into a power source.

Recommendations: Always plug the power cable into the power source last to avoid power surges. Use a power bar with surge protection where possible.

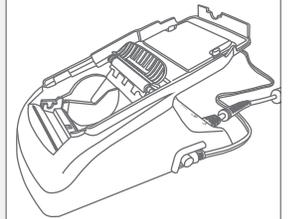
IMPORTANT: You must use the exact power adaptor and cables provided by Moneris to work with the Moneris VX 820 Duet terminal (and the external PINpad, if connected). Failure to do so may affect the operability of, or cause damage to, the equipment.

- c. Wait while the device(s) powers up. When the applications menu appears, proceed to step 5.

5 Load paper

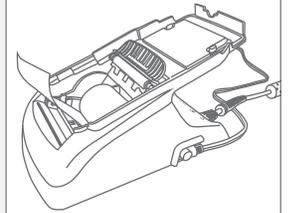
Note: You must use thermal-sensitive paper rolls. Shop for point-of-sale supplies and paper online at shop.moneris.com.

- a. Remove the terminal from the base.
b. On the base, gently pull up on the latch (look for the  icon), then lift the printer cover up and back.



- c. Prepare the new paper roll: Loosen the glued leading edge of paper and unwind the paper roll past any glue residue on the paper, or remove the protective strip.

- d. Place the paper roll into the paper well so that the paper rolls out from the underside of the roll.



- e. Pull the leading edge of the paper up until any glue residue on the paper roll is past the cutting teeth of the printer.
f. Close the printer cover and lock it by gently pressing directly on it until it clicks shut.
g. Tear off the loose end of the paper by pulling it down then sideways across the metal teeth.
h. Place the terminal back on the base.
i. From the applications menu, select **DEBIT & CREDIT** and then press the **3** key to feed paper through the printer and ensure it is working properly.
j. Press the **★ (asterisk)** key to return to the applications menu.
k. Proceed to *Setting up the terminal password* on page 13.

Tips for moving through the menus on the terminal

- To scroll down or up: On the touchscreen, press the  (Arrow) icon, i.e. the first blue icon from the left.
- To change the direction of the arrow, press the yellow  (CORR) key.
- To select a menu item: On the touchscreen, press the  (Blue Function) icon that appears to the right of the menu item.
- To finish entering information and move on to the next step, press the green  OK key.

Using the touchscreen on the terminal

The VX 820 Duet features a 3.5" colour touch-sensitive screen (referred to in this guide as the "touchscreen"). The terminal and/or external PINpad react when you touch various areas on the screen (icons) in the same way it reacts when you press a key on the keypad.

Touchscreen tips

- Use your fingertip or an approved stylus with a soft plastic tip.
- Do not use sharp or pointed objects (e.g., pens, pencils, golf tees, etc.) to press icons on the touchscreen.
- Keep the touchscreen clean and free of fingerprints by using a dry microfibre cloth to wipe down the touchscreen.
- Do not use liquid cleaning agents, such as glass cleaner, on the touchscreen.

Setting up the terminal password

IMPORTANT: You will need to use this password every time you log on and whenever you need to change settings so be sure to create a password you can remember that is difficult for others to guess.

Note: If the manager password is entered incorrectly five times in a row, the terminal will lock and will be unable to perform transactions. To unlock the terminal, contact Moneris Customer Care at **1-866-319-7450** and request a password reset.

1. At the applications menu, select **DEBIT & CREDIT**. The "Change Password" menu appears.
2. At the "New Password:" prompt, key in a password to be used as your manager password and press the green  OK key.
Note: The password must be 5-10 digits long and must consist of numbers only.
The "Confirm:" prompt appears.
3. Re-key the manager password and press the green  OK key.
The applications menu appears.
4. Proceed to *Communications setup* on page 14.

Communications setup

Your terminal must be configured to communicate with the Moneris host.

1. Ensure the communications cables are properly connected based on your communications type before proceeding with these steps. Refer to *Hardware Setup* on page 8 for more information.
2. Do one of the following based on your requirements:
 - If you are using IP, proceed to *Using IP* below.
 - If you are using Dial communication, proceed to *Using Dial* on page 17.

Using IP

1. From the applications menu, select **DEBIT & CREDIT**.
2. When the transactions menu appears, press the green  **OK** key to access the CONFIGURATION menu.
3. Select **Setup**, key in the **manager password** and press the green  **OK** key.
4. Scroll down and select **Host**. “Comm Link Type” appears.
5. Select **Edit**, then select **Next** until “CommServer” appears, and then select **Slct**.
6. Select **Next** until “Settle Comm Type” appears.
7. Select **Edit**, select **Next** until “CommServer” appears, and then select **Slct**.
8. Select **Exit**, then select **OK** to save changes.
9. Press the red  **CANC ANNUL** key, then press the **★ (asterisk)** key to return to the applications menu.
10. While the applications menu is displayed, press the **2** key.
The CommServer screen appears.

11. Press the  (**Settings**) icon, i.e. the first icon from the right, then select **IP**.

The IP Config menu appears.

Proceed with the steps for Dynamic IP or Static IP below, depending on your location’s IP service.

Using Dynamic IP

1. On the IP Config menu, at the “IP Settings” prompt, select **Edit**.
2. Select **DHCP**.
3. Select **Exit**, then select **Yes** to save changes.
CommServer repairs the connection, and when successful, prompts you to press any key.
4. Press the green  **OK** key to return to the Ethernet Cfg menu, then press the **★ (asterisk)** key to return to the applications menu.
5. Proceed to *Entering merchant IDs and terminal IDs* on page 19.

Using Static IP

IMPORTANT: Disconnect the Ethernet cable from the base BEFORE completing these steps.

1. On the IP Config menu, at the “IP Settings” prompt, select **Edit**.
2. Select **Static**.
3. If your Ethernet network requires the parameters listed below, perform steps 4 and 5 for each parameter. Otherwise go to step 6.
Note: Contact your Internet Service Provider (ISP) to determine the addresses for these parameters.
 - IP Address
 - Subnet Mask
 - Gateway IP Address
 - DNS1 IP Address
 - DNS2 IP Address.

4. Select **Next** to view these parameters.
5. Select **Edit** to key in the address for each of these parameters.
To key in a period (.), press the **1** key, then press the  (**Shift**) icon once.
6. Select **Exit**, then select **Yes** to save changes.
CommServer repairs the connection, and when successful, prompts you to press any key.
7. Press the green  **OK** key to return to the Ethernet Cfg menu, then press the ***** (**asterisk**) key to return to the applications menu.
8. Re-connect the Ethernet cable to the base.
9. Proceed to *Entering merchant IDs and terminal IDs* below.

Using dial communications as backup for IP (optional)

IMPORTANT: Disconnect the Ethernet cable from the base BEFORE completing these steps.

When you have finished setting up communications for IP:

1. **Plug in the dial cable:** Follow the *Dial setup* steps on page 9 in the *Hardware setup* section.
2. On the applications menu, select **DEBIT & CREDIT**.
3. When the transactions menu appears, press the green  **OK** key to access the CONFIGURATION menu.
4. Select **Setup**, key in the **manager password** and press the green  **OK** key.
5. Scroll down and select **Host**.
6. Select **Next** until “Backup Support” appears.
7. Select **Edit**, select **Next** until “Auto Backup” appears, and then select **Slct**.
8. Select **Exit**, then select **OK** to save changes.
9. Press the red  **CANC ANNUL** key, then press the ***** (**asterisk**) key to return to the applications menu.

Note: For other Backup Support options, see the **Moneris VX 820 Duet Webhelp**.

Using dial

1. From the applications menu, select **DEBIT & CREDIT**.
2. When the transactions menu appears, press the green  **OK** key to access the CONFIGURATION menu.
3. Select **Setup**, key in the **manager password** and press green  **OK** key.
4. Scroll down and select **Host**.
5. If “Comm Link Type” is set to “Dial”, go to step 7. If not, go to step 6.
6. Select **Edit**, select **Next** until “Dial” appears, then select **Slct**.
7. Select **Exit**, then select **OK** to save changes. The Setup menu appears.
8. If you need to dial a prefix (for example, a 9) to connect to an outside line, complete the steps below. Otherwise proceed to step 9.
 - a. On the Setup menu, scroll down and select **Terminal**.
 - b. Select **Next** until “PABX Code” appears.
 - c. Select **Edit**, key in the prefix (e.g., 9) and press the green  **OK** key.
 - d. Select **Exit**, then select **OK** to save changes.
9. Press the red  **CANC ANNUL** key, then press the ***** (**asterisk**) key to return to the applications menu.

Entering the initialization phone number

1. From the applications menu, select **DEBIT & CREDIT**.
2. When the transactions menu appears, press the green  **OK** key to access the CONFIGURATION menu.
3. Select **Setup**, key in the **manager password** and press the green  **OK** key.
4. Scroll down and select **Comm**.
5. On the Edit CPT menu, select **Next** until “Pri Init Phone” appears.

6. Select **Edit**, key in the initialization phone number as follows, and then press the green  **OK** key.

Note: Do not enter dashes (-) or spaces between the numbers.

If your merchant ID begins with:	Key in:
00301	1-888-699-7299
00302	1-888-358-8602
00304	1-888-332-8433

7. Select **Exit**, then select **OK** to save changes.
8. Press the red  **CANC ANNUL** key, then press the **★ (asterisk)** key to return to the applications menu.
9. Proceed to *Entering merchant IDs and terminal IDs* on page 19.

Entering merchant IDs and terminal IDs

1. From the applications menu, select **DEBIT & CREDIT**.
2. When the transactions menu appears, press the green  **OK** key to access the **CONFIGURATION** menu.
3. Select **Setup**, key in the **manager password** and press the green  **OK** key.
4. Select **Merchant**.
“Term Id” appears.
5. Select **Edit**, key in the **Terminal ID number** (the eight-digit number starting with “56” found on the back of the terminal, e.g., 56123456) and press the green  **OK** key.
6. Select **Next** until “Merch Num.” appears.
7. Select **Edit**, key in your **13-digit Merchant number** (e.g., 0030123456789) and press the green  **OK** key.
8. Select **Exit**, then select **OK** to save changes.
9. Press the red  **CANC ANNUL** key, then press the **★ (asterisk)** key to return to the applications menu.
10. Proceed to *Initialization and logon* on page 20.

Initialization and logon

Before processing any transactions, you must initialize your terminal with the Moneris host and logon.

IMPORTANT: If you have set up an optional external PINpad for use with your terminal, you must configure it on the terminal BEFORE following the initialization and logon instructions below. For PINpad configuration instructions, see the steps for *Configuring the external PINpad* in the *Additional options* section on page 21.

1. From the applications menu, select **DEBIT & CREDIT**.
2. When the transactions menu appears, press the green  **OK** key to access the CONFIGURATION menu.
3. Scroll down and select **Initialize**.
4. When “Retain ID?” appears, select **Yes**.
5. When “Transmitting...” and “Receiving...” appear, please wait while the terminal communicates with Moneris.
6. When the initialization is finished, “Init Successful” appears on the terminal, then the transactions menu appears.
 - If you have set up and configured an external PINpad, “WELCOME/BONJOUR” appears on the PINpad.
7. On the terminal, at the transactions menu, press the green  **OK** key to access the CONFIGURATION menu.
8. Scroll down and select **Host Logon**.
9. At the “Password:” prompt, key in the **manager password** and press the green  **OK** key.
10. “Logon Success” appears, then the transactions menu appears.

Your terminal is ready to process transactions.

Additional options

There are several options that you can choose to enable on your terminal to enhance its functionality.

Note: All instructions in this section begin at the applications menu.

Configuring the external PINpad (if connected)

IMPORTANT: You must configure the external PINpad on your terminal BEFORE following the instructions in *Initialization and logon* on page 20.

Note: Before you configure the PINpad, make sure you have followed the Connecting the external PINpad cable to the Duet base (optional) instructions on page 21 in the Hardware setup section.

1. From the applications menu, select **DEBIT & CREDIT**.
2. When the transactions menu appears, press the green  **OK** key to access the CONFIGURATION menu.
3. Select **Setup**, key in the **manager password** and press the green  **OK** key.
4. Select **Terminal**.

“Tip % nn.nn” appears on the Edit Terminal menu.
5. Select **Next** until “PINPad Type” appears.
6. Select **Edit**, then select **Next** until “External XPI” appears.
7. Select **Slct**.
8. Select **Exit**, then select **OK** to save changes.
9. Press the red  **CANC ANNUL** key, then press the **★ (asterisk)** key to return to the applications menu.
10. Power down and restart the terminal (disconnect the power supply and reconnect).
11. Proceed to *Initialization and logon* on page 20.

Changing the terminal language

Note: The terminal language can only be changed AFTER the terminal has been successfully initialized (see Initialization and logon on page 20).

1. From the applications menu, select **DEBIT & CREDIT**.
2. When the transactions menu appears, press the  (**LANG**) icon, i.e. the second blue function icon from the left.
The Set Language screen appears.
3. Select **ENG** (English) or **FRN** (French).
4. Press the **★ (asterisk)** key to return to the applications menu.

Enabling cashback, tip, or invoice number

1. From the applications menu, select **DEBIT & CREDIT**.
2. When the transactions menu appears, press the green  **OK** key to access the CONFIGURATION menu.
3. Select **Setup**, key in the **manager password** and press the green  **OK** key.
The SETUP menu appears.

For cashback option

To change the default values for cashback and to optimize dial communications for use with cashbacks, please refer to the *VX 820 Duet Webhelp* available at moneris.com/support.

1. From the SETUP menu, select **Terminal**.
2. Select **Next** until “CashBack Option” appears.
3. Select **Edit**, then select **On**.
4. Select **Exit**, then select **OK** to save changes.

The terminal returns to the SETUP menu.

For basic tip processing

To change the default values for the enhanced tip options and to optimize dial communications for use with tip processing, please refer to the *VX 820 Duet Webhelp* available at moneris.com/support.

1. From the SETUP menu, select **Terminal**.
2. Select **Next** until “Tip Processing” appears.
3. Select **Edit**, select **Next** until “On - Prompt” appears, then select **Slct**.
4. Select **Exit** then select **OK** to save changes.

The terminal returns to the SETUP menu.

For invoice number

1. From the SETUP menu, select **Merchant**.
2. Select **Next** until “Ask Inv Num?” appears.
3. Select **Edit**, then select **On**.
4. Select **Exit**, then select **OK** to save changes.
5. Press the red  **CANC ANNUL** key, then press the **★ (asterisk)** key to return to the applications menu.

Enabling Gift & Loyalty programs

Didn't order gift cards or a loyalty program but would like to find out more? Please call us at **1-855-219-3084**.

Gift & Loyalty initialization

Note: If you are using IP communications, follow these instructions to initialize the Gift & Loyalty program on your terminal.

If you are using dial communications, go to the Dial communications setup section on page 25 first. Once the dial communications setup has been completed, return to this section and follow these initialization instructions.

1. From the applications menu, select **GIFT & LOYALTY**.
2. When the Gift & Loyalty transactions menu appears, scroll down and select **Setup**.
3. Key in the **manager password** and press the green  **OK** key.
4. Select **Merchant**.
"Merchant ID" appears.
5. Select **Edit**, key in your **Moneris Merchant ID** and press the green  **OK** key.
6. Select **Next**.
"Moneris Term ID" appears.
7. Select **Edit**, key in the **Moneris Terminal ID** and press the green  **OK** key.
8. Select **Next**.
"Ernex Term ID" appears.
9. Select **Edit**, key in the **Ernex Terminal ID** (provided to you when Moneris confirmed your terminal order) and press the green  **OK** key.
10. Select **Exit**, then select **OK** to save changes.
11. When the terminal returns to the Setup menu, select **Comm**.
12. Select **Next** until "Device Type" appears.
13. Make sure the "Device Type" is set to **7C**. If it is, select **Exit** and go to step 16. If it is not, go to step 14.

14. Select **Edit**, key in **7C** and press the green  **OK** key.
Note: To key in the letter **C**, press the **2** key, then press the  (**ALPHA**) icon three times.
15. Select **Exit**, then select **OK** to save changes.
16. When the terminal returns to the Setup menu, scroll down and select **Initialization**.
"Ernex Term ID:" appears.
17. Press the green  **OK** key. The terminal will complete the initialization and return to the Setup menu.
18. Press the red  **CANC ANNUL** key, then press the ***** (**asterisk**) key to return to the applications menu.
Your terminal is ready to process gift card and loyalty card transactions.

For instructions on performing:

- gift card transactions, please refer to the *Gift Card Program Using Your Terminal for Moneris VX 820* guide.
- loyalty card transactions, refer to the *Using Your Terminal for Loyalty for Moneris VX 820 Duet* guide.

Dial communications setup

1. From the applications menu, select **GIFT & LOYALTY**.
2. When the Gift & Loyalty transactions menu appears, press the **6** key to access the Quick Setup menu.
3. Key in the **manager password** and press the green  **OK** key.
4. On the Quick Setup menu, select **Communications** and then select **View**.
"Comm Link Type" appears.
5. Select **Edit**, select **Next** until "Dial" appears, then select **Slct**.
6. Select **Exit**, then select **OK** to save changes.
7. Press the red  **CANC ANNUL** key twice to return to the Gift & Loyalty transactions menu.
8. Scroll down and select **Setup**.

9. Key in the **manager password** and press the green  **OK** key.
10. Select **Comm**.
“Pri Auth Phone” appears.
11. Select **Edit**, key in the authorization phone number as follows, and press the green  **OK** key.

Note: Do not enter dashes (-) or spaces between the numbers.

If your merchant ID begins with:	Key in:
00301	1-888-699-7299
00302	1-888-358-8602
00304	1-888-332-8433

12. Select **Next**.
“Sec Auth Phone” appears.
13. Select **Edit**, key in the same authorization phone number as above and press the green  **OK** key.
14. Select **Exit**, then select **OK** to save changes.
15. If you need to dial a prefix (for example, a 9) to connect to an outside line, complete the steps below. Otherwise proceed to step 16.
 - a. On the Setup menu, scroll down and select **Terminal**.
 - b. Select **Next** until “PABX Code” appears.
 - c. Select **Edit**, key in the prefix (e.g., 9) and press the green  **OK** key.
 - d. Select **Exit**, then select **OK** to save changes.
16. Press the red  **CANC ANNUL** key, then press the ***** (asterisk) key to return to the applications menu.
17. Proceed to *Gift & Loyalty initialization* on page 24.

Using Your Terminal



In this section, we go over everything you need to know to use your VX 820 Duet terminal, including how to perform transactions and end-of-day processes.

Moneris VX 820

Use this all-in-one POS solution to process transactions at the point of sale (POS). The lightweight VX 820 terminal/PINpad incorporates a touchscreen display, keypad and embedded contactless reader, and connects to the Duet base, which contains the printer and communications hardware. The VX 820 Duet can be operated with an optional external PINpad.

When prompted, you (and sometimes your customer) will key in information on the terminal. If your customer is required to key in information, pass the handheld to the customer. When the customer has finished keying in the information, retrieve the terminal and complete the transaction.



Terminal keys and hardware

1 Vertical blue function icons

-  icons: Multi-function icons that correspond to the options displayed on the right-hand side of touchscreen.

2 Horizontal blue function icons

-  (**Arrow**) icon. Scrolls up or down. Press the yellow  **CORR** key to toggle between scrolling up and down.
-  (**LANG**) icon. Accesses the Set Language menu.
-  (**Reprint**) icon. Displays the REPRINT menu.
-  (**Reports**) icon. Displays the REPORTS menu. (**ALPHA**) icon

3 ALPHA (ALPHA) icon

- To key in alphabetic characters, press the numeric key on the keypad labelled with the desired character, then press the **ALPHA** icon on the touchscreen until that character is displayed.

4 Asterisk (★) key

- Returns to the applications menu (displays the applications available, including DEBIT & CREDIT).

5 CANCEL (red key)

- Cancels the current operation.

6 CORR (yellow key)

- Clears displayed data one character at a time.
- Changes the direction of the Arrow icon.

7 OK (green key)

- Accepts displayed data.
- Submits keyed in data.
- Displays the CONFIGURATION menu when pressed at the transactions menu.

8 Embedded contactless reader

9 Magnetic stripe reader

10 Chip reader

11 Printer

12 Touchscreen (see page 12 for tips)

Optional VX 820 external PINpad

If an optional VX 820 external PINpad is connected to the VX 820 Duet terminal and your merchant account is configured for it, your customer must enter their information on the external PINpad during transactions. Keep the terminal in front of you to complete the transaction.

General guidelines for the VX 820 PINpad

- The PINpad displays “WELCOME/BONJOUR” while in its idle state.
- Begin the transaction on the VX 820 Duet terminal.
- When “Swipe Card:” appears on the terminal, pass the external PINpad to the customer for card entry (see *Card entry options* on pages 34-36).
- When “Wait for PINPAD” appears on the terminal, the customer follows the prompts on the PINpad.
- When “Approved” appears on the terminal, retrieve the PINpad, press the green  OK key on the terminal and complete the transaction on the terminal.

Using the touchscreen

The terminal and/or external PINpad react when you touch various areas on the screen (icons) in much the same way it reacts when you press a key on the keypad.

Touchscreen tips

- Use your fingertip or an approved stylus with a soft plastic tip.
- Do not use sharp or pointed objects (e.g., pens, pencils, golf tees, etc.) to press icons on the touchscreen.
- Keep the touchscreen clean and free of fingerprints by using a dry microfibre cloth to wipe down the screen.
- Do not use liquid cleaning agents, such as glass cleaner, on the screen.



PINpad readers

- 1 Touchscreen with embedded contactless reader
- 2 Magnetic stripe reader
- 3 Chip reader

Card types

The Moneris VX 820 supports the following card types and formats. These card types are not mutually exclusive. A single card can include a magnetic stripe, a chip, and contactless functionality.

Magnetic stripe card

- A card with a magnetic stripe
- The card is swiped on the magnetic stripe reader

Chip card

- A card with a chip
- The card is inserted into the chip reader

Contactless card

- In this guide, the term “contactless card” includes a card with contactless functionality
- Supported card brands include: Visa®, Mastercard®, American Express®, Discover®, and Interac®
- The card is tapped on the embedded contactless reader

Cardholder verification

Cardholder verification methods (CVM)

Many transactions require cardholder verification. This means your customer must provide proof that they are the valid cardholder by performing one of the cardholder verification methods below. The terminal will prompt your customer (or you) for the appropriate CVM.

When verification is required, follow these general guidelines:

- for a transaction where a card is swiped, the cardholder signs the merchant copy of the receipt;
- for a transaction where a card is inserted, the cardholder enters their PIN on the terminal (or on the external PINpad if applicable). In some cases, the cardholder may need to sign the merchant copy of the receipt.
- for a transaction where a card is tapped, the cardholder signs the merchant copy of the receipt.

Cardholder verification limit

- This is the maximum dollar amount for performing a **tapped credit** transaction without cardholder verification.
- To determine the cardholder verification limit for a card, print an EMV Parameters report (see instructions on page 53). Look under each card type for the “Contactless CVM Limit:” value.
- If the final transaction amount is greater than the limit specified (in the case of Visa, equal to or greater than) then the cardholder must perform one of the cardholder verification methods outlined above.
- In most cases, this limit does not apply to:
 - Credit transactions where the card is swiped or inserted
 - Interac Debit transactions where the card is swiped or inserted

These transactions require cardholder verification regardless of the transaction amount.

Card entry options

Insert: Chip cards

1. Wait for the “Swipe Card:”, “Swipe/Insert:” or “Swipe/Tap/Insert:” prompt to appear on the terminal or external PINpad.
2. Either you or the customer **inserts the card into the device’s chip reader.**

Note: If an optional external PINpad is connected to the VX 820 Duet, the card must be inserted in the external PINpad’s chip reader.



3. The customer may be prompted to **key in a PIN.**
Note: If the customer is prompted to key in a password, have the customer pass the device back to you. Press the red  **CANC ANNUL** key to cancel the transaction, then start a new transaction.
4. The chip card must **remain inserted** until the “Please Remove Card” prompt appears.
Note: Unless the device prompts otherwise, do not swipe a chip card even if the card has a magnetic stripe.

Wave/Tap: Contactless cards

Note: The transaction amount must be equal to or less than the maximum Contactless Dollar Value (see below).

1. Wait for the “Swipe Card:”, “Swipe/Insert:” or “Swipe/Tap/Insert:” prompt to appear on the terminal or on the external PINpad.
2. The customer taps their card on the device’s touchscreen.

Note: When a contactless card is tapped, the virtual contactless “lights” displayed at the top of the screen flash green to confirm that the embedded contactless reader successfully read the card.



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 maximum Contactless Transaction Limit set for the card (see below).
 - The card must be within 0.5 in. (1.3 cm) of the screen, but it does not have to touch it.
 - The card must be tapped or waved by itself (the customer cannot leave the card in their wallet and wave it in front of the screen).

Maximum Contactless Dollar Value (CDV)

To determine the maximum CDV for a card, print an EMV Parameters report (see page 53) and locate the **Contactless Trans Limit** parameter under the report’s record for the card. A CDV of 999999 means there is no maximum limit.

Swipe: Magnetic stripe cards

1. Wait for the “Swipe Card:”, “Swipe/Insert:” or “Swipe/Tap/Insert:” prompt to appear on the terminal or external PINpad.
2. **Swipe the card** on the device’s magnetic stripe reader.
Note: If the card has a chip and the terminal is enabled to read chip cards, the card must be inserted into the chip reader unless the device prompts otherwise.



Manual card entry

If all available card entry methods fail, you may manually enter the card number for credit cards and some chip debit cards.

1. The “Swipe Card:”, “Swipe/Insert:” or “Swipe/Tap/Insert:” prompt appears on the terminal or external PINpad if connected.
2. **Key in the card number** on the terminal and press the green  **OK** key.
3. **Key in the card’s expiry date** on the terminal and press the green  **OK** key.
 - If the “Password:” prompt appears, key in the **manager password** and press the green  **OK** key.
 - If the “Imprint Card Press OK Key” prompt appears, take an imprint of the card and press the green  **OK** key.
4. **Key in the card’s validation code** and press the green  **OK** key to continue the transaction.

Transactions

All instructions in this guide begin at the transactions menu. To access the transactions menu from the applications menu, select **DEBIT & CREDIT**. To access the transactions menu from any screen in the DEBIT & CREDIT application, press the red  **CANC ANNU** key repeatedly until the transactions menu appears.

General guidelines

1. Determine the transaction to be processed (e.g., Purchase or Refund).
2. Establish the means of payment (credit or debit).
3. Enter the card data on the POS device (see pages 34-36).
4. Follow the prompts* (see pages 42-45).
5. Process receipts (see pages 46-49).

*Prompts may vary depending on variables such as terminal setup, merchant setup and card type.

Purchase

Credit or debit purchase of goods or services.

1. Select **Purchase**.
2. **Key in the purchase amount**, press the green  **OK** key, then follow the prompts. Refer to the *Merchant and customer prompts* tables (see pages 42-45).
3. Process receipts (see pages 46-49).

Partially Approved Purchase

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

The amount on the pre-paid card is approved, i.e., part of the total purchase amount is approved. Prompts are displayed indicating how much of the purchase amount is still owed (e.g., “Amount Due \$5.00”). That amount can then be paid by another pre-paid credit card or a different tender type (e.g., a credit card, a debit card or cash).

Advice

Completes a voice-authorized (IVR) purchase.

1. Select **Advice**.
2. Key in the **advice amount**, press the green  **OK** key, and then follow the prompts. Refer to the *Merchant and customer prompts* tables (see pages 42-45).
3. Process receipts (see pages 46-49).

Pre-authorization

Authorizes a temporary amount when the final purchase amount is unknown (e.g., hotel or car rental).

1. Select **Pre Auth**, then on the Pre Auth menu, select **Pre Auth**.
2. Key in the **pre-authorization amount** and press the green  **OK** key, then follow the prompts. Refer to the *Merchant and customer prompts* tables (see pages 42-45).
3. Process receipts (see pages 46-49).
4. When the terminal returns to the Pre Auth menu, press the red  **CANC ANNUL** key to return to the transactions menu.

Note: When the final purchase amount is known, you must perform a Pre-auth Completion (see page 39) for the final amount using the same card number.

Pre-auth Completion

Used to finish a Pre-authorization once the final amount is known.

IMPORTANT: The Completion must be performed on the same terminal using the same card number as the Pre-authorization.

Note: The credit card does not need to be present for a Completion transaction.

1. Select **Pre Auth**, then select **Completion**. If prompted, key in the **manager password** and press the green  **OK** key.
2. Key in the **six-digit sequence number** (Seq #) from the Pre-authorization receipt (see page 48), press the green  **OK** key, and then follow the prompts on the terminal. Refer to the *Merchant and customer prompts* tables (see pages 42-45).
3. Approve the pre-authorization amount, or key in a new amount and press the green  **OK** key, then follow the prompts.
Note: To release the pre-authorized funds, key in an amount of \$0.00.
4. Process receipts (see pages 46-49).

Refund

Credits a customer's account for a previous Purchase.

1. Select **Refund**. If prompted, key in the **manager password** and press the green  **OK** key.
2. Key in the **refund amount**, press the green  **OK** key and then follow the prompts. Refer to the *Merchant and customer prompts* tables (see pages 42-45).
3. Process receipts (see pages 46-49).

Correction

Cancels (voids) a previous Purchase or Refund.

Note: Credit card Corrections MUST be processed in the same batch as the original transaction.

1. Scroll down and select **Correction**. If prompted, key in the **manager password** and press the green  **OK** key.

The “Correct Last” prompt appears.

2. Select the transaction to correct:

- To select the last transaction performed, select **Yes**, then go to step 3.
OR
- To select a different transaction:
 - a. Select **No**. The “Retrieve By” prompt appears.
 - b. Search for the transaction:
 - Select **Seq#**, then key in the **sequence number** and press the green  **OK** key, then go to step 3.
OR
 - Select **Acct**, then key in the **last four digits of the card number** and press the green  **OK** key, then go to step 3.

3. To confirm the displayed transaction is the one you wish to correct, select **Yes**.

OR

To view the next matching transaction, select **Next** until the desired transaction is located, then select **Yes**.

The terminal prints the receipt and returns to the transactions menu.

Delete Pre-auth

Deletes a Pre-authorization before it is completed.

1. Select **Pre Auth**, then select **Del PreAuth**. If prompted, key in the **manager password** and press the green  **OK** key.

2. At the “Retrieve By” prompt, search for the Pre-authorization transaction:

- To search by **sequence number**:
 - Select **Seq#**, key in the **sequence number** and press the green  **OK** key.

OR

- To search by the **card number**:
 - Select **Acct**, key in the **last four digits of the card number** and press the green  **OK** key.

3. To confirm that the displayed Pre-authorization is the one you wish to delete, select **Yes**.

OR

To view the next Pre-authorization, select **Next** until the desired Pre-authorization is located, then select **Yes**.

The terminal displays “PREAUTH DELETED” and returns to the Pre Auth menu.

4. Press the red  **CANC ANNUL** key to return to the transactions menu.

Balance Inquiry

Prints a cardholder receipt indicating the dollar value available on a pre-paid credit card.

1. Scroll down and select **Balance Inq**. If prompted, key in the **manager password** and press the green  **OK** key.

2. At the “Swipe Card:” prompt, **swipe the pre-paid credit card** on the terminal.

3. Wait while the terminal communicates with the Moneris host.

4. If the pre-paid card allows it, the terminal displays “Balance: \$###.##”. Press the green  **OK** key to continue.

The terminal displays “Prt Cust Cpy”.

5. To print the customer copy of the Balance Inquiry receipt, select **Yes**.

OR

To return to the transactions menu without printing a receipt, select **No**.

The terminal returns to the transactions menu.

Note: The terminal only prints one copy of the Balance Inquiry receipt: the customer copy.

Merchant and customer prompts

These tables list prompts that you and your customers might see during a POS transaction, along with the actions to take for each prompt.

Merchant prompts

This table lists common transaction prompts that appear on the terminal in alphabetical order.

Merchant prompt	Merchant action(s)
<Application name> Amount Due \$##.##	To select a debit or credit card as payment for the amount due: Select DbCr . To select cash and finish the transaction: Select Cash .
<Application name> Partial Appr \$##.##	To confirm the Partial Approval transaction: Select Yes . To cancel the transaction and return to the transactions menu: Select No .
Account #:	Key in the card number and press the green  OK key.
Approved OK to Continue	Retrieve the PINpad and press the green  OK key on the terminal to complete the transaction. If Cash Back is enabled, check for the cashback amount on this screen.
Auth #:	Key in the Voice Authorization Number that you wrote on the paper sales draft when you called Moneris Customer Care for IVR voice authorization.
Clerk Id:	Key in the clerk number and press the green  OK key.
Code present?	If the validation code is not there, select No . If the validation code is not readable, select Xread .
Customer Press OK To Continue	Pass the terminal to your customer.
Exp Date (MMYY):	Key in the card's expiry date and press the green  OK key.
Imprint Card Press OK Key	Take an imprint of the credit card and press the green  OK key.
Invoice #:	Key in the invoice number and press the green  OK key, or simply press the green  OK key to leave blank.

This table continues on the next page.

Merchant prompt	Merchant action(s)
Last 4 digits:	Key in the last four digits of the card number and press the green  OK key
Orig Auth #	Key in the six-digit Appr Code printed on the original receipt (see page 48). Note: The approval code may contain both alphabetic and numeric characters. To key in alphabetic characters, press the numeric key on the keypad labeled with the desired character, then press the  (ALPHA) icon on the touchscreen until that character is displayed. If you do not have the Appr Code, press the green  OK key to bypass the prompt.
Promo Code:	Key in the six-digit private label promotion code and press the green  OK key.
Reference #:	Key in the customer reference number (0 to 16 digits) and press the green  OK key.
Return To Clerk	When the customer sees this prompt, retrieve the terminal or external PINpad, then press the green  OK key to continue the transaction. If Cash Back is enabled, check for the cashback amount on this screen.
Swipe Card:	Swipe the card on the terminal, or pass the external PINpad to your customer for them to swipe the card.
Tear Receipt and Press OK Key	Tear off the receipt and press the green  OK key.
Validation Code:	If the code is on the signature strip on the back of the card: Key in the three- or four-digit number and press the green  OK key. If the code is not there or is not readable: Press the green  OK key to leave this blank.
Wait for PINPAD	Wait while your customer follows the prompts on the external PINpad.

Customer prompts

This table lists common customer transaction prompts that appear on the terminal (or the external PINpad if connected) in alphabetical order.

Customer prompt	Customer action(s)
<Application name> Amount Due \$ ###.## Return to Clerk	Returns the terminal to you. Note: <i>This message appears during a Partial Approval transaction, where the pre-paid credit card does not have enough value to cover the Purchase total. Inform the cardholder that there is an additional amount due.</i>
<Application name> OK?	Selects Yes to confirm that the displayed application should be used to process the transaction.
<Application name> SELECT NEXT OK	To select the displayed application: Selects OK . To view the next application on the card: Selects SELECT NEXT .
Add Tip?	To add a tip amount to the transaction: Selects Yes , keys in the tip amount and presses the green  OK key. To continue without adding a tip: Selects No Tip or None (on the external PINpad).
Amount OK? \$ ###.##	Confirms that the purchase amount is correct and selects Yes to accept it.
Cash:	To select a displayed amount: Presses the  (blue function) icon beside the desired amount. On terminal only: To key in a different amount: Selects Other , keys in a different amount and presses the green  OK key.
Cashback? or Purchase Cashback?	To receive Cashback: Selects Yes . OR To continue without Cashback: Selects No .
Customer Press OK to Continue	Presses the green  OK key.
Do Not Remove Card	Leaves the chip card inserted in the reader until instructed to remove it.

This table continues on the next page.

Customer prompt	Customer action(s)
Enter PIN & OK:	Keys in their PIN (Personal Identification Number) and presses the green  OK key.
Partial Appr \$##.##	To confirm the Partial Approval on their pre-paid credit card: Selects Yes . To cancel the transaction and return to the transactions menu: Selects No .
Please Remove Card	Removes their chip card from the reader. Note: <i>Do not remove the chip card until “Please Remove Card” appears on the terminal.</i>
Return To Clerk	Returns the device to you.
Select Account:	For Chequing account: Selects 1 – CHEQUING For Savings account: Selects 3 – SAVINGS .
Select Language	For English prompts: Selects ENG (ENGLISH) For French prompts: Selects FRN (FRENCH).
Tip: \$0.00	Keys in a dollar amount (or leaves blank) and presses the green  OK key.
Tip Type:	To choose from a list of tip percentages: Selects % . To enter a tip dollar amount: Selects \$ on the terminal or Other on the PINpad. To continue without adding a tip: Selects NoTip on the terminal or None on the PINpad.
Total OK?	Confirms that the total Purchase + Cashback + Tip amount is correct and presses the green  OK key.

Receipts

Signing credit card receipts

Merchant copy

Always retain this copy for your records, but note:

- If a signature line is printed, obtain the cardholder's signature.
- You do not need to obtain a signature if any of the following messages are printed:
 - VERIFIED BY PIN
 - NO SIGNATURE REQUIRED

Cardholder copy

Give this copy to the customer, but note:

- If a merchant signature line is printed, sign this copy.

Reprinting receipts

Prints a duplicate customer copy of a receipt.

Note: For signatureless transactions, only the customer copy is printed. To print signatureless transaction details for your records, perform a Transaction Inquiry (see page 50).

Note: For debit transactions, if the terminal is set to print the merchant copy only, the reprint receipt feature prints the customer copy.

1. Press the  (**Reprint**) icon.

The REPRINT menu appears.

2. To reprint the last transaction receipt, select **Last Receipt**.

OR

To print a different receipt, select **Any Receipt**, key in the **transaction sequence number (Seq#)** and press the green  **OK** key.

3. The terminal prints the duplicate receipt and returns to the transactions menu.

Card masking

To reduce the risk of fraudulent card use, masking and truncation are applied to card numbers printed on receipts and reports. Masking replaces a card's numbers with asterisks (e.g., *****1234).

Truncation prints only the last four digits of a card (e.g., 1234). The expiry date is not printed on any copy of any receipt.

Signatureless transactions

A customer signature is not required for swiped or tapped Purchase transactions if the total is at or below the maximum *Signatureless Dollar Value (SDV)* (see below). Depending on how your terminal is configured, receipts may not be printed for signatureless transactions. If a receipt is printed, the statement NO SIGNATURE REQUIRED appears on the receipt.

Note: Signatureless transactions for swiped purchases apply only when a customer uses a swipe-only card, not when the customer is instructed to swipe a chip card.

Maximum Signatureless Dollar Values (SDV)

To determine the maximum SDV for a card, print an EMV Parameters report (see page 53) and locate the **Contactless CVM Limit** parameter under the report's section for the card. An SDV of 999999 means there is no maximum limit.

Contactless transactions

Receipts can be suppressed for tapped credit transactions that do not require cardholder verification. Refer to the “Receipt Parameters Menu (Edit PCT)” topic in the *VX 820 WebHelp* located at moneris.com/support.

Receipts are always printed for *Interac* Flash transactions.

Receipt samples

These sample receipts will help you to locate the sequence number (for Advices) or the authorization number (for refunds and corrections).

Credit/Debit card Purchase receipt

Merchant Name
Address 1
City, Prov/State
Header Line 1
Header Line 6

Term ID: 12345678

Purchase

XXXXXXXXXXXX1234
CARD NAME ENTRY METHOD: X
CLERK ID: 001
Invoice #: 999999

Total: \$ 999.99
Paid: \$ 99.00
Due: \$ 900.00

YYYY/MM/DD HH:MM:SS
Seq #: 123-456789-0
Appr Code: ABC123
Resp Code: 00/000
CVD Code: X

**APPROVED
Thank You**

CARDHOLDER WILL PAY CARD ISSUER
ABOVE AMOUNT PURSUANT
TO CARDHOLDER AGREEMENT

X-----

Merchant Copy
- IMPORTANT -
Retain this copy for your records

Partial Approval Purchase receipt

Merchant Name
Address 1
City, Prov/State
Header Line 1
Header Line 6

Term ID: 12345678

Purchase

XXXXXXXXXXXX1234
CARD NAME ENTRY METHOD: X
CLERK ID: 001
Invoice #: 999999

Total: \$ 999.99
Paid: \$ 99.00
Due: \$ 900.00

YYYY/MM/DD HH:MM:SS
Seq #: 123-456789-0
Appr Code: ABC123
Resp Code: 00/000
CVD Code: X

**PARTIALLY APPROVED
Thank You**

CARDHOLDER WILL PAY CARD ISSUER
ABOVE AMOUNT PURSUANT
TO CARDHOLDER AGREEMENT

X-----

Merchant Copy
- IMPORTANT -
Retain this copy for your records

Useful codes

- The **Seq #** is found on all receipts. It is the first six of the last seven digits of the Seq # printed on the receipt (e.g., if the Seq # is 000-123456-0, then key in 123456).
- The **Orig Auth #** is the six-digit **Appr Code** printed on the original receipt.

Reports

Transaction Inquiry

Displays and prints the details of transactions in the terminal memory.

1. On the transactions menu, scroll down and select **Batch Review**. If prompted, key in the **manager password** and press the green  **OK** key.
2. To retrieve transactions by:
 - Clerk ID, select **Clrk**.
 - Transaction amount, select **Amt**.
 - The last four digits of the card number, select **Acct**.
 - The six-digit sequence number, select **Seq#**.
3. Key in the **required information** and press the green  **OK** key.
The transaction details appear on screen.
4. Select **Prev** or **Next** to scroll through the transactions and display the right one.
5. Choose one of the following:
 - To print the Transaction Inquiry report for the displayed transaction, select **Prnt**.
 - To void the displayed transaction, select **Corr**.
 - To return to the transactions menu, press the red  **CANC ANNUL** key twice.

Merchant Sub-totals report

Prints the totals of all transaction types in the current batch on the Moneris host without closing the batch.

1. Press the  (**Reports**) icon. If prompted, key in the **manager password** and press the green  **OK** key.
2. Scroll down and select **Merch Subtotal**.
The terminal prints the Merchant Sub-totals report and returns to the REPORTS menu.

Pre-auth Transactions report

Prints a list of all Pre-authorizations in the terminal memory that have not been completed.

1. On the transactions menu, select **Pre Auth**.
2. On the Pre Auth menu, scroll down and select **Pre-Auth Rpt**. If prompted, key in the manager password and press the green  **OK** key.
The terminal prints the Pre-auth Transactions report and returns to the Pre Auth menu.
3. Press the red  **CANC ANNUL** key to return to the transactions menu.

Tip report

Prints tip activity for the current batch in the terminal memory.

Note: Clerk IDs must be set up on the Moneris host and Tip processing must be enabled on the terminal before this report can be generated.

1. Press the  (**Reports**) icon. If prompted, key in the **manager password** and press the green  **OK** key.
 2. Scroll down and select **Tip Report**.
 3. When the “Clrk Rpt Opt” prompt appears:
 - To print the report for one clerk, select **One**, key in the **Clerk ID** and press the green  **OK** key.
OR
 - To print the report for all clerks, select **All** and press the green  **OK** key.
 4. When the “Rpt Period” prompt appears:
 - To print the report for all tip activity in the batch, select **All**.
OR
 - To print the report for a specific date, select **Date**, key in the date (in YYYYMMDD format) and press the green  **OK** key.
- The terminal prints the Tip report and returns to the REPORTS menu.

Stored Transactions report

Prints totals for the current batch in the terminal memory without closing the batch.

1. Press the  (**Reports**) icon. If prompted, key in the **manager password** and press the green  **OK** key.
2. Select **Stored Tran.**
3. At the “Rpt Period” prompt, choose one of the following:
 - To print all transactions, select **All**.
OR
 - To print transactions from a specific date, select **Date**, then key in the desired date (in YYYYMMDD format) and press the green  **OK** key.

The terminal prints the Stored Transactions report and returns to the REPORTS menu.

Deposit Totals report

Prints the totals of all transaction types in batches that have been closed on the Moneris host on the date this report is printed.

1. Press the  (**Reports**) icon. If prompted, key in the **manager password** and press the green  **OK** key.
2. Select **Deposit Totals**.

The terminal prints the Deposit Totals report and returns to the REPORTS menu.

Clerk Sub-totals report

Prints totals for all transactions in the current batch on the Moneris host sorted by Clerk ID.

IMPORTANT: Clerk IDs must be set up on the Moneris host before this report can be generated.

1. Press the  (**Reports**) icon. If prompted, key in the **manager password** and press the green  **OK** key.
2. Select **Clerk Subtotal**.

3. At the “Clerk Id:” prompt, choose one of the following:

- To print the Clerk Sub-totals report for *one clerk*, key in the **Clerk ID** and press the green  **OK** key.
- To print the Clerk Sub-totals report for *all clerks*, press the **★** (asterisk) key, then press the green  **OK** key.

4. When the “Add Another Clerk?” prompt appears:

- To select additional clerks, select **Yes**. Repeat step 3.
OR
- To finish adding clerks, select **No**.

5. When the “Clear Totals?” prompt appears:

- To clear the clerk’s totals, select **Yes**.
OR
- To keep the clerk’s totals in the terminal memory, select **No**.

The terminal prints the Clerk Sub-totals report and returns to the REPORTS menu.

EMV Parameters report

Prints a list of EMV parameters and their values by EMV card record number.

Note: This report includes the Contactless CVM Limit parameter used to determine the maximum Signatureless Dollar Value for a card.

1. Press the  (**Reports**) icon. If prompted, key in the **manager password** and press the green  **OK** key.
2. Scroll down and select **EMV Param Rpt**.

The terminal prints the EMV Parameters report and returns to the REPORTS menu.

Batch History report

Prints a list of closed batches, including each batch's total Purchases, Refunds, Corrections and net totals.

1. Press the  (**Reports**) icon. If prompted, key in the **manager password** and press the green  **OK** key.
2. Select **Batch History**.
The "Rpt Period" prompt appears.
3. Choose one of the following:
 - To print the batch history for a specific date, select **Date**. Key in a settlement date (in MMDDYY format) and press the green  **OK** key.
OR
 - To print the batch history for all dates, select **All**.

The terminal prints the Batch History report and returns to the REPORTS menu.

Administrative transactions

Logon

If the "Host Logon Required" prompt appears, you must log on before you can perform transactions on the terminal.

1. Press the green  **OK** key at the transactions menu to display the CONFIGURATION menu.
2. Scroll down and select **Host Logon**.
3. Key in the **manager password** and press the green  **OK** key.

The terminal communicates with the Moneris host, displays "Logon Success", then returns to the transactions menu.

Logoff

To ensure unauthorized transactions cannot be processed, log off your terminal at the end of each business day.

1. Press the green  **OK** key at the transactions menu to display the CONFIGURATION menu.
2. Scroll down and select **Host Logoff**.

The terminal communicates with the Moneris host, displays "Logoff Success", and returns to the transactions menu.

Re-initialization

If the "Init Required" prompt appears, you must re-initialize your terminal by 3:00 a.m. the next morning.

1. Press the green  **OK** key at the transactions menu to display the CONFIGURATION menu.

2. Scroll down and select **Initialize**. If prompted, key in the **manager password** and press the green  **OK** key.
3. When the “Retain ID?” prompt appears:
 - To keep the existing merchant ID, select **Yes**.
OR
 - To change the existing merchant ID, select **No**. When the “Merchant ID:” prompt appears with the existing merchant ID displayed, key in your **new Moneris Merchant ID number** and press the green  **OK** key.
4. When “Transmitting...” and “Receiving...” appear, please wait while the terminal communicates with the Moneris host.
5. When the initialization is finished, “Init Successful” appears and then the transactions menu appears.

Note: If the “Host Logon Required” prompt appears after the re-initialization is complete, refer to the Logon instructions on page 55.

Batch Reclaim

Only perform a Batch Reclaim if you are a System Close merchant and the terminal has displayed the message “Must Settle Soon”.

1. On the transactions menu, scroll down and select **Batch Reclaim**.
The “Batch Reclaim” screen appears.
2. Select **Yes** to start the Batch Reclaim process.
 - If the message “Batch Reclaim Not Required” appears, your batch is not yet close to capacity. Press the green  **OK** key to return to the transactions menu.

The terminal performs the Batch Reclaim and returns to the transactions menu. At the end of your day, you are still required to perform your normal End-of-day procedures.

End-of-day process

Merchant close

If your merchant account is set up for Merchant Close settlement, you must process a Batch Close transaction in order to have the funds from your POS transactions deposited to your business account. Moneris recommends closing your batch at the end of each business day. Here’s how:

Step 1: Process a Batch Close transaction

1. On the transactions menu, scroll down and select **Batch Close**. If prompted, key in the **manager password** and press the green  **OK** key.
2. At the “Close Type?” prompt, select **Sngl**.
The terminal communicates with the Moneris host and the Batch Totals report prints.
3. At the “Prt Stored Trans?” prompt, select **Yes**.
4. At the “Rpt Period” prompt, select **All**.
The Stored Transactions report prints.
5. When the “Close Batch?” prompt appears, select **Yes** to close the batch and have funds deposited to your account.

Note: If you do not make a selection at the “Close Batch?” prompt within two minutes, the terminal beeps three times and returns to the transactions menu without closing the batch.

The terminal prints the Batch Close report and returns to the transactions menu.

Step 2: Confirmation

Confirm that the totals on the **Batch Totals** report match the totals on the **Stored Transactions** report. If they do not match, call Moneris Customer Care toll-free at **1-866-319-7450** the next business day for reconciliation assistance.

System close

If your merchant account is set up for System Close settlement, 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:

Step 1: Print a Stored Transactions report

- See page 52.

Step 2: Print a Merchant Sub-totals report

- See page 50.

Note: The Merchant Sub-totals report must be printed before 11:00 p.m. local time.

Step 3: Confirmation

- Confirm that the totals on the **Stored Transactions** report (printed in step 1) match the totals on the **Merchant Sub-totals** report (printed in step 2). If they do not match, call Moneris Customer Care toll-free at **1-866-319-7450** within 30 days for reconciliation assistance.

Troubleshooting

If an error message appears, first press the green  **OK** key or the red  **CANC** **ANNUL** key to clear the message then retry the transaction. If the error message reappears and is listed in the table below, follow the instructions in the table. If the problem is still not resolved, call Moneris Customer Care toll-free at **1-866-319-7450**.

Error messages

Error message	Solution
Adjust Not Allow	You cannot perform a correction (void) on a contactless Purchase or Refund.
APP EXPIRED	The application on the contactless card has expired. Request another form of payment.
Batch Full	The batch is full. <ul style="list-style-type: none">• If you are a System Close merchant:<ul style="list-style-type: none">• Perform a Batch Reclaim now. See page 56.• If you are a Merchant Close merchant:<ul style="list-style-type: none">• Perform your normal End-of-day process now, even though it is not your end of day. See page 57.
CARD BLOCKED	The contactless card was blocked. Request another form of payment.
Card Fail Insert or Swipe	There was an error reading the contactless card. Insert or swipe the same card or another card.
Card Fail	There was an error reading the contactless card. Insert or swipe the same card or another card.
CARD NOT SUPPORTED or INVALID CARD	Your merchant account with Moneris is not set up to accept the card type entered. Request another form of payment.

This table continues on the next page.

Error message	Solution
CARD SWIPE ERROR or READ CARD ERR or ERR READ CARD NO.	There is a problem with the magnetic stripe on the card that was swiped. 1. Swipe the card again, this time more slowly or quickly, or from the front of the terminal to the back. 2. If the message reappears, request another form of payment.
Card Removed	The chip card was removed before the end of the transaction. Refer to “TRANS CANCELLED OK to Continue” in this table for more information.
Cd Not Supported	The type of contactless card tapped is not supported by the contactless reader. Request another form of payment. OR You performed a Balance Inquiry on a card that does not allow balance inquiries. • For pre-paid credit cards: The customer must contact the card issuer to determine the balance. • For all other cards: Press the green  OK key to return to the transactions menu.
Chip Malfunction Use Mag Stripe	There was an error reading the chip card. Remove the card and retry the transaction. If the message reappears, swipe the card.
CHIP CARD SWIPED	A chip-enabled card was swiped. Insert the card in the chip reader and resume the transaction.
Connection Failed	The Ethernet connection failed. If Dial Backup is configured, the terminal will switch to dial communications for this transaction. 1. Check all the cables to ensure everything is plugged in correctly. 2. Check that the router and hub/switch (if any) are functioning and are correctly configured. Please refer to the Moneris IP Readiness Checklist available at moneris.com/checklist . 3. Confirm that the network is functioning. Contact your ISP (Internet service provider) for assistance.

This table continues on the next page.

Error message	Solution
Empty Batch	There are no transactions in the current open batch.
Exceeds Limit Insert or Swipe	The transaction amount is over the contactless card's maximum Contactless Dollar Value (CDV). Insert or swipe the same card or another card.
EXC REFUND LIMIT	The total value of Refunds performed today is greater than your daily refund limit. Call Moneris Customer Care for a temporary increase. Please have the original purchase receipt available for reference.
EXPIRED CARD	The expiry date on the card has passed. Request another form of payment.
Insert on PINPad	A chip card was inserted in the terminal chip reader when there is an external PINpad connected. Insert the card in the PINpad chip reader.
Invalid Password	Press the red  CANC ANNUL key, then re-enter the manager password and press the green  OK key. IMPORTANT: If the manager password is entered incorrectly five times in a row, the terminal will lock and will be unable to perform transactions. To unlock the terminal, contact Moneris Customer Care toll-free at 1-866-319-7450 and request a password reset.
INV# IS 7 CHAR MAX PRESS OK KEY	The maximum length of an invoice number for private label credit cards is seven characters. 1. Press the green  OK key. 2. Check the invoice number, then key in the correct number of characters and press the green  OK key.
LINE BUSY	1. Check if the phone line is shared with another piece of equipment (e.g., a fax machine). 2. Check if a prefix (e.g., 9) is required to dial out.
Must Insert Card	A chip-enabled card was swiped. Insert the card in the chip reader and resume the transaction.

This table continues on the next page.

Error message	Solution
Must Settle Soon	Your batch is very nearly at capacity. <ul style="list-style-type: none"> If you are a System Close merchant: <ul style="list-style-type: none"> Perform a Batch Reclaim now. See page 56. If you are a Merchant Close merchant: <ul style="list-style-type: none"> Perform your normal end-of-day process now, even though it is not your end of day. See page 57.
No Line...	The terminal cannot detect a dial communications line. <ol style="list-style-type: none"> Check that all dial communications cables are connected to the Duet base and the wall jack correctly. If they are, check the phone line for a dial tone. Check that the phone line is an analog dial line. The terminal will not work on a digital phone line or on VoIP. Try the transaction again. If the message reappears, unplug and replug the power cable at the power source.
No Match	This error message is printed on the Batch Totals report beside terminal totals that do not match the host totals. <ul style="list-style-type: none"> If you are a Merchant Close merchant: <ul style="list-style-type: none"> Close your batch normally (see page 57) and call Moneris Customer Care the next business day for reconciliation assistance. If you are a System Close merchant: <ul style="list-style-type: none"> Contact Moneris Customer Care within 30 business days for reconciliation assistance.
No Match followed by Record Not Found	The information you have used to find a transaction in memory cannot be found. Check the information and try again.
Not Accepted	You performed a Balance Inquiry on a card that does not allow balance inquiries. <ul style="list-style-type: none"> For pre-paid credit cards: The customer must contact the card issuer to determine the balance. For all other cards: Press the green  OK key to return to the transactions menu.

This table continues on the next page.

Error message	Solution
Not Completed	The transaction was not completed, most likely because of a communication problem. A “Not Completed” receipt is printed. <ol style="list-style-type: none"> Check the communication configuration based on your communication type (e.g., dial or Ethernet). Refer to <i>Hardware Setup</i> on page 8 for more information on configuring communications. Begin a new transaction.
Out of Range	The Cashback amount requested exceeds the maximum cashback value set on the terminal. OR The total amount of the transaction, including the amount, tip, surcharge, and Cashback, exceeds \$999,999.99. Ask the cardholder to key in a lower amount when prompted. OR In Demo mode, ensure the amount of the transaction plus Cashback is \$1.00 or less, and the tip is \$1.00 or less.
Phone Num Flds Empty	The terminal has attempted to dial out but the phone number parameters are empty. If this message appears during a: <ul style="list-style-type: none"> Financial transaction: <ul style="list-style-type: none"> Contact Moneris Customer Care. Batch Close transaction: <ul style="list-style-type: none"> Perform a re-initialization (see page 55) then try the transaction again.
PIN CANCELLED or PIN Cancelled	This message occurs: <ul style="list-style-type: none"> when a customer removes their chip card at the “Enter PIN & OK” prompt when a customer presses the red  CANC ANNUL key at the “Enter PIN & OK” prompt Refer to “TRANS CANCELLED OK to Continue” in this table for more information.
Present 1 Card	Two or more contactless cards were detected in the range of the contactless reader. Ask the customer to use one contactless card only.

This table continues on the next page.

Error message	Solution
PRINTER ERR	<ol style="list-style-type: none"> 1. Open the printer. 2. Check that there is a paper roll and that the roll is loaded properly. 3. Close the printer.
SETTLE FAILED	<p>The connection with the Moneris host was lost during a Batch Close and the transaction was not completed. Try the Batch Close again. If the batch totals are \$0:</p> <ol style="list-style-type: none"> 1. Print a Deposit Totals report. (see page 52). 2. Print a Stored Transactions report (see page 52). 3. Call Moneris Customer Care.
SYSTEM PROBLEM followed by TCP INIT ERR: #### or TCP RECV ERR: #### or TCP SEND ERR: ####	<p>A communication error has occurred. Call Moneris Customer Care and give the agent the four-digit number.</p>
Tap Not Accepted Insert or Swipe	<p>A contactless error occurred during the transaction. Insert or swipe the same card or another card.</p>
TCP Error #####	<p>There has been a communication error with the host, most likely due to firewall configuration. Check that the router and hub/switch (if any) are correctly configured. Please refer to the Moneris IP Readiness Checklist available at moneris.com/checklist.</p>
TIP ERROR	<p>The customer has keyed in a tip amount or percentage that is greater than the standard percentage or a tip percentage that is not defined in the terminal.</p> <ol style="list-style-type: none"> 1. Press the green  OK key. 2. Ask the customer to enter a smaller amount.

This table continues on the next page.

Error message	Solution
TRANS CANCELLED OK to Continue	<p>This message occurs:</p> <ul style="list-style-type: none"> • when a customer removes their chip card at the “Enter PIN & OK” prompt (see the “Card Removed” message in this table for more information). <p>OR</p> <ul style="list-style-type: none"> • when a customer presses the red  CANC ANNUL key at the “Enter PIN & OK” prompt. <ol style="list-style-type: none"> 1. Press the green  OK key on the terminal twice to print the customer and merchant copy of the cancellation receipt. 2. Retry the transaction.
TRANS NOT ALLOWED or TRANS NOT SUPPORTED	<p>You have attempted to perform a transaction that is either not configured on your terminal or not set up in your merchant account.</p>
Tran Not Allowed	<p>You performed a Balance Inquiry on a card that does not allow balance inquiries.</p> <ul style="list-style-type: none"> • For pre-paid credit cards: The customer must contact the card issuer to determine the balance. • For all other cards: Press the green  OK key to return to the transactions menu.

Equipment issues

Issue	Solution
Display screen on terminal or PINpad is blank.	Check the connections on all cables to make sure all cables are plugged in correctly.
The terminal or external PINpad does not respond when an icon is pressed on the touchscreen.	Press firmly on the icon with your fingertip. If the terminal or PINpad still does not respond, use a more precise but blunt item like a stylus or the eraser on the end of a pencil. If the terminal or PINpad still does not respond, power off the terminal then power it on again.

Merchant support



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



BE PAYMENT READY

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