

Moneris® Desk/5000

Loyalty Program Reference Guide





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Overview

In this section, we provide an overview of the Moneris Loyalty Program.

Loyalty programs on the Moneris Desk/5000

Moneris Loyalty programs encourage customers to return to your store to shop. Loyalty cards can help to boost sales by giving you an advantage over your competitors.

There are four types of loyalty programs: **Basic Loyalty**, **Enhanced Loyalty**, **Pro Loyalty**, and **Tracking**. The Enhanced and Pro Loyalty programs allow you to capture more information about each transaction and therefore exercise more control over how loyalty points are awarded. Use the Tracking program to permit your customers to earn points from non-Moneris loyalty programs.

In general, this is how your **loyalty program** works:

- Every time a customer makes a purchase, you swipe the customer's loyalty card so they can earn points towards rewards.
- When a customer reaches a specified number of points, they can redeem their points for a reward.
- To learn how to enrol customers, replace lost or damaged cards, promote your loyalty program, and more, refer to your Loyalty program operating manual.

In general, this is how the **Tracking program** works:

- Every time a customer makes a purchase, you swipe the Tracking loyalty card so the customer can earn points towards rewards.
- The transaction data is passed to the Loyalty Program Provider, which then awards points to the customer's account.



Setting up your terminal for loyalty cards

No additional configuration is required to use loyalty cards on your terminal. Your existing settings will apply to loyalty card transactions. For example, if clerk IDs are turned on, you will be asked to enter a clerk ID when performing a loyalty card transaction.

For more information about terminal settings, refer to the **Moneris Desk/5000 Reference Guide** available at moneris.com/support-desk5000.

Loyalty card entry options


There are two ways to enter a loyalty card on the terminal:

Swipe

1. Wait for the “Swipe your card” prompt to appear on the terminal display.
2. Swipe the card on the terminal’s magnetic stripe reader.



Manual entry

1. Wait for the “Swipe your card” prompt to appear on the terminal display.
2. Key in the card number, then press the green  key.



Loyalty card transactions

In this section, we go over everything you need to know regarding loyalty card transaction processing on the Desk/5000 terminal.



Navigating the terminal for loyalty transactions

Review the following navigation information for using the Loyalty Card program on your Moneris terminal.

- Loyalty card transactions are integrated into the main **Transactions** menu. This means you don't have to go into the **Moneris Loyalty** menu to perform them. After the approval of a financial transaction, start the loyalty transaction when prompted on screen. The following transactions are integrated with the loyalty program:
 - Purchase
 - Refund
 - Void

Getting to the Main menu

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


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

Basic Loyalty program

These instructions are streamlined to focus on loyalty card functionality. For any screens and prompts that are not loyalty card related, refer to the ***Moneris Desk/5000 Reference Guide***.

Awarding points after a purchase

Follow these steps to award loyalty points to a customer after they have paid for a purchase.

1. At the end of the purchase transaction, the terminal displays the loyalty prompt, “Would you like to add loyalty points?” or “Does this transaction have loyalty?”.
2. Tap **Yes**.
3. Pass the terminal to the customer so they can enter their loyalty card.
4. The customer swipes their loyalty card on the terminal.
The “Processing your request” message appears.
The “Transaction approved/Please pass terminal back to clerk” prompt appears. The terminal begins printing receipts.
5. The customer passes the terminal back to you. Press the green  key to continue, if needed.
6. When “Transaction Approved” appears, tap **OK**.
7. Give the Cardholder copy of the receipt to the customer.

Awarding points after a pre-authorization or completion

This function is currently not supported.


Redeeming points automatically

If your loyalty program has been set up for Automatic Redemption, points are automatically redeemed when a cardholder reaches the configured Reward Threshold Level, and a Reward Coupon prints from the terminal.

Note: *If a cardholder’s points balance surpasses the Reward Threshold Level multiple times in one transaction (e.g. the Reward Threshold Level is 200 and the cardholder makes a \$600 purchase with a Points Earning Rate of \$1 = 1 point, meaning they have earned 600 points), the terminal will redeem points for only one Reward and print only one Reward Coupon. In the above example, the remaining coupons will be generated in increments of the Reward Threshold Level during subsequent transactions with the same card.*


Removing points after a debit or credit refund

Follow these steps to remove loyalty points from a customer's loyalty card after performing a debit or credit refund.

1. At the end of the refund transaction, the terminal displays the loyalty prompt "Does this transaction have loyalty?"
2. Tap **Yes**.
The terminal prompts you to "Enter the authorization number of the transaction that is to be refunded".
3. Key in the 9-digit authorization number found on the "Loyalty Earned" receipt and tap **OK**. To view a receipt example, go to page 11.
4. Pass the terminal to the customer so they can enter their loyalty card.
5. The customer swipes their loyalty card on the terminal.
The "Processing your request" message appears, followed by the "Transaction approved/Please pass terminal back to clerk" prompt. The terminal begins printing receipts.
6. The customer passes the terminal back to you. Press the green  key to continue, if needed.
7. When "Transaction Approved" appears, tap **OK**.
8. Give the Cardholder copy of the receipt to the customer.

Removing points after a cash refund

Follow these steps to remove loyalty points from a customer's loyalty card after performing a cash refund.

1. At the end of the cash refund transaction, the terminal displays the loyalty prompt "Does this transaction have loyalty?"
2. Tap **Yes**.
The "Swipe your card prompt" appears.
3. Pass the terminal to the customer so they can enter their loyalty card.
4. The customer swipes their loyalty card on the terminal.
The "Processing your request" message appears, followed by the "Transaction approved/Please pass terminal back to clerk" prompt. The terminal begins printing receipts.
5. The customer passes the terminal back to you. Press the green  key to continue, if needed.
6. When "Transaction Approved" appears, tap **OK**.
7. Give the Cardholder copy of the receipt to the customer.

Removing points after a void

Follow these steps to remove loyalty points from a customer's loyalty card after performing a void.

1. At the end of the void transaction, the terminal displays the loyalty prompt "Does this transaction have loyalty?"

2. Tap **Yes**.

The terminal prompts you to "Enter the authorization number of the transaction that is to be voided".

3. Key in the 9-digit authorization number found on the original loyalty receipt and tap **OK**. To view a receipt example, go to page 11.

The terminal displays the original loyalty transaction.


4. Tap **OK** to void the loyalty transaction.

The "Swipe your card" prompt appears.

5. Pass the terminal to the customer so they can swipe their loyalty card.

6. The customer swipes their loyalty card on the terminal.

The "Processing your request" message appears, followed by the "Transaction approved/Please pass terminal back to clerk" prompt. The terminal begins printing receipts.

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

8. When "Transaction Approved" appears, tap **OK**.

9. Give the Cardholder copy of the receipt to the customer.

Loyalty card authorization number

Each loyalty card transaction has an authorization number (Auth#) which is printed on both the customer copy and the merchant copy of the receipt. You may be prompted to key in this number when performing loyalty card refunds, voids and when reprinting transaction receipts.

Basic Loyalty receipt

MERCHANT NAME
MERCHANT ADDRESS
CITY PROV

Loyalty Earned

MMM DD,YYYY HH:MM:SS

Loyalty card program name

*****1234

TID: 00000000 - 000000 Batch: 000

INVOICE #: 0A0A0A0A0 Clerk: 000000

Auth#: 000000000 Response: 000

Total Amount \$000,000.00

Points Earned 00000

Current Balance 00000

Approved

Merchant copy

C

D

F

A

B

E

G

Item	Description
A	Loyalty transaction type, for example, Loyalty Earned, Loyalty Void, Loyalty Refund
B	Loyalty program name
C	Loyalty card number.
D	Authorization number. Use this number to process loyalty refunds and voids, and to re-print receipts.
E	Total Amount. This is the dollar amount of the transaction, including any tax or tip.
F	Points earned on the current transaction.
G	Current Balance. The points balance on the loyalty card.

Enhanced Loyalty program and Pro Loyalty program

These instructions are streamlined to focus on loyalty card functionality. For any screens and prompts that are not loyalty card related, refer to the ***Moneris Desk/5000 Reference Guide***.

Awarding points after a purchase


Follow these steps to award loyalty points to a customer after they have paid for a purchase.

1. At the end of the purchase transaction, the terminal displays the loyalty prompt “Would you like to add loyalty points?” or “Does this transaction have loyalty?”.
2. Tap **Yes**.

The “Swipe your card” prompt appears.
3. Pass the terminal to the customer so they can enter their loyalty card.
4. The customer swipes their loyalty card on the terminal, then returns the terminal to you, as indicated on screen.
5. Respond to any optional prompts that appear, such as:
 - “Enter Data” or “Enter Bonus Code”
 - Key in the **appropriate** information then tap **OK**. Consult your manager if you are unsure of what to enter.
 - To bypass the prompt, simply tap **OK** without entering anything.
 - Note:** Merchants participating in the Pro Loyalty program can further customize the text of this prompt.*
 - “Enter Benefit Amount” or “Enter pre-tax amount”

The Benefit Amount determines how many points the customer will be awarded. On this screen, the transaction amount is already filled in. You may choose to award points on the total transaction amount or on a smaller portion, for example, only on the purchase amount without tax or tip, or only on certain products.

 - To enter a smaller amount, first erase the existing value by tapping **Delete**, then enter a new value and tap **OK**.
 - To accept the total transaction amount, tap **OK**.
 - Note:** Merchants participating in the Pro Loyalty program can further customize the text of this prompt.*
6. The terminal processes the loyalty transaction.

The “Processing your request” message appears followed by “Transaction approved/Please pass terminal back to clerk”. The terminal begins printing receipts.
7. Press the green  key to continue, if needed.
8. When “Transaction Approved” appears, tap **OK**.
9. Give the Cardholder copy of the receipt to the customer.

Awarding points after a pre-authorization or completion

This function is currently not supported.

Awarding bonus points

You can award bonus points during a transaction by entering a bonus code when prompted by your terminal. You can choose to enable or disable this option. If you choose to enable bonus points, this functionality will be available for use and the following bonus codes will be active during the lifetime of the program.

Note: The Bonus codes below are only used for the Enhanced Loyalty program. Merchants in the Pro Loyalty program have the option to customize their Bonus codes.

Bonus code	Bonus points	Standard bonus receipt message
2	Double points	You have earned DOUBLE BONUS POINTS!
3	Triple points	You have earned TRIPLE BONUS POINTS!
10	10	You have earned 10 BONUS POINTS!
50	50	You have earned 50 BONUS POINTS!
100	100	You have earned 100 BONUS POINTS!
500	500	You have earned 500 BONUS POINTS!

Note to Managers

Ensure that these bonus codes and values are protected and released to your employees only when you are running a Loyalty promotion.

Check your reports on the Merchant Web Portal on a regular basis to ensure that these codes are not misused.

Redeeming points automatically

If your loyalty program has been set up for Automatic Redemption, points are automatically redeemed when a cardholder reaches the configured Reward Threshold Level, and a Reward Coupon prints from the terminal.

Note: If a cardholder's points balance surpasses the Reward Threshold Level multiple times in one transaction (e.g. the Reward Threshold Level is 200 and the cardholder makes a \$600 purchase with a Points Earning Rate of \$1 = 1 point, meaning they have earned 600 points), the terminal will redeem points for only one Reward and print only one Reward Coupon. In the above example, the remaining coupons will be generated in increments of the Reward Threshold Level during subsequent transactions with the same card.

For merchants participating in the Pro Loyalty program: If you have set up multiple Reward Threshold Levels, the maximum threshold will be used for the first coupon and for the remaining coupons as long as the points are available. Once the points balance falls below the maximum threshold, the next threshold level will be used.

Removing points after a debit or credit refund


Follow these steps to remove loyalty points from a customer's loyalty card after performing a debit or credit refund.

1. At the end of the refund transaction, the terminal displays the loyalty prompt "Does this transaction have loyalty?"
2. Tap **Yes**.

The terminal prompts you to "Enter the authorization number of the transaction that is to be refunded".
3. Key in the 9-digit authorization number found on the "Loyalty Earned" receipt and tap **OK**. To view a receipt example, go to page 17.
4. Pass the terminal to the customer so they can enter their loyalty card.
5. The customer swipes their loyalty card on the terminal then returns the terminal to you, as indicated on screen.
6. Respond to any optional prompts that appear, such as:
 - "Enter Data" or "Enter Bonus Code"
 - Key in the **appropriate** information then tap **OK**. Consult your manager if you are unsure of what to enter.
 - To bypass the prompt, simply tap **OK** without entering anything.
 - Note:** Merchants participating in the Pro Loyalty program can further customize the text of this prompt.*
 - "Enter Benefit Amount" or "Enter pre-tax amount"

The Benefit Amount determines how many points will be removed from the customer's loyalty card.

 - To enter a smaller amount (for example, the pre-tax amount), first erase the existing value by tapping **Delete**, then enter a new value and tap **OK**.
 - To accept the total transaction amount, tap **OK**.***Note:** Merchants participating in the Pro Loyalty program can further customize the text of this prompt.*
7. The terminal processes the loyalty transaction.

The "Processing your request" message appears, followed by the "Transaction approved/Please pass terminal back to clerk" prompt. The terminal begins printing receipts.
8. Press the green  key to continue, if needed.
9. When "Transaction Approved" appears, tap **OK**.
10. Give the Cardholder copy of the receipt to the customer.


Removing points after a cash refund

Follow these steps to remove loyalty points from a customer's loyalty card after performing a cash refund.

1. At the end of the cash refund transaction, the terminal displays the loyalty prompt "Does this transaction have loyalty?"
 2. Tap **Yes**.


The "Swipe your card prompt" appears.
 3. Pass the terminal to the customer so they can enter their loyalty card.
 4. The customer swipes their loyalty card on the terminal then returns the terminal to you, as indicated on screen.
 5. Respond to any optional prompts that appear, such as:
 - "Enter Data" or "Enter Bonus Code"
 - Key in the **appropriate** information then tap **OK**. Consult your manager if you are unsure of what to enter.
 - To bypass the prompt, simply tap **OK** without entering anything.
 - Note:** Merchants participating in the Pro Loyalty program can further customize the text of this prompt.*
 - "Enter Benefit Amount" or "Enter pre-tax amount"

The Benefit Amount determines how many points will be removed from the customer's loyalty card.

 - To enter a smaller amount (for example, the pre-tax amount), first erase the existing value by tapping **Delete**, then enter a new value and tap **OK**.
 - To accept the total transaction amount, tap **OK**.***Note:** Merchants participating in the Pro Loyalty program can further customize the text of this prompt.*
- The "Processing your request" message appears, followed by the "Transaction approved/Please pass terminal back to clerk" prompt. The terminal begins printing receipts.
6. Press the green  key to continue, if needed.
 7. When "Transaction Approved" appears, tap **OK**.
 8. Give the Cardholder copy of the receipt to the customer.

Removing points after a void

Follow these steps to remove loyalty points from a customer's loyalty card after performing a void.

1. At the end of the void transaction, the terminal displays the loyalty prompt "Does this transaction have loyalty?"
2. Tap **Yes**.
The terminal prompts you to "Enter the authorization number of the transaction that is to be voided".
3. Key in the 9-digit authorization number found on the receipt for the loyalty transaction to be voided and tap **OK**. To view a receipt example, go to page 17.
The terminal displays the original loyalty transaction.
4. Tap **OK** to void the loyalty transaction.
The Swipe your card prompt appears.
5. Pass the terminal to the customer so they can swipe their loyalty card.
6. The customer swipes their loyalty card on the terminal.
The "Processing your request" message appears, followed by the "Transaction approved/Please pass terminal back to clerk" prompt. The terminal begins printing receipts.
7. The customer passes the terminal back to you. Press the green  key to continue, if needed.
8. When "Transaction Approved" appears, tap **OK**.
9. Give the Cardholder copy of the receipt to the customer.

Loyalty card authorization number

Each loyalty card transaction has an authorization number (Auth#) which is printed on both the customer copy and the merchant copy of the receipt. You may be prompted to key in this number when performing loyalty card refunds, voids and when reprinting transaction receipts.

Enhanced and Pro Loyalty receipt

MERCHANT NAME
MERCHANT ADDRESS
CITY PROV

Loyalty Earned

MMM DD,YYYY HH:MM:SS
Loyalty card program name *****1234

TID: 00000000 - 000000 Batch: 000
INVOICE #: 0A0A0A0A0 Clerk: 000000
Auth#: 000000000 Response: 000

Total Amount \$000,000.00
[Benefit Amount] \$000,000.00

[Additional Info] 00000

Points Earned 00000
Current Balance 00000

Approved

Merchant copy

Callouts: A points to 'Loyalty Earned', B points to 'Loyalty card program name', C points to 'Loyalty card number' (*****1234), D points to 'Auth#: 000000000', E points to 'Total Amount', F points to '[Benefit Amount]', G points to '[Additional Info]', H points to 'Points Earned', I points to 'Current Balance'.


Item	Description
A	Loyalty transaction type, for example, Loyalty Earned, Loyalty Void, Loyalty Refund
B	Loyalty program name
C	Loyalty card number
D	Authorization number. Use this number to process loyalty refunds and voids, and to re-print receipts.
E	Total Amount. This is the total dollar amount of the transaction, including any tax or tip.
F	Benefit Amount. This is the dollar amount on which points are calculated. The wording of this prompt may be customized.
G	Additional Info. Any additional data provided on the "Enter data" prompt. The wording of this line/prompt may be customized.
H	Points earned (or removed) for the current transaction.
I	Current Balance. This is the current balance of points on the card.

Tracking program

These instructions are streamlined to focus on loyalty card functionality. For any screens and prompts that are not loyalty card related, refer to the ***Moneris Desk/5000 Reference Guide***.

Awarding points after a purchase

Follow these steps to award Tracking loyalty points to a customer after they have paid for a purchase.

1. At the end of the purchase transaction, the terminal displays the loyalty prompt “Would you like to add loyalty points?” or “Does this transaction have loyalty?”.
2. Tap **Yes**.
The “Swipe your card” prompt appears.
3. Pass the terminal to the customer so they can enter their loyalty card.
4. The customer swipes their loyalty card on the terminal, then returns the terminal to you, as indicated on screen.
5. Respond to any optional prompts that appear, such as:
 - “Enter Data” or a customized prompt
 - Key in the **appropriate** information then tap **OK**. Consult your manager if you are unsure of what to enter.
 - To bypass the prompt, simply tap **OK** without entering anything.
 - “Enter Benefit Amount” or a customized prompt
The Benefit Amount determines how many points the customer will be awarded. On this screen, the transaction amount is already filled in. You may choose to award points on the total transaction amount or on a smaller portion, for example, only on the purchase amount without tax or tip, or only on certain products.
 - To enter a smaller amount, first erase the existing value by tapping **Delete**, then enter a new value and tap **OK**.
 - To accept the total transaction amount, tap **OK**.
6. The terminal processes the loyalty transaction.
The “Processing your request” message appears followed by “Transaction approved/Please pass terminal back to clerk”. The terminal begins printing receipts.
7. Press the green  key to continue, if needed.
8. When “Transaction Approved” appears, tap **OK**.
9. Give the Cardholder copy of the receipt to the customer.

Awarding points after a pre-authorization or completion

This function is currently not supported.

Removing points after a debit or credit refund


Follow these steps to remove Tracking loyalty points from a customer's loyalty card after performing a debit or credit refund.

1. At the end of the refund transaction, the terminal displays the loyalty prompt "Does this transaction have loyalty?"
2. Tap **Yes**.

The terminal prompts you to "Enter the authorization number of the transaction that is to be refunded".
3. Key in the 9-digit authorization number found on the "Loyalty Earned" receipt and tap **OK**. To view a receipt example, go to page 22.
4. Pass the terminal to the customer so they can enter their loyalty card.
5. The customer swipes their loyalty card on the terminal then returns the terminal to you, as indicated on screen.
6. Respond to any optional prompts that appear, such as:
 - "Enter Data" or a customized prompt
 - Key in the **appropriate** information then tap **OK**. Consult your manager if you are unsure of what to enter.
 - To bypass the prompt, simply tap **OK** without entering anything.
 - "Enter Benefit Amount" or a customized prompt


The Benefit Amount determines how many points will be removed from the customer's loyalty card.

 - To enter a smaller amount (for example, the pre-tax amount), first erase the existing value by tapping **Delete**, then enter a new value and tap **OK**.
 - To accept the total transaction amount, tap **OK**.
7. The terminal processes the loyalty transaction.

The "Processing your request" message appears, followed by the "Transaction approved/Please pass terminal back to clerk" prompt. The terminal begins printing receipts.
8. Press the green  key to continue, if needed.
9. When "Transaction Approved" appears, tap **OK**.
10. Give the Cardholder copy of the receipt to the customer.

Removing points after a cash refund

Follow these steps to remove Tracking loyalty points from a customer's loyalty card after performing a cash refund.

1. At the end of the cash refund transaction, the terminal displays the loyalty prompt "Does this transaction have loyalty?"
2. Tap **Yes**.
The "Swipe your card prompt" appears.
3. Pass the terminal to the customer so they can swipe their loyalty card.
4. The customer swipes their loyalty card on the terminal then returns the terminal to you, as indicated on screen.
5. Respond to any optional prompts that appear, such as:
 - "Enter Data" or a customized prompt
 - Key in the **appropriate** information then tap **OK**. Consult your manager if you are unsure of what to enter.
 - To bypass the prompt, simply tap **OK** without entering anything.
 - "Enter Benefit Amount" or a customized prompt
The Benefit Amount determines how many points will be removed from the customer's loyalty card.
 - To enter a smaller amount (for example, the pre-tax amount), first erase the existing value by tapping **Delete**, then enter a new value and tap **OK**.
 - To accept the total transaction amount, tap **OK**.
6. The terminal processes the loyalty transaction.
The "Processing your request" message appears, followed by the "Transaction approved/Please pass terminal back to clerk" prompt. The terminal begins printing receipts.
7. Press the green  key to continue, if needed.
8. When "Transaction Approved" appears, tap **OK**.
9. Give the Cardholder copy of the receipt to the customer.

Removing points after a void

Follow these steps to remove loyalty points from a customer's loyalty card after performing a void.

1. At the end of the void transaction, the terminal displays the loyalty prompt "Does this transaction have loyalty?"

2. Tap **Yes**.

The terminal prompts you to "Enter the authorization number of the transaction that is to be voided".

3. Key in the 9-digit authorization number found on the receipt for the loyalty transaction to be voided and tap **OK**. To view a receipt example, go to page 22.

The terminal displays the loyalty transaction to be voided.


4. Tap **OK** to void the loyalty transaction.

The Swipe your card prompt appears.

5. Pass the terminal to the customer so they can swipe their loyalty card.

6. The customer swipes their loyalty card on the terminal.

The "Processing your request" message appears, followed by the "Transaction approved/Please pass terminal back to clerk" prompt. The terminal begins printing receipts.

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

8. When "Transaction Approved" appears, tap **OK**.

9. Give the Cardholder copy of the receipt to the customer.

Tracking loyalty card authorization number

Each loyalty card transaction has an authorization number (Auth#) which is printed on both the customer copy and the merchant copy of the receipt. You may be prompted to key in this number when performing loyalty card refunds, voids and when reprinting transaction receipts.

Tracking receipt

Diagram illustrating the layout of a merchant copy receipt with callouts A through I pointing to specific fields:

- A** points to **Loyalty Earned**
- B** points to **Loyalty card program name**
- C** points to *******1234**
- D** points to **Auth#: 000000000**
- E** points to **Total Amount \$000,000.00**
- F** points to **[Benefit Amount] \$000,000.00**
- G** points to **[Additional Info] 00000**
- H** points to **Points Earned 00000**
- I** points to **Current Balance 00000**

Other fields visible on the receipt include:

- MERCHANT NAME
- MERCHANT ADDRESS
- CITY PROV
- MMM DD,YYYY
- HH:MM:SS
- TID: 00000000 - 000000
- Batch: 000
- INVOICE #: 0A0A0A0A0
- Clerk: 000000
- Response: 000
- Approved
- Merchant copy

Item	Description
A	Loyalty transaction type, for example, Loyalty Earned, Loyalty Void, Loyalty Refund
B	Loyalty program name
C	Loyalty card number
D	Authorization number. Use this number to process loyalty refunds and voids, and to re-print receipts.
E	Total Amount. This is the total dollar amount of the transaction, including any tap or tip.
F	Benefit Amount. This is the dollar amount on which points are calculated. Note: This line may not appear or the wording may be customized.
G	Additional Info. Any additional data provided at the "Enter data" prompt. Note: This line may not appear or the wording may be customized.
H	Points earned (or removed) for the current transaction. Note: Depending on your program setup, this value may always print as "0" regardless of the actual number of points awarded or removed
I	Current Balance. The points balance on the loyalty card. Note: Depending on your program setup, this value may always print as "0" regardless of the actual balance on the card. Customers with tracking cards can contact their loyalty program provider to obtain the card balance.



Administration

This section covers administrative transactions, reporting tools, end of day processes, and troubleshooting procedures.

Administrative transactions

Activating a loyalty card

The Desk/5000 terminal only supports Loyalty programs that use pre-activated cards.

Reprinting a receipt

This function reprints both the customer copy and the merchant copy of a loyalty card transaction.

1. From the Main menu, tap **Reprint**.

The Reprint menu appears.

2. Choose **one** of the following:

- To print the receipt for the last loyalty (or gift card) transaction, tap **GL Reprint last receipt**.

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

- To print the receipt for a previous loyalty (or gift card) transaction:

- a. Tap **GL Search for receipt to reprint**.

- b. Tap one or more of the three search fields and key in a value to search for a transaction:

- authorization number;
- last 4 digits of the card number;
- transaction date.

- c. After entering your search term(s), tap **OK** to continue.

The terminal displays all transactions that match your search criteria.

- To perform another search, tap **Back**.
- To cancel the search and return to the Main menu, tap **Cancel**.

- d. Tap the transaction for which you want to print the receipts.

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

Reports

Note: If you also have a Moneris Gift program, gift card transactions will be included in the reports.

Masking card numbers on reports

For security reasons, card numbers are masked when printed on reports. Most of the digits are replaced with asterisks.

Transaction inquiry

This report finds loyalty (and gift) card transactions by card number and/or transaction date. You can choose to display or print the receipt for a transaction.

1. From the Main menu, tap **Reports, Transaction Reports, Gift and Loyalty Reports**, then **Gift & Loyalty Trans. Inquiry**.

The Transaction Inquiry screen appears.

2. Choose one of these options:

- To search by card number, tap the **Card Number** field, enter the last 4 digits of the loyalty card, then tap **OK**.
- To search by date, tap the **Date** field, enter the desired date, then tap **OK**.
- To search for loyalty transactions for a specific card on a specific date, enter a value in both fields.

3. Once you have entered a value in the card number field or the date field or both, tap **OK** to proceed with your inquiry.

- To go back and change a value, tap **Back**.

The terminal displays the transaction(s) found with the dollar amount, or indicates there are no transactions that match your search values.

4. For each item found, tap the transaction to see more details.

The terminal displays the transactions details.

5. Choose one of these options:

- To print a receipt for the displayed transaction, tap **1 Reprint Receipt** or press 1 on the keypad;
- To return to your search results, tap **Back**.
- To end the Transaction Inquiry and return to the Gift and Loyalty Reports menu, tap **OK**.

Transaction details report

This report shows details for loyalty (and gift) card transactions stored on the terminal, by date or by batch. The report also includes terminal totals, at the end, for gift and loyalty transactions in the current batch. If you wish to see the totals only, generate the [Terminal totals report](#) as described on this page.

1. From the [Main menu](#), tap **Reports, Transaction Reports, Gift and Loyalty Reports**, then **Gift & Loyalty Trans. Details**.

The Gift & Loyalty Trans. Details screen appears.

2. Tap **Select Type** and choose a search type.
 - To search by date, tap **Date**, enter a date, then tap **OK**.
 - To search the current batch, tap **Entire Batch**, then tap **OK**.

The terminal displays the stored transactions found, or indicates there are no transactions that match your search values.

3. Choose one of these options:
 - To print the report together with loyalty card totals, tap **1 Print** or press 1 on the keypad;
 - To return to the search screen, tap **Back**.
 - To end the report and return to the search screen, tap **OK**.

Terminal totals report

This report shows totals only for loyalty (and gift) card transactions recorded on the terminal for the current Gift & Loyalty batch.

1. From the [Main menu](#), tap **Reports, Transaction Reports, Gift and Loyalty Reports**, then **Gift & Loyalty Terminal Totals**.

The Gift & Loyalty Terminal Totals screen appears.

2. Tap **Select Type** and choose a search type.
 - To search by date, tap **Date**, enter a date, then tap **OK**.
 - To search the current batch, tap **Entire Batch**, then tap **OK**.

The terminal displays the stored transactions found, or indicates there are no transactions that match your search values.

3. Choose one of these options:
 - To print the totals, tap **1 Print** or press 1 on the keypad;
 - To return to the search screen, tap **Back**.
 - To end the report and return to the Gift and Loyalty Reports menu, tap **OK**.

Host totals report

This report shows loyalty (and gift) card transactions stored on the Moneris host for the current Gift & Loyalty batch.

1. From the Main menu, tap **Reports, Transaction Reports, Gift and Loyalty Reports**, then **Gift & Loyalty Host Totals**.

The terminal connects to the Moneris host to obtain the gift and loyalty totals.

The terminal displays the totals for each gift and loyalty card found, together with a grand total by transaction type for all cards in the report, or indicates there are no transactions that match your search values.

2. Choose one of these options:
 - To print the loyalty totals report, tap **1 Print** or press 1 on the keypad;
 - To end the report and return to the Gift and Loyalty Reports menu, tap **OK**.

End-of-day process

Loyalty transactions processed on your terminal are stored in a Gift & Loyalty batch. This batch is separate from the batch for your debit and credit card transactions and must be closed using the procedure below. Once the batch is closed, a new Gift & Loyalty batch is opened automatically and the batch number is incremented. Any new loyalty transactions will be stored in the new batch.

Note: When a Gift & Loyalty batch is closed, all transactions are cleared from the terminal. If you wish to view/print the terminal totals report or transactions details report for the current Gift & Loyalty batch, be sure to generate those reports before you close the batch. To view or print Reports, go to page 25.

Batch close

You must close your Gift & Loyalty batch yourself using the terminal. Moneris cannot close it for you (system close is not available for Gift & Loyalty programs).

Important: Moneris strongly recommends closing your batch each day.

1. From the Main menu, tap **End of Day**, then tap **Close Gift & Loyalty Batch**.

The terminal communicates with the Moneris host to obtain your Gift & Loyalty batch totals. On the Close Gift & Loyalty Batch menu, the terminal indicates whether the batch is “in balance” or “out of balance” with the batch totals on the Moneris host.

2. Do *one* of the following:
 - If your batch is **in balance**, go to step 8 to proceed with closing the batch.
 - If your batch is **out of balance**, go to step 3.
3. View and print the Host Totals report.
 - a. On the Close Gift & Loyalty Batch menu, tap **Host Totals**.
 - b. Tap **1 Print** to print the host totals.
 - c. Tap **OK** to return to the Close Gift & Loyalty Batch menu
4. View and print the Terminal Totals report.
 - a. On the Close Gift & Loyalty Batch menu, tap **Terminal Totals**.
 - b. On the search screen, tap **Select Type** and then tap **Entire Batch**.
 - c. Tap **OK** to proceed with the search.
 - d. Tap **1-Print** to print the terminal totals.
 - e. Tap **OK** to return to the Close Gift & Loyalty Batch menu.
5. Compare the Host Totals report (printed in step 3) with the Terminal Totals report (printed in step 4) to determine which transaction type is missing from the Moneris host. For example, a particular card may show 5 purchases (Loyalty Earned) on the terminal totals but only 4 purchases on the host totals.
6. View the Transaction Details report to find the missing transaction(s).
 - a. On the Close Gift & Loyalty Batch menu, tap **Transaction Details**.

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

- b. For each missing transaction, locate the date, time, dollar amount or points, and the last 4 digits of the card number. Print the report if this is more convenient for you.

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


- 7. Call Moneris Customer Care toll-free at 1-866-319-7450 to obtain assistance with reconciling your out-of-balance batch. Go to step 7a.

Note: *If you do not wish to reconcile your batch now, you can proceed with closing your batch (go to step 8) and contact Moneris the next business day for help with reconciliation.*

- a. When listening to the options on the telephone menu, select “Financial Inquiry”. We will ask you for the information gathered in step 6b. You can read it from the Transaction Details report screen or from the printed report.
- b. After speaking to Moneris, if the terminal still displays the Transaction Details report, tap **OK** to return to the Close Gift & Loyalty Batch menu.

- 8. On the Close Gift & Loyalty Batch menu, tap **OK** to proceed with closing the batch.

The terminal processes your request, then displays **Batch Closed**.

- 9. Tap **Batch Closed** or press the green  key to acknowledge that the batch has been closed.

The terminal returns to the End of Day menu.

Troubleshooting

If an error message appears, tap **OK** 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's Solution column. If the problem is still not resolved, contact Moneris Customer Care for assistance at 1-866-319-7450.

Error message	Solution
Card disabled	The loyalty card you swiped has been deactivated and cannot be used. Request another card.
Card not active	The loyalty card you entered has not been activated. Refer to your Loyalty program operating manual.
Card not supported Please retry.	The card type swiped by the customer cannot be used for loyalty card transactions. For example, they might have swiped a gift card or a credit card. Try the transaction again with a loyalty card.
Card read error	There is a problem with the magnetic stripe on the loyalty card that was swiped. Try swiping the card again, this time more slowly or quickly, or from front of the terminal to the back.
Host sync failed	There was a terminal, host, or communication problem during syncing with the Moneris host. Try to sync again. If this does not work, refer to the <i>Troubleshooting</i> section of your terminal's <i>Reference Guide</i> available at moneris.com/support-desk5000 .
There were no transactions found based on your criteria	The terminal did not find any loyalty card transactions matching the information you entered.
No totals available	You tried to close your Gift & Loyalty batch, but no gift or loyalty card transactions have been processed since the last Gift & Loyalty batch close. There is no need to close an empty batch.
Refund amount greater than original	The loyalty refund amount you entered is greater than the original purchase amount. Re-try the transaction with the correct refund amount.
Transaction amount over maximum	The transaction amount you entered exceeds the maximum allowable for your loyalty program. Enter a valid amount.
Matching transaction not found	The terminal did not find any loyalty card transactions matching the authorization number (or other criteria) you entered. Check the authorization number (or other criteria) and try again.
There were no receipts found based on your criteria	You attempted a Reprint request or a Transaction Inquiry but the terminal did not find any transactions based on your criteria. Check the data you entered and try again.



Merchant Support

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

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

We're only one click away.

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

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

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

Can't find what you are looking for?

Call Moneris Customer Care (available 24/7) toll-free at **1-866-319-7450**. 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.



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