Moneris Go®

Using Your Terminal

Contents

What's new?

These new features are part of the latest release of your Moneris Go terminal.

Better accessibility for low vision customers. The terminal audibly announces the cancellation of a transaction.

Print search results. You can print the results of a <u>transaction search</u> under Reports (page 51).

Remove remembered names. Remove someone from the <u>sign-in</u> screen if they're no longer around (page 6).

Control more transactions by user role. Enable or disable cash transactions and independent refunds for each <u>user role</u> on your terminal (page 58).

Keep settings secure. The Settings menu and the Edit user screen now require a password to make changes.

Secure access to cash transactions. Set password protection for cash transactions within <u>user roles</u> (page 58).

Display timeout. Screen going dark too soon? Increase the timeout using the <u>General app settings</u> (page 62).

Setting up your terminal

If you have not already set up your terminal hardware and software, refer to the Moneris Go®
Setting up Your Terminal guide at **moneris.com/en/support/devices/monerisgo**.

Note: No setup is required for cellular (4G) communication. It is enabled by default.

Moneris Go terminal

Use this wireless, all-in-one terminal and PINpad to process transactions virtually anywhere with cellular coverage and/or Wi-Fi coverage. Both you and your customer will enter information and respond to prompts on the terminal. When directed on screen, pass the terminal to the customer. When the customer has finished, they will pass the terminal back to you as directed on screen. Simply respond to the prompts to complete a transaction.
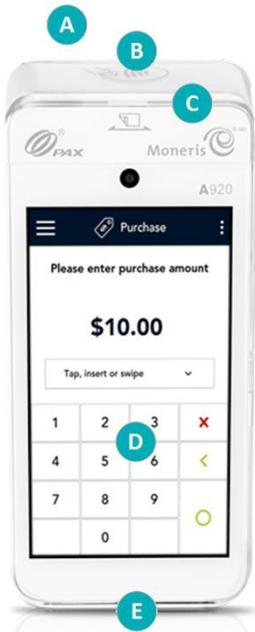
Hardware - Front of terminal

Label	Hardware element	Function
A	Printer	Prints receipts and reports.
B	Contactless reader	Reads card information when a card is <u>tapped</u>.
C	Magnetic stripe reader	Reads card information when a card is <u>swiped</u>.
D	Touch screen display	Displays information and allows you to enter information by touching the screen.
E	Chip card reader	Reads card information when a chip card is <u>inserted</u>.

Hardware - Rear of terminal

Label	Hardware element	Function
F	Rear camera	Scans QR codes on a receipt to help you find a transaction to refund, void, or reprint receipts.
G	Metal contacts	Connect the terminal with the optional charging base

On-screen buttons

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

Screen element	Action performed
☰ Main menu icon	Go to the Main menu.
✖ Cancel key	Cancel a transaction and return to the Purchase screen.
‹ Delete key	Delete one or more characters in a data-entry field.
☐ OK key	■ Submit the data shown on-screen. For example, tap **OK** to indicate the transaction amount is correct. ■ Accept/confirm the choice or information displayed on-screen.
‹ Back icon	Go back to the previous screen/menu.
⋮ Additional options icon	Display additional options

Navigating the terminal

Touch screen interaction

Your Moneris Go terminal features a large color touch screen.

■ To access a function displayed on screen (for example, a button, a menu, a field), simply use your finger to tap the item on the screen.

■ To view content (for example, a menu or report) that extends past the bottom of the screen, swipe up. Swipe down to go back to the top of the screen.

Getting to the Main menu

To get to the Main menu, tap the Main menu ☰ icon.

If the Main menu icon is not available, tap the Back ‹ icon until the Main menu icon is visible.
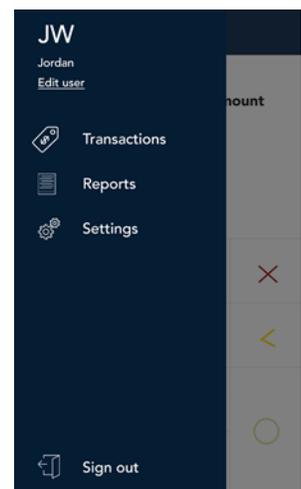
Main menu

The Main menu

To navigate to the Main menu, refer to <u>Getting to the Main menu</u> on page 4.

| Menu item	Use this menu item to:
Edit user	Change your password. Refer to <u>Edit user</u> on page 61.
Transactions	Display the Purchase screen to process a <u>Purchase transaction</u> (page 13). This is the default transaction. It will appear whenever you sign in. From the Purchase screen, tap the additional options ⋮ icon to access other transactions: <u>Independent refund</u> (page 36) and <u>Pre-authorization</u> (page 24).
Reports	Display the <u>Reports screen</u> in order to : ▪ View the <u>24-hour summary</u> of transactions (page 48) ▪ View <u>transaction details</u> (page 48) ▪ View the <u>End of day</u> report (page 63) ▪ <u>Refund</u> a purchase (page 32) ▪ <u>Void</u> a purchase (page 40) ▪ <u>Complete or void</u> a pre-authorization (page 28)
Settings	Display the <u>Settings menu</u> in order to: ▪ Change <u>receipt settings</u> (page 53) ▪ Change <u>Tip settings</u> (page 54) ▪ Change <u>Transaction settings</u> (page 55) ▪ <u>Manage users</u> (page 56) ▪ Change <u>General application settings</u> (page 62) ▪ <u>Sync terminal settings with Moneris</u> (page 52)
Sign out	<u>Sign out</u> of the terminal. Refer to page 7. ▪ Sign out at the end of the day and whenever your terminal is left unattended. This will help to keep your terminal secure. ▪ To allow the application to sign you out automatically, refer to <u>General application settings</u> on page 62. There are two options for automatic sign out.

Signing in

To ensure the security and integrity of your terminal, you must sign in before performing any transactions or other functions.
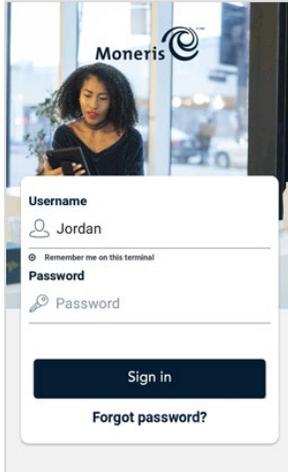
1. To sign in to Moneris Go:

   a. Tap the **Username** field and enter your user name.

   b. Tap **Remember me on this terminal**. The application will remember your user name so that you don't have to enter it the next time you sign in.

   *Note: The application can remember up to 3 user names. If you were not the last person to use the terminal, tap the **Username** field, and select your user name from the dropdown list.*
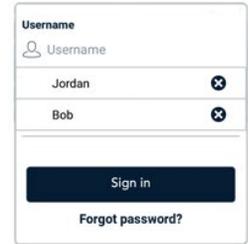
   c. To delete a name from the list, tap the x beside the name.

   d. Tap the **Password** field and enter your user password.

   e. Tap **Sign in**. The application signs you in and displays the default transaction screen.

Forgot your password?

If you can't remember your password, follow these steps.
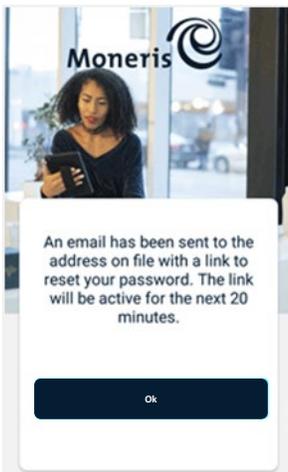
1. Tap the **Username** field and enter your user name.

2. Tap "**Forgot Password?**"

   As shown on screen, the application sends a message to your email address with a link to allow you to reset your password.

3. Access your email and click on the link to set a new password.

4. Return to the terminal and tap **OK** to continue.

5. Sign in using your new password.
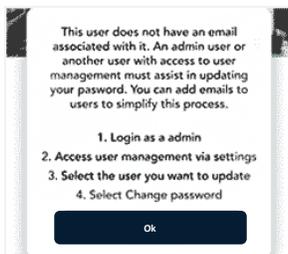
Note: If your user profile does not include an email address, the application will ask you to obtain assistance from your Admin user or any other user who has access to User management settings. Follow the instructions on screen or refer to <u>User management - Users</u> on page 56.

Signing out

Sign out at the end of the day or whenever the terminal will be left unattended to prevent unauthorized transactions.
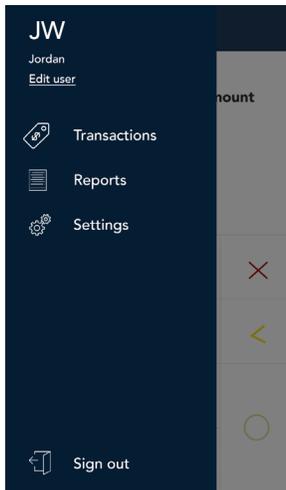
1. To sign out of Moneris Go:

    a. Tap the Main menu ☰ icon.

    b. At the bottom of the menu, tap **Sign out**.

Note: To allow the application to sign you out automatically, refer to General application settings on page 62. There are 2 methods of automatic sign out.

Wireless communication: 4G and Wi-Fi

The Moneris Go terminal uses long-range cellular communication (4G or 3G) to send and receive information to and from the Moneris host. The terminal communicates via 4G by default for faster communication, and uses 3G as a fallback where 4G is not available.

If you set up a Wi-Fi network, the terminal will switch to Wi-Fi when the Wi-Fi signal is stronger. To setup a Wi-Fi network, refer to the Moneris Go *Setting up your terminal* guide.

Network status indicator

Icons on the status bar	Description
4G	The terminal is currently connected to and using the authorized carrier's 4G wireless network.
3G	The terminal is currently connected to and using the authorized carrier's 3G wireless network (as fallback).
	The terminal is currently connected to and using your local Wi-Fi network.

To confirm 4G/3G wireless communication:

1. While the terminal is powered on, check the status bar for the 4G or 3G icon.

2. Confirm that there is sufficient signal strength (see the Signal strength indicator table below).

Signal strength indicator for cellular communication

Icon	Description
	5 bars: Terminal is receiving a very strong signal from the network and can process transactions.
	4 bars: Terminal is receiving a strong signal from the network and can process transactions.
	3 bars: Terminal is receiving a good signal from the network and can process transactions.
	2 bars: Terminal is receiving a signal from the network and can process transactions but may take longer to complete them.
	1 bar: The terminal is receiving a weak signal and may not be able to process transactions and/or print receipts.
	0 bars: The terminal is not receiving any signal and CANNOT process transactions.

Battery use

To maintain battery charge, use any method below:

- **Direct-to-terminal charging cable:** Connect this cable to the USB port on the left side of the terminal. Plug the other end into a working power outlet, or use a USB port on your computer as the power source.

- **Charging base:** Dock the terminal on the optional charging base.

If needed, refer to the Moneris Go *Setting up Your Terminal* guide at
moneris.com/en/support/devices/monerisgo .

Helpful hints

- Check the battery charge level (see icons below) before use.

- Power off (page 10) the terminal when not in use or being charged.

Battery status indicators

The battery icon displays in the status bar. The icon reflects the battery charge status/charge level.

	Terminal connected to external power source The "lightning bolt" portion of the battery icon appears when the terminal is connected to an external power source.
	25% charge or less Recharge the battery as soon as possible. The terminal may be close to powering off. Data will not be lost if this happens.
	0% charge The terminal will power off unless connected to a power source. Data will not be lost if the terminal powers off.

Power on

1. Locate the power ⏻ button on the right side of the terminal.

2. To power on the terminal, press the power button for 2 seconds or until the screen illuminates.

Power saving mode

If there is no activity on the terminal for several minutes, the display screen will darken then shut down to save battery power. To wake up the screen, briefly press the power ⏻ button.

Restart

1. Ensure that the terminal is not connected to a power source. If needed:

    ▪ Unplug the charging cable from the terminal; or
    ▪ Undock the terminal from the optional charging base.

2. Locate the power button on the right side of the terminal. Press for 2 seconds.

    A screen appears with four options: Airplane mode, Sound, Reboot, and Power off.

3. Tap **Reboot**.

    The Reboot icon appears on its own.

4. Tap **Reboot** again to confirm you want to restart the terminal.

    The screen displays "Rebooting …"

5. The terminal shuts down and restarts.

Power off

1. Ensure that the terminal is not connected to a power source. If needed:

    ▪ Unplug the charging cable from the terminal; or
    ▪ Undock the terminal from the optional charging base.

2. Locate the power button on the right side of the terminal. Press for 2 seconds.

    A screen appears with four options: Airplane mode, Sound, Reboot, and Power off.

3. Tap **Power off**.

    The Power off icon appears on its own.

4. Tap **Power off** again to confirm you want to shut down the terminal.

    The screen displays "Shutting down…"

5. The terminal powers off.

Card entry options

Insert: Chip cards

When the screen displays "Tap, insert, or swipe", the customer inserts the card into the terminal's chip reader.

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

- The customer may be prompted to key in a PIN.
- The chip card must remain inserted until the screen displays "Please remove your card".

Wave/Tap: Contactless cards

When the screen displays "Tap, insert, or swipe", the customer taps their card, or mobile device, over the contactless reader which is located above the display screen.

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

Note: *The transaction amount must be equal to or less than the contactless transaction limit set for the card. If the amount is greater than the contactless limit for the card, when the customer taps their card, the terminal displays "Limit exceeded" followed by "Insert or swipe". To complete the transaction for the same amount, the customer inserts or swipes their card.*

Swipe: Magnetic stripe cards

When the screen displays "Tap, insert, or swipe", the customer swipes the card on the terminal's magnetic stripe reader. The card's magnetic stripe faces the terminal. The card can be swiped from the left or from the right.

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

Manual entry

You can manually key in a customer's credit card information for a card-not-present transaction, that is, a transaction where the customer is not present at your place of business. The following settings are required:

- "Manual entry" is enabled in your underline user role (page 58).
- "Manual entry transactions" are enabled in Transaction settings (page 55).

Scan

The Moneris Gift Card program allows you to scan the bar code of a gift card as a method of entering the card information. Merchants who are not subscribed to the gift card program will not see the option to scan a card.

Transactions

Transaction guidelines

To process financial transactions, follow these general guidelines.

1. Make sure you are connected to Moneris. Look for the presence of the 4G/3G or Wi-Fi icons, and check the signal strength indicator in the status bar at the top of the screen. If both the 4G/3G and the Wi-Fi icons are not present, the terminal will not be able to process the transaction. If you are using 4G/3G communication and signal strength is 2 bars or below, the transaction may be processed slowly, or the terminal may not be able to process the transaction. Refer to the No connection error message on page 64.

2. Determine which transaction you want to process (for example, Purchase, Preauthorization, Refund, Independent refund, Void). Purchase is the default transaction.

3. Start the transaction on the terminal and follow the prompts. For instructions, refer to pages 13-44.

    - If prompted, pass the terminal to your customer so they can respond to the customer prompts.
    - If card entry is required to complete the transaction, the customer (if present) enters their card using tap, insert, or swipe.
    - The merchant prompts and the customer prompts may vary depending on:

        - the transaction type (for example, Purchase or Refund)
        - the payment type (for example, credit or debit)
        - the method of card entry (for example, insert, swipe, tap, or manual entry)
        - any features you have turned on (for example, tipping)
        - The merchant prompts and the customer prompts may vary depending on:

    - If a transaction is canceled, the terminal audibly announces the cancellation over the terminal speaker.

4. Process any printed receipts. (Refer to Receipts on page 45.)

    - Customer receipt: Give this copy to the customer. If the customer is holding the terminal, they can tear off the receipt themselves.
    - Merchant receipt: Keep this copy for your records.

Purchase

Follow these steps to process a Purchase transaction using a debit or credit card.

1. Start at the **Purchase** screen. This is the default transaction.

   If your terminal is at a different screen, tap the Main menu ☰ icon, then tap **Transactions**.

2. Use the on-screen numeric keypad to enter the purchase amount, then tap the OK ■ key.

3. The transaction identifier prompt appears only if enabled under Transaction settings (page 55). The label "Custom ID" will be replaced by your customized label (for example, Customer number).

   - Tap the field, enter a value using the on-screen keyboard, then tap **Go**.
   - To bypass the prompt, tap **Go** without entering a value.
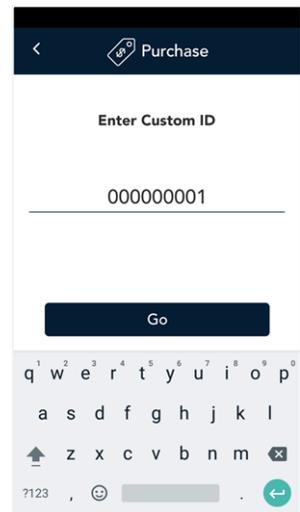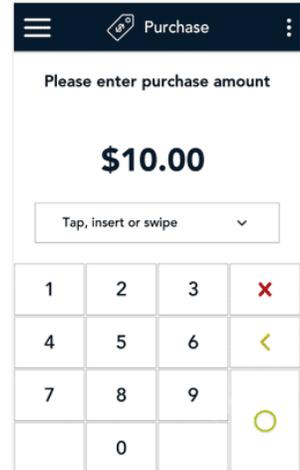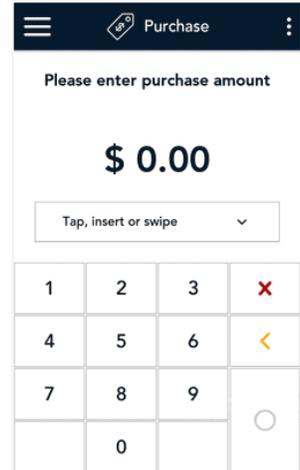
4. Pass the terminal to your customer so they can respond to the customer prompts.
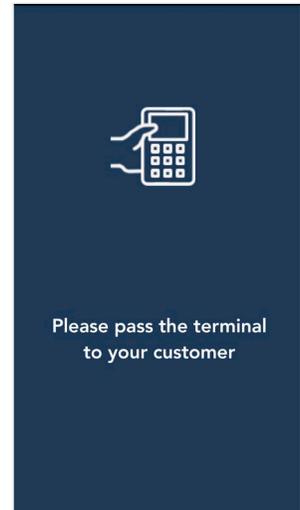
5. If tip entry is turned on, the customer enters a tip (or no tip).

   To enable tip entry, refer to Tip settings on page 54.
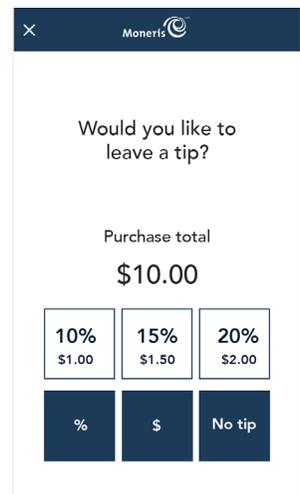
6. The Purchase total screen appears, showing:
   - The total sale, including the tip (if any);
   - The "Tap, insert or swipe" prompt;
   - The cards (for example, Interac, Visa) and mobile wallets (for example, Apple Pay) you accept.

7. The customer enters their card on the terminal. Depending on the type of card, they can tap, insert, or swipe it. For more information on card entry options, refer to page 11.

   - Additional prompts may appear such as cashback and surcharge* if these options are enabled under Transaction settings (page 55).
     *The operator of this Terminal charges a fee for INTERAC Debit Transactions. This fee is in addition to any fees that your financial institution may charge.
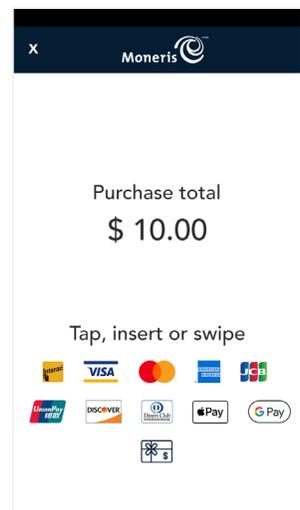
8. If prompted, the customer enters their PIN. There may be additional customer prompts.
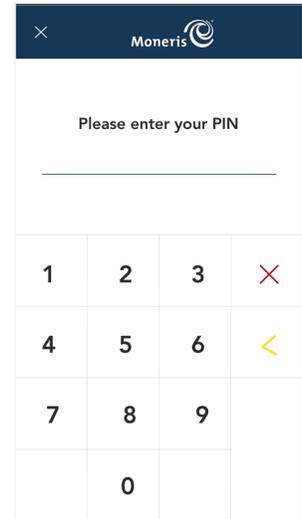
9. The "Processing, please wait" message appears.

   If the customer inserted a chip card, the message "Do not remove your card" also appears.

10. Once the purchase is approved, the "How would you like your receipt?" prompt appears, showing the customer the available options for receiving a receipt: **Print**, **Text**, **Email**, and **No Receipt**.

    Note: *You can choose which receipt options customers will see. Refer to* *Receipt settings* *on page 53.*

11. The customer selects a receipt format (or no receipt) by tapping one of the options on screen. If the customer chooses Text or Email, they are prompted to enter the appropriate information.

12. The customer passes the terminal back to you, as directed by the application.

13. The application prints receipts if requested.

    ▪ If the customer requested a printed receipt, give them the cardholder copy.
    ▪ If you enabled merchant receipt printing, keep the merchant copy for your records.

    a.

14. When the "Transaction Complete" prompt appears, tap **OK** to return to the default Purchase screen.

15. The default transaction screen appears.

    The application is ready to process your next transaction.
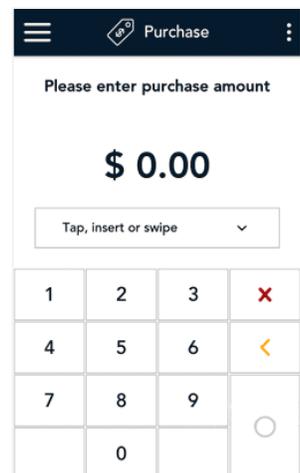
Purchase – Card not present

If your business receives orders by Internet, mail, or telephone, follow these steps to process a Purchase transaction where you can manually enter the customer's credit card information.

1. Start at the **Purchase** screen. This is the default transaction.

   If your terminal is at a different screen, tap the <u>Main menu</u> ☰ icon, then tap **Transactions**.

2. Tap the card entry field (**Tap, insert or swipe**) to display the card entry options.
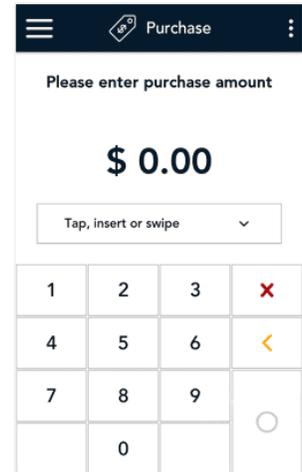
3. Tap **Manual entry**, then **OK**.

   Note: *Manual entry must be enabled in your <u>user role</u> (page 58) and in <u>Transaction settings</u> (page 55).*
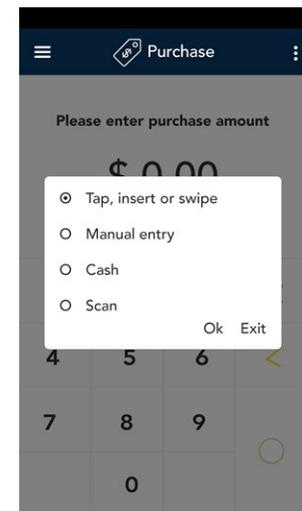
4. Enter the purchase amount, then tap the OK ■ key.

   Note: *The order of these initial steps is flexible. You can enter the purchase amount first, or you can choose the method of card entry first. Both will work.*
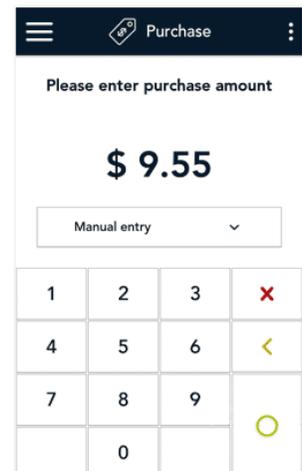
5. At the card entry screen:

   a. Verify the purchase amount. To re-enter the amount, tap x in the title bar to cancel the transaction.

   b. Tap each credit card field and enter the information required.

   c. Tap **Confirm**.

      ▪ If you did **not** enter a CVV, continue at step 6.
      ▪ Otherwise, skip to step 7.
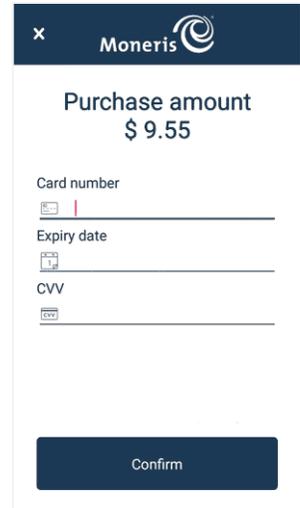
6. Tap one of the available choices to indicate why you did not enter the CVV.
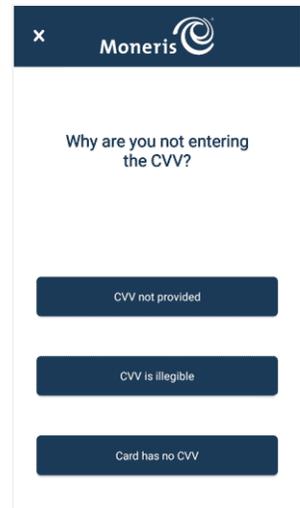
7. If tip entry is turned on, you can enter a tip amount as specified by the customer.

   To enable tip entry, refer to Tip settings on page 544.
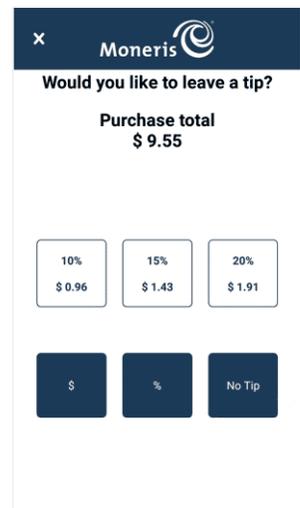
8. The "Processing, please wait" message appears.
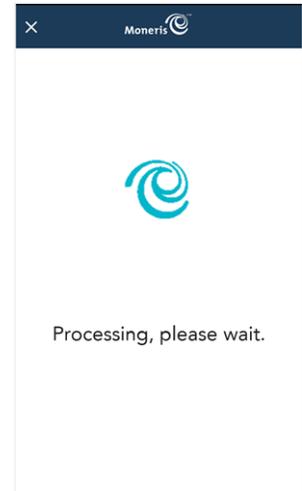
9. Once the purchase is approved, the "How would you like your receipt?" prompt appears, showing the available options for receiving a receipt.

    Note: *You can choose which receipt options will appear. Refer to Receipt settings on page 53.*

    a. Select a receipt format on behalf of the customer, or ask them if speaking on the telephone.

    b. If you selected **Text** or **Email**, enter the appropriate information.
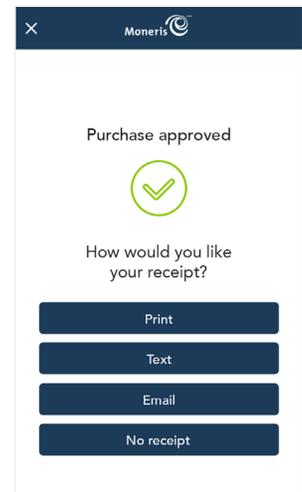
10. The application prints receipts if requested.

    ▪ If you enabled merchant receipt printing, keep the merchant copy for your records.
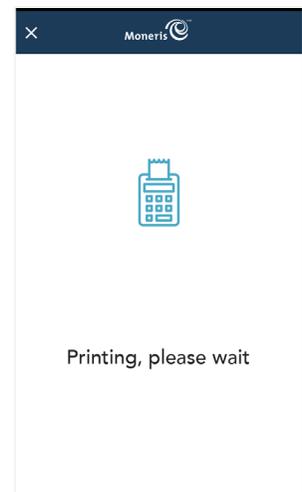
11. The "Transaction Complete" prompt appears. Tap **OK** to return to the default Purchase screen.
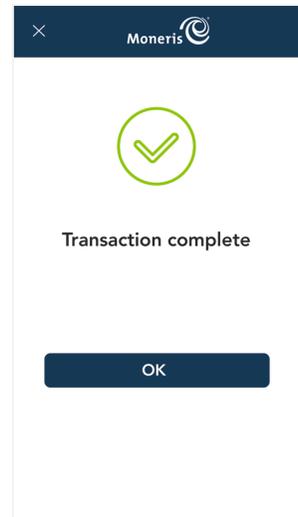
12. The default transaction screen appears.

The application is ready to process your next transaction.
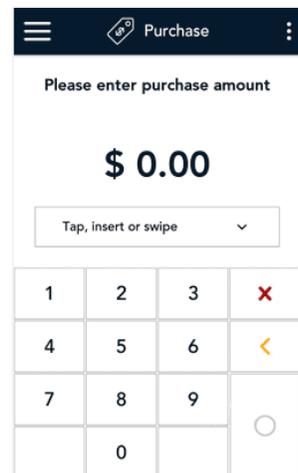
Purchase - Partial approval

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

A pre-paid card refers to a credit card (such as Visa® or Mastercard®) loaded with a specific value.

1. Start at the **Purchase** screen and follow steps 1 to 8 in the Purchase transaction procedure (refer to page 13).

   If your terminal is at a different screen, tap the Main menu ☰ icon then tap **Transactions**.

   Note: Process any pre-paid cards first -- the customer may have more than one.

2. When a partial payment is approved, the screen displays the following information to the customer:

   - The approval message;
   - The amount paid;
   - The amount still due;
   - A prompt to pass the terminal back to the merchant.

3. The customer passes the terminal back to you.

4. The screen displays the partial approval information, together with 3 options. Ask the customer how they would like to proceed.

   - To continue the transaction, tap **Cash** or **Card** depending on the customer's response. Go to step 5.
   - If the customer decides to cancel the sale, tap **Cancel**. The application will automatically cancel all partially approved transactions that were processed as part of this sale and automatically print a cancellation receipt. At the "Partial approval cancelled" message, tap **OK** to return to the default transaction screen.
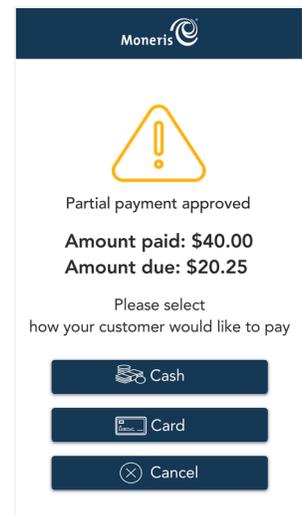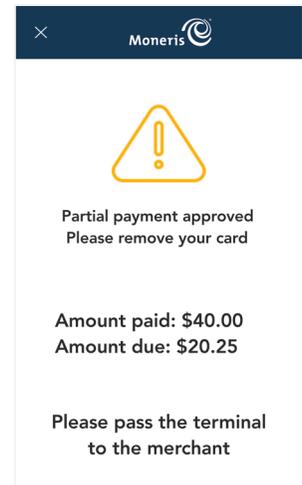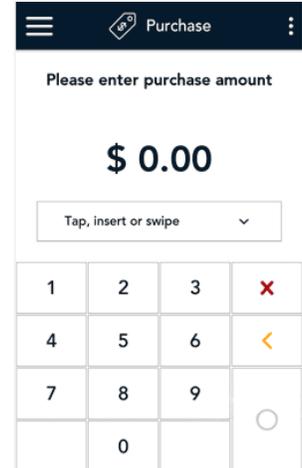
5. The receipt options screen appears for the approved payment. Pass the terminal to the customer.

6. The customer selects a receipt format (or no receipt) by tapping one of the options on screen. If the customer chooses Text or Email, they are prompted to enter the appropriate information.

7. The customer passes the terminal back to you, as directed by the application.

8. The application prints receipts if requested.

   ▪ If the customer requested a printed receipt, give them the cardholder copy.
   ▪ If you enabled merchant receipt printing, keep the merchant copy for your records.

9. Pass the terminal to the customer so they can respond to the customer prompts for the next payment of the balance due. This procedure will repeat as long as there is a balance to be paid.

10. The application begins a card purchase or a cash purchase depending on the option you selected in step 4.

   a. The customer enters their card (if applicable).

   b. If the tip prompt appears, the customer enters a tip or no tip.

   c. The customer selects a receipt format or no receipt.

   d. The customer passes the terminal back to you.
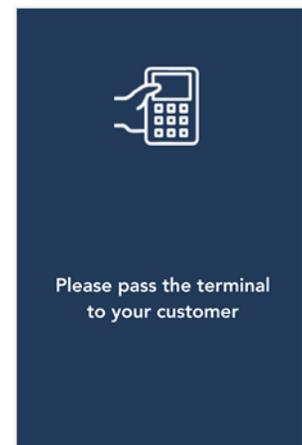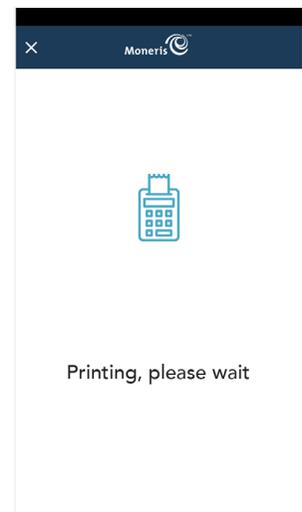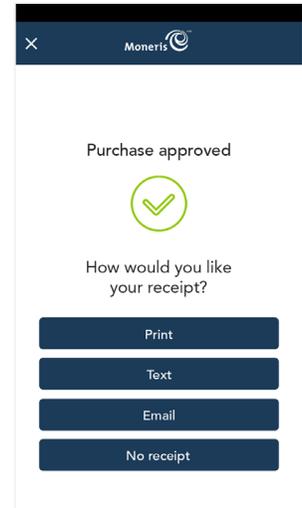
11. The application prints receipts if requested.

- If the customer requested a printed receipt, give them the cardholder copy.
- If you enabled merchant receipt printing, keep the merchant copy for your records.

12. Once the total purchase amount is paid for, the "Transaction Complete" screen appears. Tap **OK** to return to the default transaction screen.
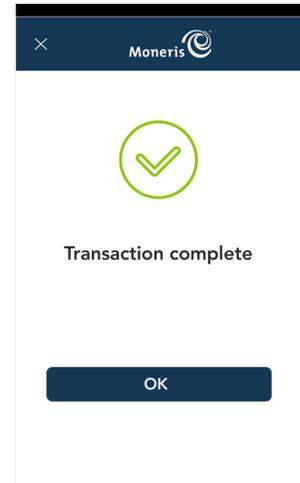
Purchase - Cash

In order to perform cash transactions, they must be enabled in your user role and in Transaction settings. The application will provide receipts for cash transactions and will also include cash transactions in your reports.

1. Start at the Purchase screen as usual.

2. Tap the card entry field to display the card entry options. Tap **Cash**, then **Ok**.

3. Enter the purchase amount then tap the OK ■ key.

4. If the password screen appears, enter your password to continue. This step appears when password protection for cash transactions is enabled in your User role (page 58).

5. Pass the terminal to the customer.

6. If tip entry is enabled, the customer enters a tip or no tip.

7. At the total amount confirmation screen, the customer taps **OK** to confirm the total amount, including any tip.

8. The receipt options screen appears.

9. The customer selects a receipt format (or no receipt) by tapping one of the options on screen. If the customer chooses Text or Email, they are prompted to enter the appropriate information.

10. The customer passes the terminal back to you, as directed by the application.

11. The application prints receipts if requested.

- If the customer requested a printed receipt, give them the customer copy.
- If you enabled merchant receipt printing, keep the merchant copy for your records.

12. When the "Transaction Complete" screen appears, tap **OK** to return to the default transaction screen.

To process a cash refund, refer to Refund on page 32. To process an independent cash refund, refer to Independent Refund on page 36.
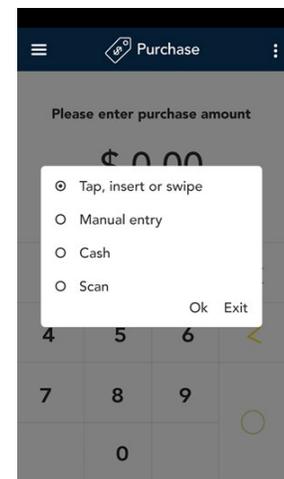
Pre-authorization

Perform a credit card pre-authorization when the final purchase amount is unknown, for example, when the customer is renting a vehicle or staying at a hotel.

1. Start at the **Purchase** screen. This is the default transaction.

   If your terminal is at a different screen, tap the <u>Main menu</u> ≡ icon, then tap **Transactions**.
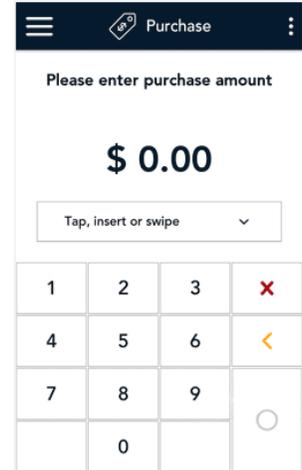
2. Tap the additional options ⋮ icon and select **Pre-authorization**.

   The title of the screen changes from Purchase to Pre-authorization.
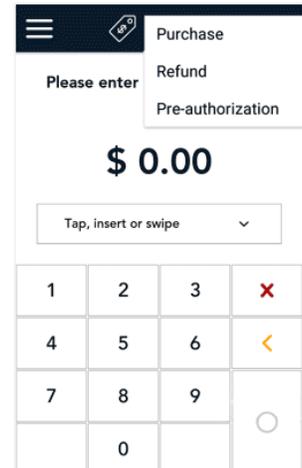
3. Use the on-screen numeric keypad to enter the amount you want to pre-authorize, then tap the OK ■ key
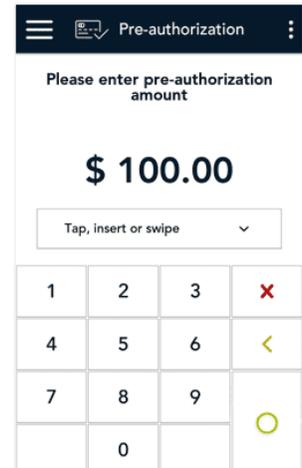
4. As indicated on-screen, pass the terminal to the customer so they can enter their card and respond to any customer prompts.

5. The pre-authorization total screen appears, prompting the customer to "Tap, insert, or swipe."

6. The customer enters their card on the terminal. Depending on the type of card, they can tap, insert, or swipe it. For more information on Card entry options, refer to page 11.

7. The "Processing, please wait" message appears.

   If the customer inserted a chip card, the message "Do not remove your card" also appears.
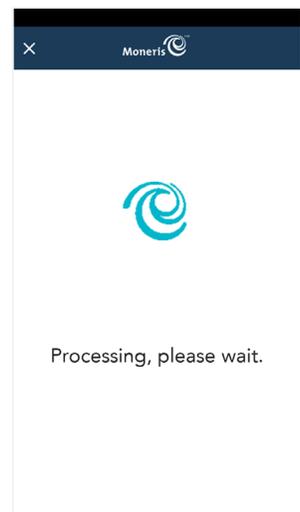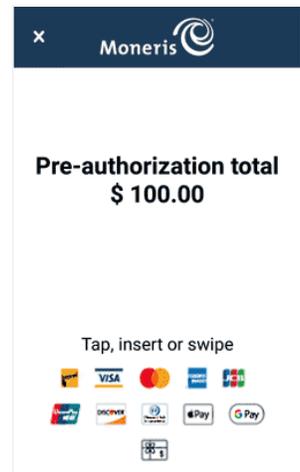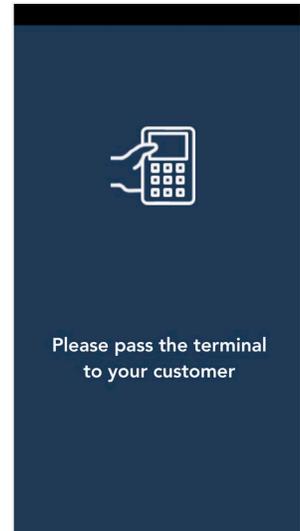
8. Once the pre-authorization is approved, the "How would you like your receipt?" prompt appears, showing the customer the available options for receiving a receipt: **Print**, **Text**, **Email**, and **No Receipt**.

   Note: *You can choose which receipt options customers will see. Refer to* <u>*receipt settings*</u> *on page 53.*

9. The customer selects a receipt format (or no receipt) by tapping one of the options on screen. If the customer chooses Text or Email, they are prompted to enter the appropriate information.

10. The customer passes the terminal back to you, as directed by the application.

11. The application prints receipts if requested.

   ▪ If the customer requested a printed receipt, give them the cardholder copy.
   ▪ If you <u>enabled merchant receipt printing</u>, keep the merchant copy for your records.

12. When the "Transaction Complete" prompt appears, tap **OK** to return to the default screen.

13. The default screen appears.

The application is ready to process your next transaction.

Follow up transactions

- Complete or void a pre-authorization (page 28)
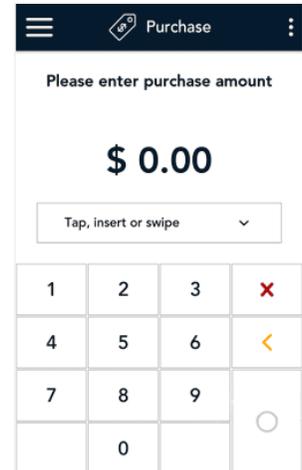
Pre-authorization – card not present

Follow these steps to perform a pre-authorization when the customer and their card are not physically present, for example, when the customer is making a reservation by telephone for a hotel stay or car rental.

1. Refer to the Pre-authorization procedure (for card present) on page 24, and follow steps 1 to 3.

2. On the Pre-authorization screen, tap the card entry field (**Tap, insert or swipe**) to display the card entry options.

3. Tap **Manual Entry**, and then **OK**.

4. When prompted, enter the credit card information using the on-screen keypad, then tap **Confirm**.

5. Follow the prompts on screen to process the pre-authorization.

For a full set of instructions, refer to the *Online User Manual* for your Moneris Go terminal available at **moneris.com/support**.
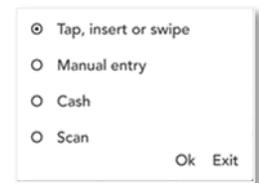
Pre-authorization – Completion or void

Choose which transaction you wish to process:

- **Completion**: Complete a pre-authorization when the final purchase amount is known, for example, at the end of a hotel stay or when a rental car is returned.

- **Void**: Void a pre-authorization to cancel the transaction and to release the funds.

1. At the Main menu, tap **Reports**.
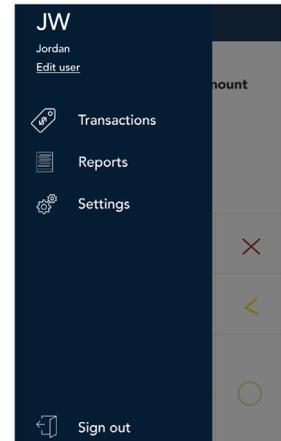
2. The Reports screen shows all transactions ordered by date. Tap the pre-authorization you want to complete or void.

   - If needed, tap the **All transactions** dropdown menu and select **Pre-authorizations** to see pre-authorization transactions processed in the last **30** days.
   - You can also tap **Scan** to scan the QR code from a receipt, or tap **Search** to look for the pre-authorization to be completed. For instructions, refer to Finding a transaction using Scan or Search on page 51.
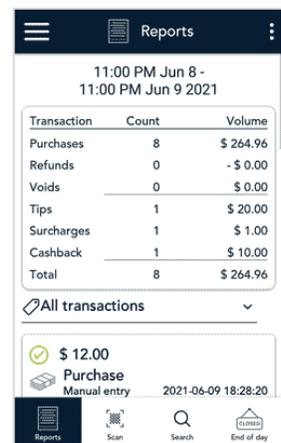
3. The transaction details screen appears.

   - Verify this is the right pre-authorization. To go back, tap ⟨ .
   - To complete the pre-auth, tap **Complete**, and proceed to step 4.
   - To void the pre-auth, tap **Void**, then tap **OK** on the confirmation screen. Proceed to step 8 (Processing, please wait).
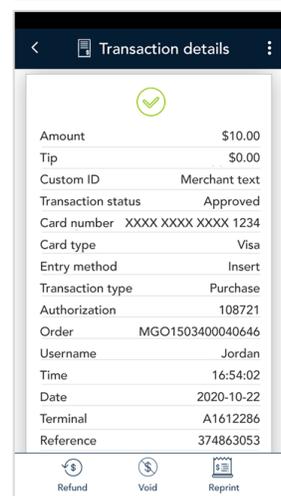
4. The "Completion" screen appears showing the original pre-authorization amount.

   ▪ To change the completion amount, tap the Delete **<** key to delete the full amount, then enter the final amount to charge to the customer's card.

5. Tap the OK ■ key to continue.
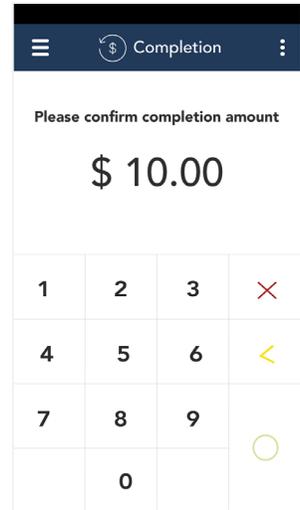
6. Pass the terminal to your customer so they can respond to the customer prompts.
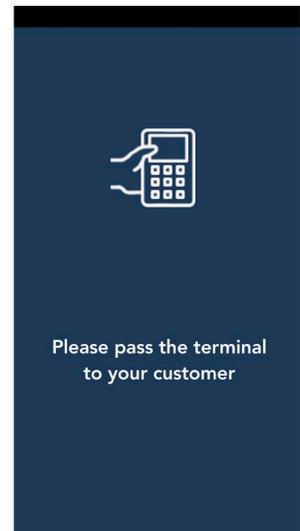
7. If tip entry is turned on, the customer enters a tip (or no tip).

   To enable tip entry, refer to <u>Tip settings</u> on page 54.
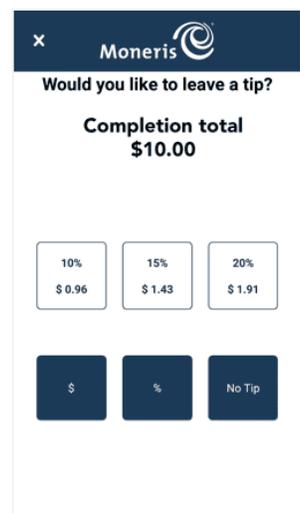
8. The "Processing, please wait" message appears.
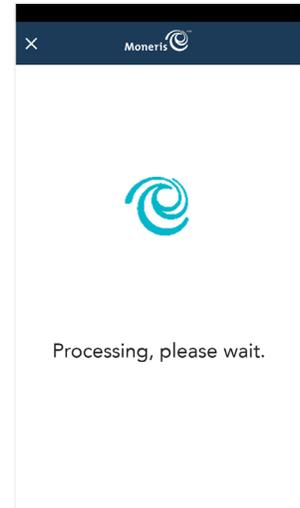
9. Once the completion (or void) is approved, the "How would you like your receipt?" prompt appears, showing the available options for the customer receipt: **Print**, **Text**, **Email**, and **No Receipt**.

    Note: *You can choose which receipt options will appear. Refer to Receipt settings on page 53.*

    a. The customer selects a receipt format (or no receipt) by tapping one of the options on screen.

    b. If the customer chooses Text or Email, they are prompted to enter the appropriate information.

10. The customer passes the terminal back to you, as directed by the application.

11. The application prints receipts if requested.

    ▪ If the customer requested a printed receipt, give them the cardholder copy.

    ▪ If you enabled merchant receipt printing, keep the merchant copy for your records.
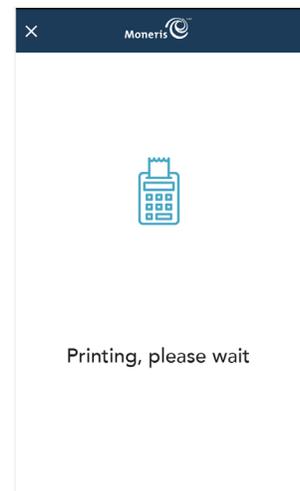
12. When the "Transaction Complete" prompt appears, tap **OK** to return to the default transaction screen.

13. The default transaction screen appears.

The application is ready to process the next transaction.
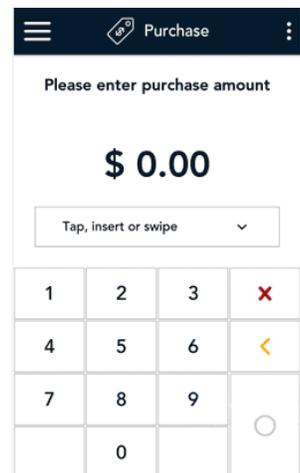
Refund

A refund credits a customer's account in relation to a specific purchase transaction. You can also refund a cash purchase. You can refund the whole amount of a purchase transaction or a portion of the amount. Refunds are processed through the Report screen.   (To process an Independent refund, refer to page 36.)

1. At the Main menu, tap **Reports**.
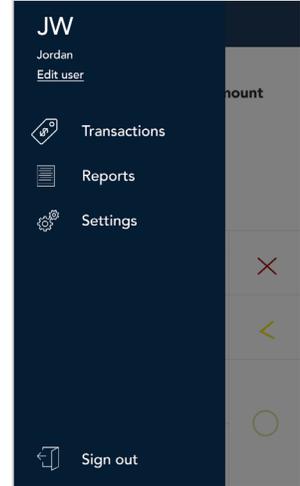
2. Tap the transaction you want to refund. If needed, tap the **All transactions** dropdown menu and select the type of transaction you are searching for.

   You can also tap **Scan** to scan the QR code from a receipt, or tap **Search** to look for the transaction to be refunded. For instructions, refer to Finding a transaction using Scan or Search on page 51.
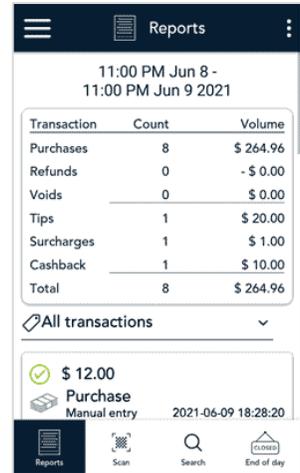
3. The transaction details appear.

   ▪ Verify this is the right transaction, then tap **Refund**.
   ▪ Otherwise, tap the Back ❮ icon in the title bar to go back to the previous screen.
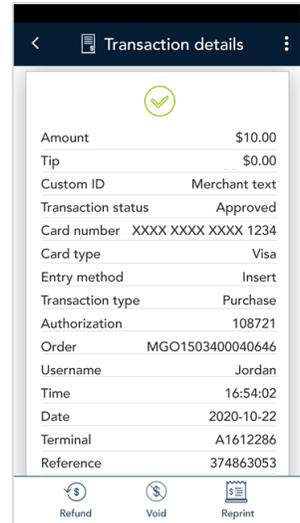
4. The Refund screen appears, showing the full amount of the original purchase transaction.

    ▪ To perform a partial refund, tap the Delete **<** key to delete the full amount, then enter the amount you want to refund.

5. Tap the OK ■ key to continue.

    ▪ If the original purchase was processed using **cash**, skip to step 10.
    ▪ If the original purchase was processed using a **credit card**, skip to step 9.
    ▪ If the original purchase was processed using a **debit card or UnionPay card**, continue to step 6.

6. As indicated on-screen, pass the terminal to the customer so they can enter their card and respond to any customer prompts.

7. The refund total screen appears, prompting the customer to "Tap, insert, or swipe."

8. The customer enters their card on the terminal. Depending on the type of card, they can tap, insert, or swipe it. For more information on Card entry options, refer to page 11.
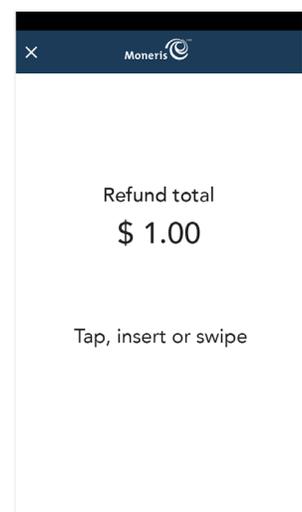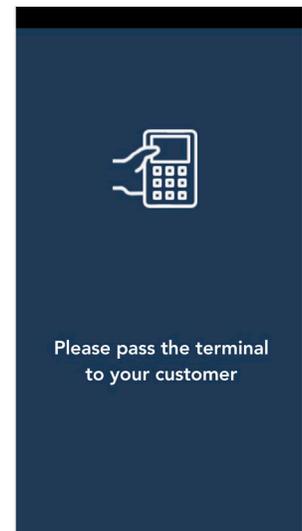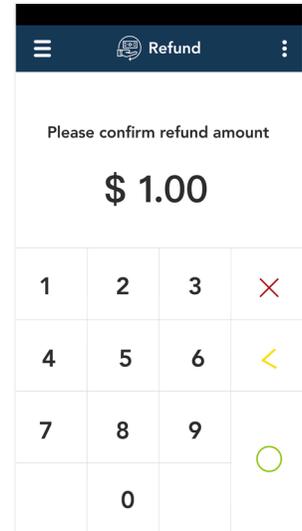
9. The "Processing, please wait" message appears.

    If the card customer inserted a chip card, the message "Do not remove your card" also appears.

10. Once the refund is approved, the "How would you like your receipt?" prompt appears, showing the customer the available options for receiving a receipt: **Print**, **Text**, **Email**, and **No Receipt**.

    Note: *You can choose which receipt options customers will see. Refer to receipt settings on page 53.*

11. The customer selects a receipt format (or no receipt) by tapping one of the options on screen. If the customer chooses Text or Email, they are prompted to enter the appropriate information.

12. The customer passes the terminal back to you, as directed by the application.

13. The application prints receipts if requested.
    - If the customer requested a printed receipt, give them the cardholder copy.
    - If you enabled merchant receipt printing, keep the merchant copy for your records.

14. When the "Transaction Complete" prompt appears, tap **OK** to return to the default transaction screen.

15. The default transaction screen appears.

   The application is ready to process your next transaction.
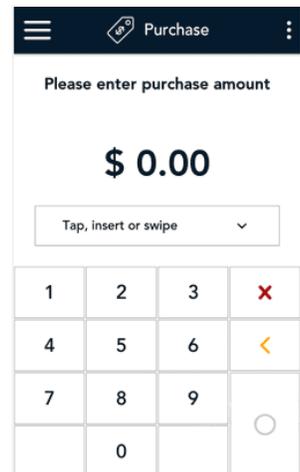
Independent refund

An independent refund credits a customer's account, or refunds cash, without being linked to a purchase or any other transaction.

Note: "Independent refund" must be enabled in your user role (usually Admin or High) in order to perform this transaction. Refer to User roles on page 58.

1. Start at the **Purchase** screen. This is the default transaction.

   If your terminal is at a different screen, tap the Main menu ☰ icon, then tap **Transactions**.
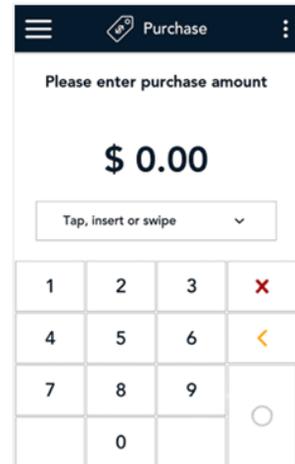
2. Tap the additional options ⋮ icon and select **Refund**.

   The title of the screen changes from Purchase to Refund.
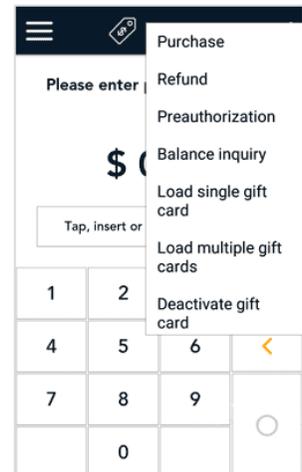
3. If this is a cash independent refund, tap the card entry field (**Tap, insert or swipe**), tap **Cash**, and then tap **Ok**.
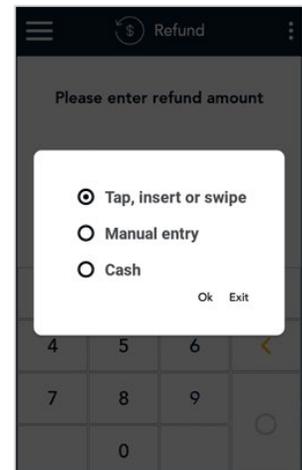
4. Use the on-screen numeric keypad to enter the refund amount, then tap the OK ■ key

5. As indicated on-screen, pass the terminal to the customer so they can respond to any customer prompts.

6. If you're processing a cash independent refund, skip to step 10 (receipt options).

7. The refund total screen appears, prompting the customer to "Tap, insert, or swipe."

8. The customer enters their card on the terminal. Depending on the type of card, they can tap, insert, or swipe it. For more information on Card entry options, refer to page 11.

9. The "Processing, please wait" message appears.

   If the customer inserted a chip card, the message "Do not remove your card" also appears.

10. Once the refund is approved, the "How would you like your receipt?" prompt appears, showing the customer the available options for receiving a receipt: **Print**, **Text**, **Email**, and **No Receipt**.

    Note: *You can choose which receipt options customers will see. Refer to* *receipt settings* *on page 53.*

11. The customer selects a receipt format (or no receipt) by tapping one of the options on screen. If the customer chooses Text or Email, they are prompted to enter the appropriate information.

12. The customer passes the terminal back to you, as directed by the application.

13. The application prints receipts if requested.

    - If the customer requested a printed receipt, give them the cardholder copy.
    - If you enabled merchant receipt printing, keep the merchant copy for your records.

14. When the "Transaction Complete" prompt appears, tap **OK** to return to the default screen.

15. The default transaction screen appears.

The application is ready to process your next transaction.

Independent refund – card not present

Follow these steps to perform an independent refund when the customer and their card are not physically present. Card-not-present transactions include mail, telephone, and Internet orders. "Independent refund" and "Manual entry" must be enabled in your user role (usually Admin or High) in order to perform this transaction. Refer to User roles on page 58. Manual entry must also be enabled in Transaction settings.

1. Refer to the Independent refund procedure (for card present) on page 36, and follow steps 1 to 3.

2. On the Refund screen, tap the card entry field (**Tap, insert or swipe**) to display the card entry options.

3. Tap **Manual Entry**, and then **Ok**.

4. When prompted, enter the credit card information using the on-screen keypad, then tap **Confirm**.

5. Follow the prompts on screen to complete the transaction.
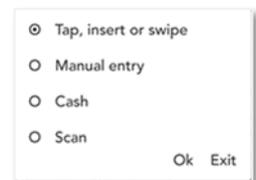
For a full set of instructions, refer to the *Online User Manual* for your Moneris Go terminal available at **moneris.com/support**.

Void

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

- If you have more than one terminal, you must process the void on the same terminal as the original transaction.

- The whole transaction will be voided -- you cannot perform a partial void.

- Only transactions in the current batch can be voided. For example, if the purchase transaction that you want to void is in a batch that is already closed, perform a refund instead.

Use the Report screen to void a purchase.

1. At the Main menu, tap **Reports**.

2. Tap the transaction you want to void. If needed, tap the **All transactions** dropdown menu and select the type of transaction you are looking for.

   You can also tap **Scan** to scan the QR code from a receipt, or tap **Search** to look for the transaction to be voided. For instructions, refer to Finding a transaction using Scan or Search on page 51.
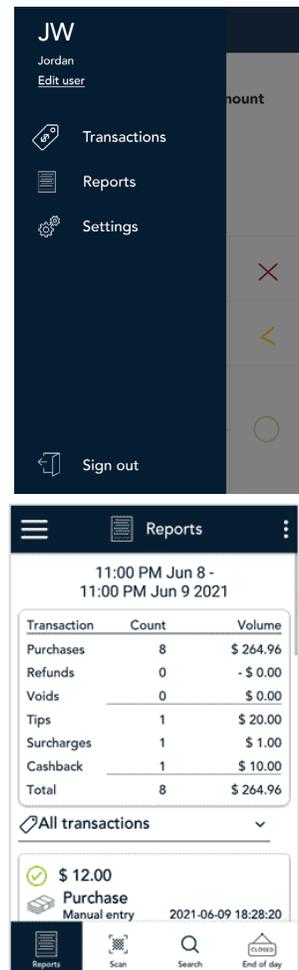
3. The transaction details appear.

   ▪ Verify this is the right transaction, then tap **Void**.

   ▪ Otherwise, tap the Back ❮ icon in the title bar to go back to the previous screen.

   Note: *What if Void does not appear at the bottom of the screen? This means the transaction is not in the current batch. Only transactions in the current batch can be voided. If you need to reverse the transaction, perform a refund instead of a void.*

4. The application prompts you to confirm that you want to proceed with voiding the transaction.

   ▪ To proceed, tap **OK**. Continue to step 5.

   ▪ To cancel, tap the Back ❮ icon.

5. Choose one of these option:

   ▪ If the original transaction was processed using an *Interac* or UnionPay card, continue to step 6. Otherwise, skip to step 8.

6. As indicated on-screen, pass the terminal to the customer so they can enter their debit card and respond to any customer prompts.
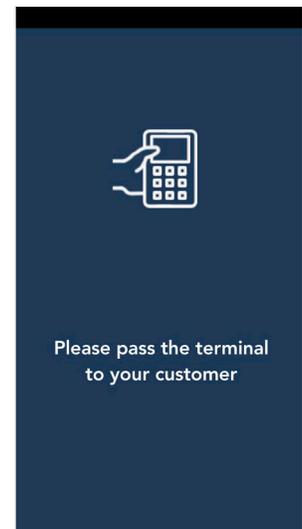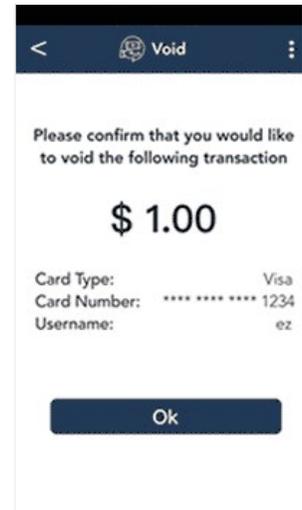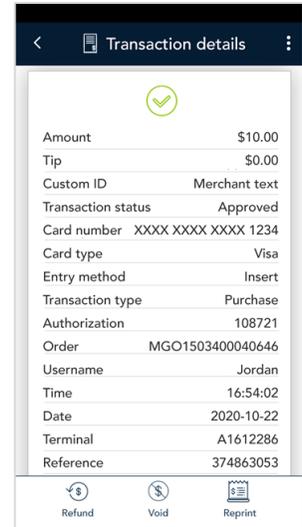
7. The Void total screen appears, prompting the customer to "Insert, or swipe."

   a. The customer enters their debit card or Union Pay card on the terminal. Depending on the type of card, they can insert, or swipe it. For more information on Card entry options, refer to page 11.

   b. The customer responds to any additional prompts. For example:
      - Select an account (chequing or saving);
      - Enter PIN
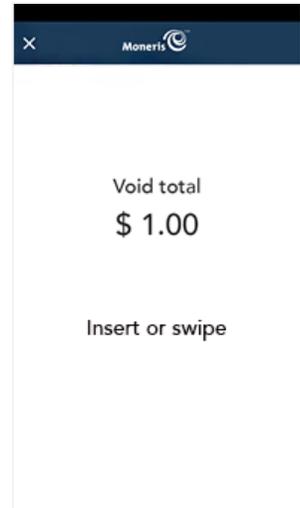
8. The "Processing, please wait" message appears.

   If the customer inserted a chip card, the message "Do not remove your card" also appears.
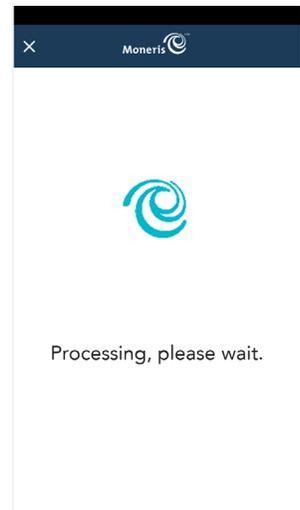
9. Once the void is approved, the "How would you like your receipt?" prompt appears, showing the customer the available options for receiving a receipt: **Print**, **Text**, **Email**, and **No Receipt**.

   Note: *You can choose which receipt options customers will see. Refer to* receipt settings *on page 53.*

   a. The customer selects a receipt format (or no receipt) by tapping one of the options on screen.

   b. If the customer selected Text or Email, they are prompted to enter the appropriate information.
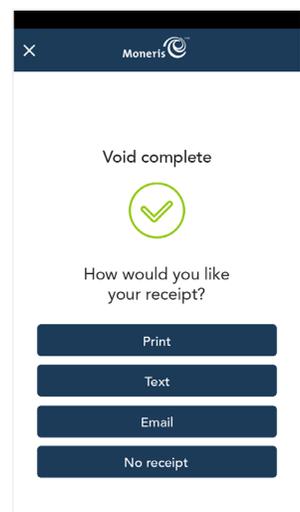
10. The customer passes the terminal back to you, as directed by the application.

11. The application prints receipts if requested.

    ▪ If the customer requested a printed receipt, give them the cardholder copy.
    ▪ If you enabled merchant receipt printing, keep the merchant copy for your records.

12. When the "Transaction Complete" prompt appears, tap **OK** to return to the default screen.

13. The default transaction screen appears.

   The application is ready to process your next transaction.
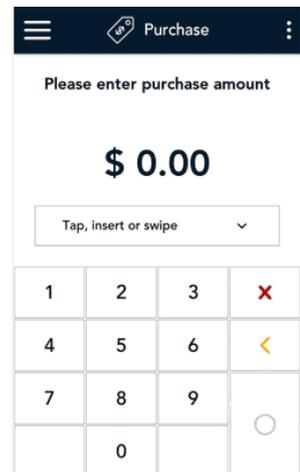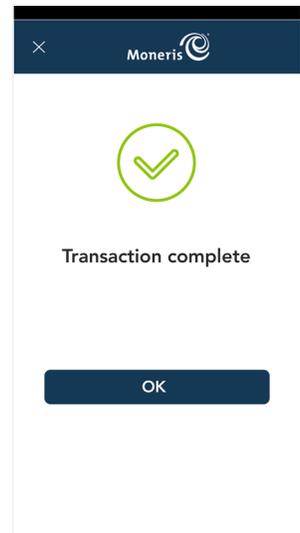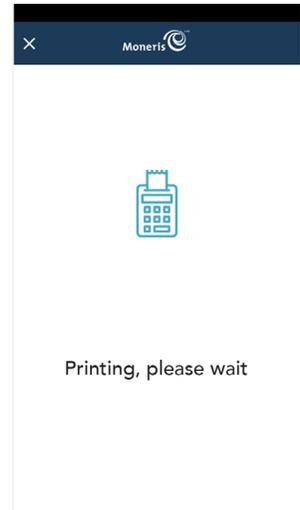
Balance inquiry

Perform a balance inquiry when you or the customer want to check the balance of a pre-paid credit card or a Moneris gift card.

1. Start at the **Purchase** screen. This is the default transaction.

   If your terminal is at a different screen, tap the Main menu ≡ icon, then tap **Transactions**.

2. Tap the additional options ⋮ icon and select **Balance inquiry**.

   The title of the screen changes from Purchase to Balance inquiry.

3. Choose a card entry method. This depends on whether the card is present or not.

   - The default method is "Tap, insert, or swipe". To select this method, simply tap **OK**. Go to step 4.
   - To manually enter the card number, tap the card entry options field, then tap **Manual entry** from the list, then **OK**. Enter the card number and CVV when prompted. Go to step 7.
   - For Moneris gift cards only, you may tap **Scan** to scan the barcode located on the back of the card. Hold the gift card below the terminal so that the barcode is visible on the screen. Go to step 7.
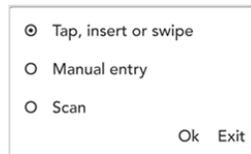
4. Pass the terminal to the customer so they can enter their card.

5. The customer taps, inserts, or swipes their card, and then enters the CVV if prompted.

6. Wait while the application processes the card.

7. The application displays the card balance.
   - To print the balance, the customer taps **Print**.
   - To continue without printing, the customer taps **OK**.

8. The customer passes the terminal back to you, as directed by the application.

9. When the "Transaction complete" screen appears, tap **OK** to return to the default screen.
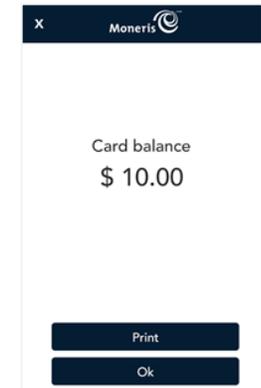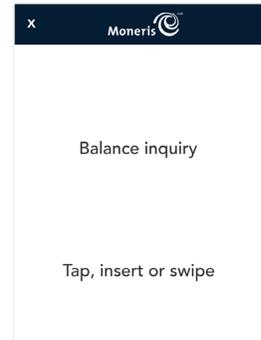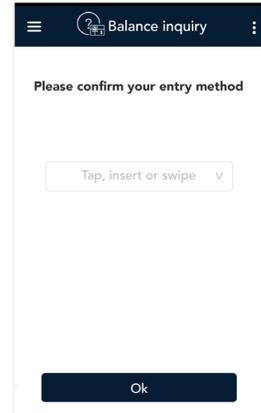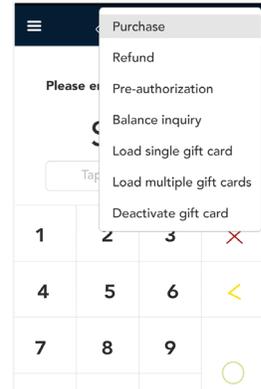
Receipts

Customer copy

The customer has up to 4 options for receiving a receipt: **Email**, **Text**, **Print**, and **No receipt,** depending on how you have set up the receipt options. Refer to <u>Receipt settings</u> on page 53.

Customer option	Merchant action
Email	No action required. Moneris does not store the customer's email address. This means the customer will have to enter their email address each time they wish to receive a receipt by email.
Text	No action required. Moneris does not store the customer's cell phone number. This means the customer will have to enter their cell phone number each time they wish to receive a receipt by text.
Print	The customer copy of the receipt will print on the terminal. Give the customer copy to the customer.
No receipt	No action required.

Merchant copy

If enabled, the merchant copy of the receipt prints after the cardholder copy. Refer to Receipt settings. You can also set a delay between the customer copy and the merchant copy.

Keep the merchant copy for your records.

Reprinting receipts

To reprint both the customer copy and the merchant copy of a transaction, follow these steps.

1. At the <u>Main menu</u>, tap **Reports**.
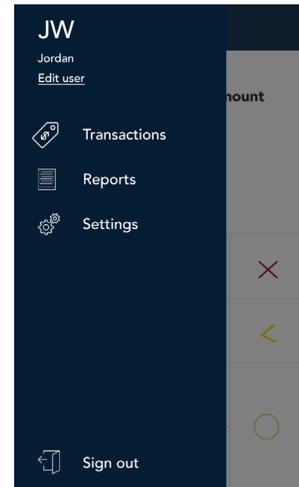
2. On the Reports screen, tap the transaction for which you want to reprint the receipts.

   You can also tap **Scan** to scan the QR code from a receipt, or tap **Search** to look for the transaction. For instructions, refer to <u>Finding a transaction using scan or search</u> on page 51.
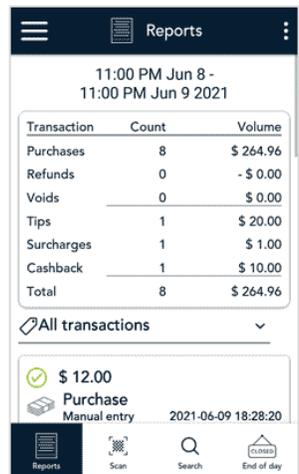
3. When the transaction details appear, tap **Reprint**.

   The application reprints both the customer copy and the merchant copy of the receipt.

4. Tap the Back icon in the title bar to return to the previous screen.

5. Tap the Main menu icon and then tap **Transactions** to return to the default transaction screen.
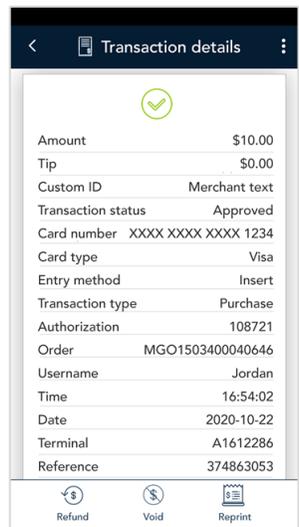
Purchase receipt example

```
              Merchant name
                 Address
              City, Province

          [Custom header lines 1-6]

                 Purchase                    (A)

MMM DD, YYYY                   HH:MM:SS
CARD BRAND                 ************1234   (B)
CHEQUING/SAVING
Entry: Tap EMV (H)                           (D)
Ref#: 000000000-000000000000
Auth#: 000000          Response: 00-000
Order :                MGO1611085196685      (F)
[Custom ID]            [text entered by user]
Username: Shafee

Amount                      $000,000.00
Tip                         $000,000.00

Total                       $000,000.00      (H)

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

                 Approved
     Verified by PIN / Signature not required

           [Custom footer lines 1-6]
```

Item	Description
A	**Transaction type.** For example, Purchase, Refund, Void.
B	**Card type and card number.** Examples of card type/brand include Interac, Visa, Mastercard, and American Express®. The card number is masked — an asterisk is printed in place of the card number except for the last four numbers.
C	**Chequing or Saving.** Indicates which account was selected by the cardholder for an *Interac* card
D	**Entry.** Indicates how the card information was entered, for example, tap, insert, or swipe.
E	**Custom ID.** You can customize the name of this field. The value for this field is the value that you enter on the terminal during the transaction.
F	**Order ID**. You can use the Order ID to search for a transaction to void, to refund, or to reprint the receipt. Refer to page 51.
G	**Username.** Indicates which user was signed in to the terminal when the transaction was processed.
H	**Total.** This is the total sale amount including any tip.
I	**QR code**. You can scan the QR code to immediately find a transaction to void, to refund, or to reprint the receipt. Refer to page 51.

Partial approval receipt

Once the customer has paid the total purchase amount, the application generates a separate receipt for each partial approval. If the customer used three pre-paid cards, the application produces three partial approval receipts.

Card masking

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

Reports

Your transaction reports are available in two ways: Through the Merchant Direct web portal; and directly in the Moneris Go application on your terminal.

Merchant Direct reporting

In addition to viewing reports on your Moneris Go terminal, you can also view reports online by logging into Merchant Direct. (For enrolment instructions, refer to the **Setting up Your Software** guide at **moneris.com/en/ support/devices/monerisgo**.) Merchant Direct allows you to view and download transaction reports by batch, date, clerk ID, and device number. You can also view and download standard monthly merchant reports and special reports. To login:

1. At **moneris.com**, in the top, right area of the screen, click **Login.**

2. From the dropdown list, select **Merchant Direct**. At the login screen, enter your user ID and password.

Reports in the Moneris Go application

All transaction information is available directly on the Reports screen. To view the Reports screen, tap the Main menu ☰ icon, then tap **Reports**. The screen shows:

Important: *You can see all transactions only if your user role is set to "View other users in reports." For example, if your user role is "Low," you may see only your own transactions. Refer to* <u>User roles</u> *on page 58.*

- **24-hour Summary**: This is a summary of all transactions processed on all of your Moneris Go terminals in the 24 hour period starting at your <u>Report reset time</u> (page 62). For example, if your reports are reset at 11 p.m., the summary shows transactions from 11 p.m. yesterday to 11 p.m. today. It shows the number of each type of transaction (Purchase, Refund, and Void) and the dollar volume, followed by a grand total. Totals for Tips, Surcharges, and Cashback will also appear if you enabled those features. To find out how to enable them, refer to <u>Settings</u> on page 52.)

- **All transactions**: This is a list of all the transactions from all of your Moneris Go terminals, including transactions from closed batches.

  - If needed, tap the **All transactions** dropdown menu to filter by transaction type and method of card entry.

  - On the list of transactions, tap any transaction to view the full details.

  - On the transaction details screen, you can perform a <u>Refund</u>, a <u>Void</u>, or <u>Reprint</u> the receipt, as well as Completion for pre-authorizations.

- **Additional options**: Tap the additional options ⋮ icon to display the options menu. This menu allows you to filter transactions by Time and date, User, and Terminal. You can apply one, two, or all three filters. For instructions on how to use the filters, refer to <u>Filtering transactions on the Reports and End of day screens</u> on page 50.

  To exit from the options menu, tap anywhere else on the screen.
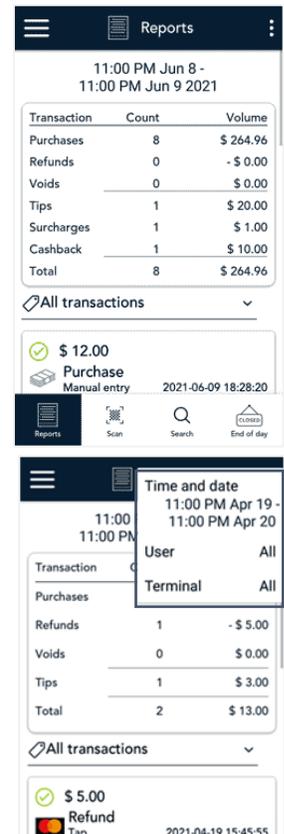
- **Scan** or **Search**: Use either of these functions to find a transaction.

  - Tap **Scan** to use the terminal's rear camera to scan the QR code on a receipt.

  - Tap **Search** to enter specific search terms. For instructions on using Scan or using Search, refer to <u>Finding a transaction using Scan or Search</u> on page 51.
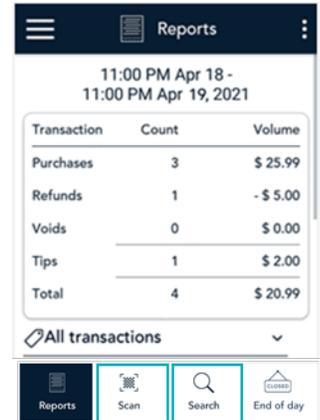
- **End of day**: At the bottom of the screen, tap **End of day** to view the End of day report which shows transaction totals since the Report reset time, followed by totals for each card type (Visa, Mastercard, *Interac*, and others). Totals for Tips, Surcharges, and Cashback will also appear if you enabled those features. To find out how to enable them, refer to <u>Settings</u> on page 52.)

- The End of day report can be used for a variety of purposes and the available filters can help you get the information you need.

  - To filter transaction totals by Time and date, User, and/or Terminal, tap the additional options ⋮ icon to display the options menu. This menu allows you to apply one, two, or all three filters. For instructions on how to use the filters, refer to <u>Filtering transactions on the Reports and End of day screens</u> on page 50.

  - Filtering transaction totals by User will enable you to get the totals for a specific user whether that user is a clerk, server, driver, or other employee.

  - The end of day report also summarizes tips. In the default summary for all users, you can see the tips for your entire account which is useful if you want to pool and divide tips. When you add a User filter, you can see the tip total for a specific person. This can be helpful for tip payouts.

  - You can use the Time and date filter on its own or in combination with the User or Terminal filters when you want to see a summary over multiple days for a pay out. This might be the case when an contract worker takes a terminal at the beginning of the week and returns it once their shifts are done. They can filter by Time and date plus Terminal, or Time and date plus User, to summarize all the transactions they completed.

  - Users can access the report and the filters from any of your Moneris Go terminals as long as the user has access to "View other users in reports" in their <u>user role</u>. You can also streamline your business processes by having someone in your office pull these reports from a centralized terminal.

  - To print the End of day reports as you apply different filters, tap the additional options ⋮ icon, then tap **Print**. Store the printed reports for your records as needed.
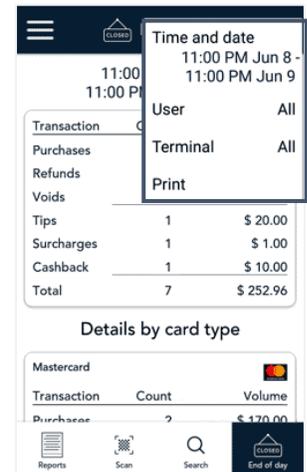
Filtering transactions on the Reports and End of day screens

Tap the additional options ⋮ icon to access the Time and date, User, and Terminal filters to create a customized view of your transactions/totals. You can apply one, two, or all three filters.

Time and date filter

1. On the additional options menu, tap **Time and date** to display the time and date picker. The default start date is the previous day. The default start time is based on your report reset time, for example, 11 p.m.

   ▪ Under "Start", select a date by scrolling through the date column. Change the hour and minute, as needed, by scrolling through the values. Tap AM or PM.
   ▪ Under "End", the default date is "Today". The default time is based on your report reset time. Select a new end date and end time as needed. Tap AM or PM.

2. Tap **Go** to apply the Time and date filter.

   The screen displays only the transactions/totals that match the time and date range you specified.
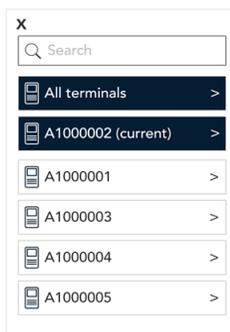
Terminal filter

1. On the additional options menu, tap **Terminal** to display the terminal list.

   ▪ All terminals and the current terminal are already selected.
   ▪ To select a different terminal, tap it.

2. The screen displays only the transactions/totals for the terminal you selected.

   To restore the default view (all terminals), repeat step 1 and select **All terminals**.
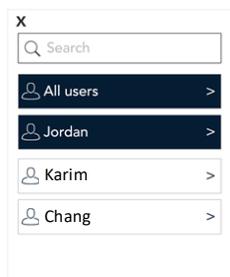
User filter

1. On the additional options menu, tap **User** to display the user list.

   ▪ All users and the current user are already selected.
   ▪ To select a different user, tap the user's name.

2. The screen displays only the transactions/totals for the user you selected.

   To restore the default view (all users), repeat step 1 and select **All users**.

Note: Filters are automatically cleared when you navigate away from the Reports screen. When you return to Reports, you will see the default view, that is, all transactions for all users for all terminals for the current 24-hour period.

Finding a transaction using Scan or Search

In addition to using filters, you can find a transaction by tapping **Scan** or **Search.**

Scan the QR code on a receipt

You can quickly find a specific transaction on the terminal by scanning the QR code on a printed receipt for that transaction.

1. On the Reports screen, tap **Scan** to active the terminal's rear camera.

2. Hold the paper receipt below the terminal so that the QR code is visible on the screen.

3. The application automatically reads the QR code and retrieves the transaction details.

Search for a transaction using specific values

You can also find a transaction on the terminal by entering a specific search term.

1. On the Reports screen, tap **Search**.

   The Search screen appears.

2. Tap the **Search** field to enter a value to look for. You can enter:

   - A **username**, to find all transactions processed by that person.
   - An **amount**, for example, 50.20.
   - A **card brand**, for example, Visa, MC, Amex, and *Interac*.
   - An **order ID**.

3. Review the **Date** field which displays the current 24-hour period.

   - To change it, tap the field, set the desired time and date range, and tap **Go**.

4. Tap **Search** to retrieve any transactions that match both the search value and the time/date range you entered.

   - The application displays a list of matching transactions.

     - To quickly change the date/time range of the search, tap the additional options ⋮ icon, then tap **Time and date**, select a new range, then tap **Go**.
     - To print the search results, then tap **Print**. The terminal will print up to 50 transactions.
     - Tap any transaction on the list of search results to see more details.

   - If no transactions are found, tap the Back ‹ icon in the title bar to return to the Search screen.
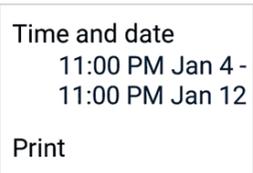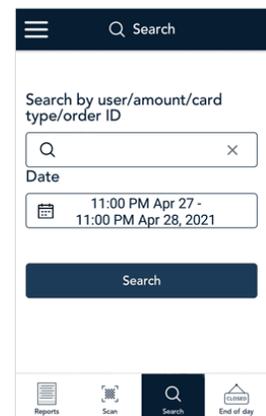
Settings

On the <u>Main menu</u>, tap **Settings**. When prompted, enter your password – the same password you used to sign in. Each item on the Settings menu allows you to configure the application to meet the needs of your business.

- **Receipts**: Change <u>receipt settings</u>. Refer to page 53.
- **Tips**: Change <u>tip settings</u>. Refer to page 54.
- **Transactions**: Change transaction settings. Refer to page 55.
- **Users**: <u>Manage users</u>. Refer to page 56.
- **General application**: Change <u>General application settings</u>. Refer to page 62.
- **Sync settings with Moneris**. Tap **Sync** to synchronize all settings with Moneris.

Changing your own password for low access users: If you do not have access to the Settings menu, and you want change your own password, refer to <u>Edit user</u> on page 61.
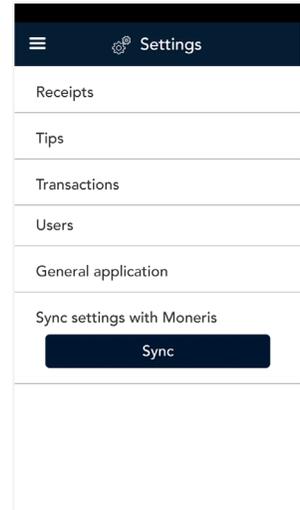
Receipt settings

1. On the Settings menu, tap **Receipts**. The Receipt settings screen appears.

2. **Receipt formats**: To give your customers a choice of receipt formats, tap the toggle next to **Cardholder choice**.

   a. The options for receipt formats appear: Email, Text, and No receipt.

   b. Enable or disable each format by tapping the toggle next to it.

   Note: *If you disable Cardholder choice, the terminal will print a customer receipt automatically.*

3. **Print QR code**. By default, the application prints a QR code on each receipt. To disable printing QR codes, tap the toggle.

4. **Print delay**. This setting determines the delay (in seconds) between printing the customer receipt and printing the merchant receipt. The default value is zero seconds.

   a. To change the setting, tap the **Print Delay** field and choose a new value.

5. **Number of merchant receipts**. By default, the terminal will **not** print a merchant receipt. If you want a receipt for each transaction, tap the field and select a new value (1 or 2 receipts).

6. **Custom receipt text >**. To add header or footer text to your customer receipts, tap **Custom receipt text** then refer to Working with headers and footers below.

7. When you are finished with the receipt settings, tap **Save**.
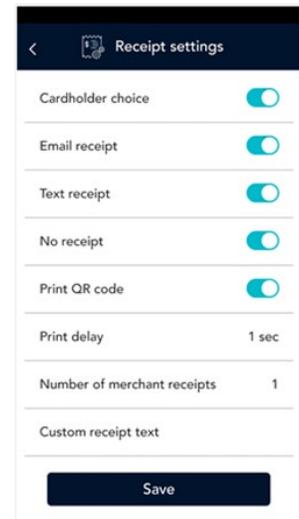
Working with headers and footers

You can add up to 6 lines in the header or footer of customer receipts. Each line can include up to 30 characters.

|	
Add a header or footer	1. On the "Custom receipt text" screen, tap **Header** or **Footer**.
	2. Tap the empty field and use the on-screen keyboard to type the text of the header or footer.
	3. Tap the plus (**+**) sign beside the field to add the header or footer to your receipt. The header or footer now appears below the empty field.
	4. To add another header or footer, follow the same steps.
Delete a header or footer	Tap the minus (**–**) sign beside the field.
Edit a header or footer	Tap the field you wish to edit.
	Note: *You can drag a header or footer field to change its order on the receipt.*
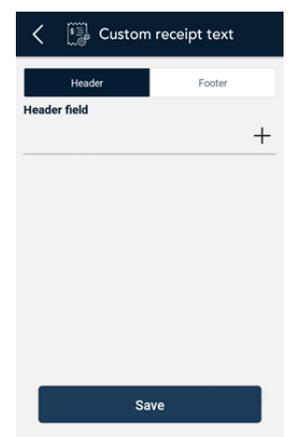
Tip settings

Change your tip settings as needed.

1. On the Settings menu, tap **Tips**.

   The Tip settings screen appears.

2. Tap each toggle to enable or disable the setting.

   Tips: Enable this setting to prompt customers to leave a tip. Once you enable Tip Support the tip options will appear.

   Tip by dollar: Enable this setting to allow customers to enter a tip as a dollar amount.

   Tip by percentage: Enable this setting to allow customers to enter a tip as a percentage of the total amount.

   Tip preset type: Decide if you want your preset tips to be fixed dollar values or percentages of the purchase total, then tap **Dollar** or **Percentage** as required. Depending on your choice, enter dollar amounts (no cents) or percentages for the pre-set tips below.

   Tip Preset 1: Enable this setting to allow customers to enter a pre-set tip. Tap the **Preset Value** field and enter a percentage or a dollar amount depending on your tip preset type above. Tap **the checkmark**.

   Tip Preset 2: Enable this setting to allow customers to enter a pre-set tip. Tap the **Preset Value** field and enter a percentage or a dollar amount depending on your tip preset type above. Tap **the checkmark**.

   Tip Preset 3: Enable this setting to allow customers to enter a pre-set tip. Tap the **Preset Value** field and enter a percentage or a dollar amount depending on your tip preset type above. Tap **the checkmark**.

3. When you are finished with the tip settings, tap **Save**.

   The application returns to the Settings menu.

4. To return to the default transaction screen, tap the Main menu ☰ icon, then tap **Transactions**.

Transaction settings

Use this screen to manage settings related to transaction options.

Note: *Looking to enable cash transactions or independent refunds? Access to specific transactions is controlled by user roles. Refer to* <u>User management</u> *on page 56 if needed.*

1. On the Settings menu, tap **Transactions**.

   The Transaction settings screen appears.

2. Change each transaction setting as needed.

   Pass terminal timer: When a customer response is needed, the application displays the "Please pass the terminal to your customer" screen for 1 second. Tap the minus sign or plus sign to change this time period.

   Manual entry transactions: This setting allows you to manually enter a payment card number for purchases where the card is not present (CNP), such as email and telephone orders.

   Transaction identifier: Enable this setting to create a custom field which you can use to capture specific information during your transactions. Once you tap the toggle, a field appears showing "Custom ID". Replace "Custom ID" with a name for the type of information you want to record during each transaction. For example, Invoice # or Customer name.
   Note: *The transaction information you enter in this field on the terminal will appear in the Customer ID field in* <u>Merchant Direct</u>.

   Surcharge*: Enable this setting to charge your customers a fee for *Interac* debit transactions. Once you tap the toggle, a field appears for you to enter the amount of the surcharge.

   *The operator of this Terminal charges a fee for INTERAC Debit Transactions. This fee is in addition to any fees that your financial institution may charge.

   Cashback: Enable this feature to offer customers cash back on debit card purchases (*Interac*, Debit Mastercard, and Visa Debit). To enable **Cashback**, tap the toggle. The other settings will appear.
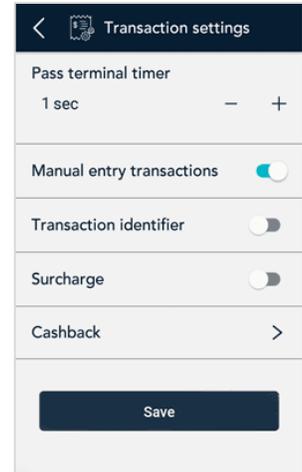
- **Cashback by dollar amount**. Enable this option to allow customers to enter the dollar amount (no cents) they would like as cash back. The value they enter must be a multiple of 5.
- **Max cashback**. Enter the maximum dollar amount you wish to offer to customers as cashback; for example, $100.
- **Cashback preset 1.** Tap the toggle to enable this preset amount. The Preset Value field appears. Enter a preset value that your customers can select; for example, $20.
- **Cashback preset 2.** Tap the toggle to enable this preset amount. The Preset Value field appears. Enter a preset value that your customers can select; for example, $40.
- **Cashback preset 3.** Tap the toggle to enable this preset amount. The Preset Value field appears. Enter a preset value that your customers can select; for example, $60.
- Tap **Save** when finished with Cashback settings. The application returns to the Transaction settings screen.
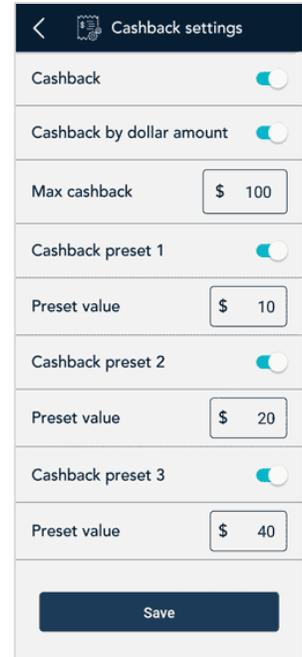
3. Tap **Save** when finished with Transaction settings.

User management

The Moneris Go application allows you to maintain a secure processing environment through a combination of users and user roles. No one can operate the terminal without signing in with a valid username and password. Each user is assigned a user role which determines which transactions and functions the user is allowed to perform. Continue reading to understand how to manage users and user roles.

Users

When you received the terminal from Moneris and signed on for the first time, you created a new user. You were automatically assigned the Admin user role. You can now create new users and assign roles to them.

To view and manage users, follow these steps.

1. On the Settings menu, tap **Users**.

   The Users screen appears.

2. Choose from the following tasks:

   - **View and edit user details**. The application displays all users, in a compact format. Tap a specific user to see complete details for that user, then go to step 3.
   - **Search for a user**.   Tap the **Search** field then go to step 4
   - **Create a new user**. Tap the **+** sign next to the Search field. The new user screen appears. Go to step 5.
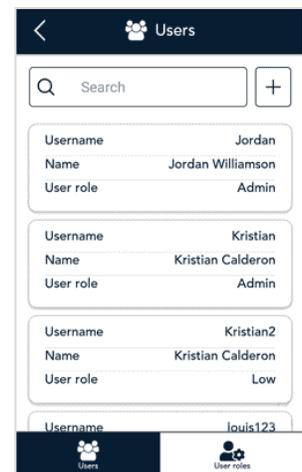
3. On the Edit user screen, you can change a user profile.

- To change the language, tap **English** or **French**.
- To change a field (Username, First name, Last name, Email), tap it and enter a new value.
- To change the user role, tap the field and select a new user role.
- To change the user password, tap **Change password** and enter a new password, keeping these rules in mind:

    - It must be at least 4 characters.
    - No more than 2 repeating characters. For example, lou449 is acceptable but lou444 is not.
    - No common sequences like 123 or abc. For example, jp126 is acceptable but jp123 is not.

  Note: If your user role allows, you can change your own password. For users who do not have access to the Users screen, refer to Edit user on page 61.

- To disable the user profile so they can no longer sign in, tap **Deactivate**.

    Note: You cannot delete your own user profile.
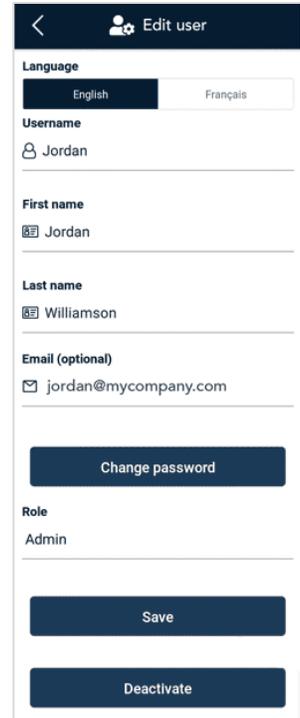
4. In the Search field, enter a specific value, such as a username, a user's first or last name, or even their role.

    a. The application displays all users that match your search terms.

    b. Tap on a user to display full details.
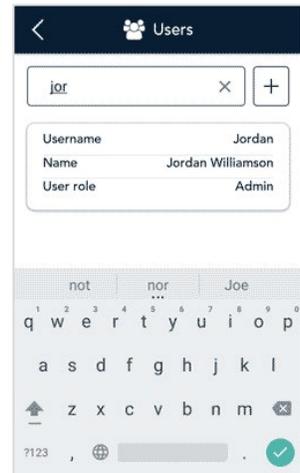
5. On the New user screen, tap each field and fill in the required information:

    - **Username**. For example, jsmith or jeffs.
    - **First name**. Enter the person's first name.
    - **Last name**. Enter the person's last name.
    - **Language**. Tap English or French.
    - **Email**. This is an optional but recommended field. An email address allows the user to reset their password if they forget it.
    - **Confirm email**. Re-enter your email address.
    - **Password**. Enter a password using at least 4 characters. The user can change it later if they wish. Refer to password rules.
    - **Confirm password**. Re-enter the password. The two fields must match.
    - **User role**. User roles control access to the application. Before creating any new users, refer to the User roles section below.

    a. Tap **Save** to save the new user.

User roles

User roles are essential to maintaining the security of your terminal. They determine which users are allowed to perform which tasks. The application features 3 default user roles:

User role	Permitted to perform these tasks	Usually assigned to this type of user
Admin	- Process all transactions - Access all settings and reports - Create and edit users and user roles *Note: This role cannot be changed.*	Administrator
High	- Process all transactions, including refunding and voiding the transactions of other users - Access some settings and reports	Manager
Low	- Process purchases, but can only refund and void their own transactions - Access their own transactions in Reports	Clerk, cashier, or server

You can rename the High and Low user roles and change their permissions. If these two roles are not enough, you can also create new user roles to match the roles in your business.

1. On the Settings menu, tap **User management**.

   The Users screen appears.

2. At the bottom of the screen, tap **User roles**.

   Each existing user role appears in a compact format, showing the first two fields.

3. Choose a task.

   ▪ View and edit a user role: Tap a user role then go to step 4.
   ▪ Search for a user role: Tap the **Search** field then go to step 5.
   ▪ Create a new user role: Tap **+** next to the Search field then go to step 6.

4. View the details of the user role you selected, and change them if needed.

   If your own user role is Admin, you can perform these actions:

   ▪ Tap a field to edit it.
   ▪ For transactions, reports, and settings, tap the adjacent toggle to enable or disable which ones this user role is allowed to access. Tap **Save** when finished.
   ▪ Delete the user role.

      Note: *You cannot delete a user role if that role is currently assigned to any users.*

5. Use the on-screen keyboard to enter a specific value in the Search field, such the name of the user role (for example, High) or a word that might appear in the description of the user role (for example, manager).

   ▪ The application displays all user roles that match your search terms.
   ▪ Tap on a user role to display full details.

6. On the "**+** Add user role" screen, fill in each field and review each setting.

   a. Tap the **User role** field and enter a name (for example, Middle).

   b. Tap the **Description** field and enter a short description (for example, Supervisors) to indicate who this role might be assigned to. This field is optional.
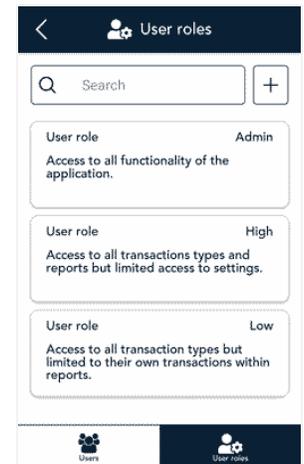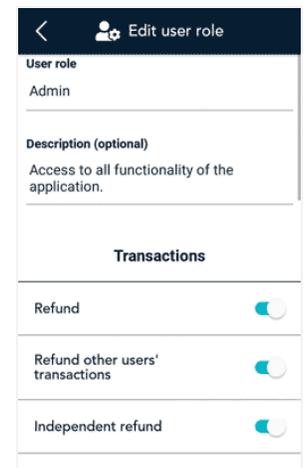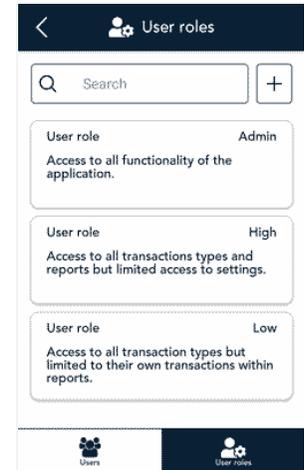
c. **Transactions, Reports, and Settings**. Tap the toggle beside each option to enable it as required for the new role. Review the screen images below.
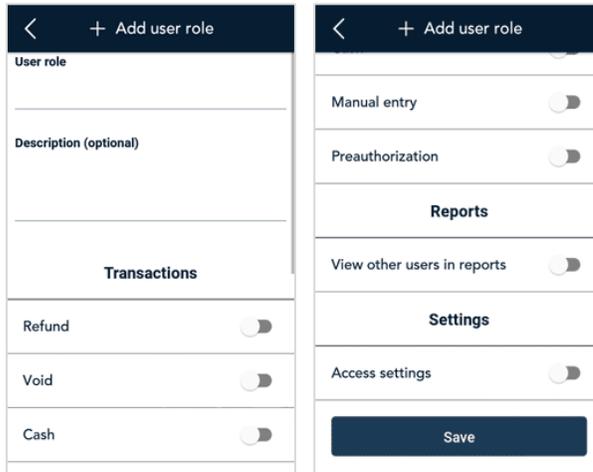
7. Tap **Save** to save the new user role.

Edit user – changing your own password

Any user can change their password using this function. However, it is most beneficial for users such as clerks, cashiers, and servers who may not have access to the User Management screen under Settings. Login to the application then follow these steps to change your own password.

1. On the <u>Main menu</u>, tap **Edit user**.

   When the password prompt appears, tap the password field, enter your current password using the on-screen keyboard, tap the checkmark, and then tap **Go**.

2. On the Edit user screen, tap **Change password**.

   When changing your password, keep these rules in mind:

   - It must be at least 4 characters.
   - Avoid more than 2 repeating characters. For example, lou449 is acceptable but lou444 is not.
   - Avoid common sequences like 123 or abc. For example, jp126 is acceptable but jp123 is not.

3. On the Change password screen:

   a. Tap each field and enter the required information.
      You will need your existing password. If you have forgotten your existing password, refer to <u>Forgot your password?</u> on page 6. The Admin user can also change your password without knowing the existing password. Refer to <u>Users</u> on page 56.

   b. Tap **Save**.

      The application returns to the Edit User screen.

   c. Tap **Save**.

      The application returns to the Main menu.
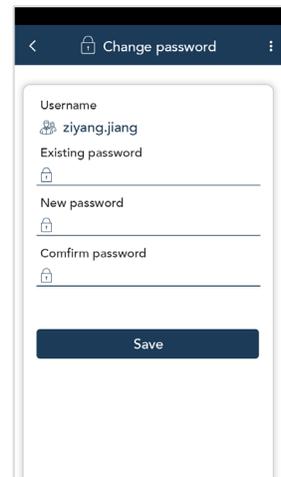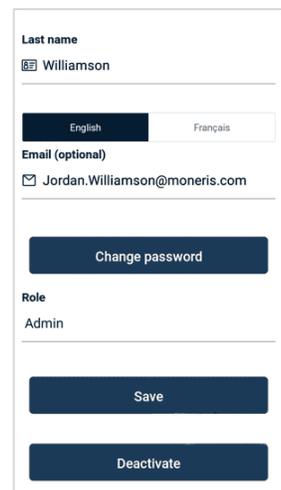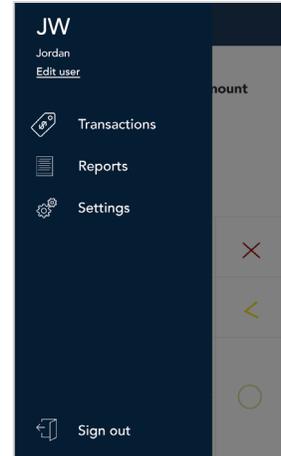
General application settings

Change these general settings as needed to match the way you work.

1. On the <u>Settings</u> menu, tap **General application**.

    The "General application settings" screen appears.

2. To change the settings, follow these instructions:

    - **Automatic sign out time**. The application will automatically sign you out after 30 minutes of no activity. To change this default period, tap the control handle.
    - **Sign out after transaction**. This option is disabled by default. If you enable it, the application will sign you out after you complete each transaction.
    - **Display timeout**. By default, the terminal goes into sleep mode after 1 minute of no activity in order to save battery power. To increase this time, tap the setting to change it to 2 minutes or 5 minutes.
    - **Report reset time**. This is the time when your reports will reset to $0. To change it, tap the field and set a new time. For example, if you set it for 12:00am, the reports in the application will cover the period from 12:00 a.m. to 11:59 p.m. It is best to set the Report reset time 2 to 3 hours outside of your typical business hours – if you close at 10 p.m. set it for 12 a.m., if you close at 2 a.m. set it for 4 a.m. If you are open 24 hours, choose a logical break point like a shift change.
    Recommendation: If you changed the Report reset time, contact Moneris to change your batch close time (usually set to 11 p.m.) to reflect your Report reset time. This way, the time period covered in your batch file will match the time period covered in your reports.

3. When you are finished with the General application settings, tap **Save**.

    The application returns to the Settings menu.

4. To return to the default transaction screen, tap the <u>Main menu</u> ☰ icon, then tap **Transactions**.
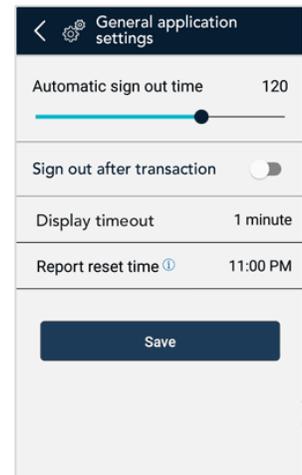
End of day process

Debit and credit transactions processed on your terminal are stored in a batch. In order to settle these transactions and transfer the funds into your business account, Moneris will automatically close the batch each night usually at 11 p.m. Please <u>contact Moneris</u> if you need to change this time. If you change your batch close time, remember to change your <u>Report reset time</u> (page 62) so that your terminal reports, including your End of day report, will reflect your daily batch.

If you would like to verify your transaction totals for the day, follow these instructions.

1. View the End of day report on your terminal.

   Note: *The End of day report must be accessed before the Report reset time. You can also view (and download) the End of day report online starting at 7 a.m. the next day by* <u>logging into the Merchant Direct</u> *web portal and selecting* ***Daily Transaction Report Menu****, then* ***Daily Batch Summary Report****.*

   a. From the <u>Main menu</u>, tap **Reports**. The Reports screen appears.

   b. At the bottom of the screen, tap **End of Day**.

      The End of Day report appears, showing transaction totals since the report reset time. Totals for Tips, Surcharges, and Cashback will also appear if you enabled those features. To find out more, refer to <u>Settings</u> on page 52.

      Under "Details by card type" you will find transaction totals for cash transactions and for each card brand

      Important*: Your user role determines which transactions are summarized in this report. For user roles where* "View other users in reports" *is enabled, the user will see* "All users" *as the default value in the user field on the End of day screen. If not, the individual user's name will appear in the user field, and only the transaction totals for that user will be counted and displayed. Refer to* <u>User roles</u> *on page 58.*

   c. Tap the additional options ⋮ icon to filter transaction totals by Time and date, User, and Terminal (if needed), or to print the report.

      - **Time and date**. The default range is the current 24-hour period starting at your Report reset time. To view transaction totals for a different period, select a new "Start" time/date and a new "End" time/date.
      - **User**. The default value is "All" users. Tap **User** to see transaction totals for specific users.
      - **Terminal**. The default value is "All" terminals. Tap **Terminal** to select specific terminals.
      - **Print**. Tap the **Print** icon to print the report, including both the summary and details by card type.

      For more instructions on using these filters, refer to <u>Filtering transactions on the Reports and End of day screens</u> on page 50. To exit from the options menu, tap anywhere else on the screen.

   d. Compare the End of day report with your receipts or other business records. If you determine there are discrepancies between the report and your records, continue to step 2. Otherwise, no further action is needed.

2. Call Moneris Customer Care toll-free at **1-866-319-7450**, now or the next business day, to obtain assistance with reconciliation. When listening to the options on the telephone menu, select "Financial Inquiry".

3. To return to the default transaction screen, tap the Main menu ☰ icon, then tap **Transactions**.
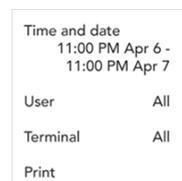
Troubleshooting

Error messages

In the table below, find the error message that appears on the terminal and try the solution. If the error message re-appears, contact Moneris Customer Care toll-free at **1-866-319-7450**.

Error message	Problem and solution
Cannot Process Please Re-Try	There may be a problem with the customer's card. Try the transaction again. If it fails again, ask the customer for another card or other form of payment.
Invalid completion amount	This error message appears when the amount of a pre-auth completion is greater than $1,500 **and** also more than 4x the pre-authorization amount. To avoid this error, reduce the amount of the completion. If necessary, void the pre-authorization (page 28), then either process a new pre-authorization (page 24) or process a purchase instead.
Login failed **Whoops! Looks like something went wrong.**	Tap **OK** to clear the message. Make sure your username and password are correct when signing in.
No connection **Whoops! Looks like you're not connected to the Internet**	The terminal cannot establish a connection to Moneris. For a **4G** connection, follow these steps: 1. Tap **OK** to clear the error message. 2. Swipe down from the top of the screen if needed to reveal the status bar. Check the battery charge level and charge the battery as required. Refer to Battery use on page 9. 3. Confirm that your terminal is connected to a 4G/3G network by checking for the presence of "4G" or "3G" in the status bar. 4. Check the signal strength (number of bars) of the connection. It is best to have at least 2 bars to communicate with Moneris. 5. Restart terminal. Press and hold the power button for about 2 seconds until a menu appears. Tap **Reboot**, then tap **Reboot** again to confirm. To troubleshoot a **Wi-Fi** connection, follow these steps: 1. Tap **OK** to clear the error message. 2. Swipe down from the top of the screen if needed to reveal the status bar. Check the battery charge level and charge the battery as required. Refer to Battery use on page 9. 3. Ensure that your terminal is within range of your wireless router. 4. Ensure the terminal is connected to the desired Wi-Fi network. 5. Ensure that your Wi-Fi network is working. Contact your Internet Service Provider or your network helpdesk as needed. 6. Restart your terminal. Press and hold the power button for about 2 seconds until a menu appears. Tap **Reboot**, then tap **Reboot** again to confirm.
Printer out of paper	The terminal is out of paper. Insert a new paper roll in the printer. If needed, refer to "Install the paper roll" in the Moneris Go® *Setting up Your Terminal* guide at **moneris.com/en/support/devices/monerisgo**.

Error message	Problem and solution
System error	Re-try the operation. If the error message appears again, contact Moneris.
Time out	A communication error occurred. Try the operation again. If the problem persists, refer to the error message "No connection / Whoops! Looks like you're not connected to the Internet" above.
Whoops! Looks like something went wrong.	Do one of the following: ▪ To retry the operation, tap **Retry**. ▪ To try performing a transaction, tap **Return to Sale**.

Equipment issues

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

Issue	Solution
Blank receipts and reports **The terminal appears to be printing receipts and reports but the paper is blank.**	The paper roll is installed backward. To re-install the paper roll, refer to "Install the paper roll" in the Moneris Go® *Setting up Your Hardware* guide at **moneris.com/en/support/ devices/monerisgo**.

Other issues

Issue	Solution
Terminal does not allow you to manually enter card numbers.	On the Purchase screen, make sure you select **Manual entry** as the method of card entry. For step by step instructions, refer to Purchase – Card not present (CNP) on page 17. To allow manual entry, the following settings are required: ▪ "Manual entry" is enabled in your user role (page 58). ▪ "Manual entry transactions" are enabled in the Transaction settings (page 55).

Merchant support

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

We're only one click away.

- Visit **moneris.com/en/support/devices/monerisgo** to download additional copies of this guide and other resources, including:

  - videos for setting up and using your terminal
  - the *Setting up Your Terminal* guide
  - the *Gift Card Program Reference* guide
  - the Moneris Go *Online User Manual*

- 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**.

Moneris Go A920 UYT EN (Sep 2024)