Moneris® VX 520

Loyalty Programs Reference Guide

Moneris

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Contents

Overview

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

Moneris Loyalty programs

There are four types of loyalty programs: Basic Loyalty, Enhanced Loyalty, Pro Loyalty and Tracking. Loyalty program functions and user instructions will vary depending on the loyalty program package to which you are subscribed.

In this guide, instructions that are specific to a package will be outlined with the appropriate headings (e.g. Basic Loyalty transactions). All other instructions will be common across all four loyalty program types.

In general, this is how your loyalty program works:

- Every time a cardholder makes a purchase, you swipe the loyalty card so he or she can earn points towards rewards.

- When a cardholder reaches a specified number of points, he or she can redeem for a reward.

- To learn how to enrol cardholders, replace lost or damaged cards, promote your loyalty program and more, please refer to the **Loyalty Program Operating Manual**.

In general, this is how a Tracking program works:

- Every time a cardholder makes a purchase, you swipe the Tracking loyalty card so he or she can earn points towards rewards.

- The transaction data is passed to the Loyalty Program Provider who then awards points or reward miles respectively to the customer's account.

Helpful hints

- To access reports, press the first purple key on the right.

- To reprint receipts, press the second purple key from the right.

- To scroll through menus, use the **Arrow** key (the first purple key on the left). Press the yellow ⌨ key to toggle between scrolling up ⬆ and down ⬇.

- To select a menu item, press the grey function key (**F1**, **F2** etc.) that appears to the right of the menu item.

- To finish entering information and move on to the next step, press the green ⏎ key.

Loyalty card entry options

There are two ways to perform transactions with a loyalty card using the terminal:

Swipe

1. Wait for the "Swipe or Enter Card:" prompt to appear on the terminal display.

2. Swipe the card on the terminal's magnetic stripe reader.

Manual entry

You may manually enter the card number.

1. Wait for the "Swipe or Enter Card:" prompt to appear on the terminal display.

2. Key in the card number and press the green key.

Loyalty transactions

In this section, we go over everything you need to know to process Loyalty transactions with the VX 520 terminal.

Basic Loyalty transactions

Awarding points

Follow the steps below to award points to a loyalty card when the cardholder makes a Purchase by credit card, debit card or cash; or with an Advice.

1. Process the Purchase transaction on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Purchase**.

   - If the "Password:" prompt appears, key in the manager password and press the green ⏎ key.

   The "Total Amount:" prompt appears.

4. Key in the total transaction dollar amount (*including* tax and gratuity) and press the green ⏎ key.

   The "Accept amount?" prompt appears.

5. To accept the purchase amount, select **Yes**.

   The "Swipe or Enter Card:" prompt appears. Proceed to step 6.

   OR

   To enter a different amount, select **No**.

   The "Total Amount:" prompt appears. Repeat step 4.

6. Swipe the loyalty card or key in the card number and press the green ⏎ key.

   - If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⏎ key.
   - If the "Invoice Number:" prompt appears, key in the invoice number and press the green ⏎ key.

   "000 Approved" appears.

7. Press the green ⏎ key to print the Cardholder copy of the receipt.

8. Tear the receipt and press the green ⏎ key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

9. Press the ***** (**asterisk**) key to return to the applications menu.

Loyalty Pre-authorizations

Process a Pre-authorization to pre-allocate points if you know that you will NOT have the loyalty card available later for the Completion. Process the Pre-authorization Completion to award points that were pre-allocated in the initial Pre-authorization.

Processing a loyalty Pre-authorization

The Pre-authorization transaction does not award points on approval, but rather "pre-allocates" points that will be awarded on the Pre-authorization Completion. A Card Inquiry (see page 45) will not include these points in the card balance until the Completion has been processed.

1. Process the Pre-authorization or the Purchase transaction on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Pre Auth**.

4. On the Pre Auth menu, select **Pre Auth**.

   The "Total Amount:" prompt appears.

5. Key in the total amount of the pre-authorization and press the green ⬚ key.

   The "Accept amount?" prompt appears.

6. To accept the pre-authorization amount, select **Yes**.

   The "Swipe or Enter Card:" prompt appears. Proceed to step 7.

   OR

   To use a different amount, select **No**.

   The "Total Amount:" prompt appears. Repeat step 5.

7. Swipe the loyalty card or key in the card number and press the green ⬚ key.

   - If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⬚ key.
   - If the "Invoice Number:" prompt appears, key in the Invoice Number and press the green ⬚ key.

   "000 Approved" appears.

8. Press the green ⬚ key to print the Cardholder copy of the receipt.

9. Tear the receipt and press the green ⬚ key to print the Merchant copy of the receipt and return to the Pre Auth menu.

10. Press the red ⬚ key to return to the Gift & Loyalty transactions menu.

11. Press the ***** (**asterisk**) key to return to the applications menu.

Deleting a loyalty Pre-authorization

Loyalty pre-authorizations can be deleted before they are completed.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, select **Pre Auth**.

3. On the Pre Auth menu, select **Del Pre Auth**.

   The "Retrieve By" prompt appears.

4. Do one of the following:

- To locate the pre-authorization by reference number, select **Ref#**. The "Ernex Ref Number:" prompt appears. Key in the loyalty reference number (printed on the pre-authorization receipt) and press the green key.

    Transaction details appear. Choose one of the following:

    - To delete the displayed transaction, select **Yes**. Proceed to step 5.
    - To cancel the operation and return to the Pre Auth menu, select **No**.
    - To locate another pre-authorization to delete, select **Next**. Once the desired transaction is displayed, select **Yes** to delete it. Proceed to step 5.

    OR

- To locate the pre-authorization by loyalty card number, select **Acct**. The "Last 4 digits:" prompt appears. Key in the last four digits of the loyalty card used and press the green key.

    Transaction details appear. Choose one of the following:

    - To delete the displayed transaction, select **Yes**. Proceed to step 5.
    - To cancel the operation and return to the Pre Auth menu, select **No**.
    - To locate another pre-authorization to delete, select **Next**. Once the desired transaction is displayed, select **Yes** to delete it. Proceed to step 5.

    The terminal displays "Preauth deleted" and returns to the Pre Auth menu.

5. Press the red key to return to the Gift & Loyalty transactions menu.

6. Press the ***** (**asterisk**) key to return to the applications menu.

Processing a loyalty Pre-authorization Completion

1. Process the Pre-authorization Completion transaction on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Pre Auth**.

4. On the Pre Auth menu, select **Completion**.

    The "Ernex Ref Number:" prompt appears.

5. Key in the loyalty reference number located on the original pre-authorization receipt and press the green key.

    The Completion screen appears.

6. Do one of the following:

   - To accept the displayed pre-authorization transaction, select **Yes**. The "New Amount:" prompt appears. Proceed to step 7.
   - To scroll to a different transaction, select **Next** or **Prev**. Once you locate the transaction, select **Yes**. The "New Amount:" prompt appears. Proceed to step 7.
   - To cancel the operation and return to the previous step, select **No**. Repeat step 5.

7. At the "New Amount:" prompt, do one of the following:

   - For a different amount than the displayed value, key in a new amount and press the green [key] key.

   OR

   - To keep the displayed value, press the green [key] key.

   "000 Approved" appears.

8. Press the green [key] key to print the Cardholder copy of the receipt.

9. Tear the receipt and press the green [key] key to print the Merchant copy of the receipt and return to the Pre Auth menu.

10. Press the red [key] key to return to the Gift & Loyalty transactions menu.

11. Press the ***** (**asterisk**) key to return to the applications menu.

Redeeming points automatically

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

Note: *If a cardholder's points balance surpasses the Reward Threshold Level multiple times in one transaction (e.g. the Reward Threshold Level is 200 and the cardholder makes a $600 purchase with a Points Earning Rate of $1 = 1 point, meaning they have earned 600 points), the terminal will redeem points for only one Reward and print only one Reward Coupon.*

In the above example, the remaining coupons will be generated in increments of the Reward Threshold Level during subsequent transactions with the same card.

Processing a Refund

Follow the steps below to remove points from a loyalty card when the cardholder receives a Refund on a Purchase transaction that awarded points.

Note: *A loyalty Purchase reference number can only be used once for a Refund regardless of whether the Refund is for the full or partial amount of the Purchase.*

1. Process the Refund on the terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Refund**.

   ▪ If the "Password:" prompt appears, key in the manager password and press the green ⃟⏎ key.

   The "Total Amount:" prompt appears.

4. Key in the total dollar amount of the refund for which points are to be deducted following the guidelines below.

   ▪ If points were awarded on the Total Amount of the Purchase transaction (*including* tax and gratuity), key in the dollar amount printed on the Amount line of the loyalty card Purchase receipt, or key in part of the amount if the cardholder wants a partial Refund, then press the green ⃟⏎ key.

   Note: *The amount can be a partial amount of the original Purchase.*

   The "Swipe or Enter Card:" prompt appears.

5. Swipe the loyalty card or key in the card number and press the green ⃟⏎ key.

   ▪ If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⃟⏎ key.

   The "Ernex Ref Number:" prompt appears.

6. Key in the loyalty reference number printed on the loyalty Purchase receipt and press the green ⃟⏎ key.

   ▪ If the "Invoice Number:" prompt, appears, key in the Invoice Number and press the green ⃟⏎ key.

   "000 Approved" appears.

7. Press the green ⃟⏎ key to print the Cardholder copy of the receipt.

8. Tear the receipt and press the green ⃟⏎ key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

9. Press the ***** (**asterisk**) key to return to the applications menu.

Voiding a loyalty transaction

Follow the steps below to void a loyalty card transaction in the current batch.

Important: A Void must be performed in the same batch and for the same amount as the original transaction. To reverse a loyalty card Purchase transaction in a closed batch, or for a partial amount, you must process a Refund.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, scroll down and select **Void**.

   ▪ If the "Password:" prompt appears, key in the manager password and press the green ⃟⏎ key.

   The "Swipe or Enter Card:" prompt appears.

3. Swipe the loyalty card or key in the card number and press the green ⃟⏎ key.

   ▪ If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⃟⏎ key.

   The "Ernex Ref Number:" prompt appears.

4. Key in the loyalty reference number printed on the receipt of the loyalty card transaction you want to void and press the green ⊙↵ key.

   Note: *If "No Match Found" appears, the loyalty card transaction you were trying to void is not in the open batch. Cancel the Void and perform a Refund instead (see page 10).*

   ▪ If the "Invoice Number:" prompt appears, key in the Invoice Number and press the green ⊙↵ key.

   "000 Approved" appears.

5. Press the green ⊙↵ key to print the Cardholder copy of the receipt.

6. Tear the receipt and press the green ⊙↵ key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

7. Press the * (**asterisk**) key to return to the applications menu.

Basic Loyalty receipt

```
        Merchant Name
        Merchant Address
     Merchant City & Prov/State

Terminal ID  99999
Clerk ID  99

        Purchase ●────────── A

B ──● Card Description    Rewards
     Card   1234567890123456789
     Entry Method    Swiped


     [Orig Ref #        12345678]●── C
D ──●Amount            $      10.00
     Points Earned     $        10 ●── E
F ──●Points Balance    $        15
     Lifetime Points   $        25 ●── G

     YYYY/MM/DD          HH:MM:SS
     Inv # 999           Batch # 0
     000 Approved
     Ref # 12345678●──────────── H


           Thank you for
           your purchase.
           Always read
           the receipts
          for your records!

          Merchant Copy
```

LABEL	DESCRIPTION
A	Transaction type. Can also display Refund, Correction, Pre-auth, Pre-auth Completion.
B	Loyalty program name. Variable based on the type of card used.
C	Original loyalty transaction reference number (prints only on Refund, Void and Pre-auth Completion receipts).
D	Transaction total amount *including* tax and tip. (Points are awarded based on this amount, also known as the "Benefit" amount.)
E	Points added or removed for this transaction.
F	Current points balance on card (including points added or removed for this transaction).
G	Total points earned on card in its lifetime.
H	Loyalty transaction reference number (prints on all transaction receipts).

Loyalty reference number

A loyalty card transaction's reference number is printed at the bottom of each receipt (**Ref #**). You may be prompted to key in this number when transacting loyalty Refunds, Voids and Pre-authorization Completions, and when reprinting transaction receipts.

Reprinting a receipt

This function prints a duplicate Customer copy of a loyalty card transaction receipt.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, press the **Reprint** key (second purple key from the right).

   The Reprints menu appears.

3. Select the receipt you want to reprint:

   ▪ To print a receipt for the last transaction:

      ▪ Select **Last Receipt**.

   ▪ To reprint another receipt:

      a. Select **Any Receipt**.

      b. At the "Ernex Ref Number:" prompt, key in the loyalty reference number of the transaction for which you want to print a receipt and press the green key.

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

4. Press the red key to return to the Gift & Loyalty transactions menu.

5. Press the ***** (**asterisk**) key to return to the applications menu.

Enhanced Loyalty transactions

Awarding points

Follow the steps below to award points to a loyalty card when the cardholder makes a Purchase by credit card, debit card or cash; or with an Advice.

1. Process the Purchase transaction on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Purchase**.

    ▪ If the "Password:" prompt appears, key in the manager password and press the green ⏎ key.

    The "Total Amount:" prompt appears.

4. Key in the total transaction dollar amount (including tax and gratuity) and press the green ⏎ key.

    The "Accept amount?" prompt appears.

5. To accept the purchase amount, select **Yes**. The "Swipe or Enter Card:" prompt appears. Proceed to step 6.

    OR

    To enter a different amount, select **No**. The "Total Amount:" prompt appears. Repeat step 4.

6. Swipe the loyalty card or key in the card number and press the green ⏎ key.

    ▪ If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⏎ key.
    ▪ If the "Bonus Code" prompt appears:

        ▪ Key in the appropriate bonus code and press the green ⏎ key to award bonus points.

        OR

        ▪ Just press the green ⏎ key to bypass bonus points.

    ▪ If the "Pre-Tax Amount" prompt appears:

        ▪ Key in the dollar amount for which points are to be awarded (excluding tax and gratuity) and press the green ⏎ key.

        OR

        ▪ If the amount is the same as the amount entered in step 4, just press the green ⏎ key.

    ▪ If the "Invoice Number:" prompt appears, key in the Invoice Number and press the green ⏎ key.

    "000 Approved" appears.

7. Press the green ⏎ key to print the Customer copy of the receipt.

8. Tear the receipt and press the green ⏎ key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

9. Press the ***** (**asterisk**) key to return to the applications menu.

Loyalty Pre-authorizations

Process a Pre-authorization to pre-allocate points if you know that you will NOT have the loyalty card available later for the Completion. Process the Pre-authorization Completion to award points that were pre-allocated in the initial Pre-authorization.

Processing a loyalty Pre-authorization

The Pre-authorization transaction does not award points on approval, but rather "pre-allocates" points that will be awarded on the Pre-authorization Completion. A Card Inquiry (see page 45) will not include these points in the card balance until the Completion has been processed.

1. Process the Pre-authorization or the Purchase transaction on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Pre Auth**.

4. On the Pre Auth menu, select **Pre Auth**.

   The "Total Amount:" prompt appears.

5. Key in the total amount of the pre-authorization and press the green key.

   The "Accept amount?" prompt appears.

6. To accept the pre-authorization amount, select **Yes**. The "Swipe or Enter Card:" prompt appears. Proceed to step 7.

   OR

   To use a different amount, select **No**. The "Total Amount:" prompt appears. Repeat step 5.

7. Swipe the loyalty card or key in the card number and press the green key.

   - If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green key.
   - If the "Bonus Code" prompt appears:

     - Key in the appropriate bonus code and press the green key to award bonus points.

       OR

     - Just press the green key to bypass bonus points.

   - If the "Pre-Tax Amount" prompt appears:

     - Key in the dollar amount for which points are to be awarded (excluding tax and gratuity) and press the green key.

       OR

     - If the amount is the same as the amount entered in step 5, just press the green key.

   - If the "Invoice Number:" prompt appears, key in the Invoice Number and press the green key.

   "000 Approved" appears.

8. Press the green key to print the Cardholder copy of the receipt.

9. Tear the receipt and press the green key to print the Merchant copy of the receipt and return to the Pre Auth menu.

10. Press the red key to return to the Gift & Loyalty transactions menu.

11. Press the ***** (**asterisk**) key to return to the applications menu.

Deleting a loyalty Pre-authorization

Loyalty pre-authorizations can be deleted before they are completed.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, select **Pre Auth**.

3. On the Pre Auth menu, select **Del Pre Auth**.

   The "Retrieve By" prompt appears.

4. Do one of the following:

   - To locate the pre-authorization by reference number, select **Ref#**. The "Ernex Ref Number:" prompt appears. Key in the loyalty reference number (printed on the Pre-authorization receipt) and press the green key.

     Transaction details appear. Choose one of the following:

       - To delete the displayed transaction, select **Yes**. Proceed to step 5.
       - To cancel the operation and return to the Pre Auth menu, select **No**.
       - To locate another pre-authorization to delete, select **Next**. Once the desired transaction is displayed, select **Yes** to delete it. Proceed to step 5.

   OR

   - To locate the pre-authorization by loyalty card number, select **Acct**. The "Last 4 digits:" prompt appears. Key in the last four digits of the loyalty card used and press the green key.

     Transaction details appear. Choose one of the following:

       - To delete the displayed transaction, select **Yes**. Proceed to step 5.
       - To cancel the operation and return to the Pre Auth menu, select **No**.
       - To locate another pre-authorization to delete, select **Next**. Once the desired transaction is displayed, select **Yes** to delete it. Proceed to step 5.

   The terminal displays "Preauth deleted" and returns to the Pre Auth menu.

5. Press the red key to return to the Gift & Loyalty transactions menu.

6. Press the ***** (**asterisk**) key to return to the applications menu.

Processing a loyalty Pre-authorization Completion

1. Process the Pre-authorization Completion transaction on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Pre Auth**.

4. On the Pre Auth menu, select **Completion**.

   The "Ernex Ref Number:" prompt appears.

5. Key in the loyalty reference number located on the original Pre-authorization receipt and press the green ⏎ key.

   The Completion screen appears.

6. Do one of the following:

   ▪ To accept the displayed pre-authorization transaction, select **Yes**. The "New Amount:" prompt appears. Proceed to step 7.
   ▪ To scroll to a different transaction, select **Next** or **Prev**. Once you locate the transaction, select **Yes**. The "New Amount:" prompt appears. Proceed to step 7.
   ▪ To cancel the operation and return to the previous step, select **No**. Repeat step 5.

7. At the "New Amount:" prompt, do one of the following:

   ▪ For a different amount than the displayed value, key in a new amount and press the green ⏎ key.

   OR

   ▪ To keep the displayed value, press the green ⏎ key.
   ▪ If the "Bonus Code" prompt appears:

      ▪ Key in the appropriate bonus code and press the green ⏎ key to award bonus points.

      OR

      ▪ Just press the green ⏎ key to bypass bonus points.

   ▪ If the "Pre-Tax Amount" prompt appears:

      ▪ Key in the dollar amount for which points are to be awarded (excluding tax and gratuity) and press the green ⏎ key.

      OR

      ▪ If the amount is the same as the amount entered before, just press the green ⏎ key.

   "000 Approved" appears.

8. Press the green ⏎ key to print the Cardholder copy of the receipt.

9. Tear the receipt and press the green ⏎ key to print the Merchant copy of the receipt and return to the Pre Auth menu.

10. Press the red [X] key to return to the Gift & Loyalty transactions menu.

11. Press the ***** (**asterisk**) key to return to the applications menu.

Redeeming points automatically

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

Note: *If a cardholder's points balance surpasses the Reward Threshold Level multiple times in one transaction (e.g. the Reward Threshold Level is 200 and the cardholder makes a $600 purchase with a Points Earning Rate of $1 = 1 point, meaning they have earned 600 points), the terminal will redeem points for only one Reward and print only one Reward Coupon.*

In the above example, the remaining coupons will be generated in increments of the Reward Threshold Level during subsequent transactions with the same card.

Redeeming points manually

If your loyalty program has been set up for Manual Redemption, follow the steps below to manually initiate a Redemption at the cardholder's request.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, select **Redemption**.

    ▪   If the "Password:" prompt appears, key in the manager password and press the green ⏎ key.

    The "Swipe or Enter Card:" prompt appears.

3. Swipe the loyalty card or key in the card number and press the green ⏎ key.

    ▪   If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⏎ key.

    The "Benefit" prompt appears.

4. Key in the number of points to be redeemed and press the green ⏎ key.

    ▪   If the "Invoice Number:" prompt, appears, key in the Invoice Number and press the green ⏎ key.

    "000 Approved" appears.

5. Press the green ⏎ key to print the Customer copy of the receipt.

6. Tear the receipt and press the green ⏎ key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

7. Press the ***** (**asterisk**) key to return to the applications menu.

Processing a Refund

Follow the steps below to remove points from a loyalty card when the cardholder receives a Refund on a Purchase transaction that awarded points.

Note: *A loyalty Purchase reference number can only be used once for a refund regardless of whether the refund is for the full or partial amount of the Purchase.*

1. Process the Refund on the terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Refund**.

    ▪   If the "Password:" prompt appears, key in the manager password and press the green ⏎ key.

    The "Total Amount:" prompt appears.

4. Key in the total dollar amount of the refund for which points are to be deducted following the guidelines below.

    ▪ If points were awarded on the Total Amount of the Purchase transaction (*including* tax and gratuity), key in the dollar amount printed on the Amount line of the loyalty Purchase receipt, or key in part of the amount if the cardholder wants a partial Refund, then press the green ⊙↵ key.

    Note: *The amount can be a partial amount of the original Purchase.*

    ▪ If points were awarded on the Pre-Tax Amount of the Purchase transaction (*excluding* tax and gratuity), key in the dollar amount printed on the Pre-Tax Amount line of the loyalty Purchase receipt, or key in part of the amount if the cardholder wants a partial Refund, then press the green ⊙↵ key.

    The "Swipe or Enter Card:" prompt appears.

5. Swipe the loyalty card or key in the card number and press the green ⊙↵ key.

    ▪ If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⊙↵ key.
    ▪ If the "Bonus Code" prompt appears:

        ▪ To remove any bonus points awarded on the Purchase, key in the appropriate bonus code and press the green ⊙↵ key (see the loyalty Purchase receipt for the bonus code used).

        OR

        ▪ To leave any awarded bonus points on the card, just press the green ⊙↵ key.

    The "Ernex Ref Number:" prompt appears.

6. Key in the loyalty reference number printed on the loyalty Purchase receipt and press the green ⊙↵ key.

    ▪ If the "Invoice Number:" prompt, appears, key in the Invoice Number and press the green ⊙↵ key.

    "000 Approved" appears.

7. Press the green ⊙↵ key to print the Customer copy of the receipt.

8. Tear the receipt and press the green ⊙↵ key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

9. Press the ***** (**asterisk**) key to return to the applications menu.

Voiding a loyalty transaction

Follow the steps below to void a loyalty card transaction in the current batch.

Important: A Void must be performed in the same batch and for the same amount as the original transaction. To reverse a loyalty card transaction in a closed batch, or for a partial amount, you must process a Refund.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, scroll down and select **Void**.

    ▪ If the "Password:" prompt appears, key in the manager password and press the green ⊙↵ key.

    The "Swipe or Enter Card:" prompt appears.

3. Swipe the loyalty card or key in the card number and press the green ⏎ key.

   ▪ If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⏎ key.

   The "Ernex Ref Number:" prompt appears.

4. Key in the loyalty reference number printed on the receipt of the loyalty transaction you want to void and press the green ⏎ key.

   Note: *If "No Match Found" appears, the loyalty card transaction you were trying to void is not in the open batch. Cancel the Void and perform a Refund instead (see page 18).*

   ▪ If the "Invoice Number:" prompt, appears, key in the Invoice Number and press the green ⏎ key.

   "000 Approved" appears.

5. Press the green ⏎ key to print the Customer copy of the receipt.

6. Tear the receipt and press the green ⏎ key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

7. Press the ***** (**asterisk**) key to return to the applications menu.

Note: *A Void automatically includes any bonus points awarded or removed in the original transaction.*

Enhanced Loyalty receipt

LABEL	DESCRIPTION
A	Transaction type. Can also display Refund, Correction, Pre-auth, Pre-auth Completion.
B	Loyalty program name. Can be customized.
C	Original loyalty transaction reference number (prints only on Refund, Void and Pre-auth Completion receipts).
D	Transaction total amount *including* tax and tip.
E	Transaction amount *excluding* tax and tip. (Points are awarded based on this amount, also known as the "Benefit" amount).
F	Points added or removed for this transaction.
G	Current points balance on the card (*including* points added or removed for this transaction).
H	Total points earned on card in its lifetime.
I	Code for Bonus points awarded for this transaction. See *Bonus points* on page 22 for possible values.
J	Loyalty transaction reference number (prints on all transaction receipts).

Loyalty reference number

A loyalty card transaction's reference number is printed at the bottom of each receipt (**Ref #**). You may be prompted to key in this number when transacting loyalty Refunds, Voids and Pre-authorization Completions, and when reprinting transaction receipts.

Reprinting a receipt

This function prints a duplicate Customer copy of a loyalty card transaction receipt.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, press the **Reprint** key (second purple key from the right).

   The Reprints menu appears.

3. Select the receipt you want to reprint:

   ▪ To print a receipt for the last transaction:

      Select **Last Receipt**.

- To reprint another receipt:
    a. Select **Any Receipt**.
    b. At the "Ernex Ref Number:" prompt, key in the loyalty reference number of the transaction for which you want to print a receipt and press the green [⏎] key.

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

4. Press the red [X] key to return to the Gift & Loyalty transactions menu.

5. Press the ***** (**asterisk**) key to return to the applications menu.

Bonus points (Enhanced Loyalty only)

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

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

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

Note to Managers

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

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

Pro Loyalty transactions

Awarding points

Follow the steps below to award points to a loyalty card when the cardholder makes a Purchase by credit card, debit card, or cash; or with an Advice.

1. Process the Purchase transaction on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Purchase**.

   ▪ If the "Password:" prompt appears, key in the manager password and press the green [⏎] key.

   The "Total Amount:" prompt appears.

4. Key in the total transaction dollar amount (including tax and gratuity) and press the green [⏎] key.

   The "Accept amount?" prompt appears.

5. To accept the purchase amount, select **Yes**. The "Swipe or Enter Card:" prompt appears. Proceed to step 6.

   OR

   To enter a different amount, select **No**. The "Total Amount:" prompt appears. Repeat step 4.

6. Swipe the loyalty card or key in the card number and press the green [⏎] key.

   ▪ If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green [⏎] key.
   ▪ If a prompt appears for additional data (e.g. "Bonus Code" or "Reference Code"):

      ▪ Key in the appropriate information and press the green [⏎] key. Consult your manager if you are unsure of what to enter.

      OR

      ▪ Just press the green [⏎] key to bypass the prompt.

   ▪ If a prompt appears for the Benefit amount (e.g. "Pre-Tax Amount" or "Food Amount"):

      ▪ Key in the dollar amount for which points are to be awarded and press the green [⏎] key. Consult your manager if you are unsure of what to enter.

      OR

      ▪ If the amount is the same as the amount entered before, just press the green [⏎] key.

   "000 Approved" appears.

7. Press the green [⏎] key to print the Customer copy of the receipt.

8. Tear the receipt and press the green [⏎] key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

9. Press the ***** (**asterisk**) key to return to the applications menu.

Loyalty Pre-authorizations

Process a Pre-authorization to pre-allocate points if you know that you will NOT have the loyalty card available later for the Completion. Process the Pre-authorization Completion to award points that were pre-allocated in the initial Pre-authorization.

Processing a loyalty Pre-authorization

The Pre-authorization transaction does not award points on approval, but rather "pre-allocates" points that will be awarded on the Pre-authorization Completion. A Card Inquiry (see page 45) will not include these points in the card balance until the Completion has been processed.

1. Process the Pre-authorization or the Purchase transaction on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Pre Auth**.

4. On the Pre Auth menu, select **Pre Auth**.

   The "Total Amount:" prompt appears.

5. Key in the total amount of the pre-authorization and press the green key.

   The "Accept amount?" prompt appears.

6. To accept the pre-authorization amount, select **Yes**. The "Swipe or Enter Card:" prompt appears. Proceed to step 7.

   OR

   To use a different amount, select **No**. The "Total Amount:" prompt appears. Repeat step 5.

7. Swipe the loyalty card or key in the card number and press the green key.

   - If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green key.
   - If a prompt appears for additional data (e.g. "Bonus Code" or "Reference Code"):

     - Key in the appropriate information and press the green key. Consult your manager if you are unsure of what to enter.

       OR

     - Just press the green key to bypass the prompt.

   - If a prompt appears for the Benefit amount (e.g. "Pre-Tax Amount" or "Food Amount"):

     - Key in the dollar amount for which points are to be awarded and press the green key. Consult your manager if you are unsure of what to enter.

       OR

     - If the amount is the same as the amount entered before, just press the green key.

   - If the "Invoice Number:" prompt appears, key in the Invoice Number and press the green key.

"000 Approved" appears.

8. Press the green ⬚ key to print the Cardholder copy of the receipt.

9. Tear the receipt and press the green ⬚ key to print the Merchant copy of the receipt and return to the Pre Auth menu.

10. Press the red ⬚ key to return to the Gift & Loyalty transactions menu.

11. Press the ***** (**asterisk**) key to return to the applications menu.

Deleting a loyalty Pre-authorization

Loyalty pre-authorizations can be deleted before they are completed.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, select **Pre Auth**.

3. On the Pre Auth menu, select **Del Pre Auth**.

   The "Retrieve By" prompt appears.

4. Do one of the following:

   - To locate the pre-authorization by reference number, select **Ref#**. The "Ernex Ref Number:" prompt appears. Key in the loyalty reference number (printed on the pre-authorization receipt) and press the green ⬚ key.

     Transaction details appear. Choose one of the following:

     - To delete the displayed transaction, select **Yes**. Proceed to step 5.
     - To cancel the operation and return to the Pre Auth menu, select **No**.
     - To locate another pre-authorization to delete, select **Next**. Once the desired transaction is displayed, select **Yes** to delete it. Proceed to step 5.

   OR

   - To locate the pre-authorization by loyalty card number, select **Acct**. The "Last 4 digits:" prompt appears. Key in the last four digits of the loyalty card used and press the green ⬚ key.

     Transaction details appear. Choose one of the following:

     - To delete the displayed transaction, select **Yes**. Proceed to step 5.
     - To cancel the operation and return to the Pre Auth menu, select **No**.
     - To locate another pre-authorization to delete, select **Next**. Once the desired transaction is displayed, select **Yes** to delete it. Proceed to step 5.

   The terminal displays "Preauth deleted" and returns to the Pre Auth menu.

5. Press the red ⬚ key to return to the Gift & Loyalty transactions menu.

6. Press the ***** (**asterisk**) key to return to the applications menu.

Processing a loyalty Pre-authorization Completion

1. Process the Pre-authorization Completion transaction on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Pre Auth**.

4. On the Pre Auth menu, select **Completion**.

   The "Ernex Ref Number:" prompt appears.

5. Key in the loyalty reference number located on the original pre-authorization receipt and press the green ⌨ key.

   The Completion screen appears.

6. Do one of the following:

   ▪ To accept the displayed pre-authorization transaction, select **Yes**. The "New Amount:" prompt appears. Proceed to step 7.
   ▪ To scroll to a different transaction, select **Next** or **Prev**. Once you locate the transaction, select **Yes**. The "New Amount:" prompt appears. Proceed to step 7.
   ▪ To cancel the operation and return to the previous step, select **No**. Repeat step 5.

7. At the "New Amount:" prompt, do one of the following:

   ▪ For a different amount than the displayed value, key in a new amount and press the green ⌨ key.

   OR

   ▪ To keep the displayed value, press the green ⌨ key.
   ▪ If a prompt appears for additional data (e.g. "Bonus Code" or "Reference Code"):

       ▪ Key in the appropriate information and press the green ⌨ key. Consult your manager if you are unsure of what to enter.

       OR

       ▪ Just press the green ⌨ key to bypass the prompt.

   ▪ If a prompt appears for the Benefit amount (e.g. "Pre-Tax Amount" or "Food Amount"):

       ▪ Key in the dollar amount for which points are to be awarded and press the green ⌨ key. Consult your manager if you are unsure of what to enter.

       OR

       ▪ If the amount is the same as the amount entered before, just press the green ⌨ key.

   "000 Approved" appears.

8. Press the green ⌨ key to print the Cardholder copy of the receipt.

9. Tear the receipt and press the green ⌨ key to print the Merchant copy of the receipt and return to the Pre Auth menu.

10. Press the red ⌨ key to return to the Gift & Loyalty transactions menu.

11. Press the ***** (**asterisk**) key to return to the applications menu.

Redeeming points automatically

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

Note: If a cardholder's points balance surpasses the Reward Threshold Level multiple times in one transaction (e.g. the Reward Threshold Level is 200 and the cardholder makes a $600 purchase with a Points Earning Rate of $1 = 1 point, meaning they have earned 600 points), the terminal will redeem points for only one Reward and print only one Reward Coupon.

In the above example, the remaining coupons will be generated in increments of the Reward Threshold Level during subsequent transactions with the same card.

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

Redeeming points manually

If your loyalty program has been set up for Manual Redemption of points, follow the steps below to manually initiate a Redemption at the cardholder's request.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, scroll down and select **Redemption**.

   - If the "Password:" prompt appears, key in the manager password and press the green ⌨ key.

   The "Swipe or Enter Card:" prompt appears.

3. Swipe the loyalty card or key in the card number and press the green ⌨ key.

   - If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⌨ key.
   - If a prompt appears for additional data (e.g. "Bonus Code" or "Reference Code"):

     - Key in the appropriate information and press the green ⌨ key

       OR

     - Just press the green ⌨ key to bypass the prompt.

   The "Benefit" prompt appears.

   Note: The wording of this prompt may be different if you have customized it (e.g. "Pre-Tax Amount" or "Food Amount").

4. Key in the number of points to be redeemed and press the green ⌨ key.

   "000 Approved" appears.

5. Press the green ⌨ key to print the Customer copy of the receipt.

6. Tear the receipt and press the green ⌨ key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

7. Press the ***** (**asterisk**) key to return to the applications menu.

Redeeming dollars manually

If your loyalty program has been set up for Manual Redemption of dollars, follow the steps below to manually initiate Redemption at the cardholder's request.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, scroll down and select **Redemption**.

   ▪ If the "Password:" prompt appears, key in the manager password and press the green ⌨ key.

   The "Swipe or Enter Card:" prompt appears.

3. Swipe the loyalty card or key in the card number and press the green   key.

   ▪ If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⌨ key.
   ▪ If a prompt appears for additional data (e.g. "Bonus Code" or "Reference Code"):

      ▪ Key in the appropriate information and press the green ⌨ key.

      OR

      ▪ Just press the green ⌨ key to bypass the prompt.

   The "Enter Amount:" prompt appears.

4. Key in the dollar amount to be redeemed and press the green ⌨ key.

   "000 Approved" appears.

5. Press the green ⌨ key.

   Note: *The Balance Due prompt appears if there are insufficient points on the card. If there are sufficient points on the card, go to step 6. If there are insufficient points on the card, follow these steps:*

   a. Press the green ⌨ key.

      The "Select Payment For Balance Due" prompt appears.

   b. Select the method that the customer wishes to use to pay:

      ▪ To use debit card or credit card, select **DbCr** (**F1** key).
      ▪ To pay with a gift card, select **Gift** (**F2** key).
      ▪ To pay with cash, select **Cash** (**F3** key).

      The terminal prints the Customer copy of the receipt.

   c. Tear the receipt and press the green ⌨ key to print the Merchant copy of the receipt.

   d. If you selected:

      ▪ **DbCr**, the terminal automatically begins a debit or credit Purchase transaction at the "Amount: $0.00" prompt. Refer to the Merchant receipt for the amount to charge.
      ▪ **Gift**, the terminal automatically begins a gift card Purchase transaction at the "Total Amount: $0.00" prompt. Refer to the Merchant receipt for the amount to charge. Refer to the ***Gift Card Program: Using Your Terminal*** guide for instructions on processing a gift card Purchase. Visit **moneris.com/support** to download a free copy of the guide.

- **Cash**, the Redemption transaction is completed. The terminal prints the Customer copy of the receipt. Proceed to step 6.

6. If there were sufficient points on the card and the "Balance Due" prompt did not appear:

   - The terminal prints the Customer copy of the receipt.

7. Tear the receipt and press the green ⌨ key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

8. Press the ***** (**asterisk**) key to return to the applications menu.

Processing a Refund

Follow the steps below to remove points from a loyalty card when the cardholder receives a Refund on a Purchase transaction that awarded points.

Note: *A loyalty Purchase reference number can only be used once for a refund regardless of whether the refund is for the full or partial amount of the Purchase.*

1. Process the Refund on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Refund**.

   - If the "Password:" prompt appears, key in the manager password and press the green ⌨ key.

   The "Total Amount:" prompt appears.

4. Key in the total dollar amount of the transaction, including tax and tip, key in the dollar amount printed on the Amount line of the loyalty Purchase receipt, or key in part of the amount if the cardholder wants a partial Refund then press the green ⌨ key.

   Note: *The amount can be a partial amount of the original Purchase.*

   The "Swipe or Enter Card:" prompt appears.

5. Swipe the loyalty card or key in the card number and press the green ⌨ key.

   - If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⌨ key.
   - If a prompt appears for additional data (e.g. "Bonus Code" or "Reference Code"), follow the instructions below:

     - If you are using the prompt for the Bonus Code:

       - To leave any awarded bonus points on the card, just press the green ⌨ key.

       OR

       - To remove any bonus points on the Purchase, key in the appropriate bonus code and press the green ⌨ key (see the loyalty card Purchase receipt for the bonus code used).

   - If you are using the prompt for other data:

     - Key in the appropriate information and press the green ⌨ key.

OR

- To bypass the prompt, just press the green [key] key.

- If a prompt appears for the Benefit amount (e.g. "Pre-Tax Amount" or "Food Amount"):

    - Key in the dollar amount for which points are to be refunded and press the green [key] key. Consult your manager if you are unsure of what to enter.

    OR

    - If the amount is the same as the amount entered before, just press the green [key] key.

    The "Ernex Ref Number:" prompt appears.

6. Key in the loyalty reference number printed on the loyalty card Purchase receipt and press the green [key] key.

    "000 Approved" appears.

7. Press the green [key] key to print the Customer copy of the receipt.

8. Tear the receipt and press the green [key] key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

9. Press the ***** (**asterisk**) key to return to the applications menu.

Voiding a loyalty transaction

Follow the steps below to void a loyalty card transaction in the current batch.

Important: A Void must be performed in the same batch and for the same amount as the original transaction. To reverse a loyalty card Purchase transaction in a closed batch, or for a partial amount, you must process a Refund.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, scroll down and select **Void**.

    - If the "Password:" prompt appears, key in the manager password and press the green [key] key.

    The "Swipe or Enter Card:" prompt appears.

3. Swipe the loyalty card or key in the card number and press the green [key] key.

    - If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green [key] key.

    The "Ernex Ref Number:" prompt appears.

4. Key in the loyalty reference number printed on the receipt of the loyalty card transaction you want to void and press the green [key] key.

    Note: If "No Match Found" appears, the loyalty card transaction you were trying to void is not in the open batch. Cancel the Void and perform a Refund instead (see page 29).

    "000 Approved" appears.

5. Press the green [key] key to print the Customer copy of the receipt.

6. Tear the receipt and press the green ⏎ key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

7. Press the ***** (**asterisk**) key to return to the applications menu.

Note: *A Void automatically reverses any bonus points awarded or removed in the original transaction.*

Pro Loyalty receipt

```
        Merchant Name
       Merchant Address
    Merchant City & Prov/State

Terminal ID  99999
Clerk ID  99

       Purchase           •———(A)

Card Description    Rewards  •———(B)
Card    1234567890123456789
Entry Method    Swiped

 [Orig Ref #        12345678]  •———(C)

Amount           $     11.75 •———(D)
Pre-Tax Amount   $     10.00
Points Earned    $        10 •———(F)
Points Balance   $       115
Lifetime Points  $       125 •———(H)
Bonus Code             ###

YYYY/MM/DD          HH:MM:SS
Inv # 999           Batch # 0
000 Approved
Ref # 12345678        •———(J)


      You have earned
    100 BONUS POINTS!

      Merchant Copy
```

(E)———•
(G)———•
(I)———•

Loyalty reference number

A loyalty card transaction's reference number is printed at the bottom of each receipt (**Ref #**). You may be prompted to key in this number when transacting loyalty Refunds, Voids and Pre-authorization Completions, and when reprinting transaction receipts.

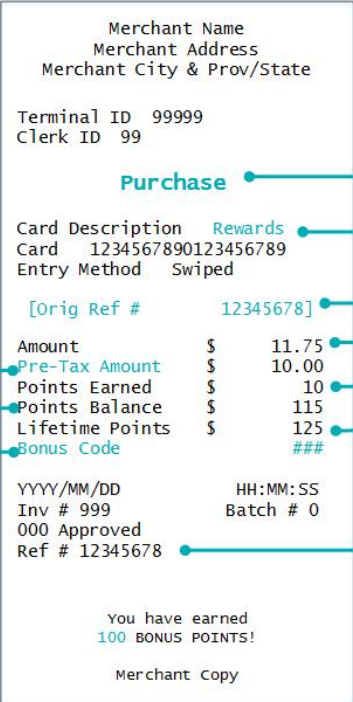| LABEL	DESCRIPTION
A	Transaction type. Can also display Refund, Correction, Pre-auth, Pre-auth Completion.
B	Loyalty program name (can be customized).
C	Original loyalty transaction reference number (prints only on Refund, Void and Pre-auth Completion receipts).
D	Transaction total amount *including* tax and tip.
E	Transaction amount *excluding* tax and tip. (Points are awarded based on this amount, also known as the "Benefit" amount). *Note: The "Pre-Tax Amount" receipt text and terminal prompts may or may not appear depending on program setup. If Pre-Tax Amount prompting is enabled, the "Pre-Tax Amount" text/terminal prompt may be different if you have customized it (e.g., could appear as "Food Amount").*
F	Points added or removed for this transaction.
G	Current points balance on the card (*including* points added or removed for this transaction).
H	Total points earned on card in its lifetime.
I	Code for Bonus points awarded for this transaction. *Note: The "Bonus Code" receipt text and terminal prompts may or may not appear depending on program setup. If Bonus Code prompting is enabled, the "Bonus Code" text/terminal prompt may be different if you have customized it (e.g., could appear as "Reference Code").*
J	Loyalty transaction reference number (prints on all transaction receipts).

Reprinting a receipt

This function prints a duplicate Customer copy of a loyalty card transaction receipt.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, press the **Reprint** key (second purple key from the right).

   The Reprints menu appears.

3. Select the receipt you want to reprint:

   ▪ To print a receipt for the last transaction:

       Select **Last Receipt**.

   ▪ To reprint another receipt:

       a. Select **Any Receipt**.

       b. At the "Ernex Ref Number:" prompt, key in the loyalty reference number of the transaction for which you want to print a receipt and press the green key.

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

4. Press the red key to return to the Gift & Loyalty transactions menu.

5. Press the ***** (**asterisk**) key to return to the applications menu.

Tracking loyalty transactions

Awarding points

Follow the steps below to award points to a Tracking loyalty card when the cardholder makes a Purchase by credit card, debit card, or cash; or with an Advice.

1. Process the Purchase transaction on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Purchase**.

   ▪ If the "Password:" prompt appears, key in the manager password and press the green ⌨ key.

   The "Total Amount:" prompt appears.

4. Key in the total transaction dollar amount (*including* tax and gratuity) and press the green ⌨ key.

   The "Accept amount?" prompt appears.

5. To accept the purchase amount, select **Yes**. The "Swipe or Enter Card:" prompt appears. Proceed to step 6.

   OR

   To enter a different amount, select **No**. The "Total Amount:" prompt appears. Repeat step 4.

6. Swipe the Tracking loyalty card or key in the card number and press the green ⌨ key.

   ▪ If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⌨ key.
   ▪ If a prompt appears for additional data (e.g. "Bonus Code" or "Reference Code"):

      ▪ Key in the appropriate information and press the green ⌨ key. Consult your manager if you are unsure of what to enter.

      OR

      ▪ Just press the green ⌨ key to bypass the prompt.

   ▪ If a prompt appears for the Benefit amount (e.g. "Pre-Tax Amount" or "Food Amount"):

      ▪ Key in the dollar amount for which points or reward miles are to be awarded and press the green ⌨ key. Consult your manager if you are unsure of what to enter.

      OR

      ▪ If the amount is the same as the amount entered before, just press the green ⌨ key.

   "000 Approved" appears.

7. Press the green ⌨ key to print the Customer copy of the receipt.

8. Tear the receipt and press the green ⌨ key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

9. Press the ***** (**asterisk**) key to return to the applications menu.

Pre-authorizations

Process a Pre-authorization to pre-allocate points or reward miles if you know that you will NOT have the loyalty card available later for the Completion. Process the Pre-authorization Completion to award points or reward miles that were pre-allocated in the initial Pre-authorization.

Processing a Pre-authorization

The Pre-authorization transaction does not award points or reward miles on approval, but rather "pre-allocates" points or reward miles that will be awarded on the Pre-authorization Completion.

1. Process the Pre-authorization or the Purchase transaction on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Pre Auth**.

4. On the Pre Auth menu, select **Pre Auth**.

    The "Total Amount:" prompt appears.

5. Key in the total amount of the pre-authorization and press the green key.

    The "Accept amount?" prompt appears.

6. To accept the pre-authorization amount, select **Yes**. The "Swipe or Enter Card:" prompt appears. Proceed to step 7.

    OR

    To use a different amount, select **No**. The "Total Amount:" prompt appears. Repeat step 5.

7. Swipe the Tracking loyalty card or key in the card number and press the green key.

    - If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green key.
    - If a prompt appears for additional data (e.g. "Bonus Code" or "Reference Code"):

        - Key in the appropriate information and press the green key. Consult your manager if you are unsure of what to enter.

        OR

        - Just press the green key to bypass the prompt.

    - If a prompt appears for the Benefit amount (e.g. "Pre-Tax Amount" or "Food Amount"):

        - Key in the dollar amount for which points or reward miles are to be awarded and press the green key. Consult your manager if you are unsure of what to enter.

        OR

        - If the amount is the same as the amount entered before, just press the green key.

    - If the "Invoice Number:" prompt appears, key in the Invoice Number and press the green key.

    "000 Approved" appears.

8. Press the green key to print the Cardholder copy of the receipt.

9. Tear the receipt and press the green key to print the Merchant copy of the receipt and return to the Pre Auth menu.

10. Press the red key to return to the Gift & Loyalty transactions menu.

11. Press the ***** (**asterisk**) key to return to the applications menu.

Deleting a Pre-authorization

Loyalty pre-authorizations can be deleted before they are completed.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, select **Pre Auth**.

3. On the Pre Auth menu, select **Del Pre Auth**.

   The "Retrieve By" prompt appears.

4. Do one of the following:

   ▪ To locate the pre-authorization by reference number, select **Ref#**. The "Ernex Ref Number:" prompt appears. Key in the loyalty reference number (printed on the pre-authorization receipt) and press the green key.

   Transaction details appear. Choose one of the following:

     ▪ To delete the displayed transaction, select **Yes**. Proceed to step 5.
     ▪ To cancel the operation and return to the Pre Auth menu, select **No**.
     ▪ To locate another pre-authorization to delete, select **Next**. Once the desired transaction is displayed, select **Yes** to delete it. Proceed to step 5.

   OR

   ▪ To locate the pre-authorization by loyalty card number, select **Acct**. The "Last 4 digits:" prompt appears. Key in the last four digits of the card used and press the green key.

   Transaction details appear. Choose one of the following:

     ▪ To delete the displayed transaction, select **Yes**. Proceed to step 5.
     ▪ To cancel the operation and return to the Pre Auth menu, select **No**.
     ▪ To locate another pre-authorization to delete, select **Next**. Once the desired transaction is displayed, select **Yes** to delete it. Proceed to step 5.

   The terminal displays "Preauth deleted" and returns to the Pre Auth menu.

5. Press the red key to return to the Gift & Loyalty transactions menu.

6. Press the ***** (**asterisk**) key to return to the applications menu.

Processing a Pre-authorization Completion

1. Process the Pre-authorization Completion transaction on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Pre Auth**.

4. On the Pre Auth menu, select **Completion**.

   The "Ernex Ref Number:" prompt appears.

5. Key in the loyalty reference number located on the original pre-authorization receipt and press the green ⌨ key.

   The Completion screen appears.

6. Do one of the following:

   ▪ To accept the displayed pre-authorization transaction, select **Yes**. The "New Amount:" prompt appears. Proceed to step 7.
   ▪ To scroll to a different transaction, select **Next** or **Prev**. Once you locate the transaction, select **Yes**. The "New Amount:" prompt appears. Proceed to step 7.
   ▪ To cancel the operation and return to the previous step, select **No**. Repeat step 5.

7. At the "New Amount:" prompt, do one of the following:

   ▪ For a different amount than the displayed value, key in a new amount and press the green ⌨ key.

   OR

   ▪ To keep the displayed value, press the green ⌨ key.
   ▪ If a prompt appears for additional data (e.g. "Bonus Code" or "Reference Code"):

      ▪ Key in the appropriate information and press the green ⌨ key. Consult your manager if you are unsure of what to enter.

      OR

      ▪ Just press the green ⌨ key to bypass the prompt.

   ▪ If a prompt appears for the Benefit amount (e.g. "Pre-Tax Amount" or "Food Amount"):

      ▪ Key in the dollar amount for which points or reward miles are to be awarded and press the green ⌨ key. Consult your manager if you are unsure of what to enter.

      OR

      ▪ If the amount is the same as the amount entered before, just press the green ⌨ key.

   "000 Approved" appears.

8. Press the green ⌨ key to print the Cardholder copy of the receipt.

9. Tear the receipt and press the green ⌨ key to print the Merchant copy of the receipt and return to the Pre Auth menu.

10. Press the red ⌨ key to return to the Gift & Loyalty transactions menu.

11. Press the ***** (**asterisk**) key to return to the applications menu.

Processing a Refund

Follow the steps below to remove points or reward miles from a Tracking loyalty card when the cardholder receives a Refund on a Purchase transaction that awarded points.

Note: *A Tracking loyalty Purchase reference number can only be used once for a refund regardless of whether the refund is for the full or partial amount of the Purchase.*

1. Process the Refund on your terminal.

2. On the applications menu, select **GIFT & LOYALTY**.

3. On the Gift & Loyalty transactions menu, select **Refund**.

   ▪ If the "Password:" prompt appears, key in the manager password and press the green ⏎ key.

   The "Total Amount:" prompt appears.

4. Key in the total dollar amount of the transaction, *including* tax and tip, key in the dollar amount printed on the Amount line of the Purchase receipt, or key in part of the amount if the cardholder wants a partial Refund, then press the green ⏎ key.

   Note: *The amount can be a partial amount of the original Purchase.*

   The "Swipe or Enter Card:" prompt appears.

5. Swipe the Tracking loyalty card or key in the card number and press the green ⏎ key.

   ▪ If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⏎ key.
   ▪ If a prompt appears for additional data (e.g. "Bonus Code" or "Reference Code"), follow the instructions below:
   ▪ If you are using the prompt for the Bonus Code:

      ▪ To leave any awarded bonus points/reward miles on the card, just press the green ⏎ key.

      OR

      ▪ To remove any bonus points/reward miles on the Purchase, key in the appropriate bonus code and press the green ⏎ key (see the Purchase receipt for the bonus code used).

   ▪ If you are using the prompt for other data:

      ▪ Key in the appropriate information and press the green ⏎ key.

      OR

      ▪ To bypass the prompt, just press the green ⏎ key.

   ▪ If a prompt appears for the Benefit amount (e.g. "Pre-Tax Amount" or "Food Amount"):

      ▪ Key in the dollar amount for which points or reward miles are to be refunded and press the green ⏎ key. Consult your manager if you are unsure of what to enter.

      OR

      ▪ If the amount is the same as the amount entered before, just press the green ⏎ key.

   The "Ernex Ref Number:" prompt appears.

6. Key in the loyalty reference number printed on the Purchase receipt and press the green ⏎ key.

   "000 Approved" appears.

7. Press the green ⏎ key to print the Customer copy of the receipt.

8. Tear the receipt and press the green ⌨ key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

9. Press the ***** (**asterisk**) key to return to the applications menu.

Voiding a transaction

Follow the steps below to void a Tracking loyalty card transaction in the current batch.

Important: A Void must be performed in the same batch and for the same amount as the original transaction. To reverse a Tracking loyalty card Purchase transaction in a closed batch, or for a partial amount, you must process a Refund.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, scroll down and select **Void**.

   ▪ If the "Password:" prompt appears, key in the manager password and press the green ⌨ key.

   The "Swipe or Enter Card:" prompt appears.

3. Swipe the Tracking loyalty card, or key in the card number and press the green ⌨ key.

   ▪ If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⌨ key.

   The "Ernex Ref Number:" prompt appears.

4. Key in the loyalty reference number printed on the receipt of the transaction you want to void and press the green ⌨ key.

   Note: If "No Match Found" appears, the loyalty card transaction you were trying to void is not in the open batch. Cancel the Void and perform a Refund instead (see page 36).

   "000 Approved" appears.

5. Press the green ⌨ key to print the Customer copy of the receipt.

6. Tear the receipt and press the green ⌨ key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

7. Press the ***** (**asterisk**) key to return to the applications menu.

Note: A Void automatically reverses any bonus points or reward miles awarded or removed in the original transaction.

Tracking Loyalty receipt

```
            Merchant Name
           Merchant Address
        Merchant City & Prov/State

     Terminal ID  99999
     Clerk ID  99

             Purchase                      ● (A)

     Card Description    Rewards            ● (B)
     Card    1234567890123456789
     Entry Method    Swiped

     [Orig Ref #         12345678]         ● (C)

(D) ●  Amount           $        11.75
       Pre-Tax Amount   $        10.00    ● (E)
(F) ●  Points Earned    $            0
       Points Balance   $            0    ● (G)
(H) ●  Bonus Code                  ###

     YYYY/MM/DD              HH:MM:SS
     Inv # 999               Batch # 0
     000 Approved
     Ref # 12345678                        ● (I)


         You have earned
         100 BONUS POINTS!

         Merchant Copy
```

Loyalty reference number

A loyalty card transaction's reference number is printed at the bottom of each receipt (**Ref #**). You may be prompted to key in this number when transacting loyalty Refunds, Voids and Pre-authorization Completions, and when reprinting transaction receipts.

LABEL	DESCRIPTION
A	Transaction type. Can also display Refund, Correction, Pre-auth, Pre-auth Completion.
B	Loyalty program name (can be customized).
C	Original loyalty transaction reference number (prints only on Refund, Void and Pre-auth Completion receipts).
D	Transaction total amount *including* tax and tip.
E	Transaction amount *excluding* tax and tip. (Points are awarded based on this amount, also known as the "Benefit" amount). ***Note:*** *The "Pre-Tax Amount" receipt text and terminal prompts may or may not appear depending on program setup. If Pre-Tax Amount prompting is enabled, the "Pre-Tax Amount" text/terminal prompt may be different if you have customized it (e.g., could appear as "Food Amount").*
F	Points added or removed for this transaction. ***Note:*** *Depending on your program setup, this value may always print as "0" regardless of the actual balance on the card.*
G	Current points balance on the card (*including* points added or removed for this transaction). ***Note:*** *Depending on your program setup, this value may always print as "0" regardless of the actual balance on the card.*
H	Code for Bonus points awarded for this transaction. ***Note:*** *The "Bonus Code" receipt text and terminal prompts may or may not appear depending on program setup. If Bonus Code prompting is enabled, the "Bonus Code" text/terminal prompt may be different if you have customized it (e.g., could appear as "Reference Code").*
I	Loyalty transaction reference number (prints on all transaction receipts).

Reprinting a receipt

This function prints a duplicate Customer copy of a loyalty card transaction receipt.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, press the **Reprint** key (second purple key from the right).

   The Reprints menu appears.

3. Select the receipt you want to reprint:

   ▪ To print a receipt for the last transaction:

     ▪ Select **Last Receipt**.

   ▪ To reprint another receipt:

     a. Select **Any Receipt**.

     b. At the "Ernex Ref Number:" prompt, key in the loyalty reference number of the transaction for which you want to print a receipt and press the green key.

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

4. Press the red key to return to the Gift & Loyalty transactions menu.

5. Press the ***** (**asterisk**) key to return to the applications menu.

Administration

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

Administrative transactions

Initializing the terminal

You must initialize your terminal when you first configure it for the loyalty program, and when prompted by the terminal after a program change request has been processed (e.g., activation or deactivation of Bonus Code functionality, if applicable to your program).

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, scroll down and select **Setup**.

   ▪ If the "Password:" prompt appears, key in the manager password and press the green key.

3. On the Setup menu, scroll down and select **Initialization**.

   If there are transactions in the open batch, the "Batch Not Empty Close Batch?" prompt appears.

   ▪ To close the batch and delete all transactions from the terminal memory, select **Yes**.

   OR

   ▪ To leave the batch open and keep all transactions in the terminal memory, select **No**. (This is recommended.)

   The "Ernex Term ID:" prompt appears.

4. Choose one of the following:

   ▪ To accept the displayed ID, press the green key.

   OR

   ▪ To change the Ernex Terminal ID:

      a. Press the red key.

      b. On the Setup menu, select **Merchant**.

      c. Select **Next** until "Ernex Term ID" appears.

      d. Select **Edit** and key in the new terminal ID.

      e. Press the green key to accept your input.

      f. Select **Exit**.

      g. Select **OK** to save your changes.

         The terminal returns to the Setup menu.

      h. Return to step 3.

   The terminal communicates with the Moneris host and "000 Approved" appears after the initialization is completed successfully.

5. Press the green key to return to the Setup menu.

6. Press the red key to return to the Gift & Loyalty transactions menu.

7. Press the ***** (**asterisk**) key to return to the applications menu.

Activating a card

Basic Loyalty/Enhanced Loyalty:

Loyalty cards are activated before they are shipped to you, so no activation process is required.

Tracking Loyalty:

Tracking loyalty cards are activated by the Loyalty Program Provider, so no activation process is required.

Pro Loyalty:

Depending on how your program is set up, the loyalty cards you have may require activation on your terminal, or they may have been activated before they were shipped to you.

Note: *Moneris recommends that you store any pre-activated loyalty cards in a secure location, and that you provide a card to a customer only after he or she has provided basic contact information and written consent to participate in the program.*

Following a card activation, points may be deducted periodically from the card due to user inactivity (your program must be configured to allow for this). To determine your program configuration: ask your manager, visit the Loyalty Web Portal if available to you, or call Moneris Customer Care toll free at **1-866-319-7450**.

If your cards are not pre-activated, follow the steps below to activate them.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, scroll down and select **Activate/Load**.

   ▪ If the "Password:" prompt appears, key in the manager password and press the green key.

   The "Swipe or Enter Card:" prompt appears.

3. Swipe the loyalty card or key in the card number and press the green key.

   ▪ If "Clerk ID:" appears, key in the Clerk ID and press the green key.
   ▪ If a prompt appears for additional data (e.g. "Bonus Code" or "Reference Code"):

      ▪ Key in the appropriate information and press the green key.

      OR

      ▪ To bypass the prompt, just press the green key.

   "000 Approved" appears.

4. Press the green [key] key.

   The "Activate/Load another card?" prompt appears.

5. To activate another loyalty card, select **Yes**. Repeat steps 3 and 4.

   OR

   To proceed without activating other cards, select **No**. Proceed to step 6.

6. If the "Balance Due:" prompt appears, press the green [key] key.

   Note: *The Balance Due prompt will appear if you are charging a fee for activation of loyalty cards.*

   - If you are NOT charging a fee for activation of loyalty cards, go to step 7.
   - If you are charging an activation fee, follow these steps:

     a. When the "Balance Due:" prompt appears, press the green [key] key.

        The "Select Payment For Balance Due" prompt appears.

     b. Select the method that the customer wishes to use to pay:

        - To use a debit card or credit card, select **DbCr** (**F1** key).
        - To pay with a gift card, select **Gift** (**F2** key).
        - To pay with cash, select **Cash** (**F3** key).

        The terminal prints the Customer copy of the receipt.

     c. Tear the receipt and press the green [key] key to print the Merchant copy of the receipt.

     d. If you selected:

        - **DbCr**, the terminal automatically begins a debit or credit Purchase transaction at the "Amount: $0.00" prompt. Refer to the Merchant receipt for the amount to charge.
        - **Gift**, the terminal automatically begins a gift card Purchase transaction at the "Total Amount: $0.00" prompt. Refer to the Merchant receipt for the amount to charge. Refer to the *Gift Card Program: Using Your Terminal* guide for instructions on processing a gift card Purchase. Visit **moneris.com/support** to download a free copy of the guide.
        - **Cash**, the Activation transaction is completed.

   After the transaction completes, the terminal returns to the Gift & Loyalty transactions menu.

7. If you are not charging for activation:

   - The terminal prints the Customer copy of the receipt. Tear the receipt and press the green [key] key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu.

     The "Activate/Load another card?" prompt appears.

8. To activate another loyalty card, select **Yes**. Repeat steps 3 and 4.

   OR

   To continue without activating other cards, select **No**. Proceed to step 9.

9. Press the ***** (**asterisk**) key to return to the applications menu.

Looking up a card balance (Card Inquiry)

Follow the steps below to display and print the points balance on a loyalty card.

Note: Balances for Tracking loyalty cards cannot be obtained on the terminal. To obtain the card balance of a Tracking loyalty card, the cardholder must contact the Loyalty Program Provider under which the card is enrolled.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, scroll down and select **Card Inquiry**.

   ▪ If the "Password:" prompt appears, key in the manager password and press the green ⃝↵ key.

   The "Swipe or Enter Card:" prompt appears.

3. Swipe the loyalty card or key in the card number and press the green ⃝↵ key.

   ▪ If "Clerk ID:" appears, key in the Clerk ID and press the green ⃝↵ key.

4. At the "000 Inquiry Complete" prompt, press the green ⃝↵ key.

   The card balance and card status appear.

5. Press the green ⃝↵ key.

   The "Print Receipt?" prompt appears.

6. To print a receipt with the points balance and card status, select **Yes**.

   OR

   To return to the Gift & Loyalty transactions menu without printing, select **No**.

7. Press the ***** (**asterisk**) key to return to the applications menu.

Note: If the card is deactivated, the points balance is zero. On the printed receipt, the status is "D" to indicate Deactivated.

Deactivating a card

Follow the steps below to deactivate a loyalty card. A receipt will print showing the points balance before deactivation. When a card is deactivated, any remaining points are removed.

Note: Tracking loyalty cards cannot be deactivated on the terminal. To deactivate a Tracking loyalty card, the cardholder must contact the Loyalty Program Provider under which the card is enrolled.

Important: Once a loyalty card has been deactivated, it can never be used again.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, scroll down and select **Deactivate**.

   ▪ If the "Password:" prompt appears, key in the manager password and press the green ⃝↵ key.

   The "Swipe or Enter Card:" prompt appears.

3. Swipe the loyalty card or key in the card number and press the green [green key] key.

    ▪ If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green [green key] key.
    ▪ If a prompt appears for additional data (e.g. "Bonus Code" or "Reference Code"):

        ▪ Key in the appropriate information and press the green [green key] key.

    OR

        ▪ Just press the green [green key] key to bypass the prompt.

    "000 Approved" appears.

4. Press the green [green key] key to print the Customer copy of the Deactivation receipt.

5. Tear the receipt and press the green [green key] key to print Merchant copy of the Deactivation receipt and return to the Gift & Loyalty transactions menu.

6. Press the ***** (**asterisk**) key to return to the applications menu.

Reporting

Transaction Inquiry

This report lists details of loyalty transactions in the open batch by card type, card number, amount and date. You can choose to view or print results.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, press the **Reports** key (first purple key on the right).

3. On the Reports menu, select **Trans Inquiry**.

   - If the "Password:" prompt appears, key in the manager password and press the green ⏎ key.
   - If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⏎ key.

4. To select the desired card type, select **Next** until the card type appears, then select **Slct**.

   OR

   To include all card types, select **All**.

5. At the "Card #:" prompt:

   - Key in the desired card number and press the green ⏎ key.

   OR

   - Press the green ⏎ key to include all card numbers.

6. At the "Enter Amount: $0.00" prompt:

   - Key in the desired amount and press the green ⏎ key.

   OR

   - Press the green ⏎ key to include all amounts.

7. At the "Date: MMDDYY" prompt:

   - Key in the desired date and press the green ⏎ key.

   OR

   - Press the green ⏎ key to include all dates.

   The "Select option" prompt appears.

8. Select how you want to view results:

- To view the results on the screen:

  a. Select **View**.

  b. Select **Prev**/**Next** to scroll up/down through results and view individual transactions.

  c. Select **Cncl** to stop viewing results and return to the Reports menu.

- To print the results:

  - Select **Print** to print the transaction list and return to the Reports menu.

9. Press the red [X] key to return to the Gift & Loyalty transactions menu.

10. Press the ***** (**asterisk**) key to return to the applications menu.

Clerk Sub-Totals

This report lists totals for all loyalty card transactions for one or more clerk IDs. Clerk sub-totals remain in memory even when a batch is closed and deleted. The steps below include the option of resetting the clerk sub-totals to zero.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, press the **Reports** key (first purple key on the right).

- If the "Password:" prompt appears, key in the manager password and press the green [↵] key.

3. On the Reports menu, select **Clerk Subtotals**.

- If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green [↵] key.

    The "Zero Clerk totals?" prompt appears.

4. To reset clerk totals to zero (0) at the completion of the report, select **Yes**.

    OR

    To continue accumulating clerk totals, select **No**.

    The "Select Clerks" prompt appears.

5. Select the clerk sub-totals you want to print:

- To print sub-totals for one clerk:

  a. Select **One**.

  b. At the "Enter Clerk ID:" prompt, key in the desired Clerk ID and press the green [↵] key.

- To print sub-totals for a group of clerks:

  a. Select **Grp**.

  b. At the "Enter Group:" prompt, key in the desired the Group ID and press the green [↵] key.

- To print sub-totals for a list of clerks:

  a. Select **List**.

  b. At the "Add Clerk/Group ID:" prompt, key in the desired Clerk ID or Group ID and press the green ⬤↵ key.

     The "Add more?" prompt appears.

  c. To include another clerk's or group's sub-totals in the report, select **Yes** and key in the appropriate ID as above. Continue adding clerks/groups as needed.

     OR

     To print the report now, select **No**.

- To print sub-totals for all clerks:

  - Select **All**.

  The terminal prints the report and returns to the Reports menu.

6. Press the red ⬤X key to return to the Gift & Loyalty transactions menu.

7. Press the ***** (**asterisk**) key to return to the applications menu.

Loyalty Pre-auth Transactions report

This report lists details of loyalty Pre-authorization transactions that have NOT been completed.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, select **Pre Auth**.

3. On the Pre Auth menu, scroll down and select **PreAuth Report**.

   - If the "Password:" prompt appears, key in the manager password and press the green ⬤↵ key.

   The report prints and returns to the Pre Auth menu.

4. Press the red ⬤X key to return to the Gift & Loyalty transactions menu.

5. Press the ***** (**asterisk**) key to return to the applications menu.

End-of-day process

Printing a Stored Transaction report

This report prints loyalty card transactions in the current batch, by date or by batch number, without closing the current batch. The report includes transaction details and batch totals.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, press the **Reports** key (first purple key on the right).

3. On the Reports menu, select **Trans List**.

   - If the "Password:" prompt appears, key in the manager password and press the green [key] key.
   - If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green [key] key.

   The "Print by Date or Batch?" prompt appears.

4. Select the transactions you want to print:

   - By date:

     a. Select **Date**.

     b. At the "Date: MMDDYY:" prompt, key in the desired date and press the green [key] key.

        OR

        Simply press the green [key] key to include all dates.

        Note: Only the current batch is stored in memory and available for reporting.

   - By batch:

     a. Select **Batch**.

     b. At the "Batch Num:" prompt, simply press the green [key] key.

        Note: Only the current batch is stored in memory and available for reporting.

   The terminal prints the report and returns to the Reports menu.

5. Press the red [key] key to return to the Gift & Loyalty transactions menu.

6. Press the ***** (**asterisk**) key to return to the applications menu.

Closing a batch

This transaction closes the current batch of loyalty card transactions and settles with the Moneris host.

Important: A Batch Close must be completed daily.

Note: Moneris recommends printing a Stored Transactions report (see page 50) before performing a Batch Close to ensure batch totals are balanced. If totals are not balanced, please contact Moneris Customer Care toll-free at 1-866-319-7450.

1. On the applications menu, select **GIFT & LOYALTY**.

2. On the Gift & Loyalty transactions menu, press the **Reports** key (first purple key on the right).

3. On the Reports menu, scroll down and select **Batch Close**.

   - If the "Password:" prompt appears, key in the manager password and press the green ⏎ key.
   - If the "Clerk ID:" prompt appears, key in the Clerk ID and press the green ⏎ key.

   The "Print Details Report?" prompt appears.

4. To include transaction details in the Batch Close report, select **Yes**.

   OR

   To print only batch totals, select **No**.

   "000 Approved" appears.

5. Press the green ⏎ key.

   The terminal prints the Batch Close report, displays "BATCH DELETED", and returns to the Reports menu.

6. Press the red ✕ key to return to the Gift & Loyalty transactions menu.

7. Press the ***** (**asterisk**) key to return to the applications menu.

Important: If "Balanced – NO" is printed at the bottom of the report, contact Moneris Customer Care toll-free at 1-866-319-7450 **the next day for reconciliation assistance.**

Troubleshooting

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

Note: *Some of these prompts may not appear based on the loyalty program you are configured to use.*

Message	Solution
BATCH EMPTY	No loyalty transactions have been processed since the last Batch Close.
Cardholder info missing	Cardholder profile information (e.g., first name, email) is required to continue using the loyalty card.
### **Card Disabled**	The loyalty card you swiped has been deactivated and cannot be used.
Card Not **Supported**	The card type you swiped cannot be used for loyalty transactions. Try again with a different card or cancel the transaction.
XXX **Card Number** **Not On File**	You tried to use a Tracking loyalty card to do a Card Balance Inquiry on the terminal. Balance Inquiry transactions are not supported for Tracking loyalty cards. Press the green ⏎ key, and when prompted to print the receipt, choose **No**. To obtain the balance of a Tracking loyalty card the customer must contact the Loyalty Program Provider under which their card is enrolled.
Card Read Error	There is a problem with the magnetic stripe on the loyalty card that was swiped. Try swiping the card again, this time more slowly or quickly, or from front of the terminal to the back. You can also key in the card number.
ERNEX **INITIALIZATION** **FAILED**	There has been a terminal, host or communication problem during initialization with the Moneris host. Press the green ⏎ key to return to the Gift & Loyalty transactions menu. Try to re-initialize again (see *Initializing the terminal* on page 42). If this does not work, contact Moneris Customer Care toll-free at **1-866-319-7450**.
ERNEX **INITIALIZATION** **REQUIRED**	Your terminal requires re-initialization with the Moneris host. Re-initialize your terminal with the Moneris host (see *Initializing the terminal* on page 42).
INITIALIZE ERNEX	The Moneris host is requesting a re-initialization of the terminal. Re-initialize your terminal with the Moneris host (see *Initializing the terminal* on page 42).

Message	Solution
Insufficient Points For Redemption	There are not enough points on the card to redeem the number of points requested.
	Perform a Card Inquiry (see page 45) to obtain the balance on the card then retry the Redemption with a valid number of points.
INVALID AMOUNT	The $ amount you have entered is invalid, e.g., you have entered $0.00 or the amount you have entered exceeds the maximum or falls below the minimum.
	Re-enter a valid $ amount.
Invalid Entry	The information you have entered in the terminal is not valid.
	Check the information and retry.
	Note: You will get this message when the Pre-Tax $ amount you have attempted to enter for a Purchase is greater than the total transaction $ amount. In this case, make sure to use the yellow ⬅ key to bring the displayed amount back to 0.00 before entering the correct amount. Remember that the wording for "Pre-Tax Amount" may be different if you have customized it.
Invalid Password	Press the red ✗ key, then re-enter the manager password and press the green ⏎ key.
	Important: If the manager password is entered incorrectly five times in a row, the terminal will lock and will be unable to perform transactions. To unlock the terminal, contact Moneris Customer Care at 1-866-319-7450 and request a password reset.
Invalid redemption points/amount	You have entered a redemption value that is outside the minimum or maximum value allowable for your loyalty program.
	Re-enter a valid $ amount.
Matching Transaction Not Found RECORD NOT FOUND	No transaction matching the reference number you entered could be found in terminal memory.
	Check the number and try again.
"NO TOTALS AVAILABLE" appears and is printed on the Gift & Loyalty Batch Close report.	A Batch Close has been sent to the Moneris host, but there are no transaction totals at the host.
REFUND AMOUNT GREATER THAN ORIGINAL	The $ amount you have entered for a Refund is greater than the amount in the original Purchase transaction.
	Press the green ⏎ key and retry the Refund with the correct amount.
SYSTEM ERROR PLEASE TRY LATER	One or more configuration parameters may have been set up incorrectly or the terminal is unable to communicate with the Moneris host.
	Check the parameter configuration and make the necessary corrections. You will need to re-initialize your terminal (see *Initializing the terminal* on page 42) before processing any transactions.

Message	Solution
Transaction amount over maximum	You have entered a Purchase amount that is greater than the maximum allowable for your loyalty program.
	Enter a valid $ amount.
XXX Transaction Code Invalid	You tried to use a Tracking loyalty card to do one of the following transactions on the terminal: Activation or Deactivation. However, these transactions on the terminal are not supported by the Tracking program configured for your account.
	Press the green [key icon] key. If you were activating a card, you will be returned to the Activate/Load screen. If you had tried to deactivate a Tracking loyalty card, you will be returned to the Gift & Loyalty transactions menu.
	To activate or deactivate a Tracking loyalty card, the customer must contact the Loyalty Program Provider under which their card is enrolled.
TRANSACTION NOT FOUND	No loyalty transaction matching the reference number you entered could be found in terminal memory.
	Check the number and try again.

Other problems

Problem	Solution
Points balance is negative.	A negative points balance is possible if you have chosen this option during program setup.
Terminal does not respond when entering a $ amount and pressing the green [key icon] key.	You have attempted to enter $0.00 as the loyalty card total transaction or Pre-Tax amount.
Only one Reward coupon prints although the loyalty card has reached the Reward Threshold Level multiple times.	For Automatic Redemption, a cardholder may redeem only one Reward Coupon per transaction (a Reward is equal to the Reward Threshold Level).
	Inform the cardholder that he/she can receive the remaining Reward Coupons during subsequent transactions with the same card.
Problems with or questions about the Tracking program and/or Tracking cards.	Contact the Loyalty Program Provider.
"Tracking Points Earned", "Reward miles Earned", "Lifetime Balance", "Current Balance" and/or "Bonus Points" are not printed on transaction receipts nor displayed during Card Inquiry.	You have used a Tracking loyalty card for the transaction. Those values do not print on a Tracking transaction receipt.
	The Loyalty Program Provider under which the card is enrolled stores card and points information.
	To obtain a Tracking loyalty card's points balance summary, the cardholder must contact the Loyalty Program Provider under which the card is enrolled.

Problem	Solution
At the Redemption screen, the Tracking Program name appears and nothing happens when the Tracking loyalty card is swiped.	You have used a Tracking loyalty card in a Redemption transaction. Redemption transactions are not supported for Tracking loyalty cards. Press the red key to return to the Gift & Loyalty transactions menu. To redeem points or reward miles using a Tracking loyalty card, the customer must contact the Loyalty Program Provider under which their card is enrolled.

Merchant Support

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

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

We're only one click away.

- Visit **moneris.com/support-VX520** to:

  - download additional copies of this guide and other resources
  - consult the ***Moneris VX 520 WebHelp*** for detailed information on all of the options available on your terminal and how to enable them

- Visit **shop.moneris.com** to purchase point-of-sale supplies and receipt paper

- Visit **moneris.com/insights** for business and payment news, trends, customer success stories, and quarterly reports & insights

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

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

Can't find what you are looking for?

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

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

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