Loyalty Programs

Using Your Terminal for Loyalty and Tracking Programs

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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 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 the cardholder can earn points towards rewards.
- The transaction data is passed to the Loyalty Program Provider who then awards points to the customer’s account.
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**

If the magnetic stripe reader fails to read the loyalty card, 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 **OK** key.

**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 (first purple key from the left). Press the yellow **CORR** key to toggle between scrolling up \( \uparrow \) and down \( \downarrow \).
- To select a menu item, press the corresponding function key (F1, F2, etc.).
- To finish entering information and move on to the next step, press the green **OK** key.
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 OK 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 OK key.
     OR
   • To change the Ernex Terminal ID:
     a. Press the red CANC ANNUL 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 OK key to accept your input.
     f. Select Exit.
     g. Select OK key 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 OK key to return to the Setup menu.
6. Press the red **CANC ANNUL** key to return to the Gift & Loyalty transactions menu.
7. Press the * (asterisk) key to return to the applications menu.

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**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 Merchant Web Portal if available to you, or call the Moneris Merchant Service Centre.

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, select **Activate/Load**.
   - If the “Password:” prompt appears, key in the manager **password** and press the green **OK** key.
   - The “Swipe or Enter Card:” prompt appears.
3. Swipe the loyalty card or key in the **card number** and press the green **OK** key.
   - If “Clerk ID:” appears, key in the Clerk **ID** and press the green **OK** key.
   - If a prompt appears for additional data (e.g. “Bonus Code” or “Reference Code”):
• Key in the **appropriate information** and press the green **OK** key.

  OR

• To bypass the prompt, just press the green **OK** key.

  “000 Approved” appears.

4. Press the green **OK** key.

   The “Activate/Load another card?” prompt appears.

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

   OR

   • To proceed without activating other cards, select **No**. Proceed to step 5.

5. If the “Balance Due:” prompt appears, press the green **OK** 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.

6. If you are charging an activation fee, follow these steps:

   a. When the “Balance Due:” prompt appears, press the green **OK** 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**, press **F1 (DbCr)**.
      • To pay with a **gift card**, press **F2 (Gift)**.
      • To pay with **cash**, press **F3 (Cash)**.

      The terminal prints the Customer copy of the receipt.

   c. Tear the receipt and press the green **OK** 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/guides to download a free copy of the guide.

- **Cash**, the Activation transaction is completed.

After the transaction, 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 OK key to print the Merchant copy of the receipt and return to the Gift & Loyalty transactions menu. The “Activate/Load another card?” prompt appears.

   - To activate another loyalty card, select **Yes**.
     Repeat steps 3 and 4.
     OR
   - To continue without activating other cards, select **No**. Proceed to step 8.

8. 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 OK key.
   The “Swipe or Enter Card:” prompt appears.
3. Swipe the loyalty card or key in the card number and press the green OK key. If “Clerk ID:” appears, key in the Clerk ID and press the green OK key.

4. At the “000 Inquiry Complete” prompt, press the green OK key. The card balance and card status appear.

5. Press the green OK 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 OK key. The “Swipe or Enter Card:” prompt appears.

3. Swipe the loyalty card or key in the card number and press the green OK key. If the “Clerk ID:” prompt appears, key in the Clerk ID and press the green OK key.
If a prompt appears for additional data (e.g. “Bonus Code” or “Reference Code”):

- Key in the **appropriate information** and press the green **OK** key.
  OR
- Just press the green **OK** key to bypass the prompt.

“000 Approved” appears.

4. Press the green **OK** key to print the Customer copy of the Deactivation receipt.

5. Tear the receipt and press the green **OK** 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.
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 OK key.
   The “Total Amount:” prompt appears.
4. Key in the total transaction dollar amount (including tax and gratuity) and press the green OK 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 OK key.
   If the “Clerk ID:” prompt appears, key in the Clerk ID and press the green OK key.
   If the “Invoice Number:” prompt appears, key in the Invoice Number and press the green OK key.
   “000 Approved” appears.
7. Press the green OK key to print the Cardholder copy of the receipt.
8. Tear the receipt and press the green OK 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 6) 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 OK 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 OK key.
   If the “Clerk ID:” prompt appears, key in the Clerk ID and press the green OK key.
   If the “Invoice Number:” prompt appears, key in the Invoice Number and press the green OK key.
   “000 Approved” appears.
8. Press the green OK key to print the Cardholder copy of the receipt.
9. Tear the receipt and press the green OK key to print the Merchant copy of the receipt and return to the Pre Auth menu.
10. Press the red CANC ANNUL 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 **OK** 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 **OK** 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 **CANC ANNUL** 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 **OK** 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 **OK** key.
   - OR
   - To keep the displayed value, press the green **OK** key.
   “000 Approved” appears.

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

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

10. Press the red **CANC ANNUL** 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 OK 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, then press the green OK key.  
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 part of the amount if the cardholder wants a partial Refund, then press the green OK 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 OK key.
   If the “Clerk ID:” prompt appears, key in the Clerk ID and press the green OK key.
   The “Ernex Ref Number:” prompt appears.

6. Key in the loyalty reference number printed on the loyalty Purchase receipt and press the green OK key.
   If the “Invoice Number:” prompt appears, key in the Invoice Number and press the green OK key.
   “000 Approved” appears.

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

8. Tear the receipt and press the green OK 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 OK key.
   The “Swipe or Enter Card:” prompt appears.

3. Swipe the loyalty card or key in the card number and press the green OK key.
   If the “Clerk ID:” prompt appears, key in the Clerk ID and press the green OK 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 OK key.
   If the “Invoice Number:” prompt appears, key in the Invoice Number and press the green OK key.
“000 Approved” appears. **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 13).

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

6. Tear the receipt and press the green OK 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.
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 **OK** key.
   The “Total Amount:” prompt appears.
4. Key in the total transaction dollar amount (including tax and gratuity) and press the green **OK** 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 **OK** key.
   If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press the green **OK** key.
   If the “Bonus Code” prompt appears:
     • Key in the appropriate **bonus code** and press the green **OK** key to award bonus points.
     OR
     • Just press the green **OK** 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 **OK** key.
     OR
     • If the amount is the same as the amount entered in step 4, just press the green **OK** key.
   If the “Invoice Number:” prompt appears, key in the **Invoice Number** and press the green **OK** key.
   “000 Approved” appears.
7. Press the green **OK** key to print the Customer copy of the receipt.
8. Tear the receipt and press the green **OK** 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 6) 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 **OK** 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 **OK** key. If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press the green **OK** key. If the “Invoice Number:” prompt appears, key in the **Invoice Number** and press the green **OK** key.
If the “Bonus Code” prompt appears:
• Key in the appropriate bonus code and press the green OK key to award bonus points.
OR
• Just press the green OK 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 OK key.
OR
• If the amount is the same as the amount entered in step 5, just press the green OK key.
“000 Approved” appears.
8. Press the green OK key to print the Cardholder copy of the receipt.
9. Tear the receipt and press the green OK key to print the Merchant copy of the receipt and return to the Pre Auth menu.
10. Press the red CANC ANNUL 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 OK key. Transaction details appear. Choose one of the following:
     o To delete the displayed transaction, select Yes. Proceed to step 5.
     o 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 OK key.

Transaction details appear. Choose one of the following:

o To delete the displayed transaction, select Yes. Proceed to step 5.

o To cancel the operation and return to the Pre Auth menu, select No.

o 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 CANC ANNUL 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 OK 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 **OK** key.
   - To keep the displayed value, press the green **OK** key.

If the “Bonus Code” prompt appears:
   - Key in the appropriate **bonus code** and press the green **OK** key to award bonus points.
   - Just press the green **OK** 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 **OK** key.
   - If the amount is the same as the amount entered in step 7, just press the green **OK** key.

“000 Approved” appears.

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

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

10. Press the red **CANC ANNUL** 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 **OK** key.
   The “Swipe or Enter Card:” prompt appears.
3. Swipe the loyalty card or key in the **card number** and press the green **OK** key.
   If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press the green **OK** key.
   The “Benefit” prompt appears.
4. Key in the **number of points to be redeemed** and press the green **OK** key.
   If the “Invoice Number:” prompt, appears, key in the **Invoice Number** and press the green **OK** key.
   “000 Approved” appears.
5. Press the green **OK** key to print the Customer copy of the receipt.
6. Tear the receipt and press the green **OK** 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 **OK** 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 then press the green **OK** key.
   
   • 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 part of the amount if the cardholder wants a partial Refund, then press the green **OK** 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 part of the amount if the cardholder wants a partial Refund, then press the green **OK** key.
   
   The “Swipe or Enter Card:” prompt appears.
5. Swipe the loyalty card or key in the **card number** and press the green **OK** key.
   
   If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press the green **OK** 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 **OK** 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 **OK** key.
   
   The “Ernex Ref Number:” prompt appears.
6. Key in the loyalty reference number printed on the loyalty Purchase receipt and press the green OK key. If the “Invoice Number:” prompt, appears, key in the Invoice Number and press the green OK key. “000 Approved” appears.

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

8. Tear the receipt and press the green OK 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.

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

4. Key in the loyalty reference number printed on the receipt of the loyalty transaction you want to void and press the green OK 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 21).

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

6. Tear the receipt and press the green OK 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.
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 OK key.
   The “Total Amount:” prompt appears.
4. Key in the total transaction dollar amount (including tax and gratuity) and press the green OK 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 OK key.
   If the “Clerk ID:” prompt appears, key in the Clerk ID and press the green OK key.
   If a prompt appears for additional data (e.g. “Bonus Code” or “Reference Code”):
     • Key in the appropriate information and press the green OK key. Consult your manager if you are unsure of what to enter. OR
     • Just press the green OK 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 OK 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 OK key. “000 Approved” appears.
7. Press the green OK key to print the Customer copy of the receipt.
8. Tear the receipt and press the green OK 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 6) 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 **OK** 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 **OK** key.
   If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press the green **OK** key.
   If a prompt appears for additional data (e.g. “Bonus Code” or “Reference Code”):
   - Key in the **appropriate information** and press the green **OK** key. Consult your manager if you are unsure of what to enter. OR
   - Just press the green **OK** 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 OK key. Consult your manager if you are unsure of what to enter.

OR

• If the amount is the same as the amount entered in step 5, just press the green OK key. If the “Invoice Number:” prompt appears, key in the Invoice Number and press the green OK key. “000 Approved” appears.

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

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

10. Press the red CANC ANNUL 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 OK 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 **OK** 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 **CANC ANNUL** 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 **OK** 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 OK key.
OR
• To keep the displayed value, press the green OK key.
If a prompt appears for additional data (e.g. “Bonus Code” or “Reference Code”):
• Key in the appropriate information and press the green OK key. Consult your manager if you are unsure of what to enter. OR
• Just press the green OK 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 OK 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 OK key.
“000 Approved” appears.
8. Press the green OK key to print the Cardholder copy of the receipt.
9. Tear the receipt and press the green OK key to print the Merchant copy of the receipt and return to the Pre Auth menu.
10. Press the red CANC ANNUL 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, select **Redemption**.
   If the “Password:] prompt appears, key in the **manager password** and press the green **OK** key.
   The “Swipe or Enter Card:” prompt appears.
3. Swipe the loyalty card or key in the **card number** and press the green **OK** key.
   If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press the green **OK** key.
   If a prompt appears for additional data (e.g. “Bonus Code” or “Reference Code”):
   • Key in the **appropriate information** and press the green **OK** key
   OR
   • Just press the green **OK** 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 **OK** key.
   “000 Approved” appears.
5. Press the green **OK** key to print the Customer copy of the receipt.
6. Tear the receipt and press the green **OK** 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, select **Redemption**.
   If the “Password:” prompt appears, key in the **manager password** and press the green **OK** key.
   The “Swipe or Enter Card:” prompt appears.
3. Swipe the loyalty card or key in the **card number** and press the green **OK** key.
   If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press the green **OK** key.
   If a prompt appears for additional data (e.g. “Bonus Code” or “Reference Code”):
   • Key in the **appropriate information** and press the green **OK** key.
     OR
   • Just press the green **OK** key to bypass the prompt.
   The “Enter Amount:” prompt appears.
4. Key in the **dollar amount to be redeemed** and press the green **OK** key.
   “000 Approved” appears.
5. Press the green **OK** 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 **OK** 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**, press **F1 (DbCR)**.
      • To pay with a **gift card**, press **F2 (Gift)**.
      • To pay with **cash**, press **F3 (Cash)**.
      The terminal prints the Customer copy of the receipt.
   c. Tear the receipt and press the green **OK** 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/guides](http://moneris.com/guides) 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 7.

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 **OK** 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 **OK** 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 OK 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 OK key.

If the “Clerk ID:” prompt appears, key in the Clerk ID and press the green OK 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 OK key.
- To remove any bonus points on the Purchase, key in the appropriate bonus code and press the green OK 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 OK key.
- To bypass the prompt, just press the green OK 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 OK key. Consult your manager if you are unsure of what to enter.
- If the amount is the same as the amount entered before, just press the green OK 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 OK key.

“000 Approved” appears.

7. Press the green OK key to print the Customer copy of the receipt.
8. Tear the receipt and press the green **OK** 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 **OK** key.
   The “Swipe or Enter Card:” prompt appears.
3. Swipe the loyalty card or key in the **card number** and press the green **OK** key.
   If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press the green **OK** 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 **OK** 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 32).
   “000 Approved” appears.
5. Press the green **OK** key to print the Customer copy of the receipt.
6. Tear the receipt and press the green **OK** 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.
Tracking 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 OK key.
   The “Total Amount:” prompt appears.
4. Key in the total transaction dollar amount (including tax and gratuity) and press the green OK 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 OK key.
   If the “Clerk ID:” prompt appears, key in the Clerk ID and press the green OK key.
   If a prompt appears for additional data (e.g. “Bonus Code” or “Reference Code”):
   • Key in the appropriate information and press the green OK key. Consult your manager if you are unsure of what to enter.
   OR
   • Just press the green OK 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 OK 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 OK key.
“000 Approved” appears.

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

8. Tear the receipt and press the green OK 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 if you know that you will NOT have the 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 Pre-authorization**

The Pre-authorization transaction does not award points on approval, but rather “pre-allocates” the points 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.
5. Key in the total amount of the pre-authorization and press the green OK 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 OK key. If the “Clerk ID:” prompt appears, key in the Clerk ID and press the green OK key. If a prompt appears for additional data (e.g. “Bonus Code” or “Reference Code”):


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

OR

• Just press the green **OK** 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 **OK** 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 **OK** key.

If the “Invoice Number:” prompt appears, key in the **Invoice Number** and press the green **OK** key.

“000 Approved” appears.

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

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

10. Press the red **CANC ANNUL** 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 **OK** key.

Transaction details appear. Choose one of the following:

  o 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 OK key. Transaction details appear. Choose one of the following:
  o To delete the displayed transaction, select Yes. Proceed to step 5.
  o To cancel the operation and return to the Pre Auth menu, select No.
  o 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 CANC ANNUL 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 OK 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.
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 **OK** key.
   OR
   • To keep the displayed value, press the green **OK** key.

If a prompt appears for additional data (e.g. “Bonus Code” or “Reference Code”):
   • Key in the **appropriate information** and press the green **OK** key. Consult your manager if you are unsure of what to enter.
   OR
   • Just press the green **OK** 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 **OK** 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 **OK** key.

8. Press the green **OK** key to print the Cardholder copy of the receipt.
9. Tear the receipt and press the green **OK** key to print the Merchant copy of the receipt and return to the Pre Auth menu.
10. Press the red **CANC ANNUL** 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 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 **OK** 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 part of the amount if the cardholder wants a partial Refund then press the green **OK** 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 **OK** key.
   
   If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press the green **OK** 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 OK key.**
   
   **OR**
   
   • **To remove any bonus points on the Purchase, key in the appropriate bonus code and press the green OK 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 OK key.**
   
   **OR**
   
   • **To bypass the prompt, just press the green OK 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 OK 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 OK key.**
   The “Ernex Ref Number:” prompt appears.
6. Key in the **loyalty reference number** printed on the Purchase receipt and press the green **OK** key. “000 Approved” appears.

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

8. Tear the receipt and press the green **OK** 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 **OK** key.
   
   The “Swipe or Enter Card:” prompt appears.

3. Swipe the Tracking loyalty card, or key in the **card number** and press the green **OK** key.
   
   If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press the green **OK** 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 **OK** 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 40).
   
   “000 Approved” appears.

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

6. Tear the receipt and press the green **OK** 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.
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:
     o 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 **OK** key.

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

4. Press the red **CANC ANNUL** key to return to the Gift & Loyalty transactions menu.
5. Press the * (asterisk) key to return to the applications menu.

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 and Voids, and when reprinting transaction receipts.

For more information about a program-specific receipt, refer to the specified page:

- Basic Loyalty receipt, see page 44.
- Enhanced/Pro Loyalty receipt, see page 45.
- Tracking Loyalty receipt, see page 46.
**Receipt – Basic Loyalty program**

| A | Transaction type. |
| B | Loyalty Program name. |
| C | Original Loyalty transaction Reference number (prints only on Refund, Void and Pre-Auth Completion receipts). |
| D | Transaction total amount including tax/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). |

---

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

Merchant Copy
Receipt – Enhanced Loyalty/Pro Loyalty program

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Transaction type.</strong></td>
<td><strong>Loyalty Program name (can be customized).</strong></td>
<td><strong>Original Loyalty transaction Reference number (prints only on Refund, Void and Pre-Auth Completion receipts).</strong></td>
<td><strong>Transaction total amount including tax/tip.</strong></td>
<td><strong>transaction amount excluding tax/tip. (Points are awarded based on this amount, also known as the “Benefit” amount.)</strong></td>
<td><strong>Pro LoyaltyInfo:</strong> 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” (card/terminal prompt may be different if you have customized it (e.g. could appear as “Food Amount”).**</td>
<td><strong>Points added or removed for this transaction.</strong></td>
<td><strong>Current points balance on the card (including points added or removed for this transaction).</strong></td>
<td><strong>Total points earned on card in its lifetime.</strong></td>
<td><strong>Code for bonus points awarded for this transaction.</strong></td>
</tr>
</tbody>
</table>

**Merchant Name**
**Merchant Address**
**Merchant City & Prov/State**
**Terminal ID** 12345
**Clerk ID** 01

**Purchase**
**Card Description** Rewards Card 12345678901234567890
**Entry Method** Swiped

<table>
<thead>
<tr>
<th>[Orig Ref #]</th>
<th>123456789</th>
</tr>
</thead>
</table>

**Amount** $1149.99
**Pre-Tax Amount** $999.00
**Points Earned** 999
**Points Balance** 2050
**Lifetime Points** 2200
**Bonus Code** ##

**YY/MM/DD** HH:MM:SS
**Inv #** 000
**Batch #** 0

000 Approved
Ref # 12345678

You have earned 50 BONUS POINTS!

Merchant Copy

45
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 **OK** key. If the “Clerk ID:” prompt appears, key in the **Clerk ID** and press the green **OK** 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 **OK** key. OR
   - Press the green **OK** key to include all card numbers.
6. At the “Enter Amount: $0.00” prompt:
   - Key in the desired **amount** and press the green **OK** key. OR
   - Press the green **OK** key to include all amounts.
7. At the “Date: MMDDYY” prompt:
   - Key in the desired **date** and press the green **OK** key. OR
   - Press the green **OK** 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:
     o Select **Print** to print the transaction list and return to the Reports menu.
9. Press the red **CANC ANNUL** 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 OK key.
3. On the Reports menu, select **Clerk Subtotals**.
   If the “Clerk ID:” prompt appears, key in the Clerk ID and press the green OK 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 OK key.
   - To print sub-totals for a group of clerks:
     a. Select Grp.
     b. At the “Enter Group:” prompt, key in the desired Group ID and press the green OK 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 OK 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:
     o Select All.
     The terminal prints the report and returns to the Reports menu.

6. Press the red CANC ANNUL key to return to the Gift & Loyalty transactions menu.
7. Press the * (asterisk) key to return to the applications menu.

Loyalty Pre-auth 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.
   If the “Password:” prompt appears, key in the manager password and press the green OK key.
   The report prints and returns to the Pre Auth menu.
4. Press the red CANC ANNUL 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 OK key.
   If the “Clerk ID:” prompt appears, key in the Clerk ID and press the green OK 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 OK key.
     OR
     Simply press the green OK 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 OK 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 CANC ANNUL 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 (p. 47) before performing a Batch Close to ensure batch totals are balanced. If totals are not balanced, please contact the Moneris Merchant Service Centre.

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 OK key.
   If the “Clerk ID:” prompt appears, key in the Clerk ID and press the green OK 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 OK key.
   The terminal prints the Batch Close report, displays “BATCH DELETED”, and returns to the Reports menu.
6. Press the red CANC ANNUL 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 the Moneris Merchant Service Centre the next day for reconciliation assistance.
Troubleshooting

If an error message appears, first press the green OK key or the red CANC ANNUL key to clear the message then retry the transaction. If the error message reappears and is listed in the table below, follow the instructions in the table’s Solution column. If the problem is still not resolved, call the Moneris Merchant Service Centre 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.

<table>
<thead>
<tr>
<th>Error message</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>BATCH EMPTY</td>
<td>No loyalty transactions have been processed since the last Batch Close.</td>
</tr>
<tr>
<td>Cardholder info missing</td>
<td>Cardholder profile information (e.g. first name, email) is required to continue using the loyalty card. Capture the cardholder’s profile information using the process outlined by your organization.</td>
</tr>
<tr>
<td>Card Disabled</td>
<td>The loyalty card you swiped has been deactivated and cannot be used.</td>
</tr>
<tr>
<td>Card Not Supported</td>
<td>The card type you swiped cannot be used for loyalty transactions. Try again with a different card or cancel the transaction.</td>
</tr>
<tr>
<td>Error message</td>
<td>Solution</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>XXX Card Number Not On File</td>
<td>You tried to use a Tracking loyalty card to do a <strong>Card Balance Inquiry</strong> on the terminal. Balance Inquiry transactions are not supported for Tracking loyalty cards.</td>
</tr>
<tr>
<td></td>
<td>Press the green <strong>OK</strong> key, and when prompted to print the receipt, choose <strong>No</strong>.</td>
</tr>
<tr>
<td></td>
<td>To obtain the balance of a Tracking loyalty card, the customer must contact the Loyalty Program Provider under which their card is enrolled.</td>
</tr>
<tr>
<td>Card Read Error</td>
<td>There is a problem with the magnetic stripe on the loyalty card that was swiped.</td>
</tr>
<tr>
<td></td>
<td>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 <strong>card number</strong>.</td>
</tr>
<tr>
<td>ERNEX INITIALIZATION FAILED</td>
<td>There has been a terminal, host or communication problem during initialization with the Moneris host. Press the green <strong>OK</strong> key to return to the Gift &amp; Loyalty transactions menu.</td>
</tr>
<tr>
<td></td>
<td>Try to re-initialize again (see <em>Initializing the terminal</em> on page 4). If this does not work, contact the Moneris Merchant Service Centre.</td>
</tr>
<tr>
<td>ERNEX INITIALIZATION REQUIRED</td>
<td>Your terminal requires re-initialization with the Moneris host. Re-initialize your terminal with the Moneris host (see <em>Initializing the terminal</em> on page 4).</td>
</tr>
<tr>
<td>INITIALIZE ERNEX</td>
<td>The Moneris host is requesting a re-initialization of the terminal. Re-initialize your terminal with the Moneris host (see <em>Initializing the terminal</em> on page 4).</td>
</tr>
<tr>
<td>Error message</td>
<td>Solution</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Insufficient Points For Redemption</td>
<td>There are not enough points on the card to redeem the number of points requested. Perform a <strong>Card inquiry</strong> (see page 6) to obtain the balance on the card then retry the Redemption with a valid number of points.</td>
</tr>
<tr>
<td>INVALID AMOUNT</td>
<td>The $ amount you have entered is invalid, e.g. you have entered 50.00 or the amount you have entered exceeds the maximum or falls below the minimum. Re-enter a valid $ amount.</td>
</tr>
</tbody>
</table>
| 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 **CORR** 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 **CANC ANNUL** key, then re-enter the manager password and press the green **OK** key.  
**IMPORTANT:** If the manager password is entered incorrectly five times in a row, the terminal will lock and will be unable to perform transactions. To unlock the terminal, contact the Moneris Merchant Service Centre and request a password reset. |
<p>| 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      | No transaction matching the reference number you entered could be found in terminal memory. Check the number and try again. |</p>
<table>
<thead>
<tr>
<th>Error message</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>“NO TOTALS AVAILABLE” appears and is printed on the Gift &amp; Loyalty Batch Close report.</td>
<td>A Batch Close has been sent to the Moneris host, but there are no transaction totals at the host.</td>
</tr>
<tr>
<td>REFUND AMOUNT GREATER THAN ORIGINAL</td>
<td>The $ amount you have entered for a Refund is greater than the amount in the original Purchase transaction. Press the green OK key and retry the Refund with the correct amount.</td>
</tr>
<tr>
<td>SYSTEM ERROR PLEASE TRY LATER</td>
<td>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 4) before processing any transactions.</td>
</tr>
<tr>
<td>Transaction amount over maximum</td>
<td>You have entered a Purchase amount that is greater than the maximum allowable for your loyalty program. Enter a valid amount.</td>
</tr>
<tr>
<td>Error message</td>
<td>Solution</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>XXX Transaction Code Invalid</td>
<td>You tried to use a Tracking loyalty card to do one of the following transactions on the terminal: <strong>Activation</strong> or <strong>Deactivation</strong>. However, these transactions on the terminal are not supported by the Tracking program configured for your account. Press the green OK 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 &amp; 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.</td>
</tr>
<tr>
<td>TRANSACTION NOT FOUND</td>
<td>No loyalty transaction matching the reference number you entered could be found in terminal memory. Check the number and try again.</td>
</tr>
</tbody>
</table>
## Other problems

<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Points balance is negative.</td>
<td>A negative points balance is possible if you have chosen this option during program setup.</td>
</tr>
<tr>
<td>Terminal does not respond when entering a $ amount and pressing the green OK key.</td>
<td>You have attempted to enter $0.00 as the loyalty card total transaction or Pre-Tax amount. Re-enter the <strong>correct amount</strong>.</td>
</tr>
<tr>
<td>Only one Reward coupon prints although the loyalty card has reached the Reward Threshold Level multiple times.</td>
<td>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.</td>
</tr>
<tr>
<td>Problems with or questions about the Tracking program and/or Tracking cards.</td>
<td>Contact the Loyalty Program Provider.</td>
</tr>
<tr>
<td>Problem</td>
<td>Solution</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>“Tracking Points Earned”, “Lifetime Balance”, “Current Balance” and/or</td>
<td>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.</td>
</tr>
<tr>
<td>“Bonus Points” are not printed on transaction receipts nor displayed</td>
<td>To obtain a Tracking loyalty card’s points balance summary, the cardholder must contact the Loyalty Program Provider under which the card is enrolled.</td>
</tr>
<tr>
<td>during Card Inquiry.</td>
<td></td>
</tr>
<tr>
<td>At the Redemption screen, the Tracking Program name appears and nothing</td>
<td>You have used a Tracking loyalty card in a Redemption transaction. Redemption transactions are not supported for Tracking loyalty cards.</td>
</tr>
<tr>
<td>happens when the Tracking loyalty card is swiped.</td>
<td>Press the red <strong>CANC/ANNUL</strong> key to return to the Gift &amp; Loyalty menu.</td>
</tr>
<tr>
<td></td>
<td>To redeem points using a Tracking loyalty card, the customer must contact the Loyalty Program Provider under which their card is enrolled.</td>
</tr>
</tbody>
</table>
Need help?
Please contact the Moneris Merchant Service Centre toll-free at 1-866-319-7450 (open 24 hours a day, 7 days a week).

If you use Merchant Direct®, you can also contact us online. Simply log in to Merchant Direct and use the Message Centre to send a secure message directly to the Moneris Merchant Service Centre.

For additional information and copies of manuals and guides for the Vx810 Duet:
- Visit moneris.com/manuals to download a copy of the Moneris Vx810 Duet Operating Manual.
- Visit moneris.com/guides to download additional copies of this reference guide.

Shop for point-of-sale supplies and paper online at shop.moneris.com.

Important: If you are experiencing equipment problems, please refer to the Moneris Vx810 Duet Using Your Terminal Guide.

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It is the merchant’s responsibility to ensure that proper card processing procedures are followed at all times. Please refer to your Loyalty Program Operating Manual and your Moneris Loyalty Program Agreement for details. The Moneris Loyalty Program manuals are available for free download at moneris.com/guides.

LOY-810UYT-E (11/17)