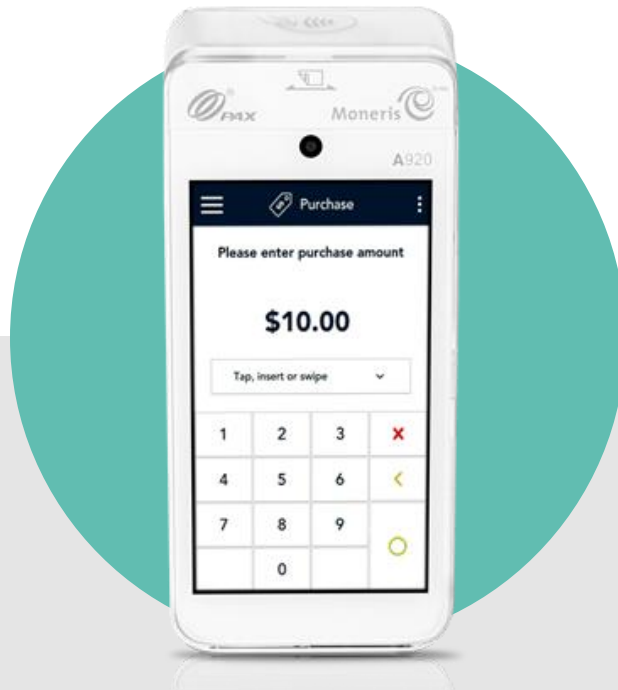




Moneris Go[®]

Gift Card Program Reference Guide



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Moneris Gift Card program

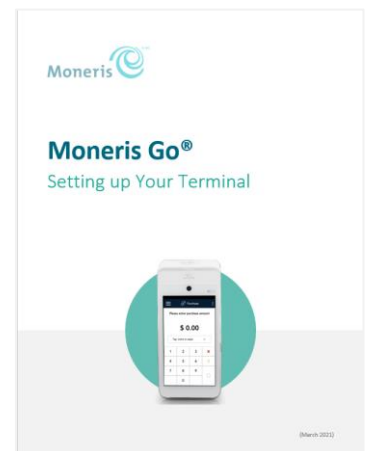
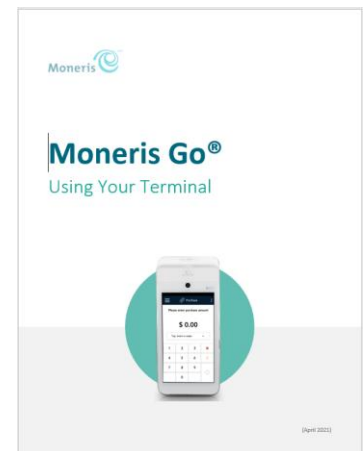
The Moneris Gift Card program allows you to sell stored-value cards for future purchases in your store or on your website. Gift cards can help to boost sales, extend your product line, and build your brand.

Setting up and using your terminal

No additional configuration is required to use Moneris gift cards on your terminal. Your existing settings will apply to gift card transactions. For example, if tip entry is turned on, your customers will see the tip prompt on gift card purchases. If manual entry is turned on, you will be able to manually enter a gift card number.

For information on how to navigate the Moneris Go application and how to change terminal settings, refer to the Moneris Go **Using Your Terminal** guide available online at moneris.com/en/support/devices/monerisgo.

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



Card entry options

Insert: Chip cards



1. The screen displays “Tap, insert, or swipe”.
2. The customer inserts the card into the terminal’s chip reader.
3. The chip card must remain inserted until the screen displays “Please remove your card”.

Wave/Tap: Contactless cards



1. The screen displays “Tap, insert, or swipe”.
2. The customer taps their card over the contactless reader which is located above the display screen.

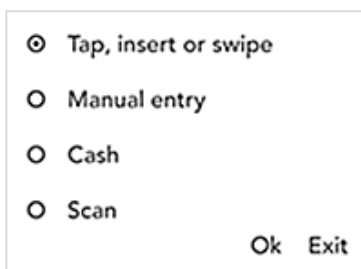
Swipe: Magnetic stripe cards



1. The screen displays “Tap, insert, or swipe”.
2. The customer swipes the card on the terminal’s magnetic stripe reader. The card’s magnetic stripe faces the terminal. The card can be swiped from the left or from the right.

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

Scan



1. On the transaction screen (Purchase, for example), tap the card entry options field to display the list of card entry options.
2. Tap **Scan** then **Ok** to activate the terminal’s rear camera.
3. Hold the gift card below the terminal so that the bar code of the gift card is visible on the screen.
4. The application automatically reads the bar code and retrieves the card information.

Manual entry

You can manually key in a customer’s gift card information for a card-not-present transaction, that is, a transaction where the customer is not present at your place of business. “Manual entry” must be enabled in your user role and enabled in Transaction settings. If needed, refer to the Moneris Go **Using Your Terminal** guide (page 2).



For step by step instructions on how to perform a card-not-present sale using a gift card, refer to [Gift card purchase – Card not present](#), on page 8.

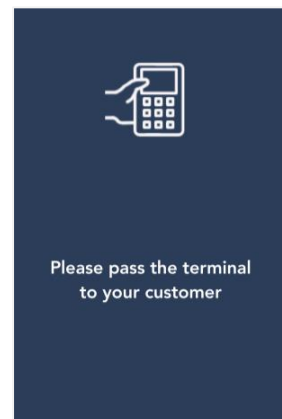
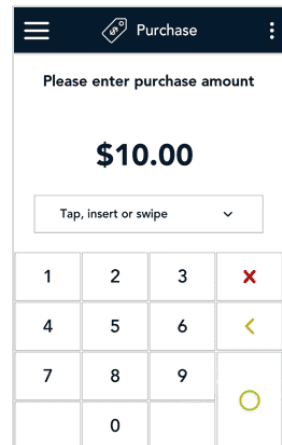
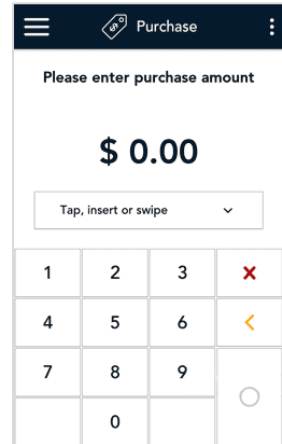
Gift card transactions

These instructions are streamlined to focus on gift card functionality. For instructions related to settings (such as tip prompt, user roles, manual entry, receipt printing and others), refer to the Moneris Go *Using your terminal* guide (see page 2).

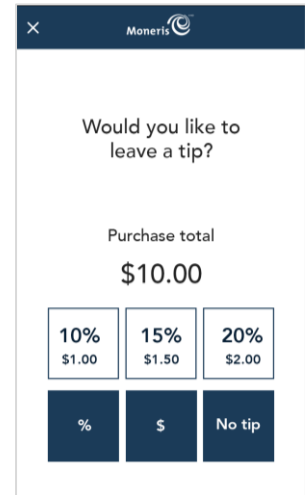
Gift card purchase

Follow these steps to process a purchase transaction using a Moneris gift card.

1. Start at the **Purchase** screen. This is the default transaction.
If your terminal is at a different screen, tap the Main menu  icon, then tap **Transactions**.
2. Use the on-screen numeric keypad to enter the purchase amount, then tap the OK  key.
3. Pass the terminal to your customer so they can respond to the customer prompts.

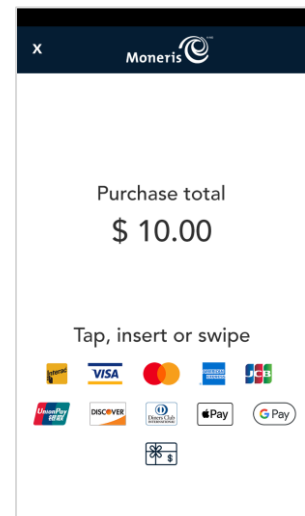


4. If tip entry is turned on, the customer enters a tip (or no tip).

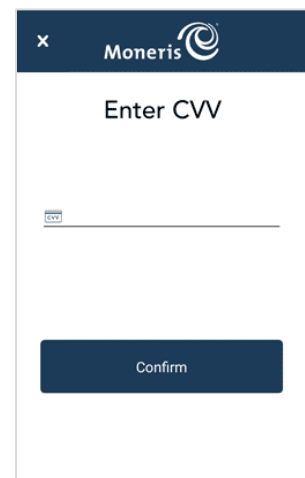


5. The Purchase total screen appears, showing:
- The total sale, including the tip (if any);
 - The “Tap, insert or swipe” prompt;
 - The cards you accept, which includes Moneris gift cards.

6. The customer enters their card on the terminal. Depending on the type of card, they can tap, insert, or swipe it. For information on [card entry options](#), refer to page 3.



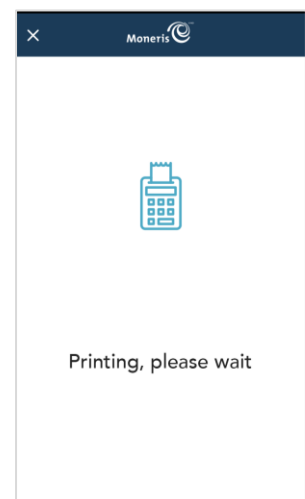
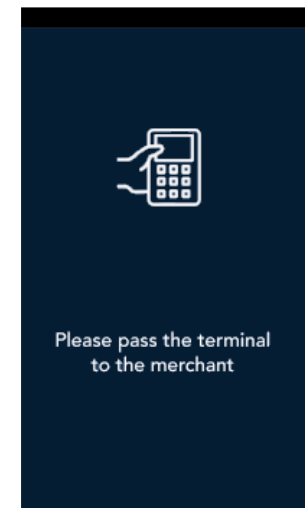
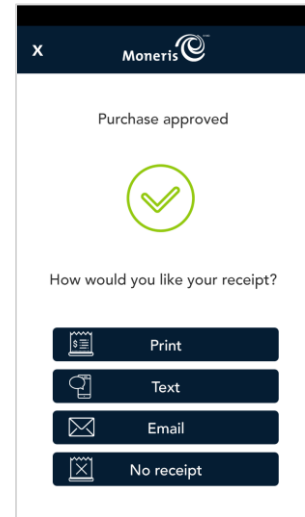
7. The CVV prompt appears.
- a. The customer taps the CVV field.
 - b. The customer enters the card verification value (CVV) from the back of the Moneris gift card, then taps the checkmark.
 - c. The customer taps **Confirm** to continue.



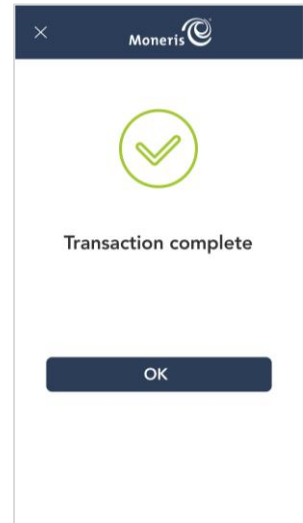
8. Once the purchase is approved, the “How would you like your receipt?” prompt appears, showing the customer the available options for receiving a receipt: **Print, Text, Email, and No Receipt.**
9. The customer selects a receipt format (or no receipt) by tapping one of the options on screen. If the customer chooses Text or Email, they are prompted to enter the appropriate information.

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

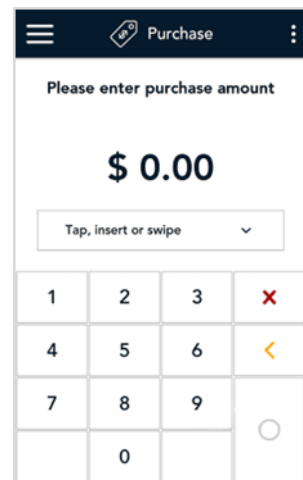
11. The application prints receipts if requested.
 - If the customer requested a printed receipt, give them the cardholder copy.
 - If you enabled merchant receipt printing, keep the merchant copy for your records.



12. When the “Transaction Complete” prompt appears tap **OK** to return to the default transaction screen.




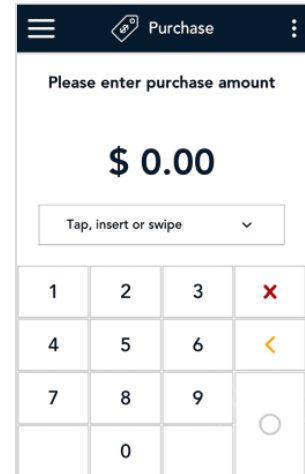
13. The default transaction screen appears.
The application is ready to process your next transaction.



Gift card purchase – Card not present

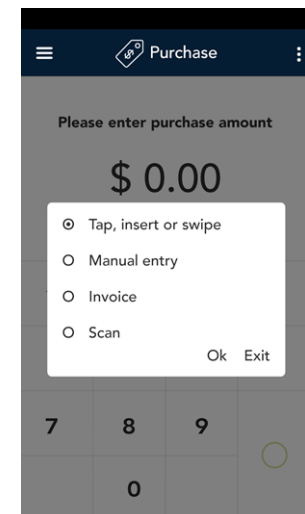
If your business receives orders by Internet, mail, or telephone, follow these steps to process a Purchase transaction where you can manually enter the customer's Moneris gift card information.


1. Start at the **Purchase** screen. This is the default transaction.
If your terminal is at a different screen, tap the Main menu  icon, then tap **Transactions**.
2. Tap the card entry field (**Tap, insert or swipe**) to display the card entry options.



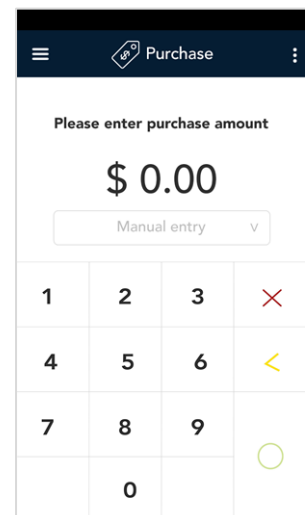
3. Tap **Manual entry**, then **Ok**.

Note: Manual entry must be enabled in your user role and in Transaction settings. Refer to the Moneris Go **Using your terminal** guide (see page 2).

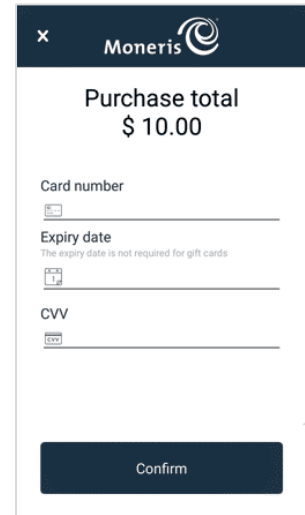


4. Enter the purchase amount, then tap the OK  key.

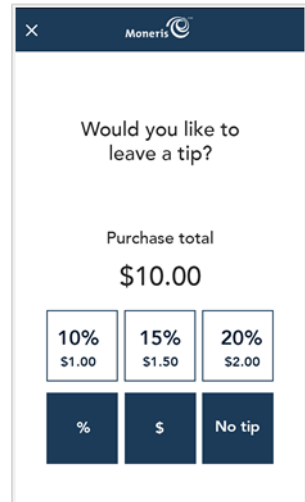
Note: The order of these initial steps is flexible. You can enter the purchase amount first, or you can choose the method of card entry first. Both will work.



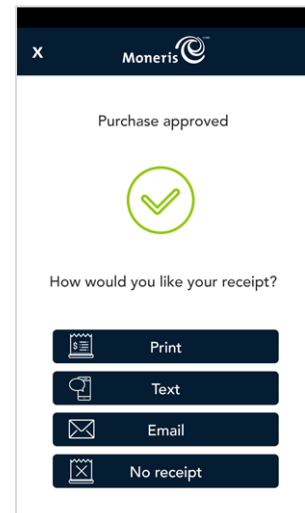
5. At the card entry screen:
 - a. Verify the purchase amount. (To cancel the transaction, tap the **X** in the title bar.)
 - b. Tap each gift card field and enter the information required.
 - You do not have to enter an expiry date for gift cards.
 - The CVV is located on the back of the card.
 - c. Tap **Confirm**.



6. If tip entry is turned on, you can enter a tip as specified by the customer.

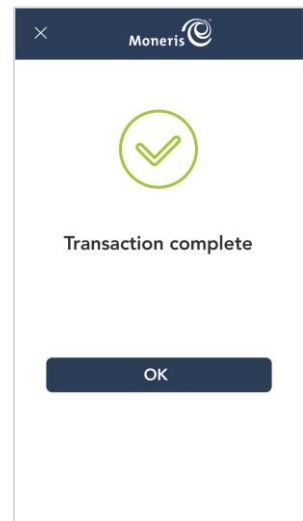
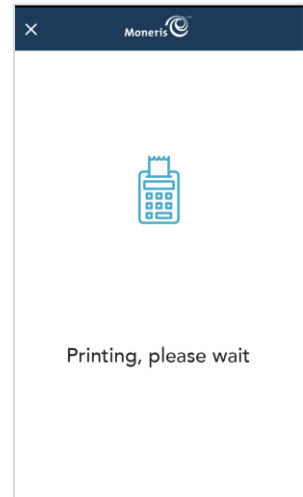


7. Once the purchase is approved, the “How would you like your receipt?” prompt appears, showing the available options for receiving a receipt.
 - a. Select a receipt format on behalf of the customer. You can ask for their preference if speaking on the telephone.
 - b. If you selected **Text** or **Email**, enter the appropriate information.




8. The application prints receipts if requested.
 - If you enabled merchant receipt printing, keep the merchant copy for your records.

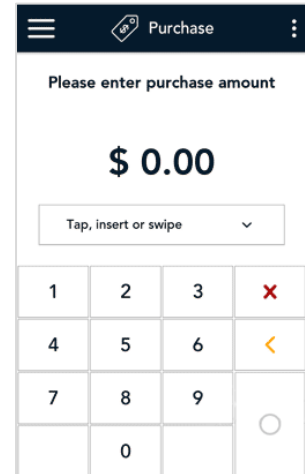
9. When the “Transaction Complete” prompt appears, tap **OK** to return to the default Purchase screen.



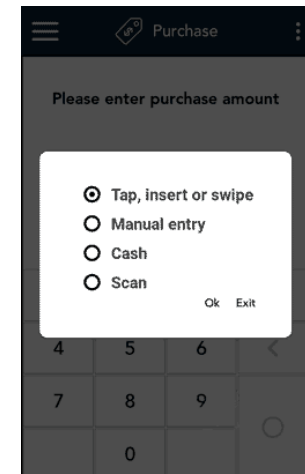
Gift card purchase – Bar code scan


If your Moneris gift cards have a bar code, you can scan the bar code to enter the card information instead of having the customer tap or swipe the card.

1. Start at the **Purchase** screen. This is the default transaction.
If your terminal is at a different screen, tap the Main menu  icon, then tap **Transactions**.
2. Tap the card entry field (**Tap, insert or swipe**) to display the card entry options.

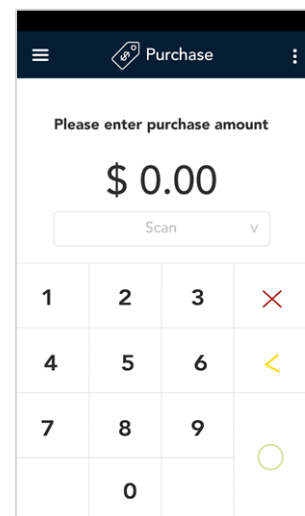


3. Tap **Scan**, then **Ok**.

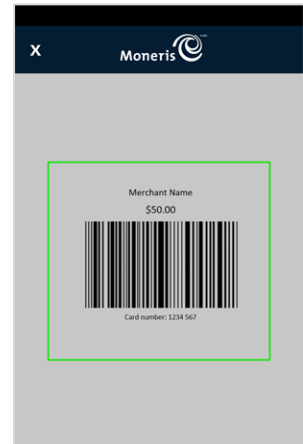


4. Enter the purchase amount, then tap the OK  key.

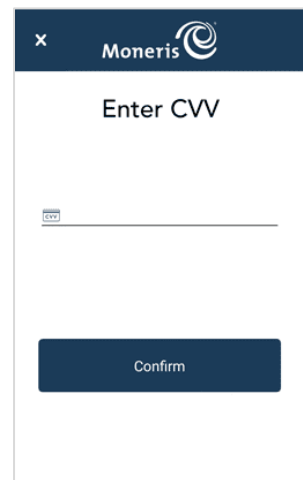
Note: *The order of these initial steps is flexible. You can enter the purchase amount first, or you can choose the method of card entry first. Both will work.*



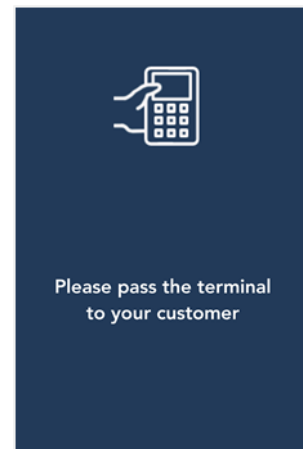
5. Hold the gift card below the terminal so that the bar code is visible on the screen. The application automatically reads the bar code and retrieves the card number.



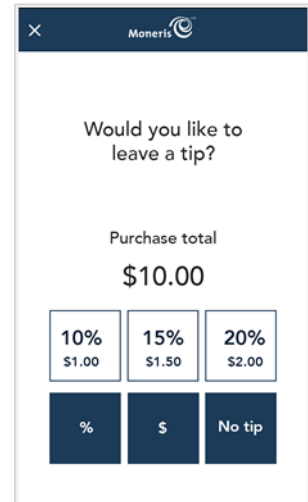
6. Tap the CVV field, enter the card verification value (CVV) from the back of the card, then tap the checkmark. Tap **Confirm** to continue.



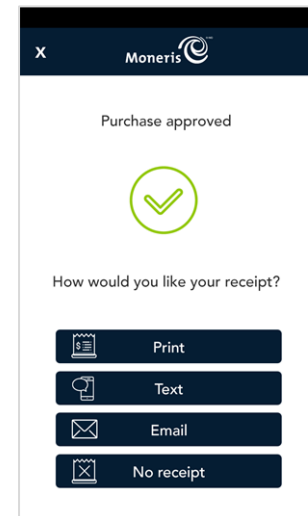
7. Pass the terminal to your customer so they can respond to the customer prompts.



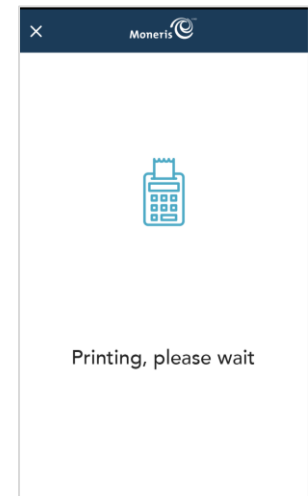
8. If tip entry is enabled, the customer enters a tip (or no tip).
The “Processing, please wait” message may appear.



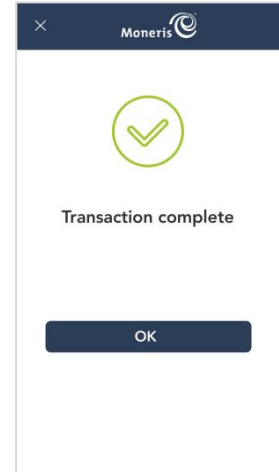
9. Once the purchase is approved, the “How would you like your receipt?” prompt appears, showing the available options for receiving a receipt.
10. The customer selects a receipt format (or no receipt) by tapping one of the options on screen. If the customer chooses Text or Email, they are prompted to enter the appropriate information.



11. The customer passes the terminal back to you, as directed by the application.
12. The application prints receipts if requested.
- If the customer requested a printed receipt, give them the cardholder copy.
 - If you enabled merchant receipt printing, keep the merchant copy for your records.




- When the “Transaction Complete” prompt appears, tap **OK** to return to the default Purchase screen.



Gift card purchase - Partial approval

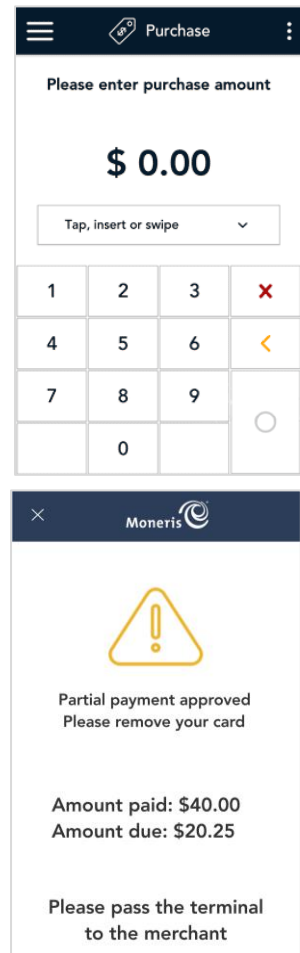
A Partial Approval of a purchase transaction occurs when the customer pays for a purchase with a pre-paid credit card or with a Moneris gift card but the value on the pre-paid card or gift card is less than the purchase amount. A pre-paid card refers to a credit card (such as Visa® or Mastercard®) loaded with a specific value.

- Start at the **Purchase** screen and follow steps 1 to 8 in the [Gift card purchase transaction](#) on page 4).

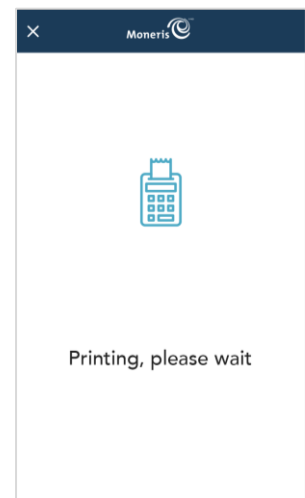
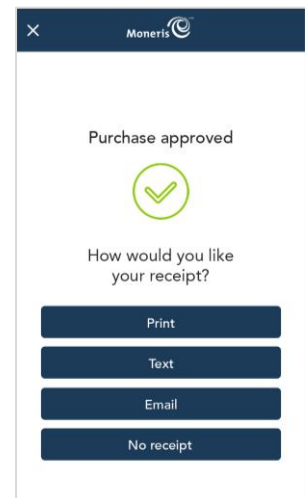
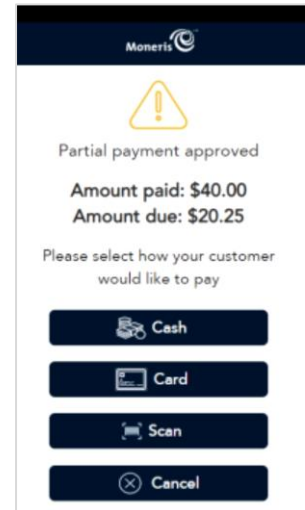
If your terminal is at a different screen, tap the Main menu  icon then tap **Transactions**.

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

- When a partial payment is approved, the screen displays the following information to the customer:
 - The approval message;
 - The amount paid;
 - The amount still due;
 - A prompt to pass the terminal back to the merchant.
- The customer passes the terminal back to you, as directed on-screen.



4. The screen displays the partial approval information, together with 4 options. Ask the customer how they would like to proceed.
 - To continue the transaction, choose one of these options, then go to step 5
 - tap **Cash** to pay the balance using cash,
 - tap **Card** to pay the balance using another card, or
 - tap **Scan** to pay the balance using a Moneris gift card with a bar code.
 - If the customer decides to cancel the sale, tap **Cancel**. The application will automatically cancel all partially approved transactions that were processed as part of this sale and automatically print a cancellation receipt. At the “Partial approval cancelled” message, tap **OK** to return to the default transaction screen.
5. The receipt options screen appears for the first approved payment. Pass the terminal to the customer.
6. The customer selects a receipt format (or no receipt) by tapping one of the options on screen. If the customer chooses Text or Email, they are prompted to enter the appropriate information.
7. The customer passes the terminal back to you, as directed by the application.
8. The application prints receipts if requested.
 - If the customer requested a printed receipt, give them the cardholder copy.
 - If you enabled merchant receipt printing, keep the merchant copy for your records.
9. Choose from the following:
 - If you tapped **Scan** above in step 4, go to step 10 to scan the gift card.
 - If you tapped **Cash** or **Card** in step 4, skip to step 12.



10. Hold the gift card below the terminal so that the bar code is visible on the screen. The application automatically reads the bar code and retrieves the card number.

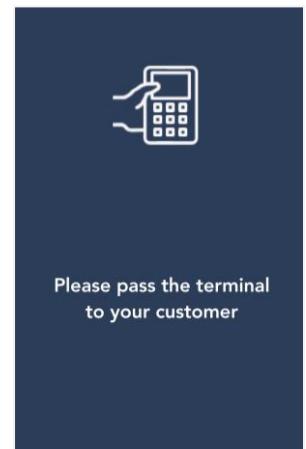


11. Tap the CVV field, enter the card verification value (CVV) from the back of the card, then tap the checkmark. Tap **Confirm** to continue.



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

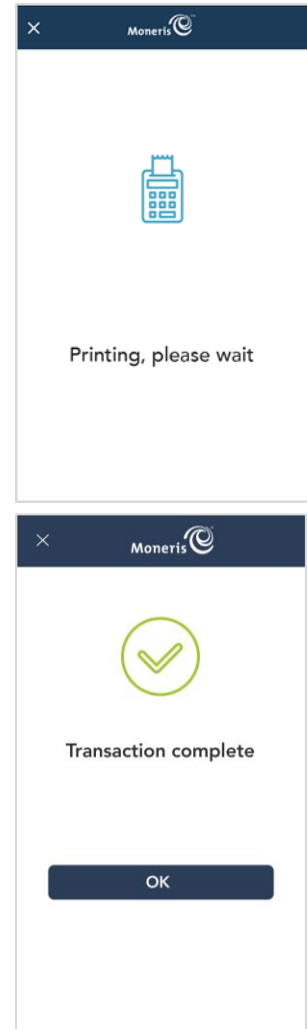
13. The application begins the next payment of the balance due
- a. The customer enters their card (not applicable for Cash or Scan).
 - b. If the tip prompt appears, the customer enters a tip or no tip.
 - c. The customer selects a receipt format or no receipt.
 - d. The customer passes the terminal back to you.



14. The application prints receipts if requested.

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

15. Once the total purchase amount is paid for, the “Transaction Complete” screen appears. Tap **OK** to return to the default transaction screen.



Note: If you wish to refund a sale involving partial approval, you must perform a refund transaction for each partially approved purchase transaction. For example, if the customer used three Moneris gift cards to pay for the total purchase amount, you must perform three refund transactions, one for each partial purchase. Refer to [Gift card refund](#) on page 18.

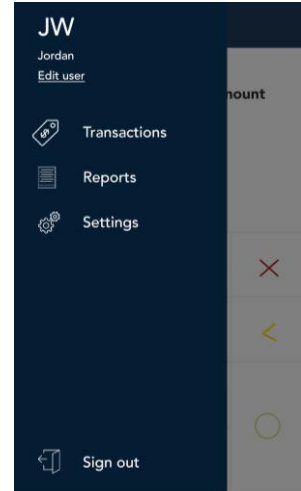
Gift card pre-authorization

You cannot use a Moneris gift card to pre-authorize a purchase. Use a credit card instead. For instructions, refer to the Moneris Go **Using Your Terminal** guide and look under Transactions, then Pre-authorization.

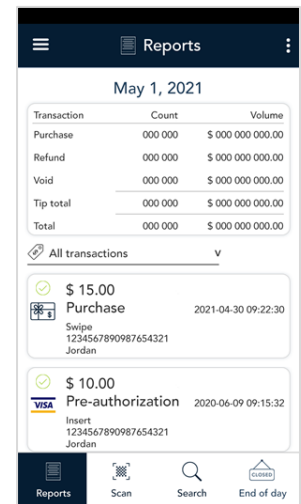
Gift card refund

A gift card refund credits a customer's account in relation to a specific gift card purchase. You can refund the whole amount of a purchase transaction or a portion of the amount. Refunds are processed through the Report screen.


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

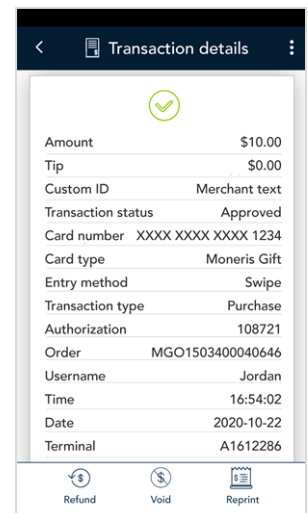


2. In the list of transactions, tap the transaction you want to refund. If needed, tap the **All transactions** dropdown menu and select the type of transaction you are searching for.

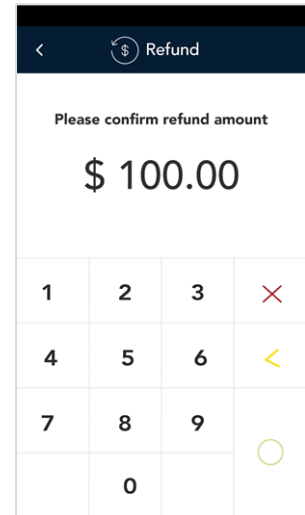


3. The transaction details appear.

- Verify this is the right transaction, then tap **Refund**.
- Otherwise, tap the Back  icon in the title bar to go back to the previous screen.

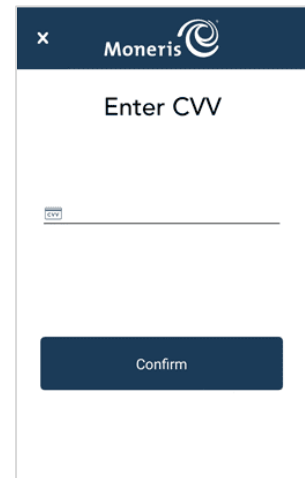


4. The Refund screen appears, showing the full amount of the original purchase transaction.
 - To perform a partial refund, tap the Delete < key to delete the full amount, then enter the amount you want to refund.
5. Tap the OK ○ key to continue.

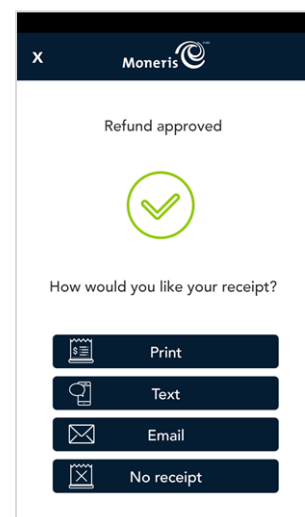


6. The CVV prompt appears.
 - a. Tap the CVV field.
 - b. Enter the card verification value (CVV) from the back of the Moneris gift card, then tap the checkmark.
 - c. Tap **Confirm** to continue.

Note: If necessary, you can bypass the CVV. Leave the field empty, then tap **Confirm**.

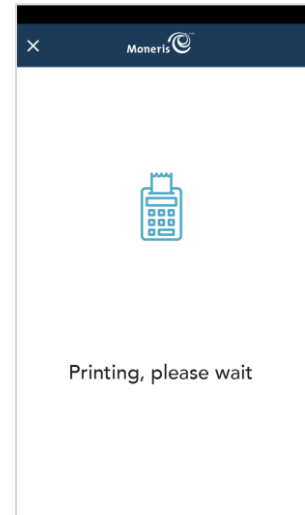


7. Once the refund is approved, the "How would you like your receipt?" prompt appears, showing the available options for receiving a receipt: **Print, Text, Email, and No Receipt.**
8. Ask the customer which receipt format they prefer and tap one of the options on screen.

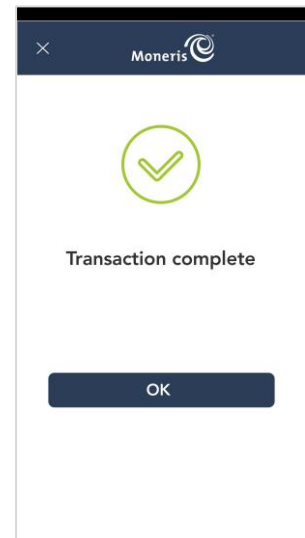


9. The application prints receipts if requested.

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

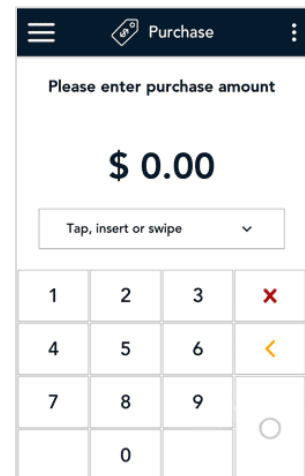


10. When the “Transaction Complete” prompt appears, tap **OK** to return to the default transaction screen.



11. The default transaction screen appears.

The application is ready to process your next transaction.



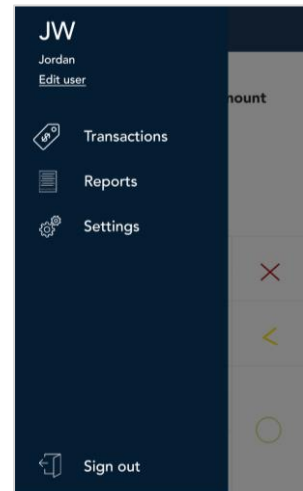
Gift card void

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

- If you have more than one terminal, you must process the void on the same terminal as the original transaction.
- The whole transaction will be voided -- you cannot perform a partial void.
- Only transactions in the current batch can be voided. For example, if the purchase transaction that you want to void is in a batch that is already closed, perform a refund instead.

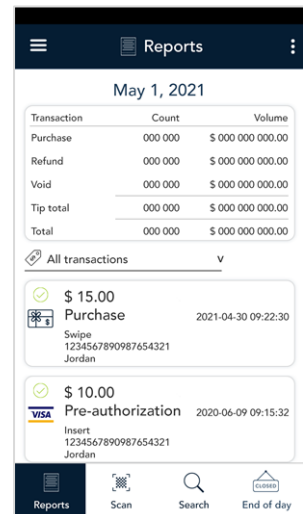
Use the Report screen to void a purchase.

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




2. Look under “All transactions” and tap the gift card transaction you want to void. If needed, tap the **All transactions** dropdown menu and select the type of transaction you are looking for.

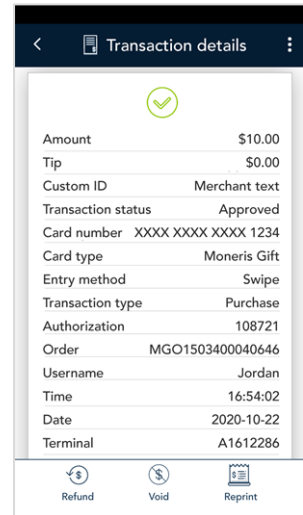
You can also tap **Scan** to scan the QR code from a receipt, or tap **Search** to look for the transaction to be voided.




3. The transaction details appear.

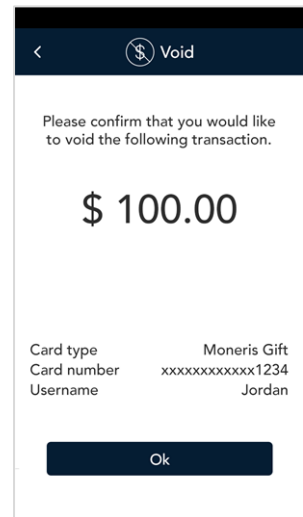
- Verify this is the right transaction, then tap **Void** at the bottom of the screen.
- Otherwise, tap the Back  icon in the title bar to go back to the previous screen.

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



4. The application prompts you to confirm the void.

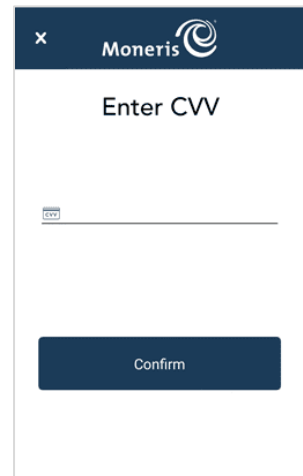
- To proceed, tap **OK**. Continue to step 5.
- To cancel, tap the Back  icon.



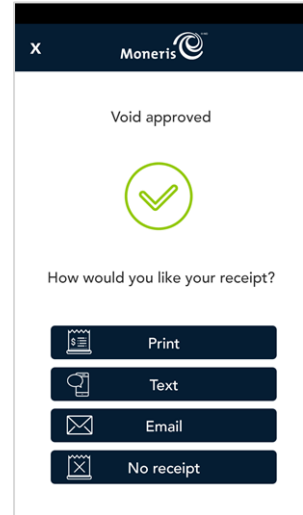
5. The CVV prompt appears.

- a. Tap the CVV field.
- b. Enter the card verification value (CVV) from the back of the Moneris gift card, then tap the checkmark.
- c. Tap **Confirm** to continue.

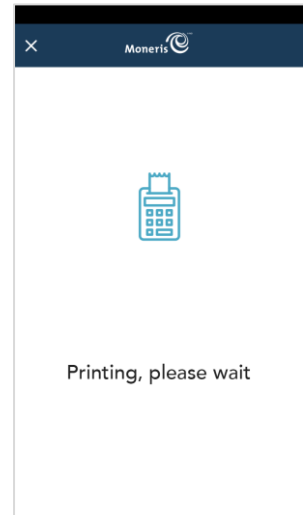
Note: If necessary, you can bypass the CVV. Leave the field empty, then tap **Confirm**.



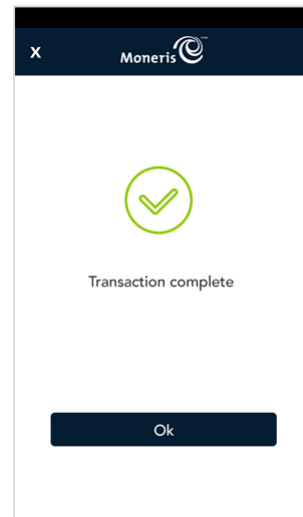
6. Once the void is approved, the “How would you like your receipt?” prompt appears, showing the available options for receiving a receipt: **Print, Text, Email, and No Receipt.**
7. Ask the customer which receipt format they prefer and tap one of the options on screen.



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





9. When the “Transaction Complete” prompt appears, tap **OK** to return to the default transaction.



Balance inquiry

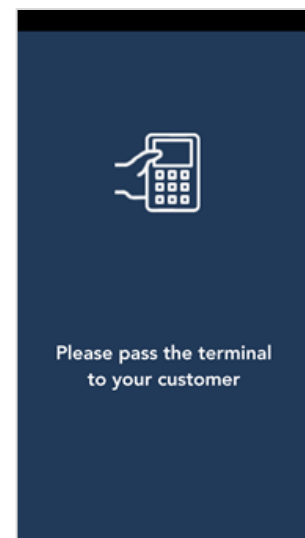
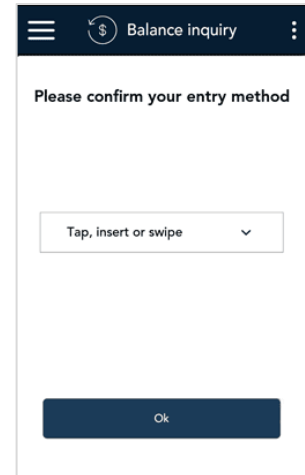
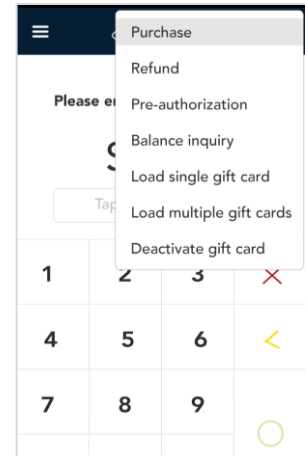
Perform a balance inquiry to check the balance of a gift card.

1. Start at the **Purchase** screen. This is the default transaction.
If your terminal is at a different screen, tap the Main menu  icon, then tap **Transactions**.
2. Tap the additional options  icon and select **Balance inquiry**.
The title of the screen changes from Purchase to Balance inquiry.

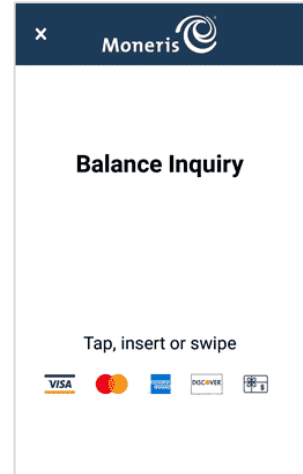
3. Choose a card entry method. This depends on the type of card and whether the card is present or not.

- The default method is “Tap, insert, or swipe”. To select this method, simply tap **OK**. Go to step 4.
- To manually enter the card number:
 - Tap the card entry field, then tap **Manual entry** from the list, then **Ok**.
 - When prompted, enter the card number and the CVV from the back of the card.
 - Go to step 7 (Card Balance) and follow the instructions, as applicable.
- To scan the barcode, tap **Scan**. Hold the gift card below the terminal so that the bar code is visible on the screen. Go to step 6 (Enter CVV).

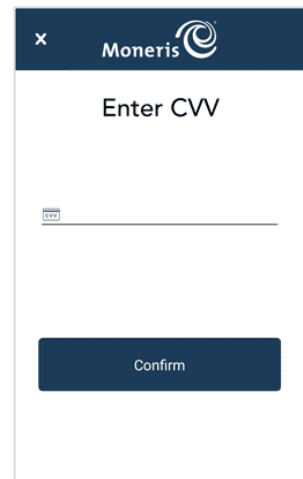
4. Pass the terminal to the customer.



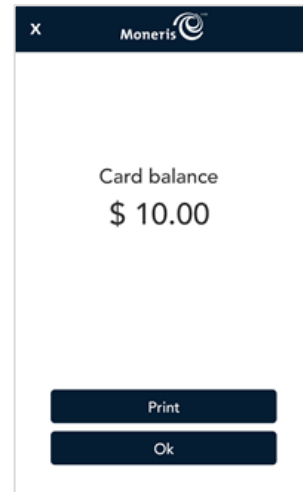
5. The customer enters the gift card information, by tapping, inserting, or swiping the gift card.



6. The CVV prompt appears.
- The customer taps the CVV field.
 - The customer enters the card verification value (CVV) from the back of their Moneris gift card, then taps the checkmark.
 - The customer taps **Confirm** to continue.

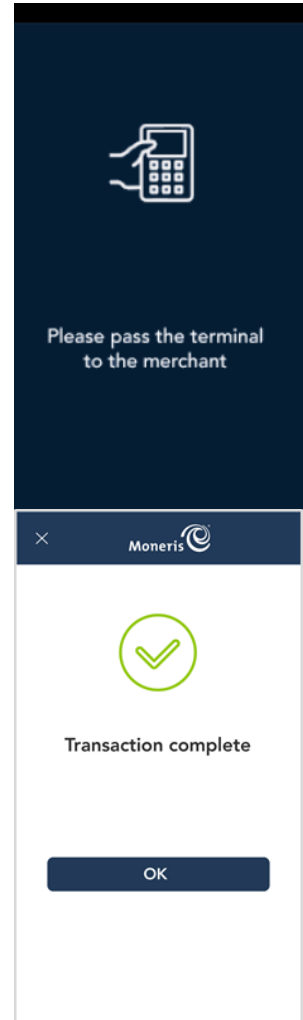


7. The application displays the card balance.
- To print the balance, the customer taps **Print**.
 - To continue without printing, the customer taps **OK**.



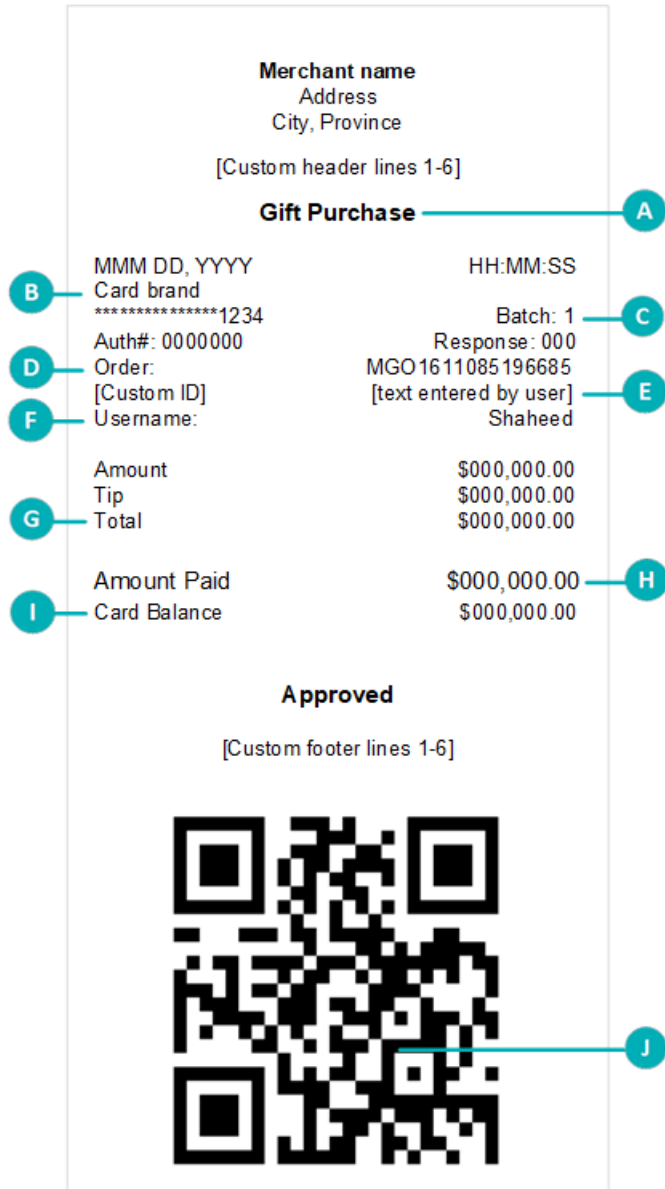
8. The customer passes the terminal back to you.

9. When the “Transaction Complete” prompt appears, tap **OK** to return to the default Purchase screen.



Receipts


Gift card purchase receipt

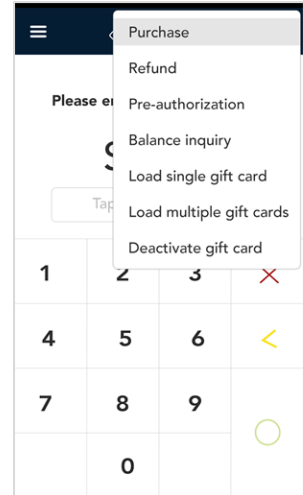



| Item | Description |
|------|---|
| A | Transaction type. For example, Purchase, Refund, Void. |
| B | Card brand and card number. The card number is masked — an asterisk is printed in place of the card number except for the last four numbers. |
| C | Batch number. This is the Moneris Gift & Loyalty batch number. |
| D | Order ID. You can use the Order ID to search for a transaction to void, to refund, or to reprint the receipt. Refer to the <i>Using Your Terminal</i> guide (p.3). |
| E | Custom ID. You can customize the name of this field. The value for this field is the value that you entered on the terminal during the transaction. |
| F | Username. Indicates which user was signed in to the terminal when the transaction was processed. |
| G | Total. This is the total amount for the current purchase, including any tip. |
| H | Amount paid. This is the total amount paid so far, after one or more partial approvals. |
| I | Card balance. This is the value remaining on the card. |
| J | Optional QR code. You can scan the QR code to immediately find a transaction to void, to refund, or to reprint the receipt. Refer to the <i>Using Your Terminal</i> guide (p.3). |

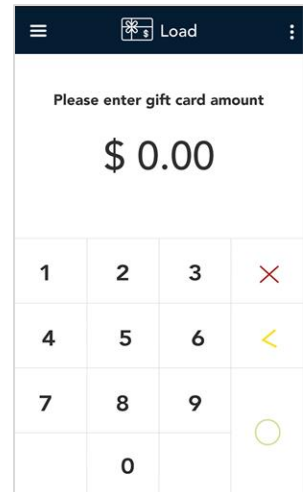
Gift card administration

Load a single gift card using credit or debit

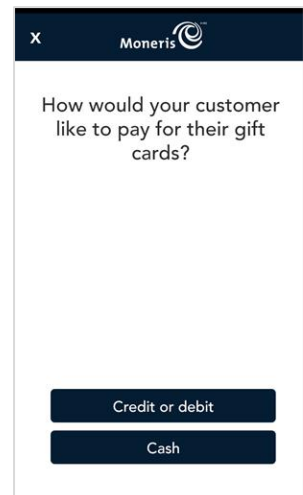
1. At the Purchase screen, tap the additional options  icon in the title bar, then select **Load single gift card**.



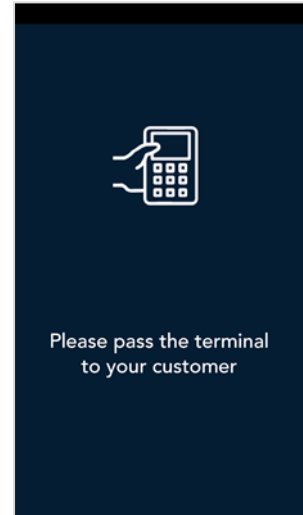
2. Ask the customer how much money they would like to load on their gift card. Enter the requested dollar amount, then tap the OK  key.



3. Ask the customer how they would like to pay for their gift card.
 - If the customer offers a credit or debit card, tap **Credit or debit**. Go to the next step.
 - If the customer offers cash, refer to [Load a single gift card using cash](#) on page 33.



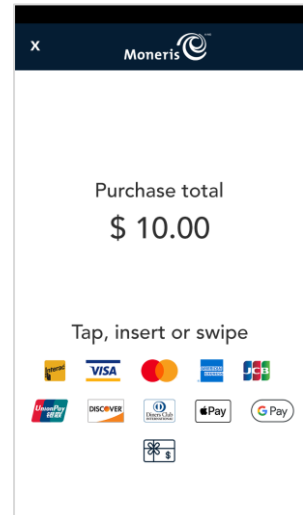
4. Pass the terminal to your customer so they can respond to the customer prompts.



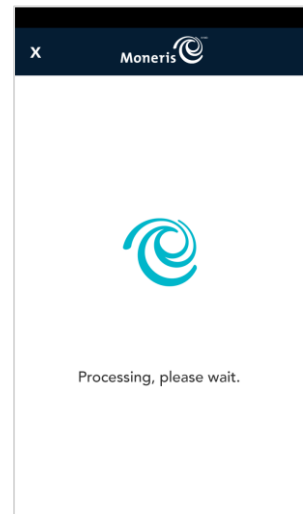
5. The Purchase total screen appears, showing:

- The total sale;
- The “Tap, insert or swipe” prompt;
- The card brands you accept.

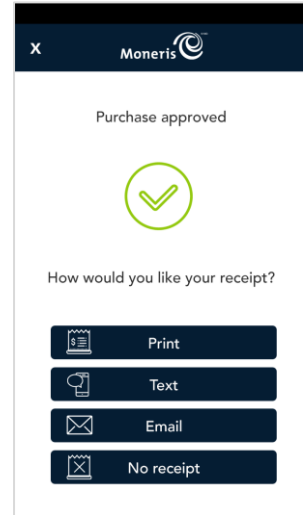
6. The customer enters their card on the terminal. Depending on the type of card, they can tap, insert, or swipe it.



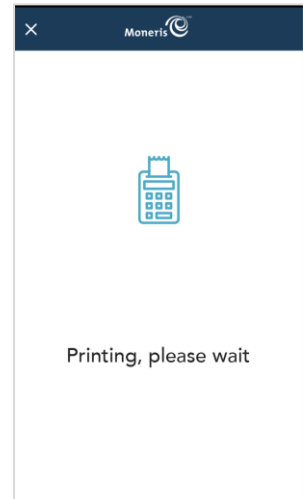
7. The “Processing, please wait” message appears.



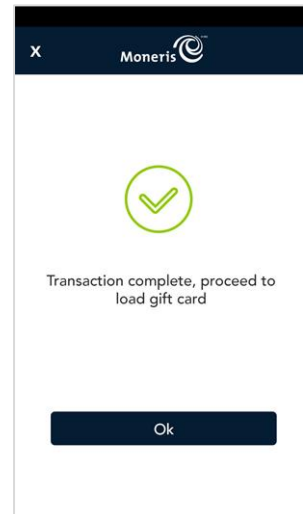
8. Once the payment is approved, the “How would you like your receipt?” prompt appears, showing the customer the available options for receiving a receipt: **Print, Text, Email, and No Receipt.**
9. The customer selects a receipt format (or no receipt) by tapping one of the options on screen. If the customer chooses Text or Email, they are prompted to enter the appropriate information.



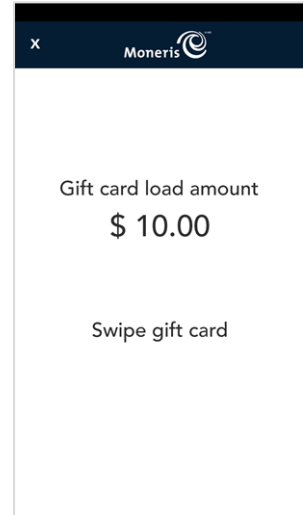
10. The customer passes the terminal back to you, as directed by the application.
11. The application prints receipts if requested.
 - If the customer requested a printed receipt, give them the cardholder copy.
 - If you enabled merchant receipt printing, keep the merchant copy for your records.



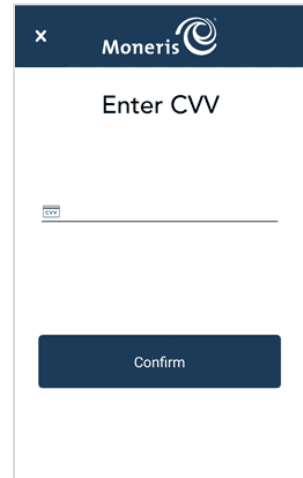
12. When the “Transaction complete, proceed to load gift card” prompt appears, tap **OK** to continue.



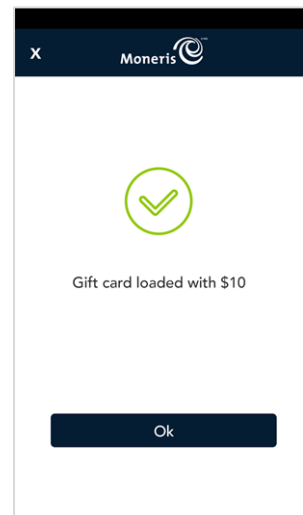
13. When the application re-displays the dollar amount to be loaded, swipe the gift card.



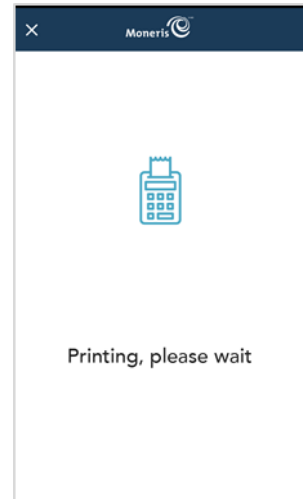
14. Enter the CVV from the back of the gift card.



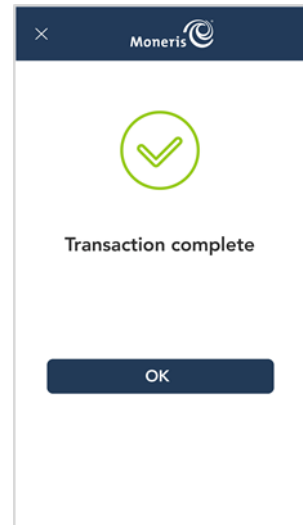
15. The application confirms that the gift card has been successfully loaded with the requested value. Tap **OK** to continue.



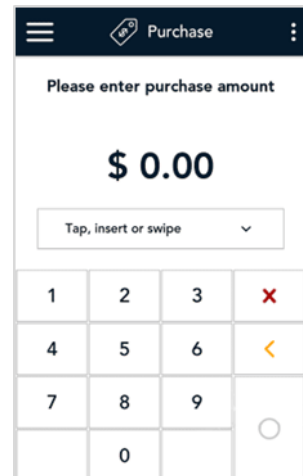
16. The application prints a gift card activation receipt showing the value on the gift card. Give the card and the receipt to the customer.




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

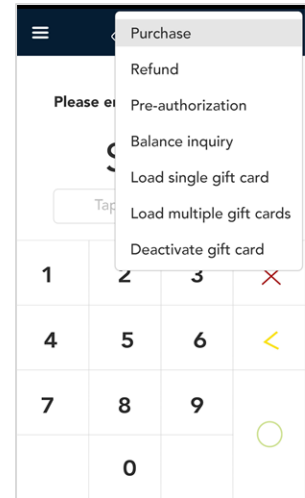



18. The default transaction screen appears.
The application is ready to process your next transaction.

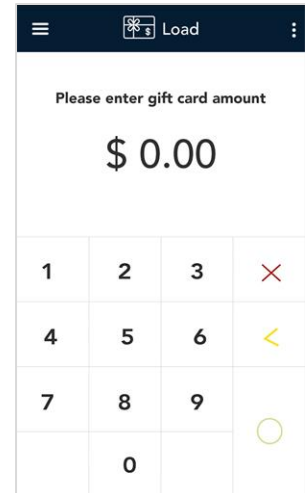


Load a single gift card using cash

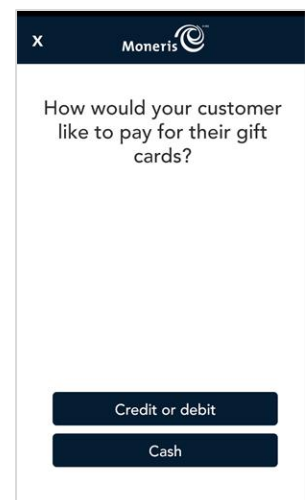
1. At the Purchase screen, tap the additional options  icon in the title bar, then select **Load single gift card**.



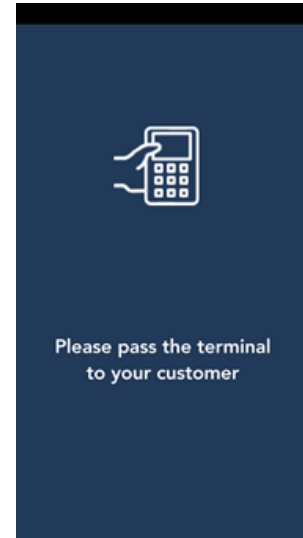
2. Ask the customer how much money they would like to load on their gift card. Enter the requested dollar amount, then tap the OK  key.



3. Ask the customer how they would like to pay for their gift card.
 - If the customer offers cash, tap **Cash**. Go to the next step.
 - If the customer offers a credit or debit card, refer to [Load a single gift card using credit or debit on page 28](#).

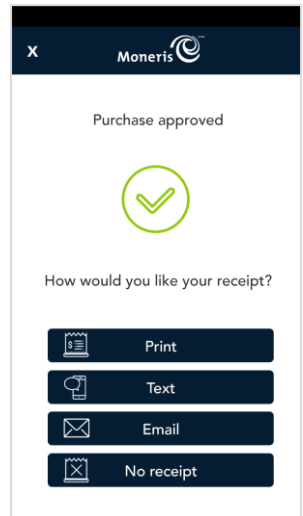


4. Pass the terminal to your customer.



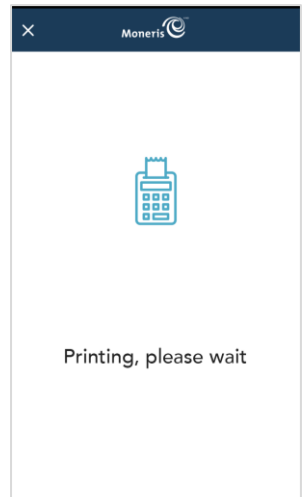
5. The “How would you like your receipt?” prompt appears, showing the customer the available options for receiving a receipt: **Print, Text, Email, and No Receipt.**

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

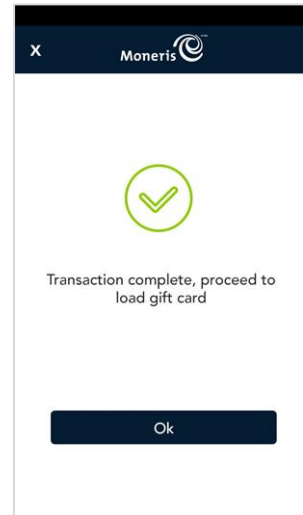


7. The customer passes the terminal back to you, as directed by the application.

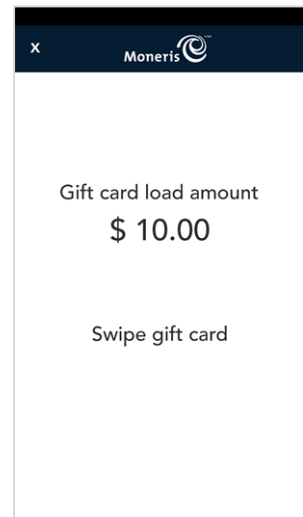
8. The application prints receipts if requested.
- If the customer requested a printed receipt, give them the customer copy.
 - If you enabled merchant receipt printing, keep the merchant copy for your records.



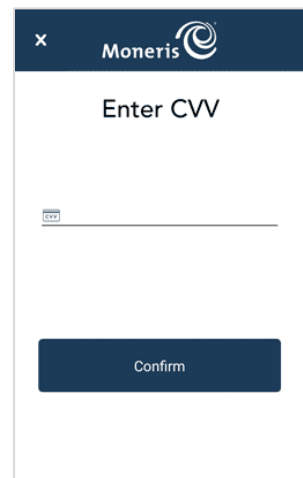
9. When the “Transaction complete, proceed to load gift card” prompt appears, tap **OK** to continue.



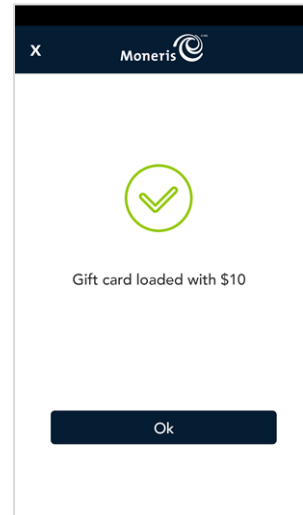
10. When the application re-displays the dollar amount to be loaded, swipe the gift card.



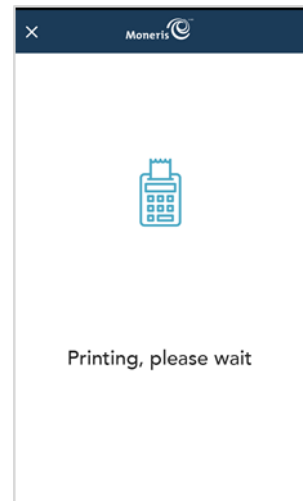
11. Enter the CVV from the back of the gift card, then tap **Confirm**.



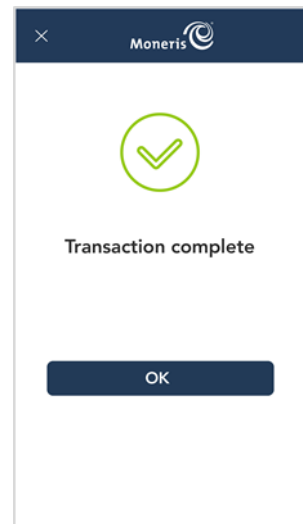
12. The application confirms that the gift card has been successfully loaded with the requested value. Tap **OK** to continue.



13. The application prints a gift card activation receipt showing the value on the gift card. Give the card and the receipt to the customer.




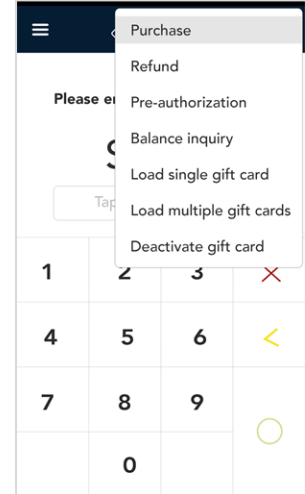
14. When the "Transaction Complete" prompt appears, tap **OK** to return to the default transaction screen.



Load multiple gift cards using credit or debit

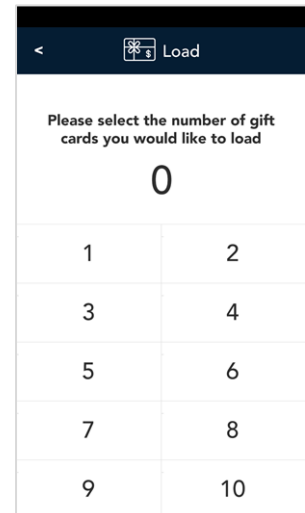
Use this procedure to load multiple gift cards with the same dollar value. For example, a customer would like to purchase 5 gift cards of \$10 each. If the customer wants several gift cards with different values, you must load each card separately. To load single cards, refer to [Load a single gift card using credit or debit](#) on page 28.


1. At the Purchase screen, tap the additional options  icon in the title bar, then select **Load multiple gift cards**.

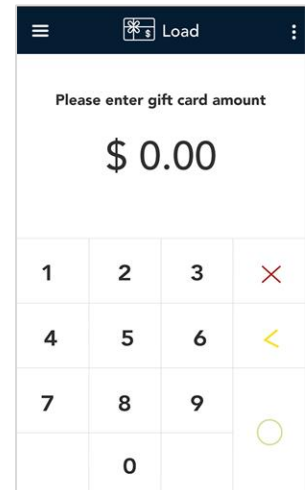


2. Ask the customer how many gift cards they would like to purchase, then tap the number of cards requested.

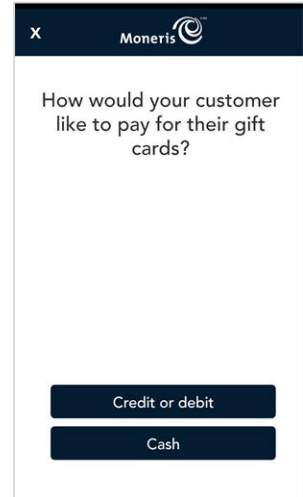
Note: The maximum number of gift cards you can load in one procedure is 10. If the customer would like to purchase more than 10 cards, repeat this procedure for the remaining cards.



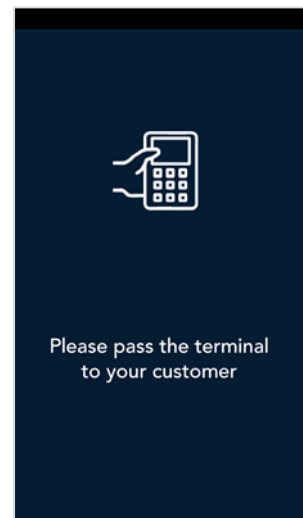
3. Ask the customer how much money they would like to load on each gift card. Enter the requested dollar amount, then tap the OK  key.



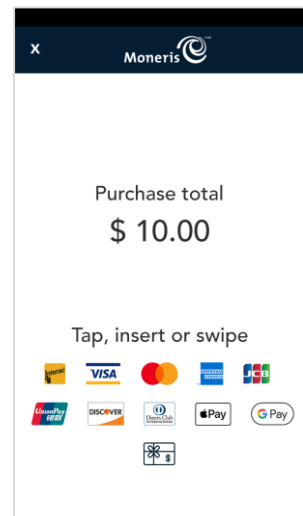
4. Ask the customer how they would like to pay for their gift cards.
 - If the customer offers a credit or debit card, tap **Credit or debit**. Go to the next step.
 - If the customer offers cash, refer to [Load multiple gift cards using cash](#) on page 42.



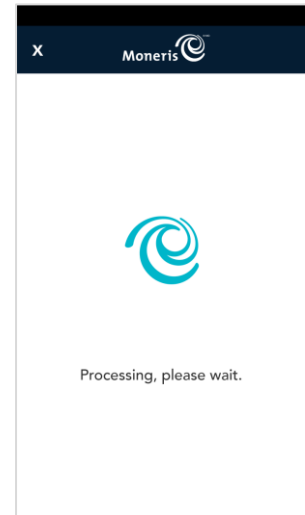
5. Pass the terminal to your customer so they can respond to the customer prompts.



6. The Purchase total screen appears, showing:
 - The total sale, that is, the value of each card multiplied by the number of cards;
 - The "Tap, insert or swipe" prompt;
 - The card brands you accept.
7. The customer enters their card on the terminal. Depending on the type of card, they can tap, insert, or swipe it.

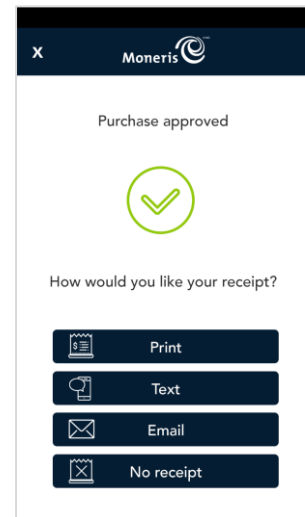


8. The “Processing, please wait” message appears.



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

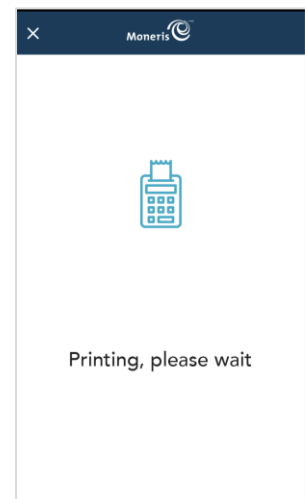
10. The customer selects a receipt format (or no receipt) by tapping one of the options on screen. If the customer chooses Text or Email, they are prompted to enter the appropriate information.



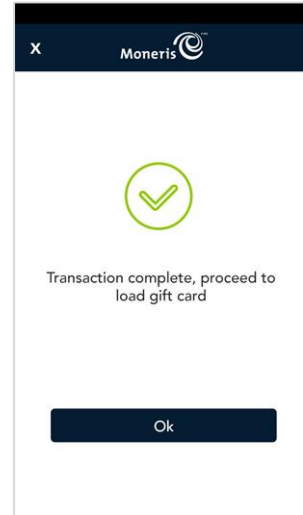
11. The customer passes the terminal back to you, as directed by the application.

12. The application prints receipts if requested.

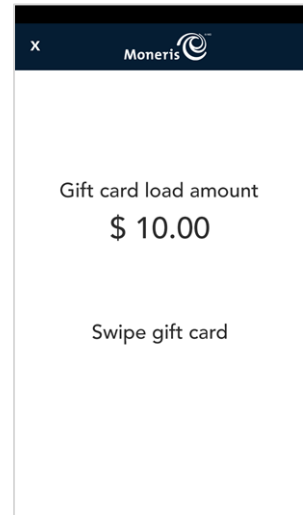
- If the customer requested a printed receipt, give them the cardholder copy.
- If you enabled merchant receipt printing, keep the merchant copy for your records.



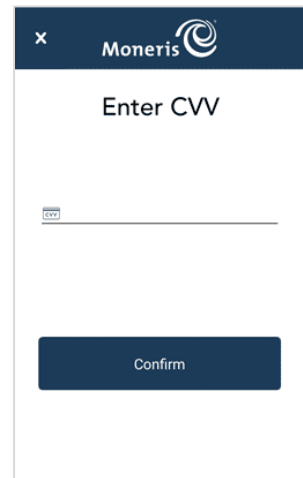
13. When the “Transaction complete, proceed to load gift card” prompt appears, tap **OK** to continue.



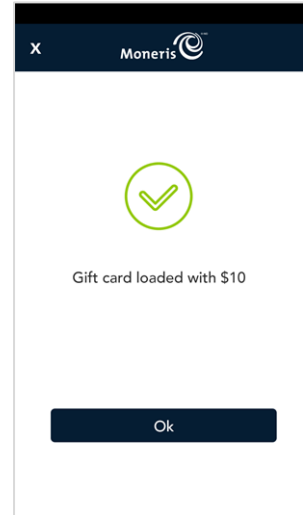
14. When the application re-displays the dollar amount to be loaded, swipe the gift card.



15. Enter the CVV from the back of the gift card, and tap **Confirm**.

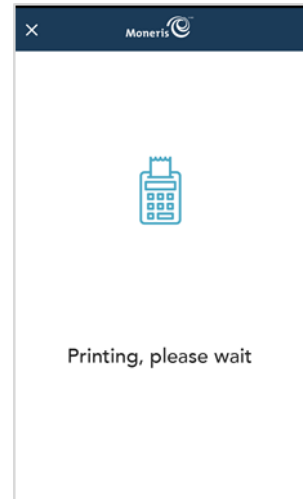


16. The application confirms that the gift card has been successfully loaded with the requested value. Tap **OK** to continue.

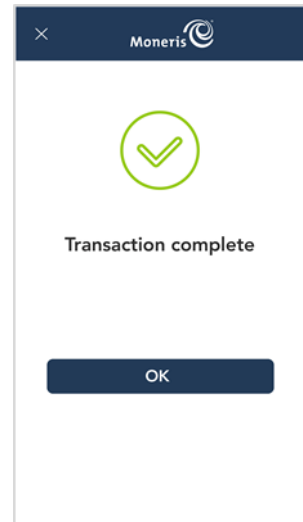


17. The application prints a gift card activation receipt showing the value on the gift card. Give the card and the receipt to the customer.

18. The application prompts you to swipe the next gift card. Repeat steps 14 to 17 until all the gift cards have been loaded.




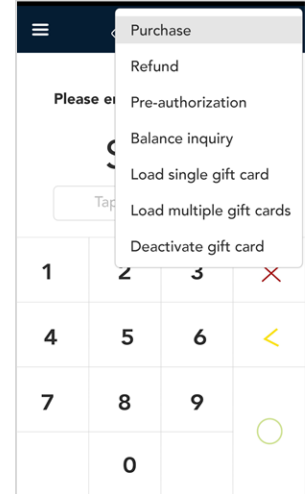
19. Once all gift cards have been loaded, the application displays the "Transaction complete" message. Tap **OK** to return to the default transaction screen.



Load multiple gift cards using cash

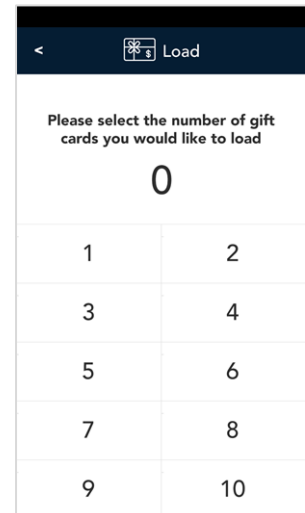
Use this procedure to load multiple gift cards with the same dollar value. For example, a customer would like to purchase 4 gift cards of \$20 each. If the customer wants several gift cards with different values, then you must load each card separately. To load single cards, refer to [Load a single gift card using cash](#) on page 33.


1. At the Purchase screen, tap the additional options  icon in the title bar, then select **Load multiple gift cards**.

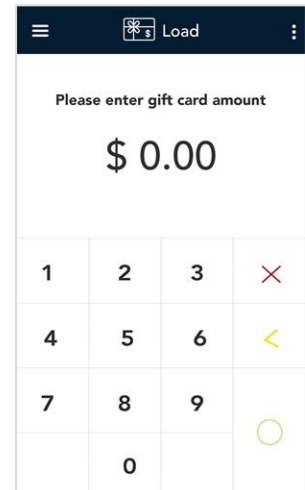


2. Ask the customer how many gift cards they would like to purchase, then tap the number of cards requested.

Note: The maximum number of gift cards you can load in one procedure is 10. If the customer would like to purchase more than 10 cards, repeat this procedure for the remaining cards.



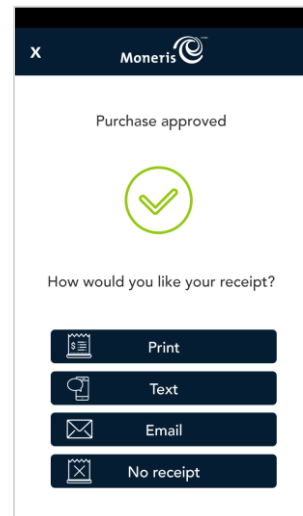
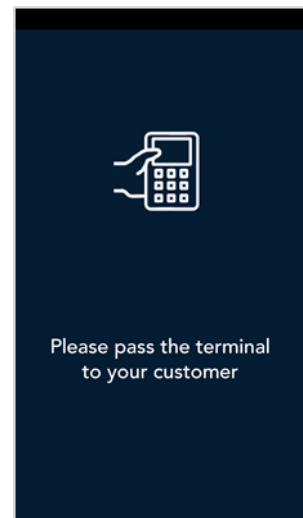
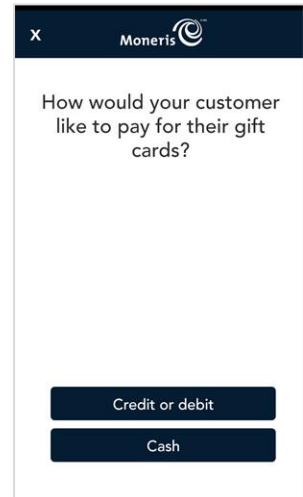
3. Ask the customer how much money they would like to load on each gift card. Enter the requested dollar amount, then tap the OK  key.



4. Ask the customer how they would like to pay for their gift cards.
 - If the customer offers cash, tap **Cash**. Go to the next step.
 - If the customer offers a credit or debit card, refer to [Load multiple gift cards using credit or debit](#) on page 37.

5. Pass the terminal to your customer so they can respond to the customer prompts.

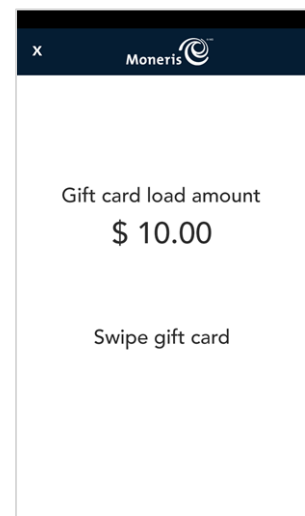
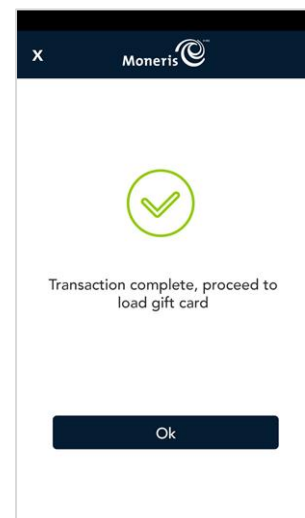
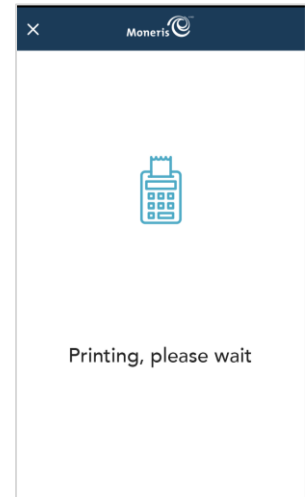
6. The “How would you like your receipt?” prompt appears, showing the customer the available options for receiving a receipt: **Print, Text, Email,** and **No Receipt**.
7. The customer selects a receipt format (or no receipt) by tapping one of the options on screen. If the customer chooses Text or Email, they are prompted to enter the appropriate information.



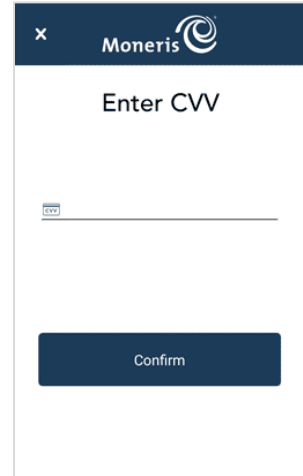
8. The customer passes the terminal back to you, as directed by the application.
9. The application prints receipts if requested.
 - If the customer requested a printed receipt, give them the customer copy.
 - If you enabled merchant receipt printing, keep the merchant copy for your records.

10. When the “Transaction complete, proceed to load gift card” prompt appears, tap **OK** to continue.

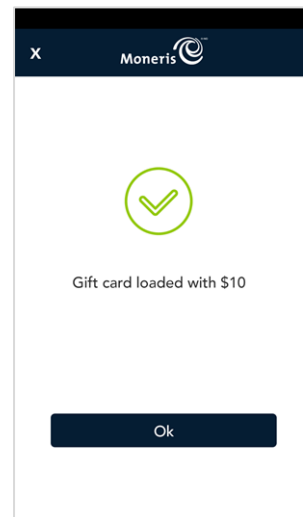
11. When the application re-displays the dollar amount to be loaded, swipe the gift card.



12. Enter the CVV from the back of the gift card, and tap **Confirm**.

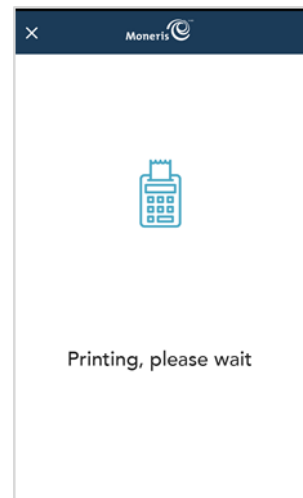


13. The application confirms that the gift card has been successfully loaded with the requested value. Tap **OK** to continue.

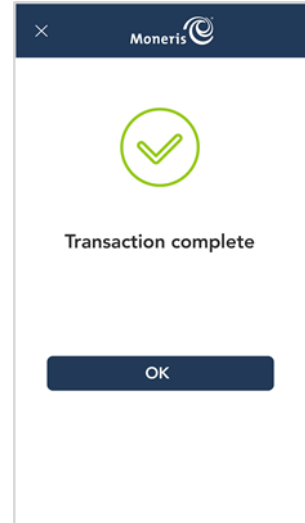


14. The application prints a gift card activation receipt showing the value on the gift card. Give the card and the receipt to the customer.

15. The application prompts you to swipe the next gift card. Repeat steps 11 to 14 until all the gift cards have been loaded.



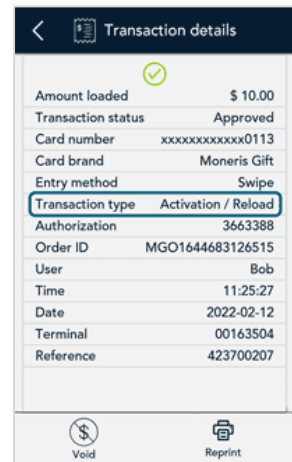
16. Once all gift cards have been loaded, the application displays the “Transaction complete” message. Tap **OK** to return to the default transaction screen.



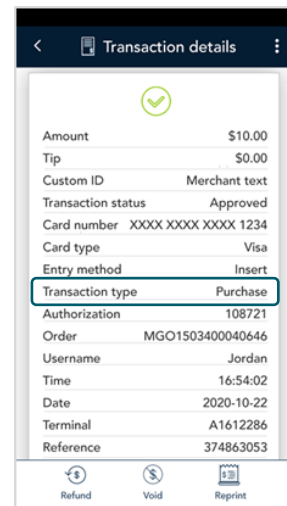
Void a gift card activation

If a customer purchases a gift card and then no longer wants it and has not used it, or you need to correct an error, you may cancel the activation as needed.

1. Void the gift card activation transaction.
 - a. On the main menu, tap **Reports**.
 - b. On the list of transactions, tap the Activation/Reload transaction you want to void.
 - c. On the transaction details screen, tap **Void** at the bottom of the screen.
 - d. Tap **OK** to confirm you want to void the transaction.
 - e. Choose a receipt format.
 - f. Tap **OK** to complete the transaction.




2. Void the payment for the gift card.
 - a. On the main menu, tap **Reports**.
 - b. On the list of transactions, tap the payment transaction (debit, credit, or cash) that was used to pay for the gift card.
 - c. On the transaction details screen, tap **Void** at the bottom of the screen.
 - d. Tap **OK** to confirm you want to void the transaction.
 - e. Follow any additional prompts on screen.
 - f. Choose a receipt format.
 - g. Tap **OK** to complete the transaction.

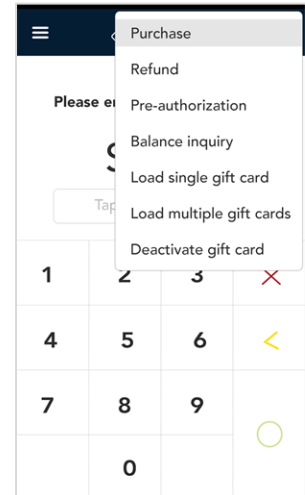


3. You may re-do the gift card activation, as needed, using the same card.

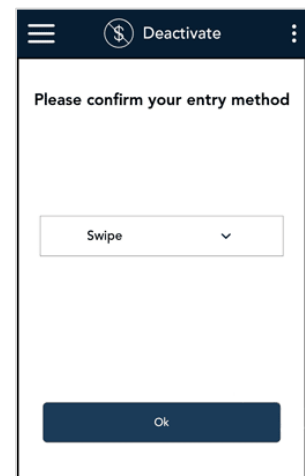
Deactivate a gift card

Follow these steps to deactivate a gift card and print a deactivation receipt. If there is a balance on the card, you can transfer the balance to another gift card.

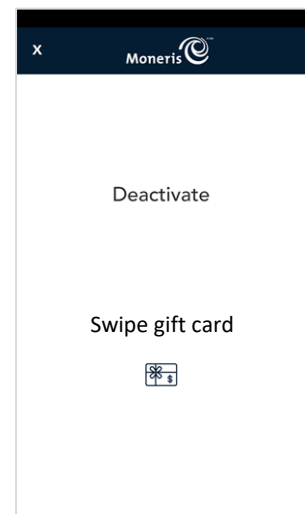
1. At the Purchase screen, tap the additional options  icon in the title bar, then select **Deactivate gift card**.



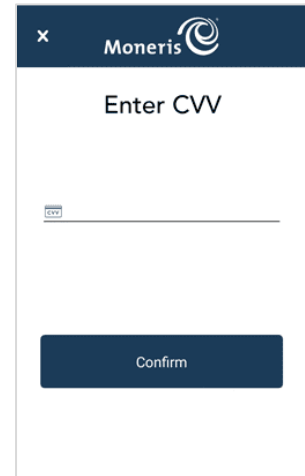
2. Select a method of entering the gift card.
 - To swipe the card (the default method), simply tap **Ok**. Go to the next step.
 - To manually enter the card number:
 - Tap the card entry field, then tap **Manual entry** from the list, then **Ok**.
 - Tap **OK** again at the bottom of the screen to continue.
 - When prompted, enter the card number and tap **Confirm**.
 - Go to step 4 (Enter the CVV).



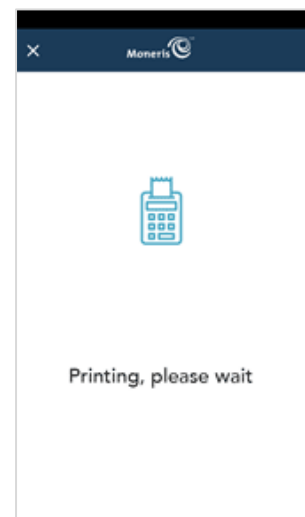
3. Swipe the gift card you want to deactivate.



4. Enter the CVV from the back of the gift card then tap **Confirm**.



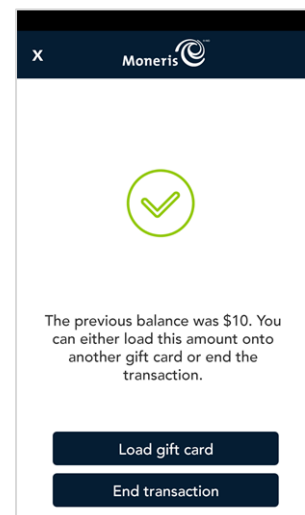
5. The application prints a deactivation receipt. Give the cardholder copy to the customer.



6. Select one of these options.

- If there was a balance on the deactivated card and the customer wants to transfer that balance to another card, tap **Load gift card**, then go to [Transfer a balance upon deactivation](#) below.
- To simply complete the deactivation, tap **End transaction**. If there was a balance, it will be deleted and cannot be recovered.

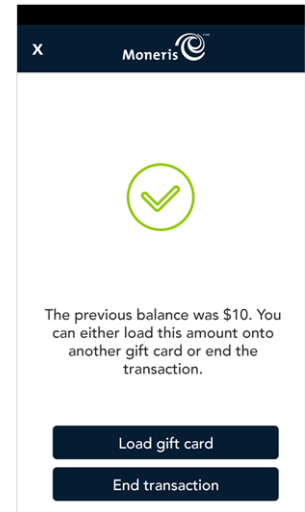
Note: *Once a card is deactivated, it cannot be used again.*



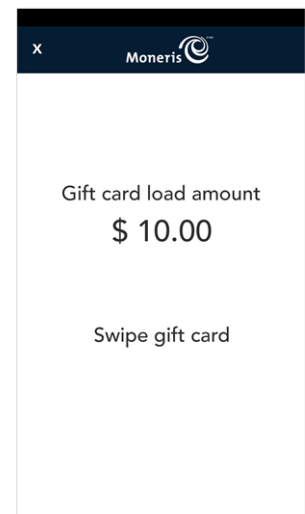
Transfer a balance upon deactivation

At the end of the deactivation procedure, the application will indicate if there is a balance on the card. You can transfer any balance to another gift card.

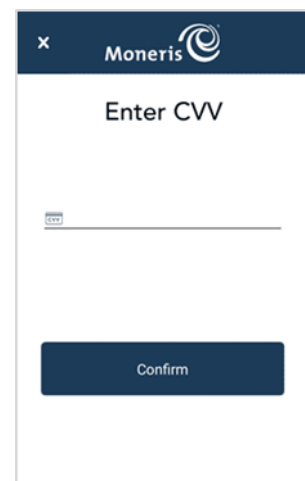
1. Tap **Load gift card** to transfer the remaining balance to another gift card.



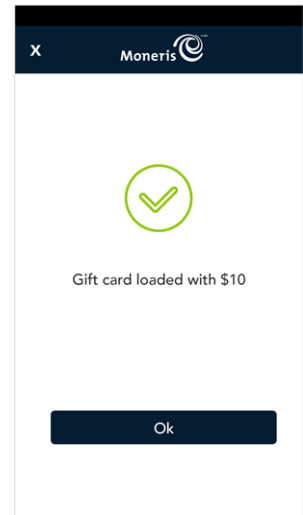
2. Swipe the gift card to which you want to transfer the balance.



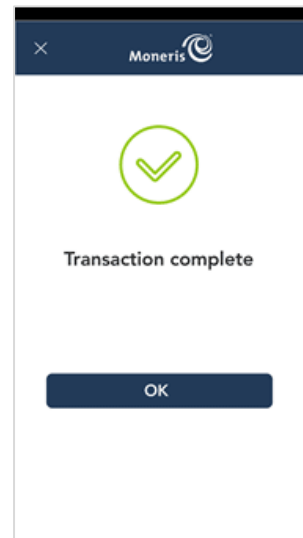
3. Enter the CVV from the back of the gift card then tap **Confirm**.



4. The application displays how much money was transferred to the other gift card.
5. Tap **Ok** to complete the transaction and print a receipt. Give the cardholder receipt to the customer with the card.



6. At the "Transaction Complete" prompt, tap **OK** to return to the default transaction screen.




Reports

Gift card transactions are included in the Moneris Go reports on your terminal.

Important: You can see all transactions only if your user role is set to “View other users in reports.” For example, if your user role is “Low,” you may see only your own transactions.

Viewing transaction details for gift cards

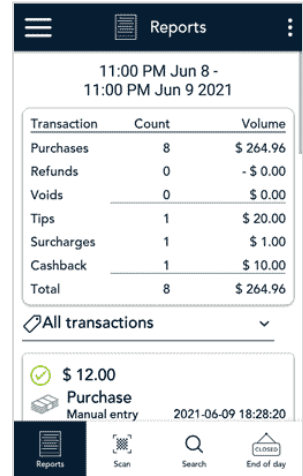
All transaction information, including gift card transactions, is available directly on the Reports screen. To view the Reports screen, tap the Main menu  icon, then tap **Reports**.

24-hour summary: Gift card transactions are included in the summary of transactions at the top of the screen. For example, the “Purchase” total for each day includes gift card purchases.


All transactions: To view individual gift card transactions, look under “All transactions”. Tap a gift card transaction to see its details. If needed, tap the **All transactions** dropdown menu to filter by transaction type and method of card entry. On the Transaction details screen, you can:

- [Refund a gift card purchase](#) (page 18)
- [Void a gift card transaction](#), if original transaction is in the same batch (page 21)
- Reprint a receipt

To learn more about the Reports screen, and how to filter transactions to match your business needs, refer to the **Using your terminal** guide (see page 2).



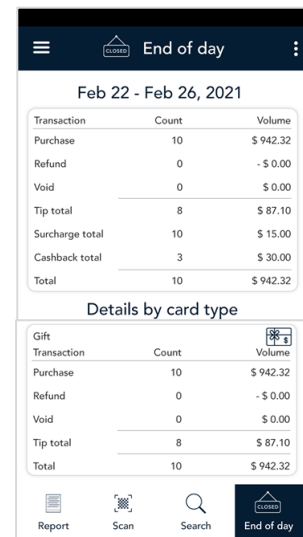
Viewing totals for gift card transactions

You can find gift card totals on the End of day screen. To view the End of day screen, tap the Main menu  icon, then tap **Reports**. At the bottom of the screen, tap **End of day**.

Under “Details by card type,” you will see totals for each card type. Look for Gift cards. The details include transaction count and transaction totals for:

- Gift card purchases
- Gift card refunds
- Gift card voids
- Gift card tips
- All gift transactions

To learn more about the End of day screen and how to filter transactions to match your business needs, refer to the **Using your terminal** guide (see page 2).



End of day process

Gift card transactions are included in the End of day report along with your other transactions. If you would like to verify your transaction totals for the day, refer to the “End of day process” in the Moneris Go **Using your terminal** guide.

Troubleshooting

Gift card error messages

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

| Error message | Problem and solution |
|--|--|
| Card disabled | The gift card you swiped has been deactivated and cannot be used. Ask the customer for another card. |
| Card not active | The gift card you entered is not active. Load the card (see Gift card administration on page 28), or ask the customer for another gift card or other form of payment. |
| Invalid CVC | The card verification value you entered is not correct. This is the 3-digit number from the back of the card. Check the number and re-enter it. |
| Invalid expiry date | The promotional gift card entered has passed its expiry date. Ask the customer for another form of payment. <i>Note: A promotional gift card is like a coupon. It is given, not sold, to customers at the merchant's discretion and can be set up to expire. An expired promotional gift card and its balance cannot be used again nor can the balance be transferred to another card.</i> |
| Refund amount greater than original | The refund amount you entered is greater than the original purchase amount. Re-try the transaction with a refund amount that is less than or equal to the original purchase. |

Merchant support

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

We're only one click away.

- Visit moneris.com/en/support/devices/monerisgo to:
 - download additional copies of this guide
 - view and download the *Using Your Terminal* and *Setting up Your Terminal* guides,
 - consult your terminal's *Online User Manual* 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 insights.moneris.com for business and payment news, trends, customer success stories, and quarterly reports & insights

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

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

Can't find what you are looking for?

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

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



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