Moneris
SOLUTIONS

Say hello to

Morris™

Moneris Online Retail Register & Inventory System

Getting Started Guide

Table of Contents

This page deliberately left blank

1.   INTRODUCTION

Thank you for selecting Morris as your retail Point of Sale (POS) solution. The purpose of this guide is to provide general information and instructions that will help you get your store set up quickly and easily, so that you can get Morris working for you as soon as possible.

Upon signing up for Morris, you should have received a **welcome** email, which contains your Moneris Merchant Number, and an **activation** e-mail, which contains your Morris Store ID and instructions on how to activate your account. **You will need to complete the activation process prior to following the setup instructions in this guide.**

If you have not yet received your welcome or activation email, please contact the Morris Support Team at 1-888-260-5494 or via e-mail at morrissupport@moneris.com.

2.   SYSTEM REQUIREMENTS[1]

2.1   Minimum Hardware Requirements

If you are not using Moneris POS hardware to access Morris, please ensure your PC meets the following minimum system requirements:

- Processor: Pentium 4.1.8G
- Hard Drive: 20GB
- RAM: 1GB
- USB Ports: 5 (printer, PIN Pad, scanner, keyboard, mouse)

2.2   Recommended Hardware Requirements

Although you can run Morris with the above minimum requirements, in order to ensure optimal Morris performance, we recommend the following hardware specifications:

- Processor: Dual Core 1.8
- Hard Drive: 40GB
- RAM: 1GB
- USB Ports: 7

2.3   Required Software

You will also need the following software to run Morris successfully on your PC:

- Internet Explorer 7.0
- Java 1.6
- Windows XP SP3

---

[1] Hardware and software requirements subject to change. Updated requirements are available at moneris.com/morris/support. Morris may not function or function properly on systems that do not meet the minimum recommended hardware specifications and the minimum recommended software specifications.

3.   ASSISTANCE AND SUPPORT

3.1   Help

Getting help while using Morris is simple. When logged in, you can access Help from any screen by pressing the help button. [?] A new window opens displaying the Help topic for the current application screen or window.

You can also access the Morris Online Help System from Morris POS. On the Cash Register view, click the **Tools** tab and then click **Help**.

3.2   Additional Documentation

Additional documentation can be accessed from the Morris Support web page at moneris.com/morris/support:

* POS Quick Reference Guide
* Merchant Admin Quick Reference Guide
* User Guide
* Hardware Quick Installation Guide
* FAQ
* Tutorial Video

3.3   Support

If you cannot find what you are looking for through Morris Help or the documentation, please contact the **Morris Support Team** at:

* **Toll-free:** 1-888-260-5494
* **E-mail:** morrissupport@moneris.com

4.   MERCHANT ADMIN FUNCTIONALITY

Once you have completed the activation process and set up your **Employee ID** and **Password**, you are ready to put Morris to work. Let's begin!

4.1   Accessing Morris

To start Morris:

* On your Internet Explorer browser, type in the following URL: **moneris.com/mymorris**.

    The Morris login screen appears.

To log in to Morris Merchant Admin:

1. Enter your **Employee ID**, **Password** and **Store ID**.

   You will see two available options: 1) access to the Merchant Admin interface (Backend) and 2) access to the point-of-sale interface (POS).

2. Click the **Backend** button.

   The Morris Merchant Admin main view appears with the following menu items along the top: Customers, Orders, Inventory, Reports, Configuration and Audit Logs.
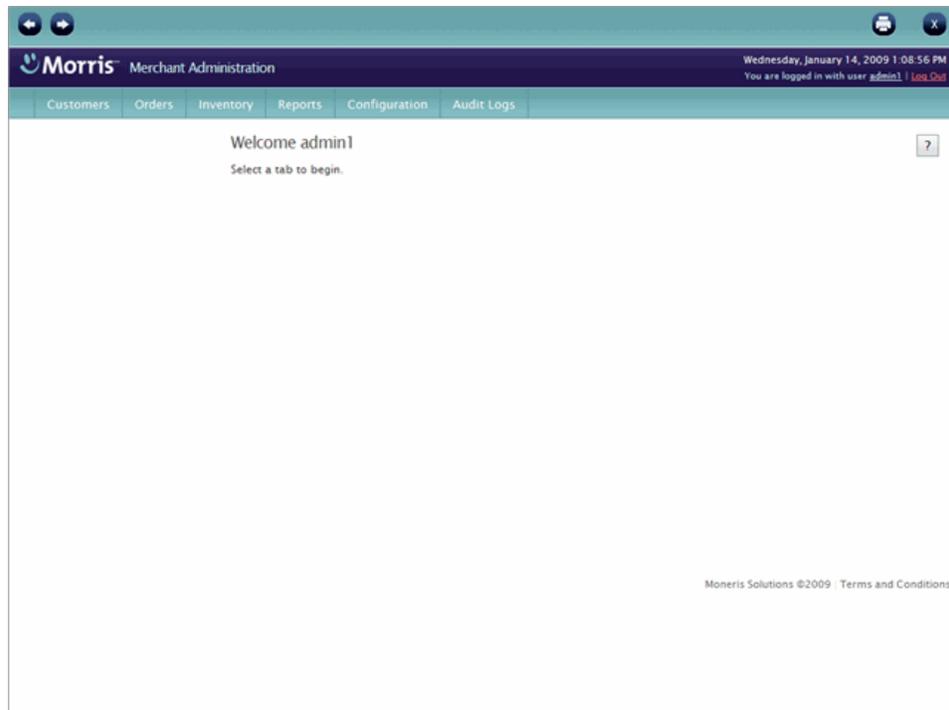
3. As a new user to Morris, start by configuring your merchant settings.

4.2   Configuring Merchant Settings

To configure merchant settings:

1.   On the main menu, click **Configuration**.

2.   On the **Configuration** menu, click **Merchant**.

The following merchant setting tabs appear: Contact Information, Receipt Options and Settings.

4.2.1   Configuring Contact Information

This is where you can enter contact information for your business. Contact information can be printed on receipts (see Configuring Receipt Options below).

To configure contact information:

1.   In the **Contact Information** tab, enter the desired contact information (required fields are marked with an asterisk *).

2.   At the bottom of the screen, click **Save**.

4.2.2   Configuring Receipt Options

This is where you can specify your desired print options, including what will appear on your receipts. You can enter a receipt message such as: "Thank you for shopping with us today. We hope to see you again soon." This message will print at the bottom of the receipt you hand to your customers.

To configure receipt options:

1. Click the **Receipt Options** tab.

2. Configure your desired print options and message.

3. At the bottom of the screen, click **Save**.

4.2.3 Configuring Batch Close and Cash Drawer Settings

The **Settings** tab allows you to set how Morris will perform a Batch Close and when you want the cash drawer to open.

To configure Batch Close and cash drawer settings:

1. Click the **Settings** tab.

2. To configure **Batch Close** options, click the radio button for the option you want to set, using the following guidelines:

   - **Manual –** The batch will not close until you initiate the close manually.
   - **Merchant Automated –** The batch will close automatically every day at a specified time set by you (EST, 24-hour clock).
   - **System Automated –** The batch will close automatically every day between 10:00 p.m. and 11:00 p.m. This is the default setting.

3. To configure **Open Cash Drawer** options, click the radio button for the option you want to set: **On demand**, **For any sale**, **For cash sale**.

4. At the bottom of the screen, click **Save**.

5. Continue by setting up your inventory.

4.3 Inventory Setup

To display the Inventory Management view, click **Inventory** on the main menu. The **Inventory** menu appears to the left of the view.

Before you begin adding products, you need to consider how you want to organize your inventory. Ensuring that your inventory is set up correctly will help you manage your inventory more efficiently in the long run. Morris uses **categories**, **brand names** and **attributes** to organize and structure your inventory in order to make it easier for you to add products, search products, set up sales and promotions, and report on inventory movement.

PREPARATION WORK:

Take a few moments to organize your products into departments or areas. Write down how you would like to organize your inventory. This will help you as you begin to input your inventory. Once you are ready, go through the following three sections for guidance on how to set up and use categories, brand names and attributes in your inventory.

NOTE: Categories, brand names, and attributes must be added through the Category Management view, Brand Name Management view, and Attribute Management view, respectively before you can assign them to individual products.

4.3.1 Managing Categories

Morris uses categories to help you organize and search products. Think of categories as the sections you would have in a product catalogue. For example, if you run an apparel store, you may want to have different categories for men's, ladies' and children's wear.

Consider the following questions about the way you currently run your business or how you would like it to run in the future:

- Do you have a way of grouping/categorizing your products?
- Do you want to track the types of products that sell quicker than others to manage your inventory more effectively?
- Do you put groups of products on sale at various times of the year? For example, "seasonal" items or "accessories"?

If you answered **yes** to any of the above questions, you should consider adding categories to your Morris inventory management. To do so, follow the steps below.

If you answered **no** to all of the above questions, move onto Managing Brand Names below.

To add a category:

1. To display the Category Management view, click **Categories** on the **Inventory** menu.
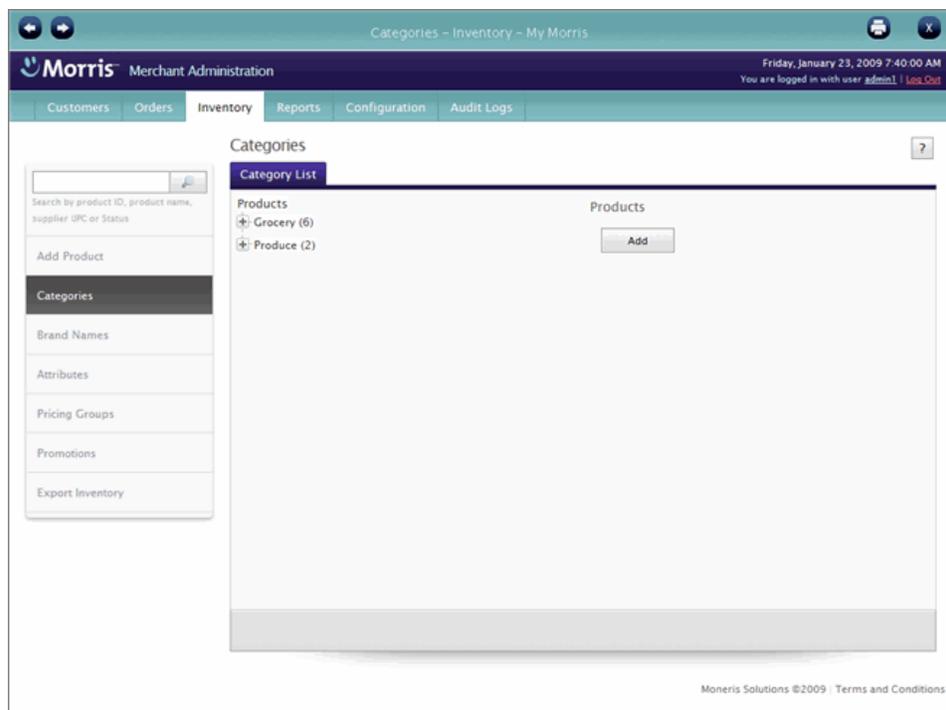
2. Click the **Add** button.

3. Under **Name**, enter an **English** name for the category (required). A **French** name is optional.

4. Under **Description**, enter an English description for the category (both **English** and **French** are optional).

5. Click **Save**.

   The category hierarchy tree is updated with the new category and options for modifying or deleting the category appear when you select it. You can now add another category or create a sub-category.

To add another category at the top of the hierarchy:

1. Click **Products** and then click the **Add** button on the right.

2. Repeat Steps 3 to 5 above.

To add a sub-category:

1. To add a new category under an existing category (i.e., a sub-category), click the desired parent category in the hierarchy tree and then click the **Add** button on the right.

2. Finish adding the category as above.

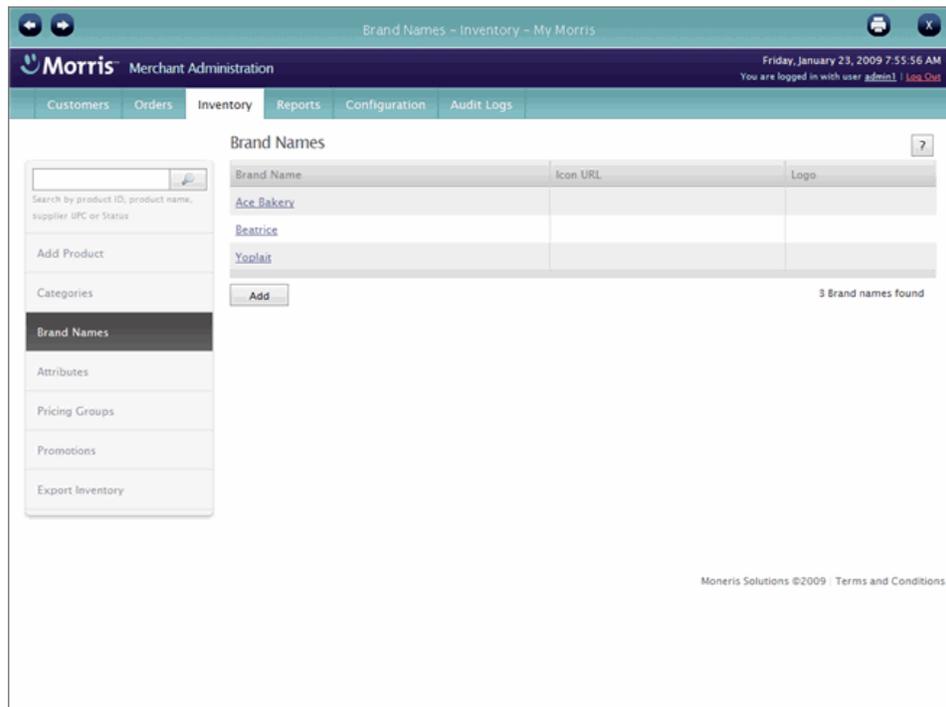### 4.3.2 Managing Brand Names

Morris understands that you may want to track your products by brand to quickly assess which brands are selling.

If this functionality appeals to your business, follow the steps below.

If this does not apply to your business, move onto Managing Attributes below.

To add a brand name:

1. To display the Brand Management view, click **Brand Names** on the **Inventory menu**.

2. Click the **Add** button.

3. Enter an **English** name for the brand (required). A **French** name is optional.

4. Enter additional details if desired (i.e., URL, logo).

5. Click **Save**.

6. Repeat steps 2 to 5 until you have added all the desired brand names.

4.3.3 Managing Attributes

Attributes enable you to further define and group products that are similar by specifying product variations. For example, if you sell a certain product that comes in red, blue and green, you can add an attribute "Colour" to the system and then assign values "Red," "Blue," and "Green" to it.

By using attributes you can reduce the amount of information you need to enter for each item, making inventory management more efficient. Updating product information in the future is also easier if products are grouped together from the beginning. Attributes are also helpful for quickly displaying similar items in one view so you can easily see how much of a product variation you have in stock.

Make note of the different attributes that apply to your inventory (e.g., size, colour, fabric type, etc). For each of the attributes, list the values that are associated with it (e.g., you may want to associate the values "Small," "Medium" and "Large" for the attribute "Size"). To proceed, follow the steps below.

If you do not feel you will benefit from attributes, move onto Adding Products to Inventory below. However, please note that products that do not have any attributes assigned to them can have only one variation.

To add an attribute:

1. To display the Attribute Management view, click **Attributes** on the **Inventory** menu.
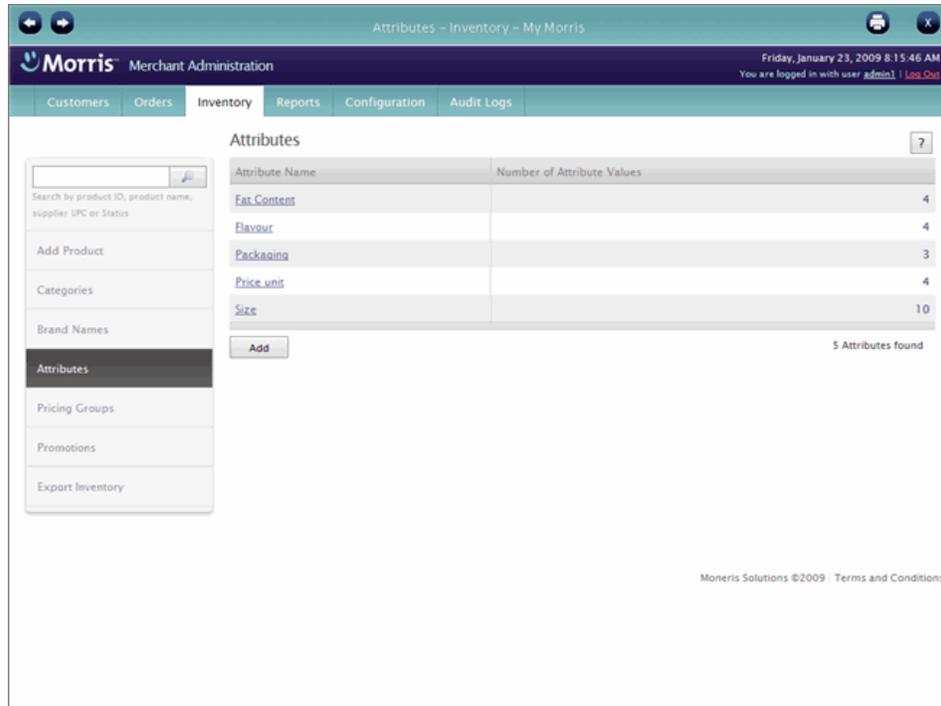
2. To add a new attribute, click the **Add** button.

   NOTE: Keep in mind that you are entering an attribute name and not a value at this point. For example, instead of entering "Blue", you should be entering "Colour."

3. Enter an **English** name for the attribute (required). A **French** name is optional.

4. Click **Save**.

5. Click the **Attribute Values** tab.

6. Click the **Add** button.

7. In the **English** textbox, enter the first value for the attribute. A **French** value is optional.

8. Click the **Save** button.

9. Click the **Close** button.

   *The new value appears in the **Available** values drop-down list.*

10. Continue adding values as needed repeating the steps above.

11. At the bottom of the view, click the **Save** button.

NOTE: Inventory management also supports pricing groups and promotions. For help, please see Morris Help and the *Morris User Guide*.

4.4 Adding Products to Inventory

Now that you have set up categories, brand names and attributes to organize your inventory according to your needs, you are ready to begin adding products to your Morris inventory.

4.4.1 Adding a New Product

To add a new product:

1. On the **Inventory** menu, click **Add Product**.

   The Create a New Product view appears.

2. In the **General Information** tab, enter the product's name and information related to pricing, tax exemptions and inventory quantities (required fields are marked with an asterisk *).

3. Click **Save**.

   The saved information appears on the Product Details view.

   NOTE: A default product variation, or *Product ID*, is automatically created for a new product when you add it to Morris. You can then add other Product IDs to the product in order to represent each of its variations (see Assigning Attributes to a Product below).

   TIP: You can enter your own existing **Product ID** in the Create a New Product view or click the **Generate** button to have Morris automatically generate one for you.

To enter additional product information:

- Enter additional product information in the remaining tabs. For detailed help, please see Morris Help and the *Morris User Guide*.

To view the product's default Product ID:

1. On the Product Details view, click the **IDs** tab.
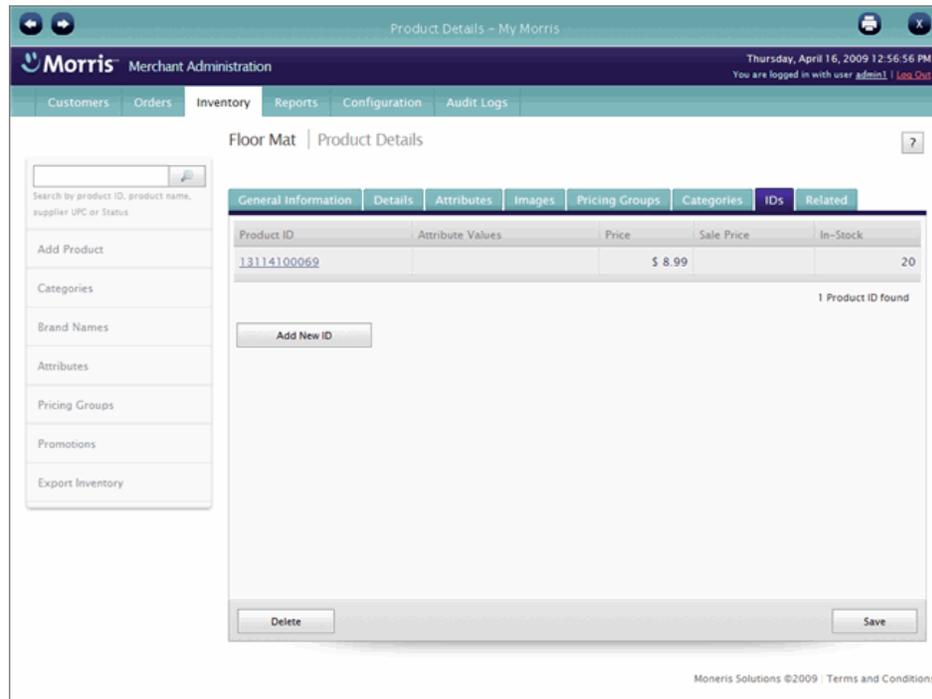
2. On the table, click the **Product ID** to display its details in the Product ID Details popup.

3. To return to the Product Details view, click **Close**.

You are now ready to assign attributes, brand names and categories to your new product by following the steps below.

4.4.2 Assigning Attributes to a Product

In order to manage a product's multiple variations in Morris (i.e., Product IDs), you must assign at least one attribute to the product and have available enough values for each assigned attribute to allow you to assign a unique value or combination of values to each of the Product IDs. If you have not added sufficient attributes to Morris, refer back to Managing Attributes above.

To assign an attribute/value to the product/Product ID:

1. On the Product Details view, click the **Attributes** tab.
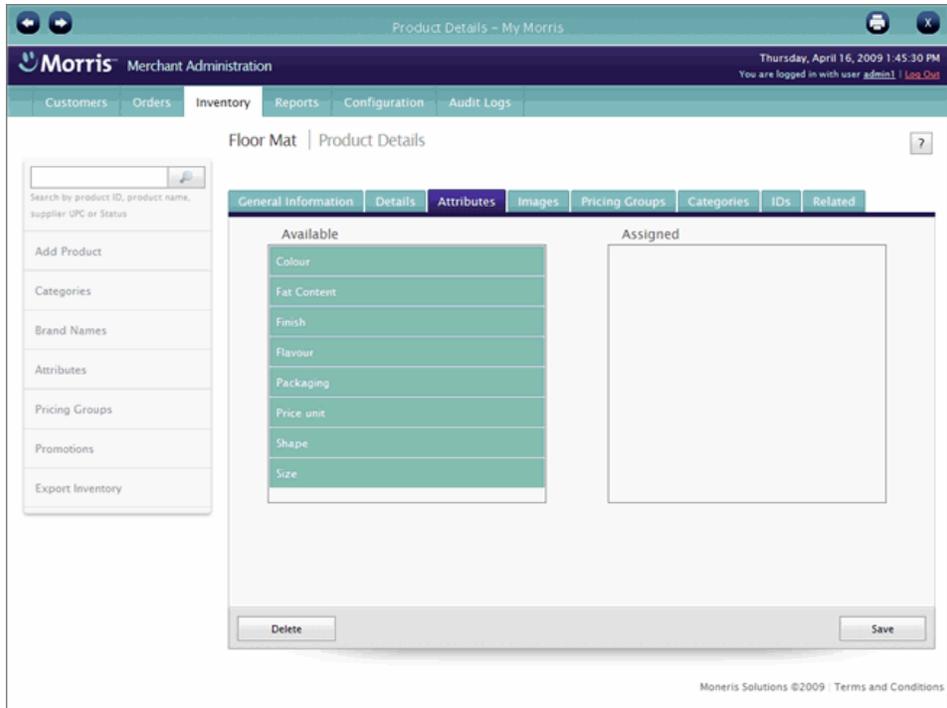
2. Select an attribute name in the **Available** list and drag-and-drop it in the **Assigned** list.

3. Continue to assign additional attribute names if needed, as above.

   NOTE: A maximum of five (5) attributes can be assigned to each product.

4. At the bottom of the view, click the **Save** button.

   The Attribute Values popup appears informing you that a default value has been assigned to the default Product ID for each of the assigned attribute names. You are prompted to confirm or change the default assignments.
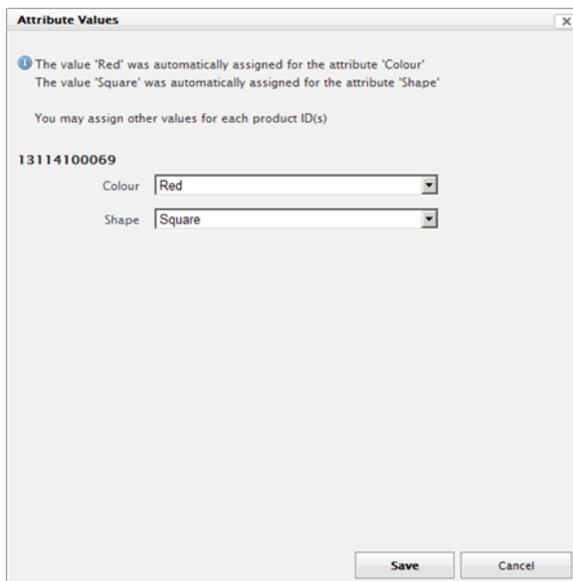
5. Do one of the following:

- To accept the default attribute values, click the **Save** button.
- To assign a different value to an attribute name, select the value from the attribute's drop-down list. Once you are done with your changes, click the **Save** button.

To assign other attribute values to the product (and add other Product IDs):

To define more variations for this product, you must add a Product ID for each variation and differentiate the Product IDs by assigning attribute values accordingly.

1. On the Product Details view, click the **IDs** tab.

2. Click the **Add New ID** button.

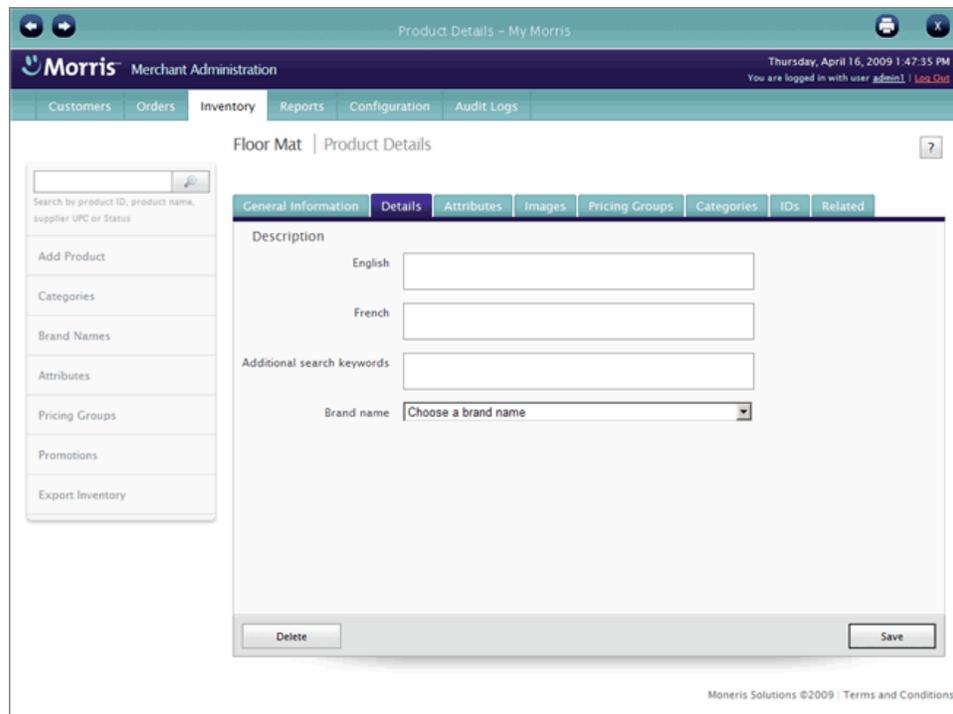   *The Create a New Product ID popup appears.*

3. Enter an existing Product ID for the product variation or click the **Generate** button to have Morris automatically generate an ID for you.

4. Enter other general information as needed.

5. Click the **Attribute Values** tab.

6. Select a value from one or more of the attribute drop-down lists.

7. Complete the other tabs as needed.

8. Click **Save**.

Now you have a clear and concise view of the different variations of this product and how much of each you have available in stock. If required, continue to add variations for this product as above.

4.4.3 Assigning Brand Names to a Product

To assign a brand name to a product:

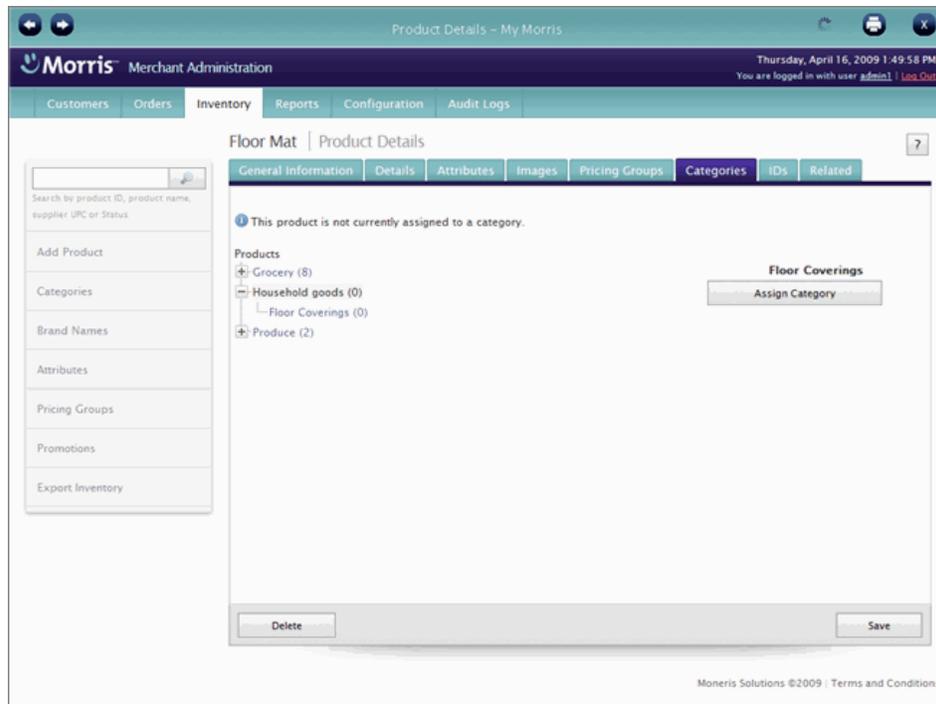1. On the Product Details view, click the **Details** tab.

2. Select the brand name from the **Brand name** drop-down list.

3. At the bottom of the view, click the **Save** button.

4.4.4 Assigning a Category to the Product

To assign a category to the product:

1. Click the **Categories** tab.

2. In the category hierarchy tree, locate the category to which you want to assign this product. Use the plus and minus buttons to expand and collapse the tree.

3. Click the category in the tree to select it.

4. Click the **Assign Category** button.

    TIP: To unassign the product from the category, click the **Remove** button.

5. At the bottom of the view, click the **Save** button.

Once you have finished adding products to your Morris inventory, click on the **Log Out** link on the application header and proceed to the next section to learn about Morris POS functionality.

5.   POS FUNCTIONALITY

Now that you have configured your basic store settings and set up your Morris inventory through Morris Merchant Admin, it's time to discover the powerful point of sale tool that lies behind Morris's smiling face. Let's begin by logging in.

5.1   Logging in

To start Morris:

* On your Internet Explorer browser, type in the following URL: **moneris.com/mymorris**.

    The Morris login screen appears.

To log in:

1. Enter your **Employee ID**, **Password** and **Store ID**.

2. Click the **POS** button.

A small Java applet is downloaded to your computer on your first login. The Morris system then goes through the initialization process for POS hardware. Once initialization is complete, the Morris Cash Register view appears.

5.2   Transacting a Sale

The Cash Register view provides access to all functions for transacting sales on Morris.

Conducting a sales transaction is as easy as 1-2-3:

1. Assigning a customer to the sale (optional)
2. Adding items to the sale
3. Checking out

1.   Assigning a Customer to a Sale (optional)

When transacting a sale, you can assign a customer in your Morris customer database to the sale. You must assign a customer to a sale *before* adding any sale items.

To assign a customer:

1.   On the Cash Register view header, click the **Anonymous Sale** button.

      The Customer Search screen appears listing customers in the database..

2.   To find the customer, enter the customer's ID, name or phone number and click the **Search** button.

3.   To assign the customer to the sale, click the corresponding **Assign** button.

      The customer is assigned to the sale and the Customer Search screen closes. The assigned customer's name is displayed on the Cash Register view header in place of the Anonymous Sale button.

If the customer is not in your customer database:

1. At the bottom of the Customer Search screen, click the **New Customer** button.

   A blank Customer Details popup appears.

2. Complete the required fields as needed (yellow highlighting).

3. At the bottom of the popup, click the **Add** button.

4. To assign the new customer to the sale, click the **Assign** button that appears at the bottom of the popup.

5. Click the **Close** button.

2. Adding Items to a Sale

There are several options for adding items to a current sale.

To add an item by scanning:

1. Scan the item to populate the Cash Register view Add Product panel with the **Product ID**.

2. In the **Qty** textbox, change quantity if needed (the default is **1**).

3. Click the **Add** button.

   The item is added to the sale and displayed in the Sale Items List.

To add an item by keying in Product ID:

1. Key in the item's **Product ID** to populate the Cash Register view Add Product panel.

2. In the **Qty** textbox, change quantity if needed (the default is **1**).

3. Click the **Add** button.

   The item is added to the sale and displayed in the Sale Items List.

To add an item by searching inventory:

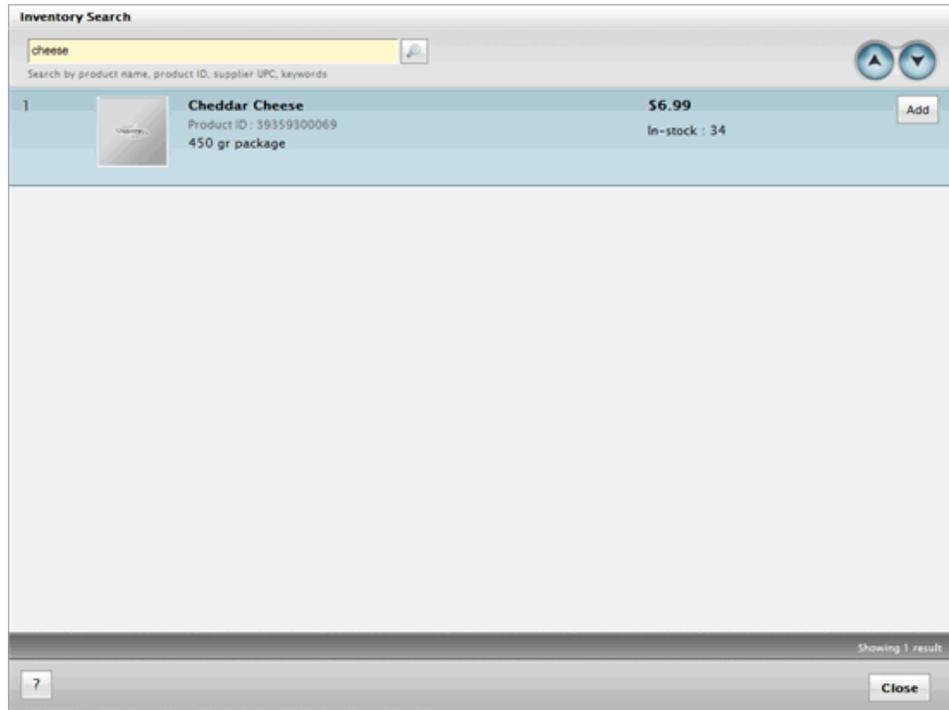1. On the Cash Register view **Transactions** button panel, click **Inventory**.

2. In the Inventory Search screen, enter Product Name, Product ID, supplier UPC or keywords and click the **Search** button.

   Search results appear on the screen.

3. On the search results list, click the product's **Add** button.

4. At the bottom of the screen, click the **Close** button.

   The Inventory Search screen closes, and the item is added to the sale and displayed in the Sale Items List.

To add a non-inventory item:

1. On the Cash Register view Add Product Panel, click the **Misc.** button.

   The Non-Inventory Product popup appears.

2. Enter **Qty**, **Product ID** and **Price**, and then click **OK**.

   The popup closes, and the item is added to the sale and displayed in the Sale Items List.

3. Checking Out

To process a cash payment:

1. On the Cash Register view **Transactions** button panel, click **Cash**.

2. Enter the amount tendered and click **OK**.

To process a debit payment:

1. On the **Transactions** button panel, click **Debit**.

2. Do one of the following:

   - **With the integrated payments options:**[2] Swipe the card on the PIN pad and complete the transaction as prompted. If you experience problems, click the **Swipe** button and re-swipe the card.
   - **With the non-integrated payments option:** Process the transaction on your terminal first as you would normally, making note of the Authorization ID. In the Debit Checkout window, enter the **Authorization ID** and click **OK**.

To process a credit card payment:

1. On the **Transactions** button panel, click **Debit**.

2. Do one of the following:

   - **With the integrated payments option:**[2] Swipe the card on the PIN pad (or manually enter card number and expiry date) and complete the transaction as prompted. If you experience problems, click the **Swipe** button and re-swipe the card. If swipe is still unsuccessful, click the **Manual Entry** button, manually enter the credit card number and expiry date, and then click **OK**.
   - **With the non-integrated payments option:** Process the transaction on your terminal first as you would normally, making note of the Authorization ID. In the Credit Card Checkout window, select the appropriate Credit Card type (e.g., Visa, MC, Amex), enter the **Authorization ID** and click **OK**.

NOTE: Other check out payment options are gift card, cheque and split tender (e.g., cash/debit, cash/Visa, Visa/MC).

---

[2] Requires credit and debit card processing and rental of POS terminal under separate agreement with Moneris. Moneris is under no obligation to approve a merchant for card processing.