



Moneris[®] payment plugin for Oracle Symphony

Reference guide



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Getting started

The Moneris payment plugin connects your Oracle Symphony solution to your Moneris payment terminal. You can start a transaction in Oracle Symphony and send it to the Moneris terminal. Your customer enters their card information and other details (for example, tipping) on the terminal which communicates with the Moneris host to process the payment. The plugin also returns transaction details for use within Oracle.

Follow each section of this reference guide to install and configure the payment plugin.

Gather required information

In order to set up the Moneris payment plugin you will need specific information. Before installing and configuring the plugin, gather the items in the table below. You may want to bring them together in a document on the computer where the Moneris payment plugin will be installed so that you can easily copy and paste the items.

Item	Company	Where to obtain the item
Store ID / Gateway Store ID	Moneris	You can find your store ID in the welcome emails from Moneris.
Merchant ID (MID)	Moneris	You can find your merchant ID in the welcome emails from Moneris.
API token / Gateway API token	Moneris	Log in to the Merchant Resource Centre (MRC) at https://www3.moneris.com/mpg/ . Click Admin , then Store settings , and look for API token. For help with these steps, refer to the <i>Merchant Resource Centre User Manual</i> on the login page.
Integration config code	Moneris	You can obtain the config code from your Client consultant.
Site ID	Oracle	This is provided by Oracle.
Terminal ID (TID)	Moneris	You can find the terminal ID on a sticker on the back or the side of the terminal.

Setting up your Moneris terminal or PINpad

In order to communicate with each other, your Moneris device and the computer on which you run Oracle Symphony must be on the same network. Review the instructions below depending on which Moneris device you are using.

Moneris Go and Go Plus terminals

Visit moneris.com/en/support to locate the support page for your terminal.

- Refer to the **Online user manual**, the **Setting up your terminal** guide (PDF), or the **Setting up your terminal** video to install the paper roll, charge the battery, and walk through the initial setup.
- Refer to the **Moneris Go Integrated Getting Started Guide** to place your terminal into integrated mode.

Moneris P400 PINpad

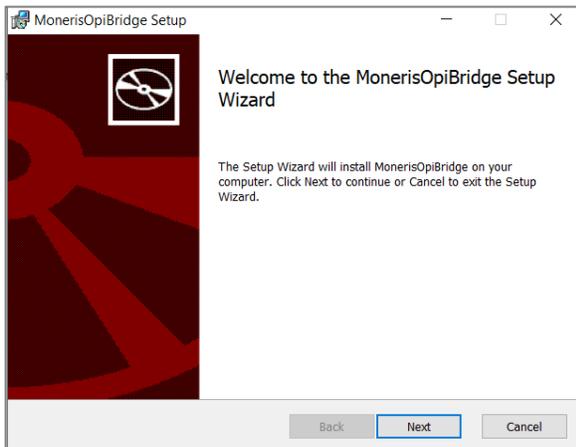
Refer to the P400 **Getting Started Guide** (provided by your Moneris client consultant) to connect the PINpad to your Oracle Symphony computer and to configure the PINpad.

Installing and configuring the Moneris payment plugin

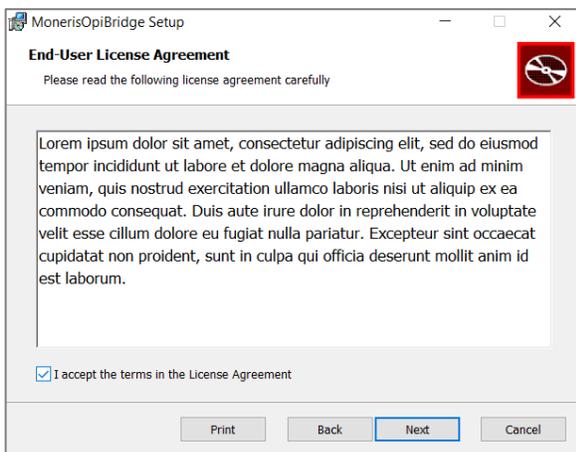
You must download and install the plugin on a Windows computer within the local infrastructure where you run Oracle Symphony. The plugin and Symphony must be connected via your TCP/IP network.

Download and install the plugin

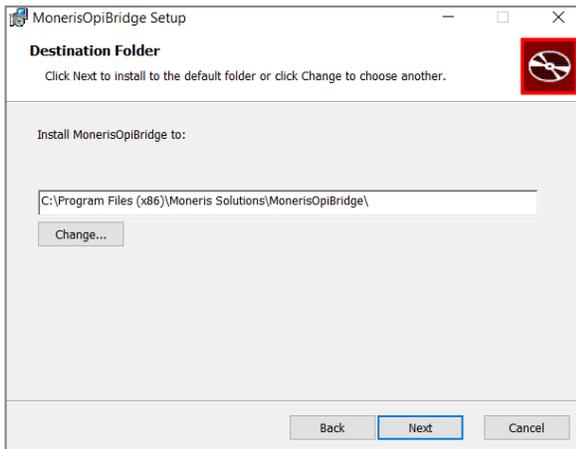
1. The installation file will be provided to you by Moneris.
2. Download the installer file to a Windows computer/server that is connected to your TCP/IP network.
3. Double click the .MSI installer file to start the installation.
4. At the welcome screen, click **Next**.



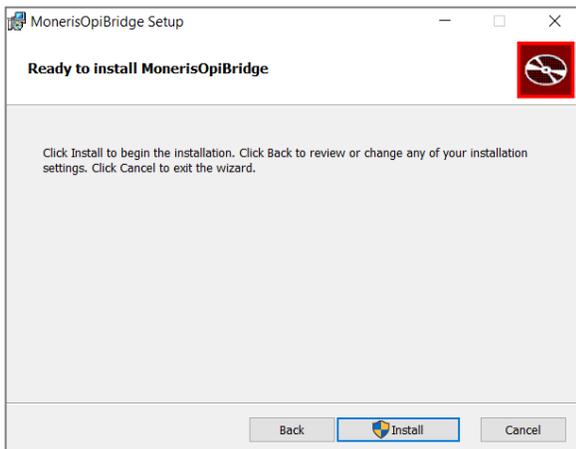
5. Click the checkbox to accept the license agreement, then click **Next**.



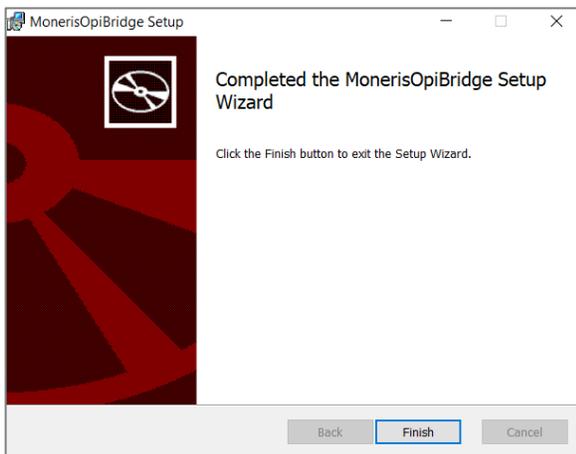
6. At the Destination folder screen, modify the destination folder if needed, then click **Next**.



7. Click **Install** and wait while the plugin installs itself.



8. At the "Completed" screen, click **Finish**.



Edit the appsettings.json file

1. Before editing the JSON file, ensure that you or your site administrator has created and installed an SSL certificate for this application to ensure secure communication.
2. Use Windows File Explorer to navigate to the folder where you installed the plugin.
3. Locate the **appsettings.json** file and open it with your preferred text editor.
4. Configure the following fields:

Field	Values
AllowedHosts	Enter the IP addresses allowed to listen for the services in this application
Kestrel	URL: Enter the URL that will be used to access the middleware application Certificate: <ul style="list-style-type: none">• Path: Enter the file path of the SSL certificate• Password: Enter the password to access the SSL certificate

5. Save the file.

Restart the Windows service

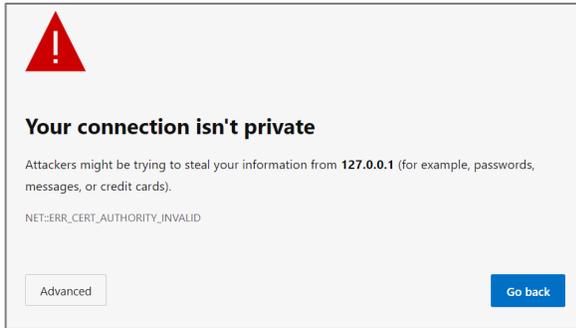
After editing the appsettings.json file, restart the OPI/SPI connector service by following these steps.

1. Press the **Windows key** on your keyboard.
2. In the search box, type in “services” and press **Enter** on your keyboard to display the services app.
3. Double click on **Services**.
4. Scroll down the list to locate the service named “Moneris OPI/SPI Core Service”.
5. Click on the **Restart** icon in the task bar to restart the service. You can also right-click on the service and choose Restart.
6. After restarting the service successfully, proceed to the next section.

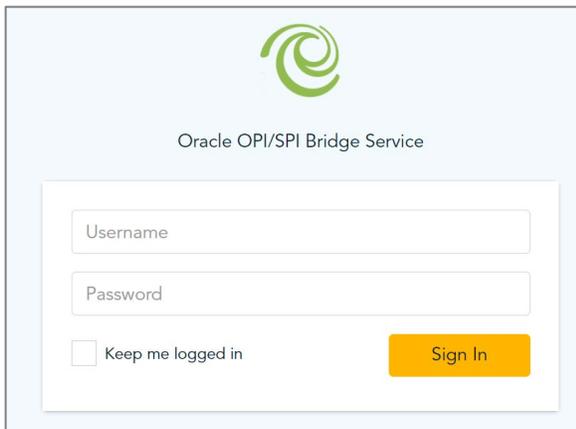
Launch the plugin's web interface

The plugin requires TCP/IP connectivity and runs on local host.

1. Open a web browser and go to <https://127.0.0.1:8991/Dashboard>.
2. If you receive a security warning, check the values in the Kestrel field in the section above.



3. When the OPI/SPI Bridge Service appears, enter your credentials. For username, enter **admin**. For password, enter **admin**. Click **Sign In**.



4. The Home screen appears.



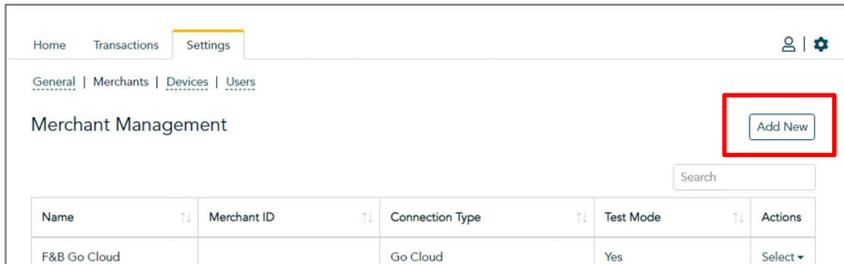
Configure the plugin

After signing in, follow these steps to configure the plugin to connect Symphony with your Moneris payment terminal.

1. On the Home page, click the **settings icon**, then click **Merchant Management**.



2. On the Merchant Management screen, click **Add new** to create a new merchant profile.



3. On the new merchant screen, first select the Connection Type:
 - If you are using the Moneris Go terminal, select **Go Cloud**.
 - If you are using the Moneris P400 PINpad, select **DHC**.

A screenshot of the 'Add New' merchant form. It contains several input fields: 'Connection Type' (a dropdown menu with 'Go Cloud' selected), 'Name', 'Store ID', 'Description', 'Merchant ID', 'API Token', 'Integration Config Code', 'Merchant Currency' (a dropdown menu with 'USD' selected), 'Site ID', and a 'Test Mode' checkbox. A 'Back' link is in the bottom left, and a yellow 'Save' button is in the bottom right.

- a. Fill in the remaining fields. Refer to the table below for help with each field.

Fields for Go Cloud

Field name	What to enter
Store ID	Enter your Moneris Store ID. This can be found in your welcome email from Moneris.
Merchant ID	Enter your Moneris merchant ID. This can be found in your welcome email from Moneris.
API Token	Enter your Moneris API token. To find your API token, log in to the Merchant Resource Centre (MRC) at https://www3.moneris.com/mpg/ . Click Admin , then Store settings , and look for API token. For help with these steps, refer to the Merchant Resource Centre User Manual on the login page.
Integration Config Code	Enter the Moneris integration configuration code. You can obtain it from your Client Integration consultant.
Merchant currency	Enter the currency you want your transactions to be settled in (USD or CAD). Note: <i>USD settlement is not available on all devices. Contact your Moneris client consultant for more information.</i>
Site ID	Enter your Oracle site ID.
Test mode	<ul style="list-style-type: none"> • QA. Check this box to send requests to the QA environment. • Production. Leave this box unchecked to send requests to the production environment.
Name	Enter a name for this merchant profile.
Description	Enter a description of this profile. This field is optional.

Fields for DHC

Field name	What to enter
Merchant ID	Enter your Moneris merchant ID. This can be found in your welcome email from Moneris.
Merchant currency	Enter the currency you want your transactions to be settled in (USD or CAD). Note: <i>USD settlement is not available on all devices. Contact your Moneris client consultant for more information.</i>
Site ID	Enter your Oracle site ID.
Gateway Store ID	Enter your Moneris Store ID. This can be found in your welcome email from Moneris.
Gateway API Token	Enter your Moneris API token. To find your API token, log in to the Merchant Resource Centre (MRC) at https://www3.moneris.com/mpg/ . Click Admin , then Store settings , and look for API token. For help with these steps, refer to the Merchant Resource Centre User Manual on the login page.
Test mode	<ul style="list-style-type: none"> • QA. Check this box to send requests to the QA environment. • Production. Leave this box unchecked to send requests to the production environment.

Field name	What to enter
Name	Enter a name for this merchant profile.
Merchant Display Name	Enter the name of your business that will be printed on transaction receipts.
Merchant Address	Enter your business address.
Description	Enter a description of this profile. This field is optional.

- After completing the required fields, click **Save**. The Merchant Management screen re-appears.
 - The new merchant profile you just added should be listed.
 - Under Actions, click **Manage** to change it, or click **Delete** to remove it.

Name	Merchant ID	Connection Type	Test Mode	Actions
F&B Go Cloud	0030128924942	Go Cloud	Yes	Select ▾
DHC	0030128925436	DHC	Yes	Manage Delete

- Under Settings, click **Devices**, then click **Add New**.

Home Transactions Settings

General Merchants Devices Users

Device Management

Add New

Name	Merchant	Terminal ID	Workstation ID	Created By	Actions

- On the Add new device screen, complete the fields to add your Moneris terminal.

General Merchants Devices Users

Add New

Merchant Account: Merchant Account ▾ Name: Name

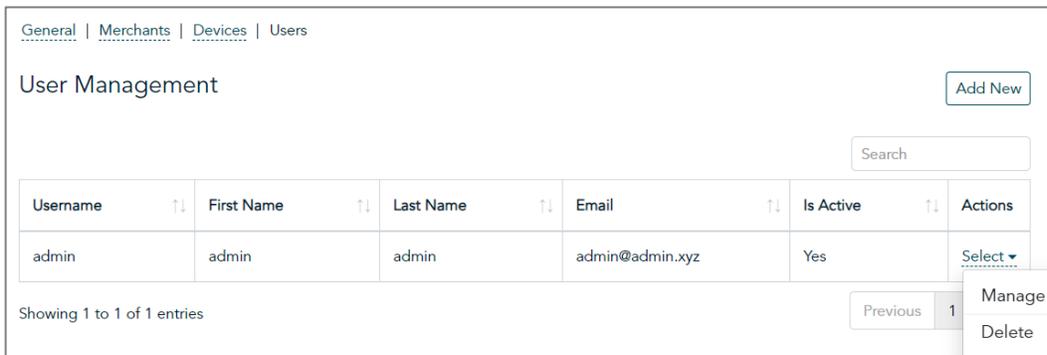
Terminal ID: Terminal ID Description: Description

Workstation ID: Workstation ID

Back Save

Field name	What to enter
Merchant account	Select the merchant profile you created in step 3.
Terminal ID	You can find the terminal ID on a sticker on the back or the side of the terminal.
Workstation ID	Enter your Symphony workstation ID.
Name	Enter a name for this device profile. Think of a meaningful name (for example, Upstairs bar terminal) or use the model number (for example, PAX A920) to distinguish one terminal from another if you have different models.
Description	Enter an optional description for this device.

7. After completing the device fields, click **Save**. The Device Management screen reappears.
 - The new device profile you just added should be listed.
 - Under Actions, click **Manage** to change it, or click **Delete** to remove it.
8. Under Settings, click **Users**. You should see the admin user.



- a. Under Actions, click **Select**, then **Manage** to manage the admin user profile.
- b. When the Edit admin screen appears, enter the first name, last name, and email address of the administrator.
- c. Use the **Password** and **Confirm Password** fields to change the admin password from the default password.
- d. In the field called “Your Current Password,” enter your **current password (not the new one)**. You will not be able to save any changes without your password.
- e. Click **Save**.

Edit admin

Username	<input type="text" value="admin"/>	First Name	<input type="text" value="admin"/>
Password	<input type="password" value="Password"/>	Last Name	<input type="text" value="admin"/>
Confirm Password	<input type="password" value="Confirm Password"/>	Email	<input type="text" value="admin@admin.xyz"/>
		Permissions	
		<input type="checkbox"/> General Settings × <input type="checkbox"/> Merchant Management ×	
		<input type="checkbox"/> Device Management × <input type="checkbox"/> User Management ×	
		<input type="checkbox"/> Transaction Log ×	
		<input checked="" type="checkbox"/> Is Active	
		Your Current Password	
		<input type="password" value="Your Current Password"/>	

[Back](#)

9. Click **Users** to return to the summary of users.

[General](#) | [Merchants](#) | [Devices](#) | [Users](#)

User Management

Username	First Name	Last Name	Email	Is Active	Actions
admin	admin	admin	admin@admin.xyz	Yes	Select

- To add a new user, click **Add New**.
- To modify a user, click **Select** in the appropriate row, then click **Manage**.
- To delete a user, click **Select** in the appropriate row, then click **Delete**.

Merchant support

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

For general help

Call Moneris Customer Care toll-free at **1-866-319-7450**. Available 24/7. 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**.

For help specifically with the Moneris payment plugin

Contact Abbot Kinney at **1-310-906-0826** or by email at **moneris_enterprise_support@abbotkinney.agency**. Available 24/7.

Other resources

- 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



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