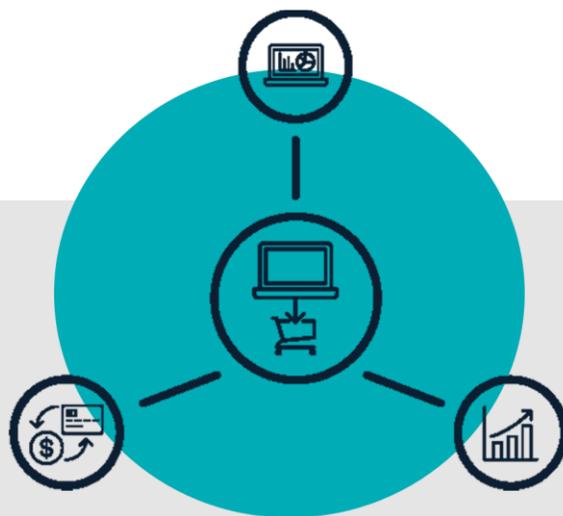




Configuring the Moneris Checkout plug-in for Salesforce® B2C Commerce Reference Guide





Need help?

Web: www.moneris.com/en/support/products/salesforce-b2c-commerce

Email: is.operations@moneris.com

Record your Moneris® merchant ID here:

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Getting started

In this section, we go over everything you need to know to link your Moneris Checkout (MCO) profile to your Salesforce B2C Commerce Cloud solution to enable Moneris payments.

Configuration steps

The overview setup steps below describe what you need to do to link your Moneris Checkout (MCO) profile to your Salesforce B2C Commerce Cloud solution to enable Moneris payments.

- 1** Contact us so that we can establish your Moneris Gateway merchant account (visit <https://go.moneris.com/offer>).

Note: We will assign you with a **Moneris merchant ID** (13 digits) and a **Moneris store ID**, to which you will be instructed to refer in the next few steps.
- 2** Contact Salesforce so that they can set up your B2B Cloud Commerce account (visit <https://www.salesforce.com/products/commerce-cloud/ecommerce/>).

Note: Salesforce will assist you with your Business Manager and Store Front Reference Architecture (SFRA) setup¹ and assign you a **Commerce Cloud Site ID**. You will be instructed to refer to this ID in the next few steps.
- 3** Install the Moneris LINK cartridge (visit <https://github.com/mondg/SFCC#cartridge>, and follow the installation instructions).

Note: This cartridge facilitates a Moneris Gateway integration with Salesforce Commerce Cloud (SFCC) enabling an SFCC storefront to utilize our Moneris payment processing services. The cartridge supports SFRA version 6.1.0 or higher.
- 4** Activate your Moneris Merchant Resource Center store (see [Activating your Moneris Merchant Resource Center store](#) on page 6).
- 5** Log into your Merchant Resource Center store (see [Logging into your Moneris Merchant Resource Center store](#) on page 8).
- 6** Obtain your Moneris **API token** and Moneris **Checkout ID** (see [Obtaining your Moneris API token and Moneris Checkout ID](#) on page 9).
- 7** Log into the Salesforce B2C Commerce Cloud Business Manager, and configure the Site Preferences values pertaining to Moneris (see [Configuring Site Preferences with your Moneris identifiers](#) on page 11).

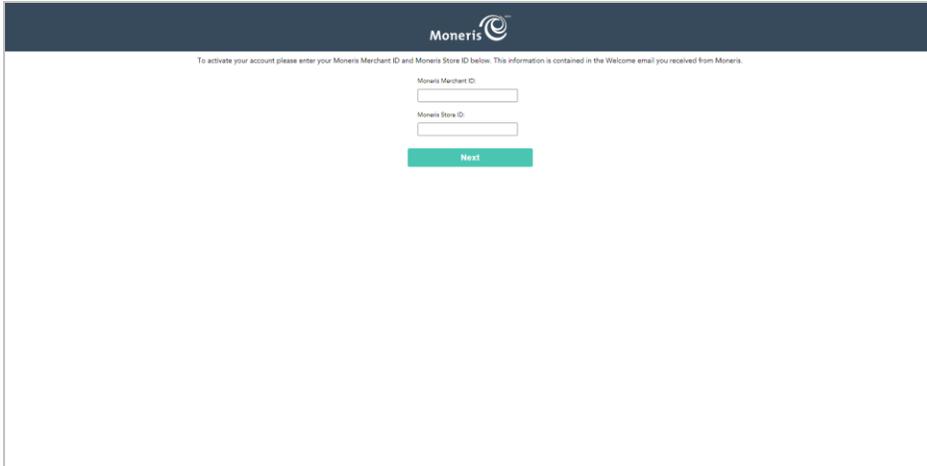
¹ For more about Business Manager and SFRA, visit <https://trailhead.salesforce.com/content/learn/modules/cc-digital-for-developers/cc-business-manager>.

Activating your Moneris Merchant Resource Center store

Important! Please ensure that you review the setup overview as outlined in [Configuration steps \(page 5\)](#).

When you are ready, follow the steps below to activate your Moneris Merchant Resource Center (Gateway) store and create the login credentials that you will use to access the store.

1. Visit moneris.com/activate to start on the Moneris Merchant Resource Center store activation page (shown below).



2. Enter your Moneris Gateway credentials (refer to the "Your Moneris Order is Ready" email for these credentials).

- a. In the **Moneris Merchant ID** field, enter your 13-digit Moneris merchant ID.
- b. In the **Moneris Store ID** field, enter your Moneris store ID.
- c. Click on the **Next** button.

3. Enter your name information, and create your login password:

- a. In the **First Name** field, enter your first name.
- b. In the **Last Name** field, enter your surname.
- c. In the **Username** field, enter the username that you want to use for your login session.
- d. In the **Password** field, enter your login password.

Note: Password fields are case sensitive. The password must include 7-16 characters; start with a letter; and contain a number. You must change your password periodically. If your password expires, you will be prompted to create a new password.

- e. In the **Confirm Password** field, re-enter your login password.
- f. Click on the **Next** button.

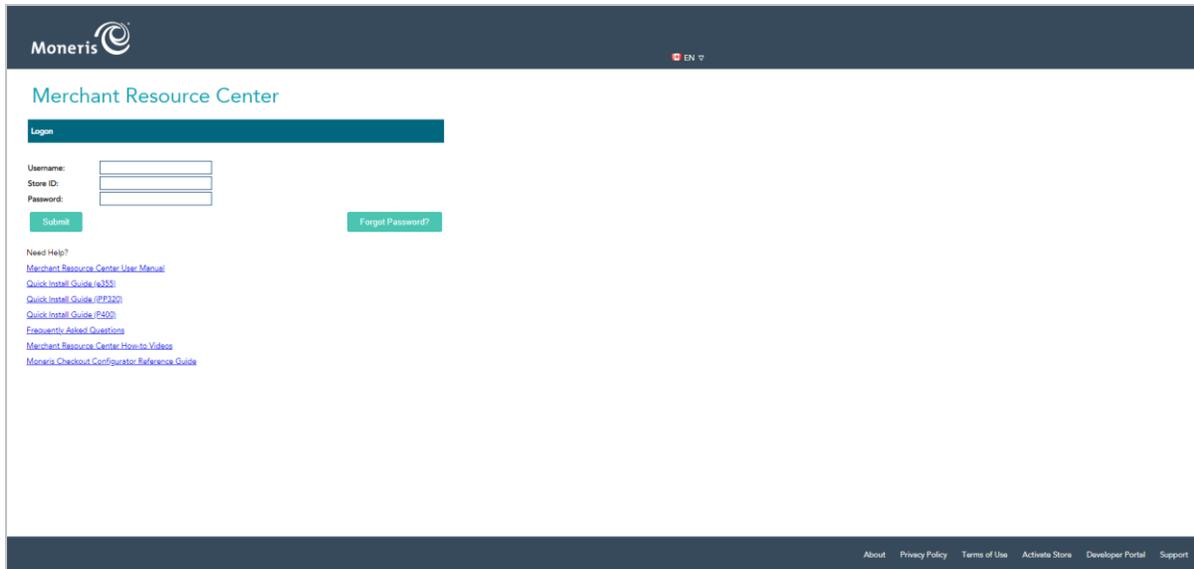
4. Set up your security questions and email:
 - a. From each of the three **Question/Answer #** drop-down lists, select a question, and enter an answer in the corresponding field.
***Note:** Periodically you will be prompted to answer one of the questions when logging in.*
 - b. In the **Email Address** field, enter a valid email address.
***Note:** If you ever need to have your password reset, a temporary password will be sent to this address.*
 - c. Click on the **Complete Activation** button.
5. When the "Congratulations!" response displays, it means your Merchant Resource Center store is activated.
6. Proceed to the next configuration step (see [Configuration steps](#) on page 5).

Logging into your Moneris Merchant Resource Center store

Important! Please ensure that you review the setup overview as outlined in [Configuration steps](#) (page 5).

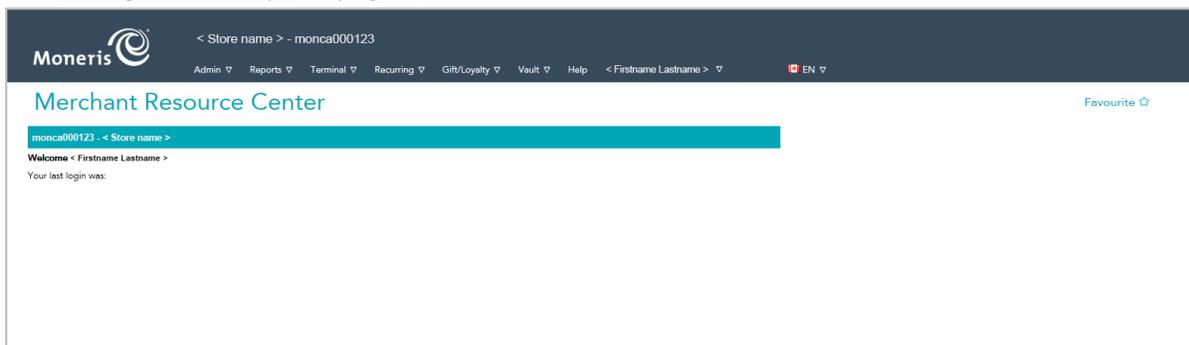
When you are ready, follow the steps below to log into your Moneris Merchant Resource Center (Gateway) store.

1. Visit <https://www3.moneris.com/mpg> to start on the "Merchant Resource Center" login page (shown below).



The screenshot shows the Moneris Merchant Resource Center login page. At the top left is the Moneris logo. The page title is "Merchant Resource Center". Below the title is a "Logon" section with a dark blue header. Underneath, there are three input fields labeled "Username:", "Store ID:", and "Password:". To the right of the "Password:" field is a "Forgot Password?" link. Below the input fields are two buttons: "Submit" and "Forgot Password?". Under the "Logon" section, there is a "Need Help?" section with several links: "Merchant Resource Center User Manual", "Quick Install Guide (v335)", "Quick Install Guide (FP320)", "Quick Install Guide (P420)", "Frequently Asked Questions", "Merchant Resource Center How-to Videos", and "Moneris Checkout Configurator Reference Guide". At the bottom of the page, there is a footer with links: "About", "Privacy Policy", "Terms of Use", "Activate Store", "Developer Portal", and "Support".

2. Enter your Merchant Resource Center (Gateway) credentials in the "Logon" fields:²
 - a. In the **Username** field, enter your username.
 - b. In the **Store ID** field, enter your store ID.
 - c. In the **Password** field, enter your password.
 - d. Click on the **Submit** button.
3. When the homepage displays (shown below), proceed to the next configuration step (see [Configuration steps](#) on page 5).



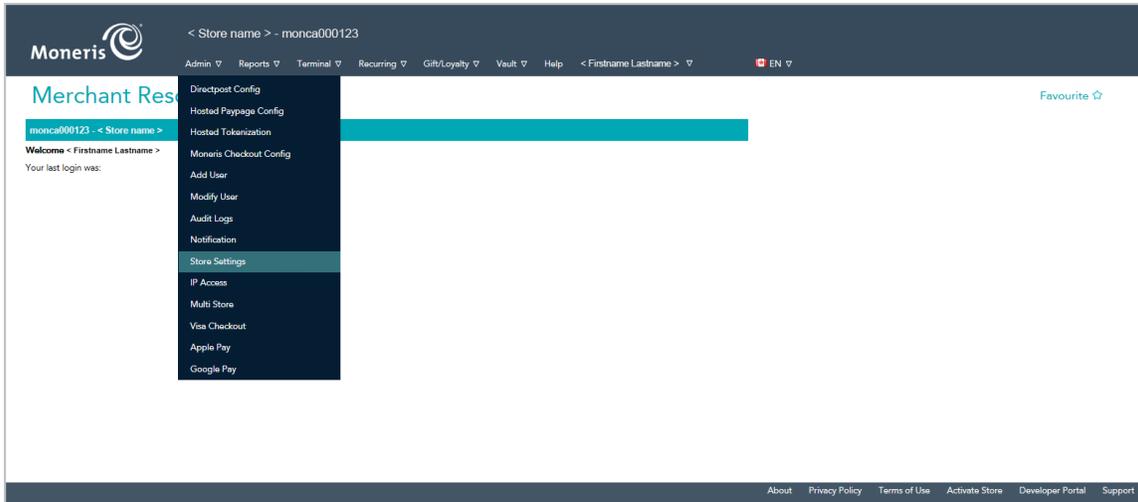
The screenshot shows the Moneris Merchant Resource Center homepage. At the top left is the Moneris logo. The page title is "Merchant Resource Center". Below the title is a dark blue header with the text "< Store name > - monca000123". Below the header, there is a navigation menu with links: "Admin", "Reports", "Terminal", "Recurring", "Gift/Loyalty", "Vault", "Help", and "< Firstname Lastname >". To the right of the navigation menu is a "Favourite" link with a star icon. Below the navigation menu, there is a "Welcome < Firstname Lastname >" message and a "Your last login was:" message. Below the "Your last login was:" message, there is a large empty space.

² You established these credentials when you activated your store (see [Activating your Moneris Merchant Resource Center store](#) on page 6).

Obtaining your Moneris API token and Moneris Checkout ID

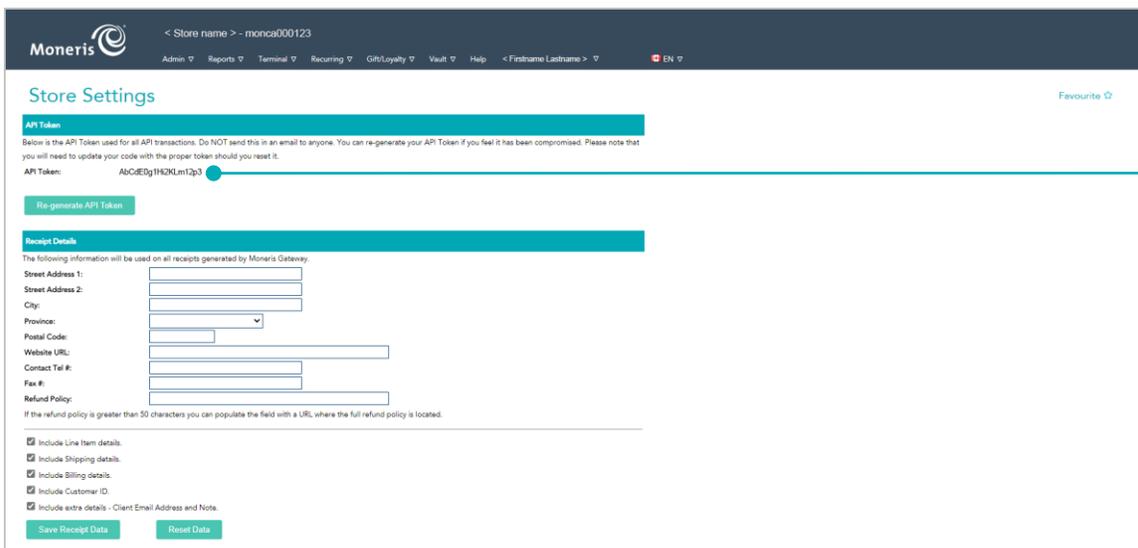
Follow the steps below to obtain your Moneris API token and Moneris Checkout ID.

1. Log into your Moneris Merchant Resource Center store (see [Logging into your Moneris Merchant Resource Center store](#) on page 8).
2. Obtain your Moneris API token by doing the following:
 - a. In the menu bar, click on **Admin > Store Settings** (shown below).



- b. When the "Store Settings" page displays (shown below), locate your token in the "API Token" area.

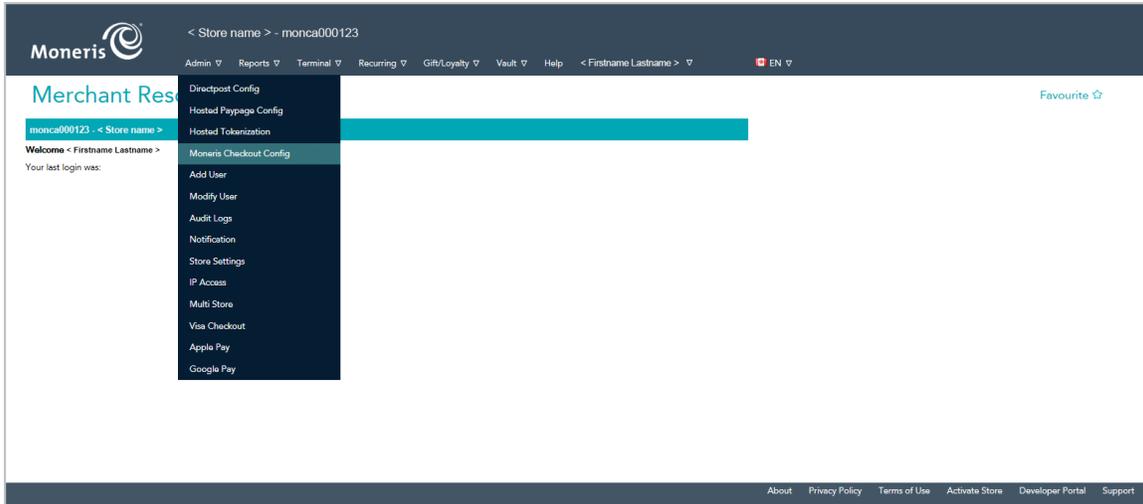
Important! The Moneris API token will be used to process your ecommerce financial transactions through our Moneris Gateway. Do not share this token or send it in an email.



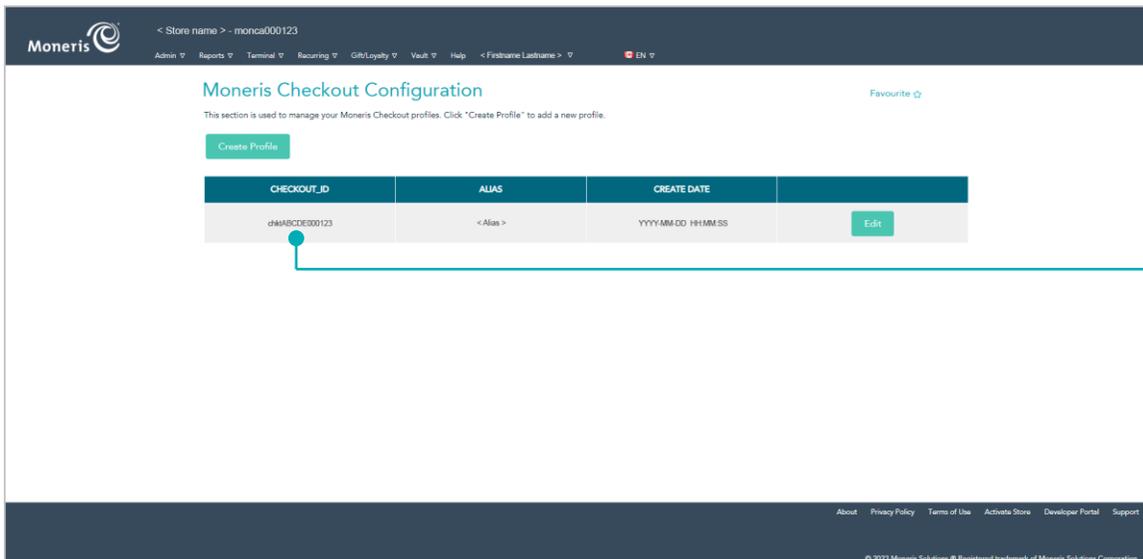
API TOKEN

3. Obtain your Moneris Checkout ID by doing the following:

a. In the menu bar, click on **Admin > Moneris Checkout Config** (shown below).



b. When the "Moneris Checkout Configuration" page displays (shown below), locate your Moneris Checkout ID under the "CHECKOUT_ID" header.



4. When you are finished, proceed to the next configuration step (see [Configuration steps](#) on page 5).

Note: If you want to end your Merchant Resource Center login session, go to the menu bar, and click on **Firstname Lastname > Logout**.

Configuring Site Preferences with your Moneris identifiers

Follow the steps below configure Site Preferences with your Moneris store ID, Moneris API token, and Moneris Checkout ID.

1. Log into the Salesforce B2C Commerce Cloud Business Manager.

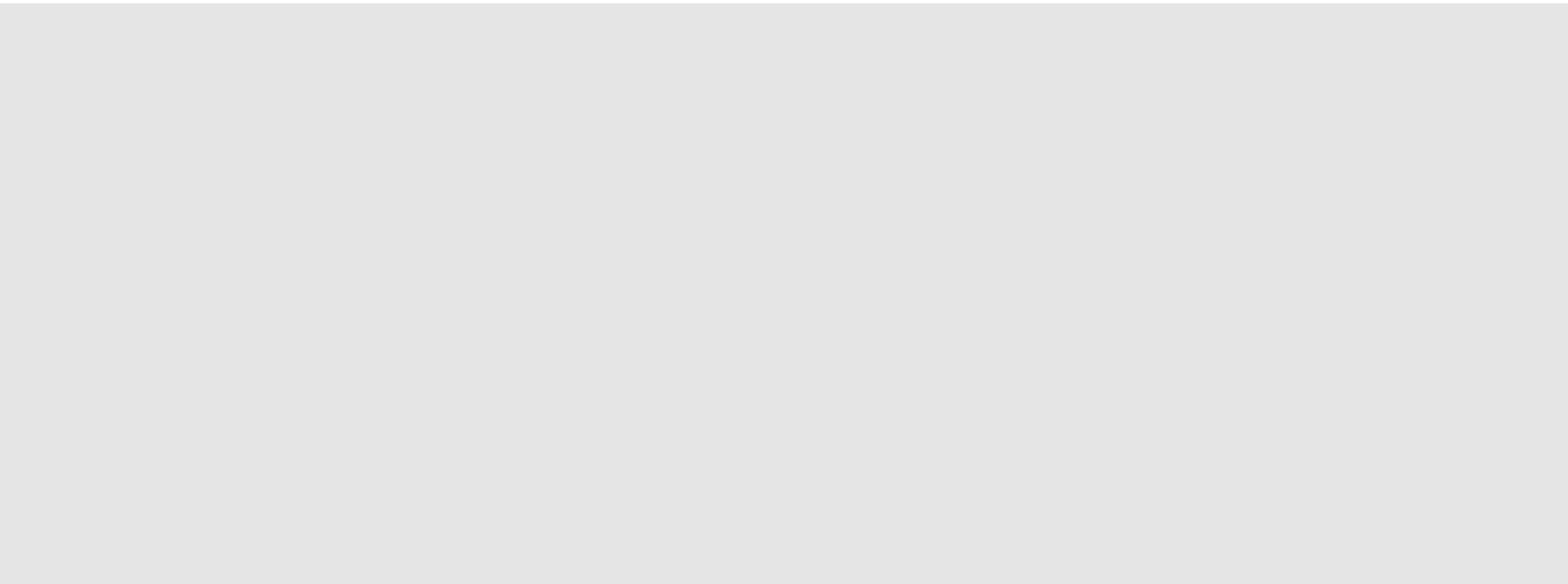
Note: You will need to use the Commerce Cloud Site ID that Salesforce assigned to you.

2. Go to **Business Manager > Site Development > System Object Types > Site Preferences**, and:
 - a. Replace the values "monerisStoreId", "monerisApiToken" and "monerisCheckoutId" with your actual **Moneris store ID, Moneris API token³**, and **Moneris Checkout ID**, which you obtained in the earlier configuration steps.
3. When you complete the configuration, your Moneris Checkout plug-in will be fully functional and allow you to accept payments through your ecommerce site.

³ If you believe that your API token has been compromised, you can regenerate the token (see [Need to regenerate your Moneris API token?](#) on page 13).



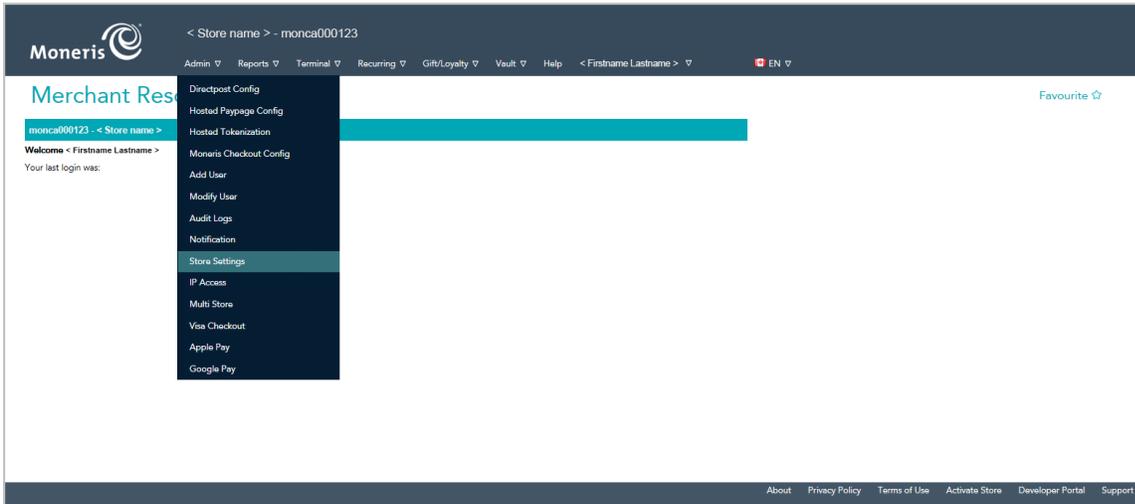
Appendix



Need to regenerate your Moneris API token?

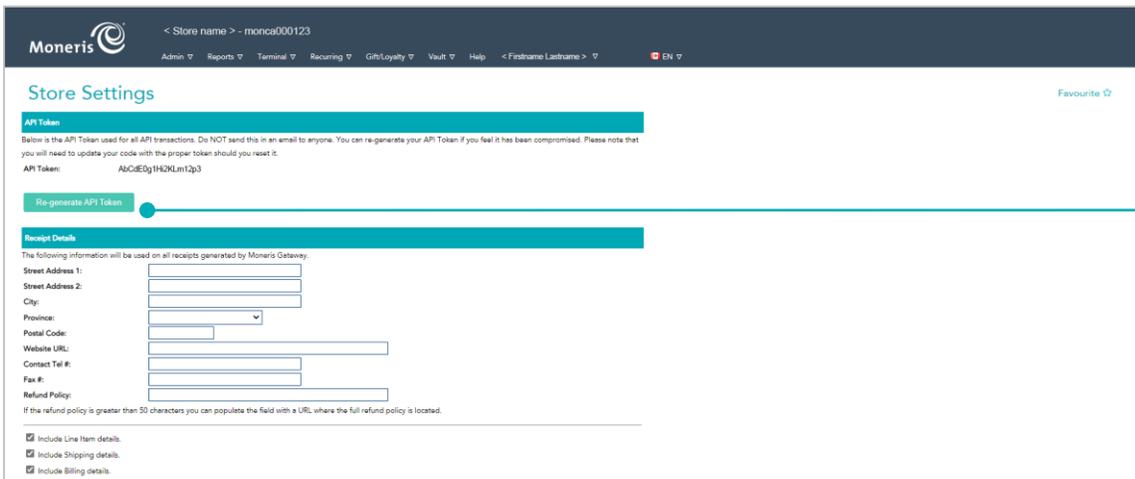
If you have already configured your Salesforce B2C Commerce Cloud integration with Moneris Gateway (see [Configuration steps](#) on page 5) but now believe that your Moneris API token has been compromised, you can regenerate the token by following the steps below.

1. Log into your Moneris Merchant Resource Center store (see [Logging into your Moneris Merchant Resource Center store](#) on page 8).
2. In the menu bar, click on **Admin > Store Settings** (shown below).



3. When the "Store Settings" page displays (shown below), go to the "API Token" area, and click on the **Re-generate API Token** button.

Important! The Moneris API token will be used to process your ecommerce financial transactions through our Moneris Gateway. Do not share this token or send it in an email.



4. When the new Moneris API token is generated, you must update the "monerisApiToken" value in your Site Preferences configuration (see [Configuring Site Preferences with your Moneris identifiers](#) on page 11).



Merchant Support

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

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

We're only one click away.

- Visit www.moneris.com/en/support/products/salesforce-b2c-commerce to download additional copies of this guide and view other resources
- Visit shop.moneris.com to purchase point-of-sale supplies and receipt paper
- Visit moneris.com/insights for business and payment news, trends, customer success stories, and quarterly reports & insights

Can't find what you are looking for?

- Email is.operations@moneris.com, or for general enquiries call Moneris Customer Care toll-free (available 24/7) 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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(07/2023)