



Loyalty Program Web Portal Operating Manual



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Loyalty Web Portal Minimum Requirements

Internet Browser 6.0 or higher

Microsoft Internet Explorer 6.0 and higher is required to run the Web Portal.

1. If you do not have Microsoft Internet Explorer go to microsoft.com and search for Internet Explorer. Follow Microsoft's instructions on how to download and install Internet Explorer.
2. Ensure that your zoom setting is at 100% at all times.

JavaScript-enabled

JavaScript must be enabled in Microsoft Internet Explorer. To enable JavaScript in Microsoft Internet Explorer 6.0 or higher:

1. From the **Tools** menu, click **Internet Options**.
2. Click on the **Security Tab**. Make sure that the 'Internet' icon is highlighted and then click **Custom Level**.
3. Scroll down to **Active Scripting** and click **Enable**.
4. Click **OK**.
5. Click **OK**.
6. Re-start your Internet Explorer.

Pop-ups-enabled

Pop-ups must be enabled for Web Portal website. To enable pop-ups in Microsoft Internet Explorer:

1. Click the **Tools** menu and point to **Pop-up Blocker**.
2. Click **Turn Off Pop-up Blocker**.

Merchant Web Portal

This section provides the instructions on how to use the Merchant Web Portal.

Merchant Registration, Login and Profile Management

Web Portal Registration

To register for an account on the Merchant Web Portal:

1. Go to moneris.com/loyaltycard/merchant.
2. Click on **Create Online Account**.
3. Enter your **Registration Token** (use your 13 digit Moneris Merchant ID) in "Registration Token" field.
4. Enter your **Validation Code** (use the last four digits of your Business phone number that you provided to Moneris Solutions during program sign-up) in "Validation Code" field.
5. Enter the **Numeric Code** shown in the picture on the screen, in the "Numeric Code" field.
6. Click **Continue**.

Login to Your Merchant Web Portal

To login to the Merchant Web Portal and access your information after you have registered for an account (see "Web Portal Registration" section above):

1. Go to moneris.com/loyaltycard/merchant.
Note: We strongly recommend you bookmark this page for easy access, by adding this to your Internet Explorer Favorites.
2. Enter your **Login ID** (use your e-mail address) in the "Login ID" field.
3. Enter your **Password** in the "Password" field.
4. Click **Log In**.

Reset Your Online Password

If you forgot your password:

1. From the Merchant Login screen, select the **Reset Online Password** link.
2. Enter your **Login ID** in the “Enter your login ID” field.
3. Click **Continue**.
4. Fill in the answers to the security questions displayed.
5. Enter a **New Password** in the “Choose new password” field.
6. Enter your **New Password** again in the “Re-enter new password” field.
7. Click **Submit**.

Note: You will be locked out of the system after three incorrect attempts to reset your online password. If you do not remember answers to your security questions, call Merchant Customer Service at 1-866-319-7450 for support.

Update Your Web Portal Profile

To update your personal profile including first name, last name and language preference:

1. Select the **My Profile** section from the top menu.
2. Select **Update Profile** from the left menu.
3. Enter your **First Name** in the “First Name” field.
4. Enter your **Last Name** in the “Last Name” field.
5. Select preferred **Portal Language** (English or French) from the “Language” drop down menu.
6. Click **Update**.

Change Your Password

To change your Merchant Web Portal Login password:

1. Select the **My Profile** section from the top menu.
2. Select **Update Password** from the left menu.
3. Enter **Old Password** in the “Old password” field.
4. Enter **New Password** in the “New password” field.
5. Enter your **New Password** again in the “Re-enter new password” field.
6. Click **Update**.

Note: The new password must be at least 6 alpha-numeric characters long.

Change Your Merchant Security Questions

To update your security questions and answers:

1. Select the **My Profile** section from the top menu.
2. Select **Update Security Information** from the left menu.
3. Enter your **Password** in the “Password” field.
4. Select **Security question #1** from the drop down menu.
5. Enter your **Answer** in the “Enter Your Answer” field for Security question #1.
6. Select **Security question #2** from the drop down menu.
7. Enter your **Answer** in the “Enter Your Answer” field for Security question #2.
8. Click **Update**.

Update Merchant Login ID

To update your Merchant Web Portal Login ID:

1. Select the **My Profile** section from the top menu.
2. Select **Update Login ID (e-mail)**.
3. Enter your **Password** in the “Password” field.
4. Enter your **New Login ID** in the “New Login ID” field. Your Login ID should be a valid e-mail address.
5. Click **Update**.

Log Out and System Time-Out

1. To log-off at any time while using the Web Portal, click on the **Log Out** button on the top right-hand corner.

Note: For security reasons, the Web Portal automatically signs you out after 30 minutes of inactivity. To continue using the Web Portal, you will need to login again.

Cardholder Management

Cardholder Lookup

To search for a specific Loyalty cardholder and access their card information:

1. Select the **Cardholders** section from the top menu.
2. Key the **Card Number** in the “Card Number” field.
OR
Enter full **First Name** in the “First Name” field.
OR
Enter cardholder’s full **Last Name** in the “Last Name” field.
OR
Enter full **Phone Number** in the “Phone” field.
OR
Enter complete **Postal/Zip Code** in the “Postal/Zip Code” field.
3. Click **Search**.
4. Click on the **View** link to access the information for a selected card.

Note: If the cardholder search result contains only one cardholder, the cardholder information will automatically be displayed in the Web Portal.

Cardholder Information

After you perform a Cardholder Lookup, you will see this as the default section for the selected card. In this section, you will be able to:

- View card information, card transaction history and cardholder profile
- Update cardholder profile and Web Portal account
- Adjust points on a card
- Deactivate a card

View Card Information

To view card status, expired date, last transaction date, last transaction points amount and current points balance:

1. Select **Display Card Information** from the left menu.

View Card Transaction History

1. Select **Display Transaction History** from the left menu.
2. Select a **Transaction Period**:
Last 30 days, Last 60 days, Last 90 days or **All** from the dropdown menu.
3. Click **Go!**.
4. Click on **Details** to view transaction details.

Update Cardholder Profile

To view or manage cardholder profile:

1. Select **Display/Update Account Information** from the left menu.
2. Update profile details as required.
3. Click **Update**.

Deactivate Card

To deactivate a card from the Merchant Web Portal:

1. Select **Deactivate Card** from the left menu.
2. To assign the transaction to a Location for tracking purposes, select the **Enterprise**, then **Business** and **Location** using the drop down menus.
3. Click **Deactivate**.

Note: Once a card has been deactivated, it is permanently disabled. Members will have to re-enroll to use the program again. A card can also be deactivated via your Moneris terminal(s). See your Using Your Terminal for Loyalty Guide for more information.

Adjust Points Balance

To adjust points on a Loyalty card:

1. Select **Adjust Points Balance** from the left menu.
2. Enter the **Number** of points to be adjusted.
3. Select **Enterprise, Business and Location** to assign the transaction to a Location for tracking purposes.
4. Click on **Add Points** or **Remove Points** to complete the adjustment.

Update Cardholder's Login

In order to manage a cardholder's online Web Portal account, the cardholder must first create his or her online account.

To view or manage a cardholder's Web Portal account:

1. Select **Update Cardholder Log In** from the left menu.

Update Cardholder's Web Portal Password

To update a cardholder's Web Portal password:

1. Select **Update Password** from the left menu.
2. Enter cardholder's **New Password** in the "New Password" field.
3. Enter cardholder's **New Password** again in the "Re-enter New Password" field.
4. Click **Update**.

Disable Cardholder's Web Portal Account

To disable a cardholder's Web Portal account:

1. Select **Update Account Status** from the left menu.
2. Click **Disable**.

Enable Cardholder's Web Portal Account

To enable a previously disabled cardholder's Web Portal account:

1. Select **Update Account Status** from the left menu.
2. Click **Enable**.


Reports and Extracts

Your Web Portal has powerful reports that will give you more insight into your customers and help you run your business better, such as:

- **Transaction Activity Reports** – Gives you summary and detailed information about Loyalty transactions which occurred in your program. You can group the data by different dimensions such as location, date, card number, clerk ID and transaction type.
- **Points Liability Reports** – Gives you an overview of all outstanding points that you are liable for in your Loyalty program.
- **Cardholder Contact Lists** – Cardholder contact information lists for all cardholders or for cardholders based on your chosen criteria (e.g. top cardholders by spend).
- **Exception Reports** (Enhanced Loyalty only) – Provides transaction information for cards that meet your exception criteria (e.g. number of redemptions).



View Reports List

To view a list of available reports:

1. Select the **Reports** section from the top menu.
2. Select a **Program** folder  from the left menu bar.


View Report

To view a report:

1. Select the **Reports** section from the top menu.
2. Select a **Report** from a reports folder  in the left menu bar.
3. Input or select the **Start Date** and **End Date** by clicking .
4. Click **Submit**.

View Report Details

To access the next level of details for any available reports:

1. Select a **Value** in the report that is blue and underlined.
2. To return to the parent report, click  on the top menu bar.

Download Report

To download a report:

1. Access available reports (see “View Report” section).
2. Select a **Format** (PDF, CSV or Excel) from the drop down list on the report’s top menu.
3. Click **Export**.

Scroll through Report

To scroll through a report:

1. Access available reports (see “View Report” section).
2. To scroll up and down the current page of the report, use scrollbars on the left or on the bottom.

OR

To scroll between pages, use the arrow icons found at the top of each report.

- Click on ► to scroll to the next page
- Click on ◀ to scroll to the previous page
- Click on |► to scroll down to the last page
- Click on ◀| to scroll up to the first page


Sort Data in Report

To re-sort data by a particular column in a report (e.g. sort by date):

1. Access available reports (see “View Report” section).
 2. Click on ▲, located adjacent to the column title, to re-sort data in ascending order.
- OR
- Click on ▼, located adjacent to the column title, to re-sort data in descending order.

Print Report


To print a report:

1. Access available reports (see “View Report” section).
2. Click on  located on the top menu of the report.

Generate Extracts


This section describes how to access extracts. Extracts are generated only upon user request and a notification is sent to the user’s registered email address when the file is ready for download from the Web Portal. Extracts are identified with “Extract” in the title of the extract.

To generate a new extract:

1. Select the **Reports** section from the top menu.
2. Select an **Extract** from a reports folder  in the left menu bar.
3. Select an **Export Format** (CSV or Excel) using the drop down list.
4. Click **Generate**.


Download Extracts

To download an existing extract:

1. Select the **Reports** section from the top menu.
2. Select an **Extract** from a reports folder  in the left menu bar. Extracts are identified with “Extract” in the title of the extract.
3. Select **Version** from the list on the right menu and click **Download**.
4. You will receive an e-mail when an extract is available for download.

View Help for a Report or Extract

To view additional help information for a specific report or extract:

1. Select the **Reports** section from the top menu.
2. Select a report from a reports folder  in the left menu bar.
3. Click on the **HERE** link (underlined in blue) in the text to view help information on the report or extract.

Cardholder Web Portal

Figure 1: View of a Sample Report

ERNE X
Points Transaction Summary

Program Owner: **Jeff's Training Shop** Program: **Rewards (PID: 3153)**
Reporting Period: **01/01/2008** to **31/01/2008**

Location Name	Store #	Merchant Id	Debit		Credit		Net	
			Amount	Benefit	Amount	Benefit	Amount	Benefit
Ernex - a division of Moneris Solutions								
IB Loyalty Admin Location		0030421807450	\$0.00	0	\$0.00	6	\$0.00	6
Total			\$0.00	0	\$0.00	6	\$0.00	6
Jeff's Training Shop								
Jeff's Training Shop		0030200293167	\$0.00	-1,163	\$1,142.51	1,142	\$1,142.51	-21
Sackville		0030100939348	\$0.00	-200	\$244.00	244	\$244.00	44
Total			\$0.00	-1,363	\$1,386.51	1,386	\$1,386.51	23
Jeff's Training Shop Online Business								
Jeff's Training Shop Online Location			\$0.00	0	\$0.00	2	\$0.00	2
Total			\$0.00	0	\$0.00	2	\$0.00	2
Report Total			\$0.00	-1,363	\$1,386.51	1,394	\$1,386.51	31

- 1 Go to first page
- 2 Go to previous page
- 3 Go to next page
- 4 Go to last page
- 5 Go to parent report
- 6 Zoom
- 7 Find text
- 8 Select data export format:
 - CSV (comma delimited) – usually used for exporting data to external tools, such as an email marketing tool.
 - Acrobat (PDF) file – used for printing a report.
 - Excel – used for data analysis or manipulation.
- 9 Print report
- 10 Click link to drill-down to more detailed reports – links are blue and underlined.
- 11 Sort report data

Instructions are provided below for how to use the Cardholder Web Portal in case you need to guide a customer through this process. Basic instructions are found on the back of each Loyalty card as well.

Cardholder Registration and Login

Cardholder Web Portal Registration

To register for a Cardholder Web Portal account:

1. Go to moneris.com/loyaltycard/cardholder (the web address is provided on the back of the Loyalty cards).
2. Click on the **Create Online Password** link.
3. Enter the **Card Number** printed on the back of the Loyalty card in the “Card Number” field.
4. Enter the **Password** printed underneath the scratch-off foil on the Loyalty card in the “Card Password” field.
5. Enter a **New Password** in the “New Password” field.
6. Enter a **New Password** again in the “Re-enter new password” field.
7. Select **Security question #1** from the drop down menu.
8. Enter an **Answer** in the “Enter your answer” field for Security question #1.
9. Select **Security question #2** from the drop down menu.
10. Enter an **Answer** in the “Enter your answer” field for Security question #2.
11. Click **Register** to use the Portal.

Cardholder Web Portal Login

To login to the Cardholder Web Portal and access account information after the cardholder has registered for an account (see “Cardholder Web Portal Registration” section above):

1. Go to moneris.com/loyaltycard/cardholder (the web address provided on the back of the Loyalty cards).
2. Enter the **Login ID** (use the card number as shown on the card) in the “Login” field.
3. Enter the **Password** in the “Password” field.
4. Click **Log In**.

Reset Cardholder Web Portal Login Online Password

If the cardholder forgot their password:

1. From the cardholder Login screen select the “Reset Online Password” link.
2. Enter the **Card Number** in the “Please enter a card number” field.
3. Click **Continue**.
4. Fill in the answers to the security questions displayed.
5. Enter a **New Password** in the “Choose new password” field.
6. Enter the **New Password** again in the “Re-enter new password” field.
7. Click **Submit**.

Note: The cardholder will be locked out of the system after three incorrect attempts to reset their online password. If they do not remember answers to their security questions, then they may call you to reset their password (see “Cardholder Management” in the “Merchant Web Portal” section starting on p. 6).

Log Out and System Time-Out

1. To log-off at any time while using the Web Portal, click on the **Log out** button on the top right-hand corner.

Note: For security reasons, the Web Portal automatically signs a user out after 30 minutes of inactivity. To continue using the Web Portal, the cardholder will need to login again.

View Card Information and Transaction History (My Card)

This section enables cardholders to view their card status, balance and transaction history.

View Card Information

To view card status, last transaction date, last transaction points amount and current points balance:

1. Select the **My Card** section from the top menu.
2. Select **Display Card Information** from the left menu.

View Card Transaction History

To view card transaction history:

1. Select the **My Card** section from the top menu.
2. Select **Display Card History** from the left menu.
3. Select a **Transaction Period:**
Last 30 days, Last 60 days, Last 90 days or **All** from the dropdown menu.
4. Click **Go!**
5. Click on **Details** to view transaction details.

How to contact us

Our Merchant Customer Service support line is available 24 hours a day, seven days a week to answer any questions you may have regarding your merchant account. Please visit us online at moneris.com or call us at **1-866-319-7450**.

If you would like to speak to our Sales department, please call us at 1-866-666-3747.

How to order stationery/promotional materials

You can order a number of supplies for your business from Moneris. Please visit us online at shopmoneris.com or call us at **1-866-319-7450**.

Get an updated manual

Moneris may, from time to time, update this operating manual. You are responsible for ensuring you obtain and are using the most up to date copy of the *Loyalty Program Web Portal Operating Manual*. To obtain an updated copy, please go to moneris.com and search Downloads.



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