

Your Moneris Merchant Number is:

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### TO VIEW A BATCH:

1. Go to the left navigation bar and click the purple button that reads, “VIEW”
2. Click on the sub-button under VIEW that reads, “BATCHES”
3. Select your primary search criteria by clicking the respective boxes beside:
  - Current Batch
  - Batch Date
  - Batch Number
  - Batch
  - Terminal List
4. Based on the search criteria selected in #3, indicate secondary search criteria by clicking on the radio dials under the selected categories.
5. Click “Submit” button.

Example below shows the user selecting **Current Batch** as the primary search criteria.



## FINANCIAL TRANSACTIONS

### VIRTUAL TERMINAL

For merchants who accept orders via mail or telephone and require on-the-spot authorization for individual transactions.

#### Transaction Type Virtual Terminal

- |                 |   |
|-----------------|---|
| <b>Pre Auth</b> | Click on <b>TERMINAL</b> button<br>Click on subbutton <b>Pre Auth</b><br>Complete the transaction information and any desired Order Details<br>Click <b>Process</b>   |
| <b>Capture</b>  | Click on <b>TERMINAL</b> button<br>Click subbutton <b>Capture</b><br>Enter the Order ID of the transaction<br>Click <b>Locate Order</b><br>Click in the box beside the desired transaction to confirm this is the desired transaction<br>Click <b>Process Grouped Transactions</b>                              |
| <b>Purchase</b> | Click on <b>TERMINAL</b> button<br>Click on subbutton <b>Purchase</b><br>Complete the transaction information and any desired Order Details<br>Click <b>Process Grouped Transactions</b>  |
| <b>Void</b>     | Click on <b>TERMINAL</b> button<br>Click on subbutton <b>Void</b><br>Complete the transaction information and any desired Order Details<br>Click <b>Locate Order</b><br>Click in the box beside the desired transaction to confirm this is the desired transaction<br>Click <b>Process Grouped Transactions</b> |
| <b>Refund</b>   | Click on <b>TERMINAL</b> button<br>Click on subbutton <b>Refund</b><br>Enter the Order ID of the transaction<br>Click <b>Locate Order</b><br>Click in the box beside the desired transaction to confirm this is the desired transaction<br>Click <b>Process Grouped Transactions</b>                            |

- OR -

1. Complete the **Independent Refund** section, enter credit card to be refunded, expiry date and total amount to be refunded
2. Click **Process**

## ADMIN FUNCTIONS

Function	Instructions
<b>Add User</b>	Click on the <b>ADMIN</b> button Click on sub-button under ADMIN that reads <b>ADD USER</b> Complete all fields under User Data, Preferred Language, Security Level Press <b>SAVE PROFILE</b> button
<b>Modify User</b>	Click on the <b>ADMIN</b> button Click on sub-button under ADMIN that reads <b>MODIFY USER</b> Enter a partial or full username or last name Click <b>Modify User</b> Click <b>MODIFY</b> beside the desired user Make the desired changes Click <b>Save Profile</b>
<b>Delete User</b>	Click on the <b>ADMIN</b> button Click on sub-button under ADMIN that reads <b>MODIFY USER</b> Enter a partial or full username or last name Click <b>MODIFY USER</b> Click <b>MODIFY</b> beside the desired user Click <b>Delete User</b> Click <b>Confirm</b>
<b>Audit Logs</b>	Click on the <b>ADMIN</b> button Click on sub-button under ADMIN that reads <b>AUDIT LOGS</b> Identify the user you wish to review by clicking in the box beside their his/her username. Click <b>SUBMIT</b> button.
<b>Notification</b>	Click on the <b>ADMIN</b> button Click on the sub-button under ADMIN that reads <b>NOTIFICATION</b> Type the email addresses of the customers you wish to add to your distribution list for promotions and more! Click <b>Save Contacts</b>
<b>Store Info</b>	Click on the <b>ADMIN</b> button Click on the sub-button under ADMIN that reads <b>STORE INFO</b> Review information under Receipt Information and Batch Close. Modify information as desired and click <b>SAVE INFO</b> button

## REPORTING

### TO VIEW A TRANSACTION OR A SERIES OF TRANSACTIONS:

1. Go to the left navigation bar and click the purple button that reads, **"VIEW"**
2. Click on the sub-button under VIEW that reads, **"TRANSACTIONS"**
3. Select your primary search criteria by clicking the respective boxes beside:
  - Transaction Date
  - Transaction Type
  - Transaction Result
  - Card Type
  - Other Criteria
4. Based on the search criteria selected in #3, indicate secondary search criteria by clicking on the radio dials under the selected categories.
5. Click **"Query Transactions"** button.

Example below shows the user selecting **Transaction Date** as the primary search criteria and **Today** as the secondary criteria.

The screenshot displays a web interface for searching transactions. It features several sections with checkboxes and radio buttons for selection:

- Transaction Date:** Includes radio buttons for Today, This Week, This Month, and a date range selector (From: 10/01/2002 To: 10/01/2002).
- Transaction Type:** Includes checkboxes for PreAuth, Refund, Capture, Void, and Purchase.
- Transaction Result:** Includes checkboxes for Approved and Declined, and radio buttons for Successful and Failed.
- Card Type:** Includes checkboxes for Visa, American Express, MasterCard, and Discover, and a radio button for Debit.
- Other Criteria:** Includes checkboxes for Card Number (with a masked input field), Order ID, Amount, and Batch Number.

At the bottom of the form, there are two buttons: "Query Transactions" and "Save As Defaults".