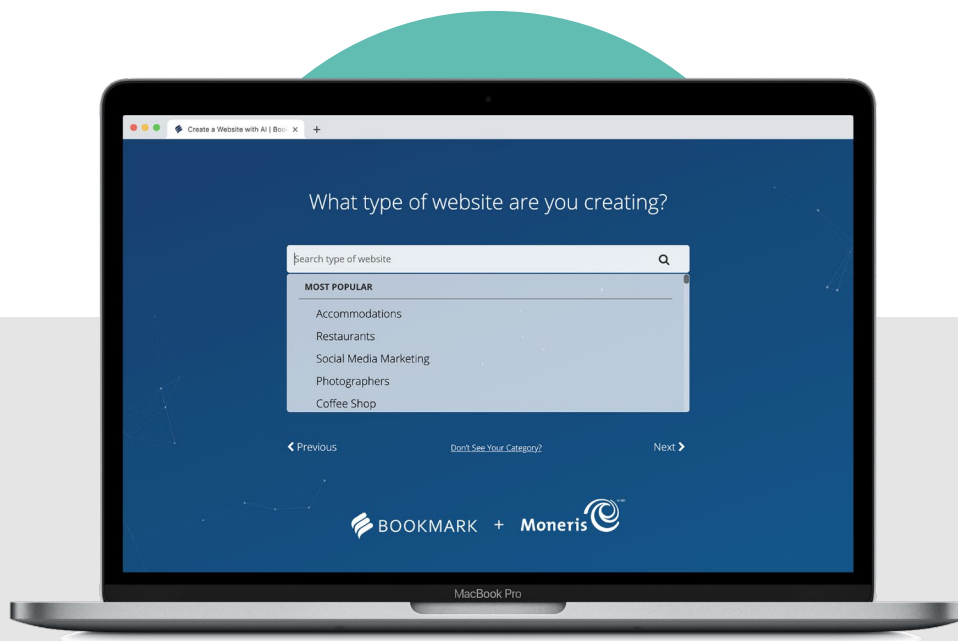




Moneris[®] Online

Setup Guide





Need help?

Visit [Moneris Support](#) or call 1-866-319-7450

Bookmark™: bookmark.com/help_center

Record your Moneris® merchant ID here:

Contents

- Introduction2**
 - Bookmark and Moneris Online 3
- Linking Bookmark and Moneris Checkout4**
 - Before you get started..... 5
 - Configure Merchant Resource Center 7
 - Create your Moneris Checkout profile7
 - Configure the Moneris Checkout profile to accept payment.....9
 - Configure email settings11
 - Sections that do not require configuration12
 - Access information for integration 13
 - Configure Bookmark..... 14
 - Enable Apple Pay..... 16
- Merchant support.....20**



Introduction

In this section, we introduce the Moneris Checkout solution, the Bookmark website design tool, and the requirements for integration.

Bookmark and Moneris Online

Your customers are looking for you online, so now more than ever it's important for your business to have its own website. We've made this easy with the help of our partner, Bookmark.

- Bookmark is a website creation tool for anyone who doesn't know how to design a website. Using Bookmark's simple interface, combined with AiDA, their powerful artificial intelligence design assistant, creating your business' website is fast, easy and fun.

Note: *You must have a Bookmark Business Account to accept payment. Contact Moneris at [1-866-761-1047](tel:1-866-761-1047) to sign up.*

- With the help of the Merchant Resource Center (MRC) and Moneris Checkout, you can securely accept and process payments directly from your website.
- The combination of a Bookmark website and payment processing using Moneris Checkout (including the Kount® Essentials and Moneris 3D Secure fraud tools) is the holistic solution we are calling *Moneris Online*.

This guide will explain how to link your Moneris Checkout and your Bookmark account, via the MRC, so that you can operate an ecommerce website.



Checkout

Linking Bookmark and Moneris Checkout

In this section, we go over everything you need to know to link your Bookmark website with Moneris Checkout to enable ecommerce functionality on your website.

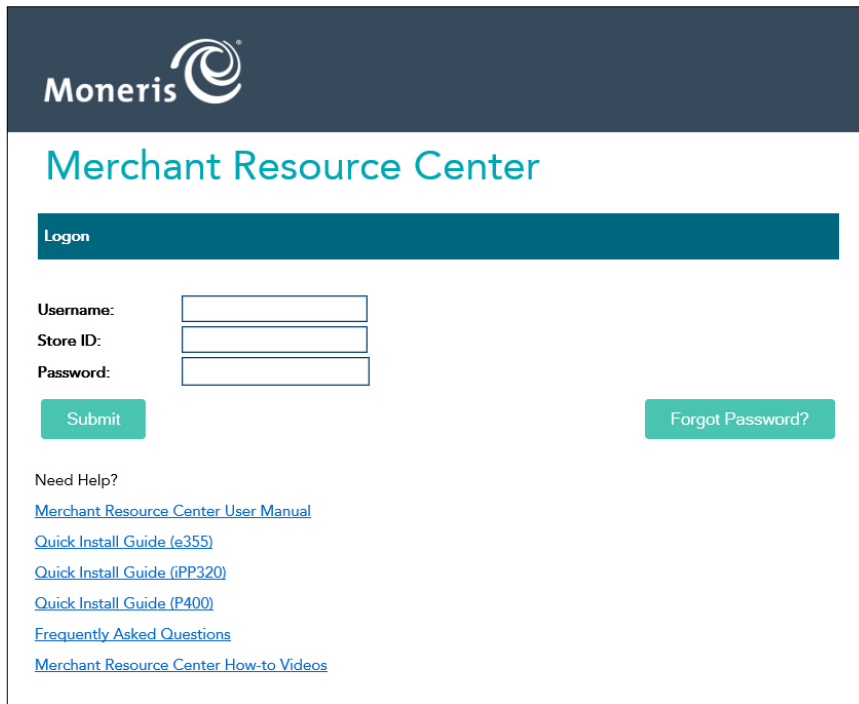
Before you get started

When you sign up for Moneris Online in addition to your Bookmark Business account, your Moneris Checkout configuration will be done for you automatically. You can verify the setup following the instructions below.

1. Log in to the MRC:

- a. Access the MRC [here](#) (or launch a web browser and go to moneris.com/mrc).

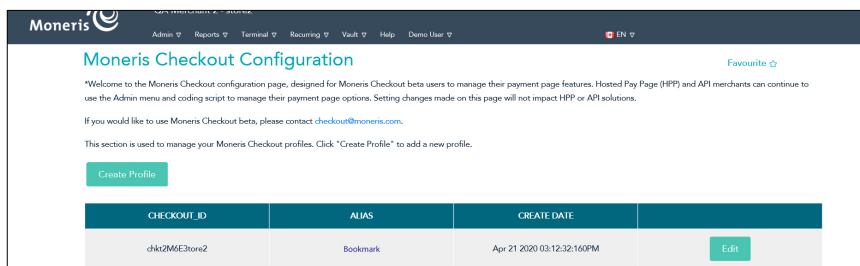
The “Merchant Resource Center” login page appears.



- b. Enter your MRC login credentials (**Username, Store ID, and Password**) into the provided fields, then click **Submit**.

Note: *The Username and Password are defined by you when you activate your MRC account; the Store ID is contained in the Welcome emails sent to you when you signed up for MRC.*

2. From the main Merchant Resource Center screen, click the **Admin** menu, then click **Moneris Checkout Config**.
3. When the "Moneris Checkout Configuration" page displays, look for the one labelled “Bookmark”.



CHECKOUT ID	ALIAS	CREATE DATE	
ch42ME3tov2	Bookmark	Apr 21 2020 03:12:32:140PM	Edit

If the Bookmark configuration for Moneris Checkout has been completed, it should be listed here. In this case, you can skip ahead to the [Configure Bookmark](#) section on page 14. If you do not see a Bookmark configuration, follow the instructions in the [Configure Merchant Resource Center](#) section on page 7.

After you've configured Bookmark, you can choose to enable Apple Pay for your ecommerce website. Refer to the [Enable Apple Pay](#) section on page 16 for directions.

Configure Merchant Resource Center

Perform these configuration steps in the Merchant Resource Center (MRC) to prepare for integration into a Bookmark ecommerce site.

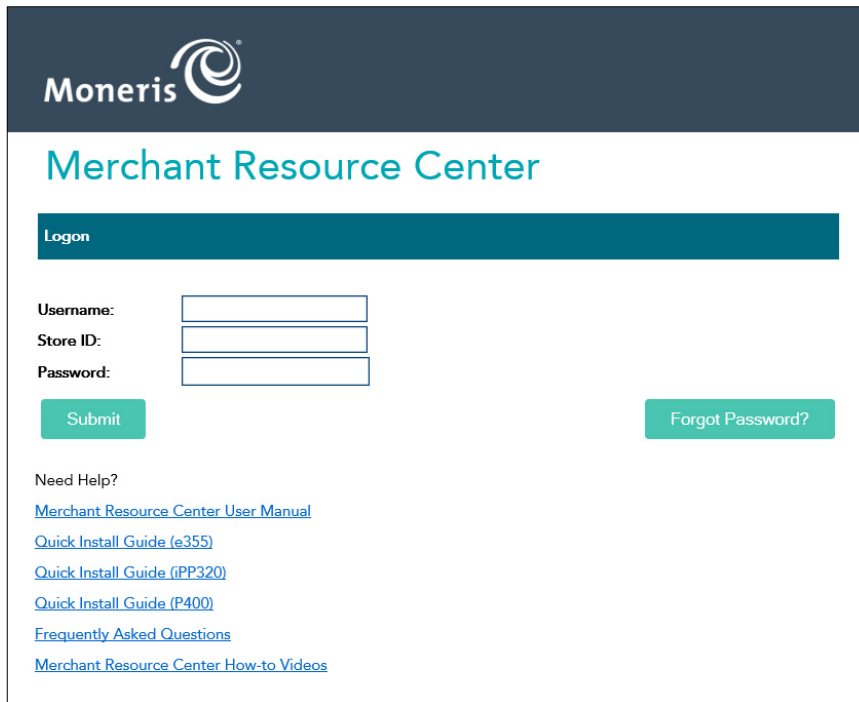
Important: Do not change any of the configurations for areas in Moneris Checkout not mentioned in this guide. Unauthorized configuration changes could affect the operability of online transaction processing.

Create your Moneris Checkout profile

Follow these steps to create a basic Moneris Checkout profile.

1. Log in to the MRC:
 - a. Access the MRC [here](#) (or launch a web browser and go to moneris.com/mrc).

The “Merchant Resource Center” login page appears.



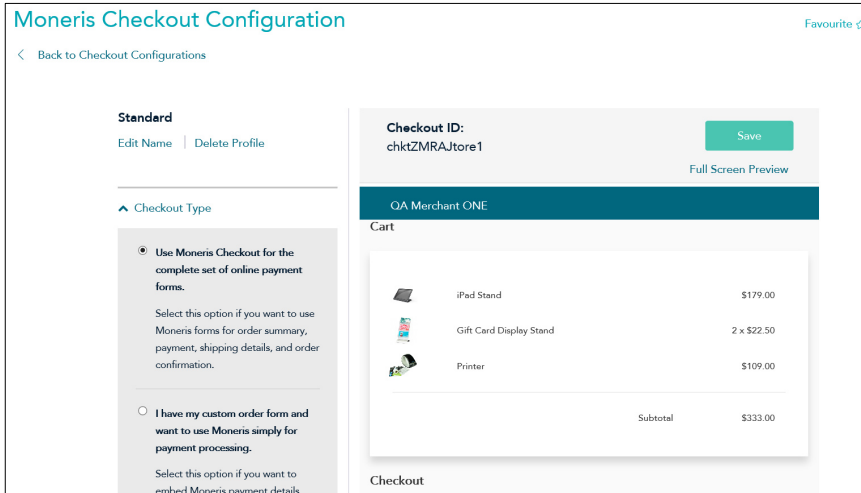
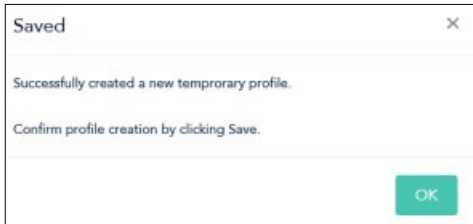
The screenshot shows the Moneris Merchant Resource Center login page. At the top left is the Moneris logo. Below it, the text "Merchant Resource Center" is displayed in a teal color. A dark teal bar with the word "Ligon" (likely a typo for "Login") is positioned below the header. The login form consists of three input fields: "Username:", "Store ID:", and "Password:". Below these fields are two buttons: a teal "Submit" button and a teal "Forgot Password?" button. At the bottom of the form, there is a "Need Help?" section with several links: "Merchant Resource Center User Manual", "Quick Install Guide (e355)", "Quick Install Guide (fPP320)", "Quick Install Guide (P400)", "Frequently Asked Questions", and "Merchant Resource Center How-to Videos".

- b. Enter your MRC login credentials (**Username**, **Store ID**, and **Password**) into the provided fields, then click **Submit**.

Note: The Username and Password are defined by you when you activate your MRC account; the Store ID is contained in the Welcome emails sent to you when you signed up for MRC.

2. From the main Merchant Resource Center screen, click the **Admin** menu, then click **Moneris Checkout Config**.
3. When the "Moneris Checkout Configuration" page displays, click the **Create Profile** button.

- When the "Saved" dialog box displays, click the **OK** button to close the dialog box.



- On the left side of the screen, above **Checkout Type**, click the **Edit Name** link.
The Edit Checkout Alias popup appears.
- Click inside the **Alias** field and enter a new alias for your Checkout configuration e.g. "Bookmark".
- Click **Save** when finished, then click **OK** in the confirmation popup.
- Go to the top of the live checkout preview and click the **Save** button.
- In the setting configuration section on the left side of the page, click **Checkout Type** to expand it (if it is not already expanded).
- In the **Checkout Type** section, select the **I have my custom order form and want to use Moneris simply for payment processing** radio button.
- Go to the top of your live checkout preview and click the **Save** button.
- When the "Success" dialog box displays, click the **OK** button to close the dialog box.
Note: Your live preview area refreshes to reflect the updated configuration settings.
- Click ^ **Checkout Type** in the setting configuration section on the left side of the page to contract the checkout type settings.

Configure the Moneris Checkout profile to accept payment

Once the profile has been created and saved, it needs to be configured to enable various payment types and security options. Follow the steps below to configure payments in Moneris Checkout. Your screen should look like the images presented here to ensure optimal transaction processing.

1. Configure the payment type settings for the MRC:
 - a. In the setting configuration section on the left side of the page, click **Payment** to expand it.
 - b. In the **Accepted Digital Wallets** section, place a checkmark in the **Google Pay** checkbox. For now, leave **Apple Pay** unchecked.
***Note:** Apple Pay needs to be set up later after the MCO configuration has been completed. Refer to [Enable Apple Pay](#) on page 16 for complete setup instructions.*
 - c. In the **Card Logos** section, place a checkmark in the **Display Supported Cards** checkbox.
 - d. Ignore the **Card Details** section. These items are locked and cannot be changed.

Payment

The screenshot displays the 'Payment' configuration section of the Moneris Checkout profile. It is divided into three sub-sections: 'Accepted Digital Wallets', 'Card Logos', and 'Card Details'. In the 'Accepted Digital Wallets' section, the 'Apple Pay' checkbox is unchecked, and the 'Google Pay' checkbox is checked. Below the 'Card Logos' section, the 'Display Supported Cards' checkbox is checked. The 'Card Details' section contains four items: 'Cardholder Name', 'Card Number', 'Expiry Date', and 'CV', all of which are preceded by a lock icon, indicating they are locked and cannot be modified.

Accepted Digital Wallets

Apple Pay
If you enable Apple Pay you acknowledge that you have read the [Moneris Terms of Use](#) and [Apple Terms of Use](#) and you agree to be bound by these terms.

Google Pay
If you enable Google Pay you agree to the [Google Pay API Terms of Service](#)

Card Logos

Display Supported Cards

Card Details

Cardholder Name

Card Number

Expiry Date

CV

2. In the **Payment Security** section, configure the payment card security and fraud prevention tools you wish to use when accepting payment on your ecommerce website:

Note: *Auto Decision is enabled by default with Moneris Online, because it comes bundled with Moneris Kount Essentials. Decisions are based on fraud-prevention response codes from supported fraud-prevention tools such as AVS, CVV, 3-D Secure, and Moneris Kount.*

- a. Enable the fraud-prevention tools by placing checkmarks in the **AVS** and **3D Secure** checkboxes.
- b. Click the drop-down menus beside **AVS** and **CVV** and select **Optional**.

The screenshot shows a configuration panel for 'Payment Security'. At the top, there is a section for 'Auto Decision by Moneris' which is locked. Below this, there are four rows of settings, each with a lock icon, a label, and a dropdown menu:

- AVS**: Checked checkbox, dropdown menu set to 'Optional'.
- CVV**: Locked icon, dropdown menu set to 'Optional'.
- 3D Secure**: Checked checkbox.
- Kount**: Locked icon, dropdown menu set to 'Mandatory'.

Below the 'Payment Security' section is the 'Transaction Type' section, which contains three radio button options:

- Purchase**: Selected (indicated by a blue dot).
- Preauthorization**: Not selected.
- Card Verification**: Not selected.

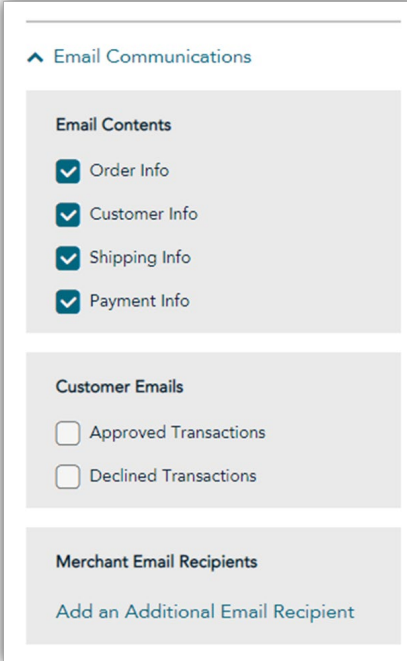
3. In the **Transaction Type** section, click the **Purchase** option, and leave the others blank.
4. If the **Transaction Limits** section is visible to you, ignore it for now.
5. Go to the top of your live checkout preview, and click the **Save** button.
6. When the "Success" dialog box displays, click the **OK** button to close the dialog box.
- Note:** *Your live preview area refreshes to reflect the updated configuration settings.*
7. Click **^ Payment** on the left side of the screen to contract the payment settings.

For more information about Moneris' suite of fraud prevention tools, click [here](#).

Configure email settings

Use the Email Communications section to configure the information that is sent to customers.

1. In the setting configuration section on the left side of the page, click **Email Communications**.
2. In the **Email Contents** section, select the following items to include in the email to your customers by placing checkmarks in the checkboxes.
 - **Order Info** – displays information about the items purchased.
 - **Customer Info** – displays name and address information the customer entered during checkout.
 - **Shipping Info** – displays shipper/expeditor info, including tracking number and delivery ETA.
 - **Payment Info** – displays payment information (although sensitive card data is masked).



The screenshot shows the 'Email Communications' configuration panel. It is titled 'Email Communications' with a blue arrow icon. Below the title, there are three main sections: 'Email Contents', 'Customer Emails', and 'Merchant Email Recipients'. The 'Email Contents' section has four checkboxes, all of which are checked: 'Order Info', 'Customer Info', 'Shipping Info', and 'Payment Info'. The 'Customer Emails' section has two checkboxes, both of which are unchecked: 'Approved Transactions' and 'Declined Transactions'. The 'Merchant Email Recipients' section has a single link: 'Add an Additional Email Recipient'.

3. Leave the options in the **Customer Emails** and **Merchant Email Recipients** sections alone; these sections will be handled by another system.
4. Go to the top of your live checkout preview, and click the **Save** button.
5. When the "Success" dialog box displays, click the **OK** button to close the dialog box.

Note: Your live preview area refreshes to reflect the updated configuration settings.
6. Click ^ **Email Communications** on the left side of the screen to contract the email settings.

Sections that do not require configuration

There are several sections that do not require configuration to integrate Moneris Checkout with Bookmark. These sections include:

- Order Summary (Cart)*
- Customer Details*
- Multi-Currency*
- Branding & Design
- Order Confirmation

Important: Do not change any of the configurations for any of the areas in this list. Unauthorized configuration changes could affect the operability of online transaction processing.

* These areas may not be visible to you based on your Moneris Checkout configuration.

The Moneris Checkout configuration is now complete!

Access information for integration

In order to successfully integrate Moneris Checkout and Bookmark for payment processing, you will need certain pieces of information. This section explains what information you need, and where to access that information.

REQUIRED INFORMATION	HOW TO ACCESS
Store ID	<p>The Store ID is sent to you in the <i>Welcome email</i> when you first sign up for Moneris Online. It is the same Store ID that you use when you login to the MRC.</p>
Checkout ID	<p>The Checkout ID is generated when Moneris Checkout is configured. You can access it from the "Moneris Checkout Configuration" main page.</p> <ol style="list-style-type: none">1. Log in to the MRC.2. From the main Merchant Resource Center screen, click the Admin menu, then click Moneris Checkout Config.3. When the "Moneris Checkout Configuration" page displays, look for the one labelled "Bookmark". <p>The Checkout ID is listed on that page.</p>
API Token	<ol style="list-style-type: none">1. Log in to the MRC.2. From the main Merchant Resource Center screen, click the Admin menu.3. On the Admin menu, click Store Settings.4. In the Store Settings page, locate the API Token section. <p>The API token is displayed there.</p>

Be sure to have this information handy for when you begin the process of entering Moneris Checkout settings into Bookmark.


Now you need to integrate Moneris Checkout with Bookmark so that your ecommerce website is ready to process online transactions.

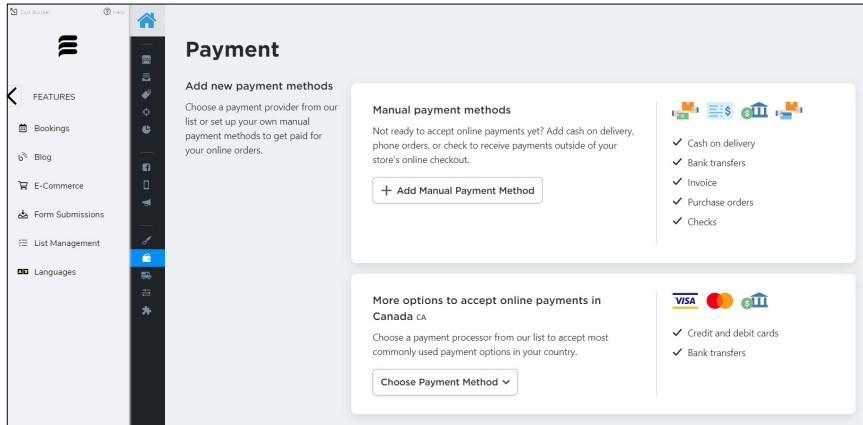
Configure Bookmark

Follow the instructions below to configure Bookmark to accept online payments and integrate with Moneris as the payment processor.

1. Open a separate tab in your web browser and login to your Bookmark account.
2. From the homepage, click the **Your Website** tab at the top of the screen.
3. On the Your Websites page, click the **Edit** button.

The website builder tool appears.

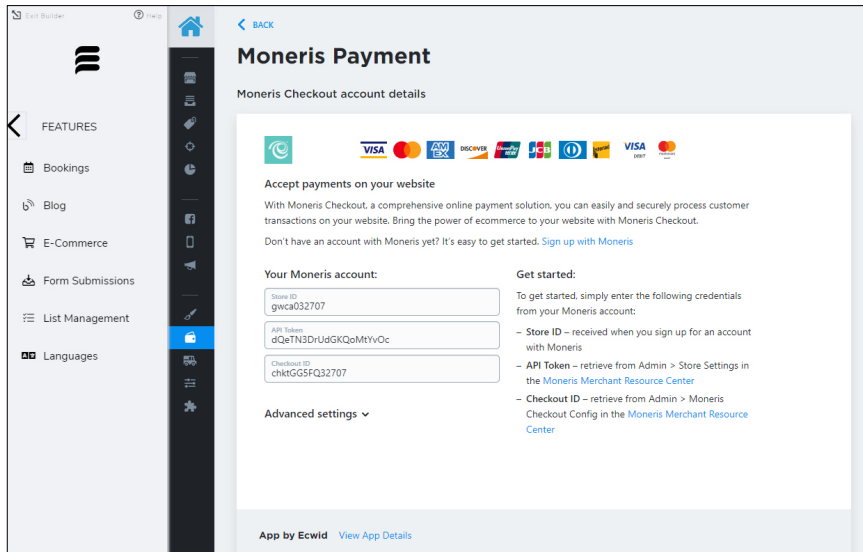
4. From the menu bar on the left, click **Features**.
5. On the FEATURES menu, click **E-Commerce**.
6. On the ECOMMERCE sub-menu, click **Payment** (or the **Payment** icon ()).



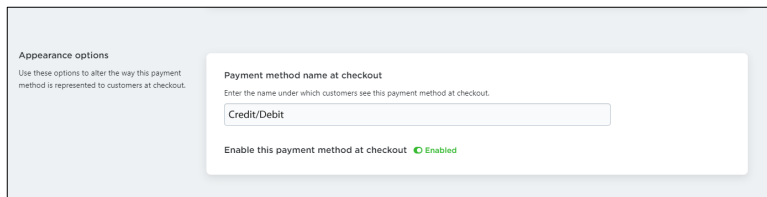
7. In the Payment screen, click inside the **More options to accept online payments in Canada** section.
8. Click the **Choose Payment Method** drop-down menu, and select **Moneris Checkout**.
9. In the Moneris Payment account details page, enter your Moneris Checkout account details to link your Bookmark ecommerce site with Moneris Checkout as follows:
 - a. Click inside the **Store ID** field and enter your Moneris Checkout store ID.
 - b. Click inside the **API Token** field and enter the API token you recorded earlier.
 - c. Click inside the **Checkout ID** field and enter the Moneris Checkout ID you recorded earlier.

Note: Instructions for accessing these settings can be found in the [Access information for integration](#) section on page 13.

Note: There is a toggle to enable a test mode under the **Advanced settings** section. It is not necessary to enable the test mode for this integration, however if you do enable the test mode, please ensure it's disabled when processing live transactions.



10. Scroll down to the **Appearance options** section, and rename the button that will take your online customers to the Moneris Checkout to process their transaction as follows:
 - a. Click inside the **Payment method name at checkout** field and enter a description for this payment method that will appear to your customers during checkout e.g. “Credit/Debit”. By default, the button name is “Moneris Payment”.
 - b. Ensure the **Enable this payment method at checkout** switch is set to “Enabled”.
 - c. Click the **Save** button at the top of the screen.



11. Click the **< BACK** link at the top of the page to save your work and return to the configuration.

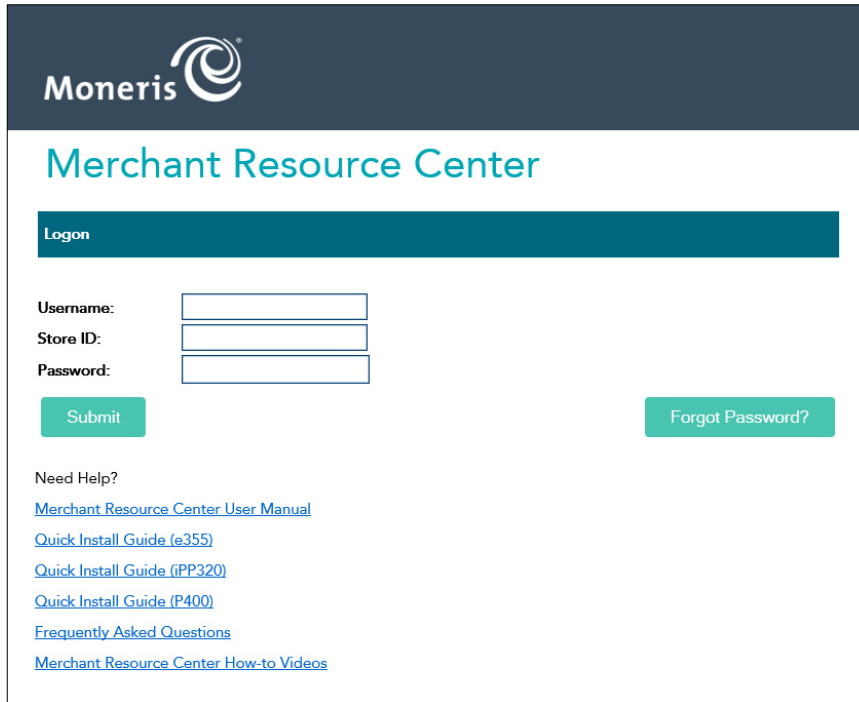
Congratulations! Payment processing with Moneris Checkout is now successfully integrated into your Bookmark website.

Enable Apple Pay

If you wish to accept Apple Pay on your ecommerce site, follow the instructions below to enable Apple Pay in MCO and Bookmark.

1. Log in to the MRC:
 - a. Access the MRC [here](#) (or launch a web browser and go to moneris.com/mrc).

The “Merchant Resource Center” login page appears.

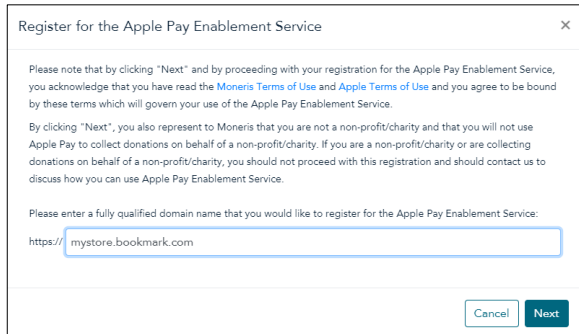


The screenshot shows the Moneris Merchant Resource Center login page. At the top left is the Moneris logo. Below it, the text "Merchant Resource Center" is displayed in a teal color. A dark teal bar with the word "Lagon" in white is positioned below the title. The login form consists of three input fields: "Username:", "Store ID:", and "Password:". To the right of the "Password:" field is a teal button labeled "Forgot Password?". Below the input fields is a teal button labeled "Submit". At the bottom of the page, there is a "Need Help?" section with several blue hyperlinks: "Merchant Resource Center User Manual", "Quick Install Guide (e355)", "Quick Install Guide (iPP320)", "Quick Install Guide (P400)", "Frequently Asked Questions", and "Merchant Resource Center How-to Videos".

- b. Enter your MRC login credentials (**Username**, **Store ID**, and **Password**) into the provided fields, then click **Submit**.
2. From the main Merchant Resource Center screen, click the **Admin** menu.
 3. On the Admin menu, click **Apple Pay**.
 4. In the Apple Pay Configuration screen, click the **Add Profile** button.

5. In the Register for the Apple Pay Enablement Service popup, click inside the URL field (beginning with **https://**) and enter the URL for your Bookmark ecommerce store.

Note: Do not enter the *https://* portion of the URL. If your URL is <https://mystore.bookmark.com>, you would only enter *mystore.bookmark.com* into the field.



Register for the Apple Pay Enablement Service

Please note that by clicking "Next" and by proceeding with your registration for the Apple Pay Enablement Service, you acknowledge that you have read the [Moneris Terms of Use](#) and [Apple Terms of Use](#) and you agree to be bound by these terms which will govern your use of the Apple Pay Enablement Service.

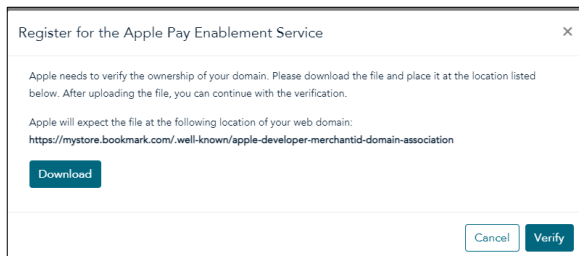
By clicking "Next", you also represent to Moneris that you are not a non-profit/charity and that you will not use Apple Pay to collect donations on behalf of a non-profit/charity. If you are a non-profit/charity or are collecting donations on behalf of a non-profit/charity, you should not proceed with this registration and should contact us to discuss how you can use Apple Pay Enablement Service.

Please enter a fully qualified domain name that you would like to register for the Apple Pay Enablement Service:

Cancel Next

6. Click the **Next** button.
7. In the next Register for the Apple Pay Enablement Service popup, click the **Verify** button.

Note: You do not need to download anything, so do not click the *Download* button.



Register for the Apple Pay Enablement Service

Apple needs to verify the ownership of your domain. Please download the file and place it at the location listed below. After uploading the file, you can continue with the verification.

Apple will expect the file at the following location of your web domain:
<https://mystore.bookmark.com/.well-known/apple-developer-merchantid-domain-association>

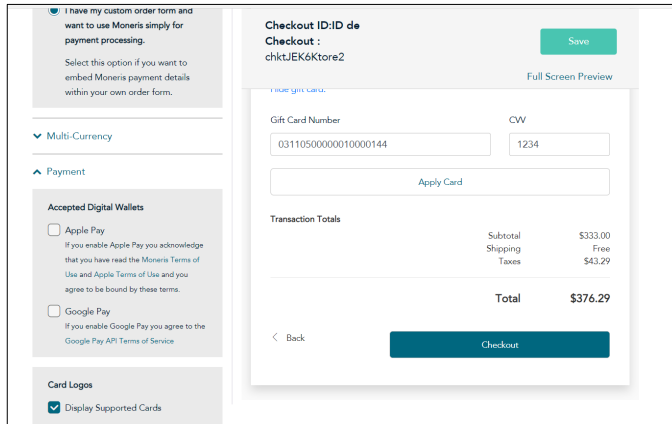
Download

Cancel Verify

Now your Bookmark ecommerce site is registered with Apple Pay and it will appear in the list on the Apple Pay Configuration page.

8. Do one of the following based on the earlier setup conditions:
 - When you initially set up your Bookmark integration, if you needed to follow the instructions in the [Configure Merchant Resource Center](#) section on page 7, proceed to step 9 in these instructions.
 - When you initially setup your Bookmark integration, if you had the Bookmark MCO profile created for you (and therefore did not need to complete the expanded setup instructions), proceed to step 16 in these instructions.
9. From the main Merchant Resource Center screen, click the **Admin** menu, then click **Moneris Checkout Config**.
10. In the Moneris Checkout Configuration screen, locate the checkout configuration labelled "Bookmark", and click its **Edit** button.

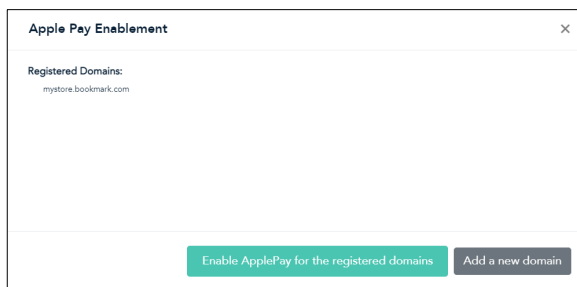
11. In the setting configuration section on the left side of the page, click to expand **Payment**.



12. Under the **Accepted Digital Wallets** section, read the *Apple* and *Moneris Terms of Use* (by clicking the links to the terms).

13. If you agree to the terms, place a checkmark in the **Apple Pay** checkbox.

An Apple Pay Enablement popup appears.



14. Click the **Enable ApplePay for the registered domains** button.

The Success popup appears.

15. Click the **OK** button.

16. Open a separate tab in your web browser and login to your Bookmark account.

17. From the homepage, click the **Your Website** tab at the top of the screen.

18. On the Your Websites page, click the **Edit** button.

The website builder tool appears.

19. From the menu bar on the left, click **Features**.

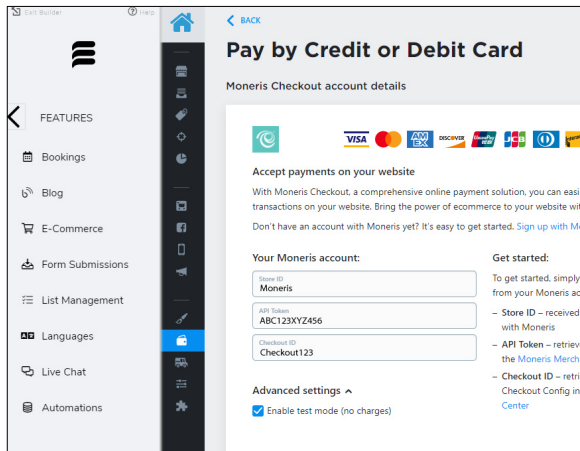
20. On the FEATURES menu, click **E-Commerce**.

21. On the ECOMMERCE sub-menu, click **Payment** (or the **Payment** icon ()).

22. In the Payment screen, click the **Actions** drop-down menu beside **Moneris Checkout – Settings**, then click **Edit**.

23. In the Moneris Checkout account details screen, click the **Advanced settings** arrow.

24. Place a checkmark in the **Enable test mode** checkbox.



25. Click the **< BACK** link at the top of the screen.

26. Open the Safari® browser on your personal Apple device (iPhone, iPad, Mac, etc.), and navigate to your Bookmark ecommerce site.

27. Perform a test transaction by “buying” one of your items and using Apple Pay at checkout to “pay” for it.

28. Do one of the following:

- If your test transaction was successful:
 - Proceed to step 29.
- If your test transaction failed or you received an error, try the following:
 - a. Ensure that you did not change any of the other payment settings in the Payment screen (the API Token, Checkout ID, or Store ID). If you changed them, you will need to restore them back to their original values. Refer to step 9 in the *Configure Bookmark* section on page 14 for instructions.
 - b. Close your Safari browser, reopen it, and try a brand new transaction.
 - c. If those two options fail, contact Moneris Customer Care at **1-866-319-7450**.

29. Disable test mode:

- a. In Bookmark, in the Payment screen, click the **Actions** drop-down menu beside **Moneris Checkout – Settings**, then click **Edit**.
- b. In the Moneris Checkout account details screen, click the **Advanced settings** arrow.
- c. Remove the checkmark in the **Enable test mode** checkbox.
- d. Click the **< BACK** link at the top of the screen.

Congratulations! Apple Pay is now enabled for your Bookmark ecommerce website.



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 [Moneris Support](#) to:
 - download additional copies of this guide and other resources
- Get help from Bookmark's support resources:
 - Visit bookmark.com/elearning to access several self-directed elearning tools
 - Visit bookmark.com/askanexpert to access a community of other Bookmark users
 - Visit bookmark.com/help_center to access a series of articles pertaining to using Bookmark
- 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?

Call Moneris Customer Care (available 24/7) toll-free 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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