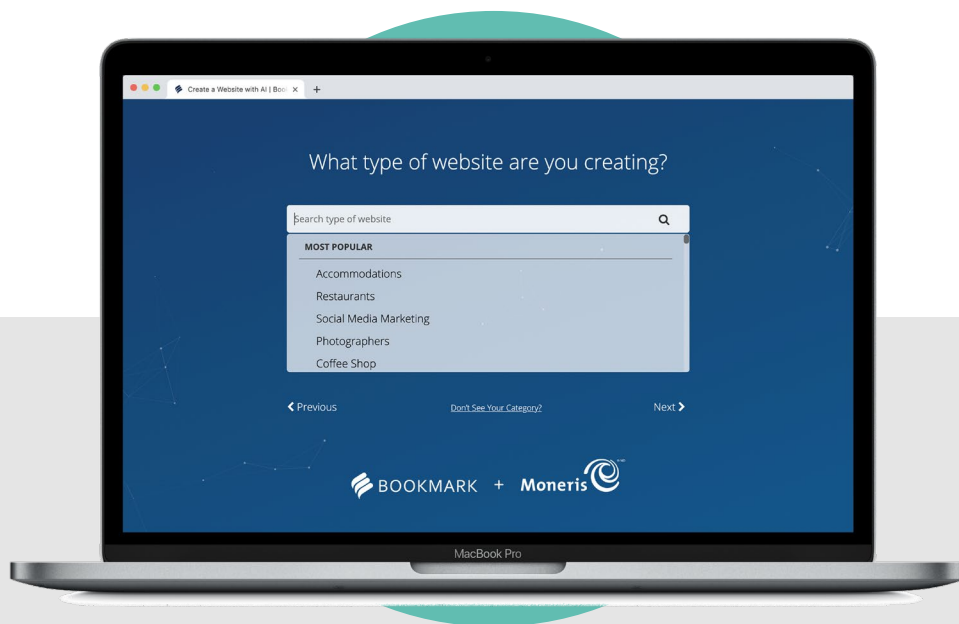




BE PAYMENT READY

Moneris® Online

Setup Guide





BE PAYMENT READY

Need help?

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

Bookmark™: bookmark.com/help_center

Record your Moneris® merchant ID here:

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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.

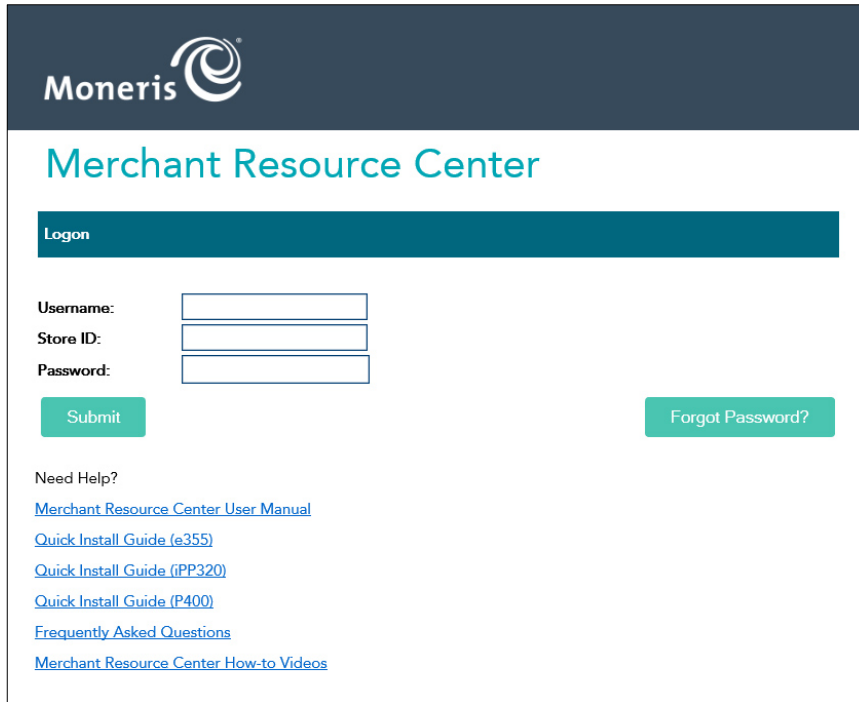
Before you get started

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.

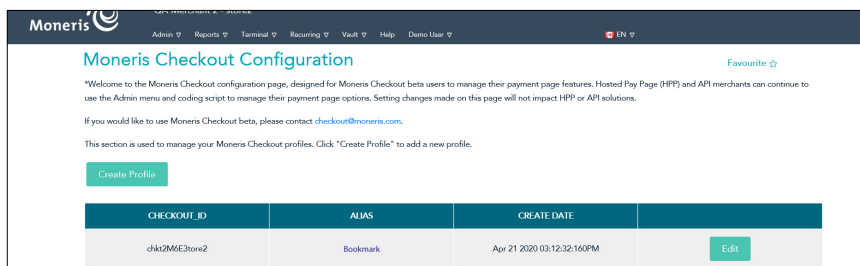


The screenshot shows the Moneris Merchant Resource Center login page. At the top is the Moneris logo. Below it is the title "Merchant Resource Center". A "Lagon" button is present. There are three input fields for "Username:", "Store ID:", and "Password:". Below these fields are two buttons: "Submit" and "Forgot Password?". Under the "Need Help?" section, there are several links: "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**.

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”.



The screenshot shows the Moneris Checkout Configuration page. At the top is the Moneris logo and a navigation bar with links: Admin, Reports, Terminal, Recurring, Vault, Help, Demo User. The title is "Moneris Checkout Configuration". Below the title is a "Favourite" button. A welcome message states: "Welcome to the Moneris Checkout configuration page, designed for Moneris Checkout beta users to manage their payment page features. Hosted Pay Page (HPP) and API merchants can continue to use the Admin menu and coding script to manage their payment page options. Setting changes made on this page will not impact HPP or API solutions." Below this is a link: "If you would like to use Moneris Checkout beta, please contact checkout@moneris.com." A note states: "This section is used to manage your Moneris Checkout profiles. Click 'Create Profile' to add a new profile." There is a "Create Profile" button. Below this is a table with columns: CHECKOUT ID, ALIAS, CREATE DATE, and an "Edit" button.

CHECKOUT ID	ALIAS	CREATE DATE	
chk2M6E3tore2	Bookmark	Apr 21 2020 03:12:32:160PM	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.

Configure Merchant Resource Center

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

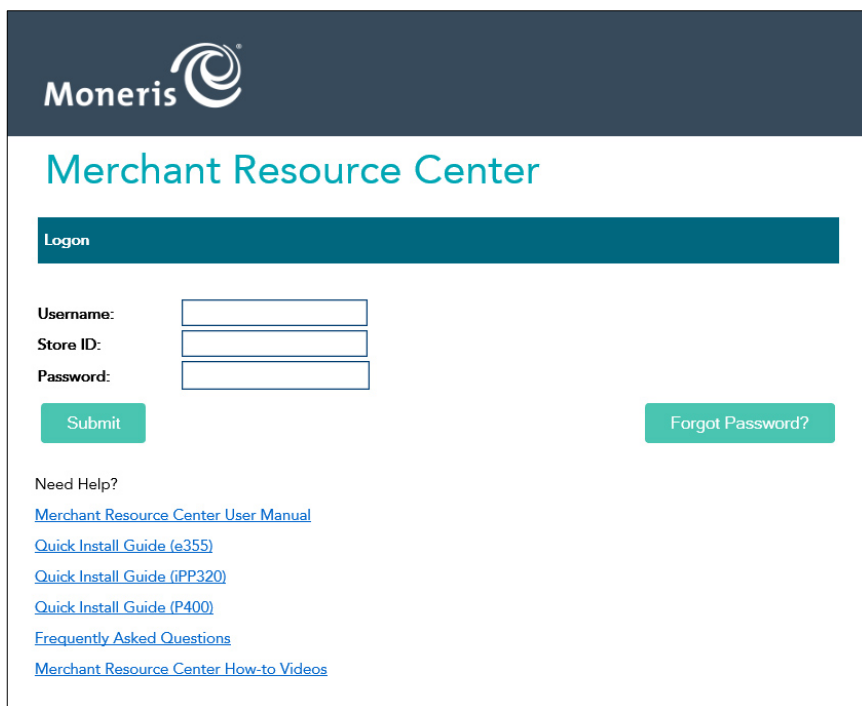
Important: Do not change any of the configurations for areas in Moneris Checkout not mentioned in this guide. Unauthorized configuration changes could affect the operability of online transaction processing.

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.

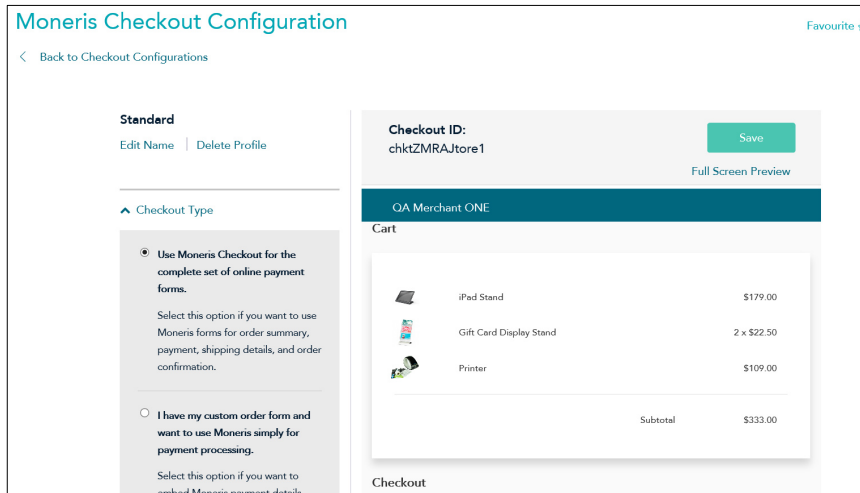
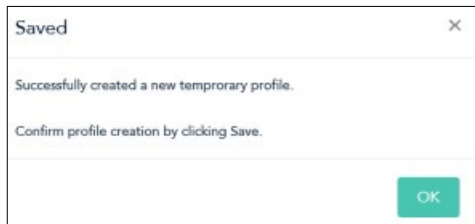
The screenshot shows the Moneris Merchant Resource Center login page. At the top is the Moneris logo. Below it is the title "Merchant Resource Center". A dark teal bar with the word "Ligon" (likely a typo for "Login") is present. Below this are three input fields labeled "Username:", "Store ID:", and "Password:". To the right of the "Password:" field is a "Forgot Password?" button. Below the input fields is a "Submit" button. At the bottom, there is a "Need Help?" section with several links: "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**.

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.



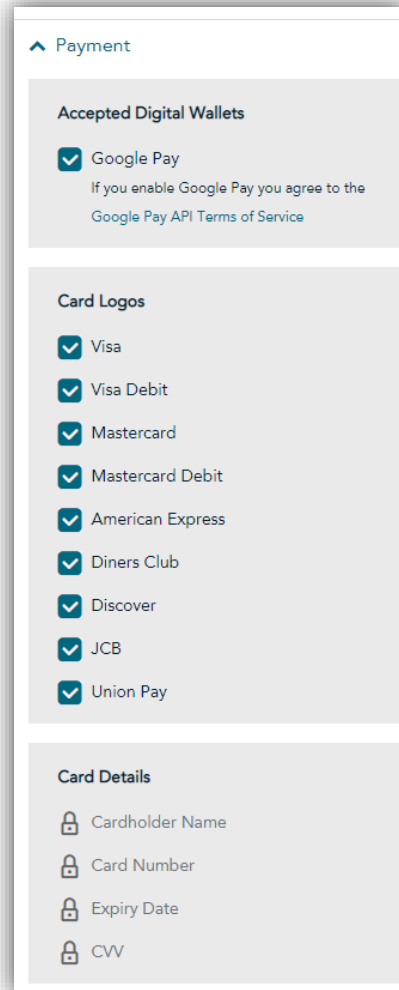
- On the left side of the screen, above **Checkout Type**, click the **Edit Name** link.
The Edit Checkout Alias popup appears.
- Click inside the **Alias** field and enter a new alias for your Checkout configuration e.g. "Bookmark".
- Click **Save** when finished, then click **OK** in the confirmation 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.
 - c. In the **Card Logos** section, place checkmarks in all of the checkboxes for the payment types so that the logos for those payment types appear on your Bookmark ecommerce website.

Note: Do not leave any logos unchecked.
 - d. Ignore the **Card Details** section. These items are locked and cannot be changed.



The screenshot shows the 'Payment' configuration page in the Moneris Checkout interface. It is divided into three main sections: 'Accepted Digital Wallets', 'Card Logos', and 'Card Details'. The 'Accepted Digital Wallets' section has a checkbox for 'Google Pay' which is checked, with a note below it stating 'If you enable Google Pay you agree to the Google Pay API Terms of Service'. The 'Card Logos' section lists various card types with checkboxes, all of which are checked: Visa, Visa Debit, Mastercard, Mastercard Debit, American Express, Diners Club, Discover, JCB, and Union Pay. The 'Card Details' section lists 'Cardholder Name', 'Card Number', 'Expiry Date', and 'CVV', each preceded by a lock icon, indicating these fields are locked and cannot be edited.

Payment

Accepted Digital Wallets

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

Card Logos

☒ Visa
☒ Visa Debit
☒ Mastercard
☒ Mastercard Debit
☒ American Express
☒ Diners Club
☒ Discover
☒ JCB
☒ Union Pay

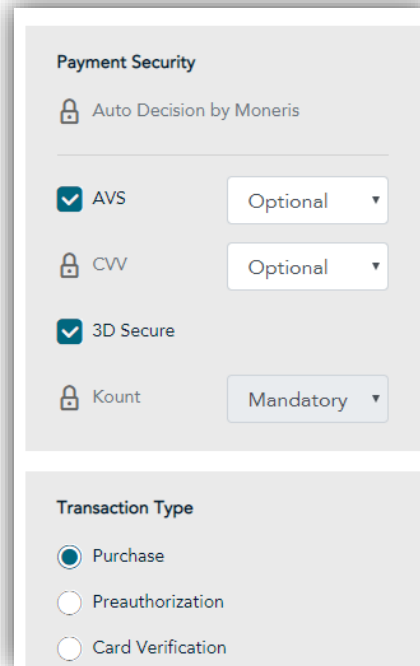
Card Details

Cardholder Name
 Card Number
 Expiry Date
 CVV

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 'Payment Security' configuration panel. At the top, there is a section for 'Auto Decision by Moneris' with a lock icon. Below this, there are four rows of settings, each with a lock icon, a label, and a dropdown menu. The first row is 'AVS' with a checked checkbox and a dropdown set to 'Optional'. The second row is 'CVV' with an unchecked checkbox and a dropdown set to 'Optional'. The third row is '3D Secure' with a checked checkbox and a dropdown set to 'Optional'. The fourth row is 'Kount' with an unchecked checkbox and a dropdown set to 'Mandatory'. Below this section is a 'Transaction Type' section with three radio button options: 'Purchase' (selected), 'Preauthorization', and 'Card Verification'.

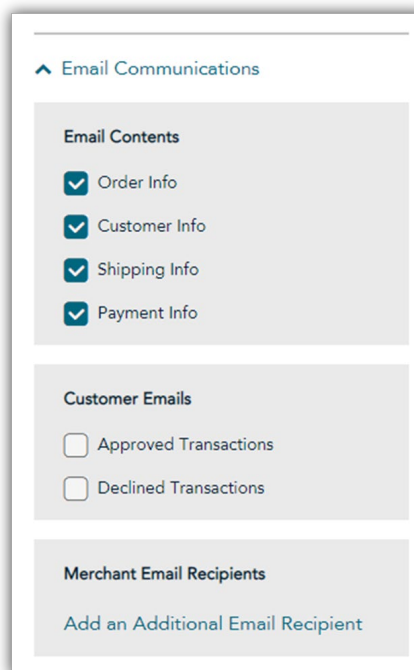
3. In the **Transaction Type** section, click the **Purchase** option, and leave the others blank.
4. If the **Transaction Limits** section is visible to you, ignore it for now.
5. Go to the top of your live checkout preview, and click the **Save** button.
6. When the "Success" dialog box displays, click 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 a configuration panel titled "Email Communications" with a blue upward arrow icon. It contains three main sections: "Email Contents" with four checked checkboxes for "Order Info", "Customer Info", "Shipping Info", and "Payment Info"; "Customer Emails" with two unchecked checkboxes for "Approved Transactions" and "Declined Transactions"; and "Merchant Email Recipients" with a 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*
- 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.

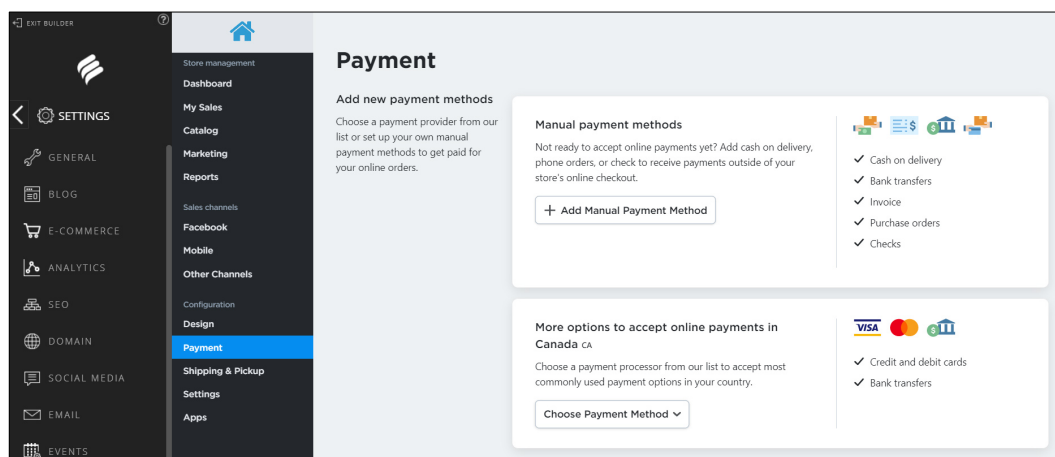
Configure Bookmark

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.

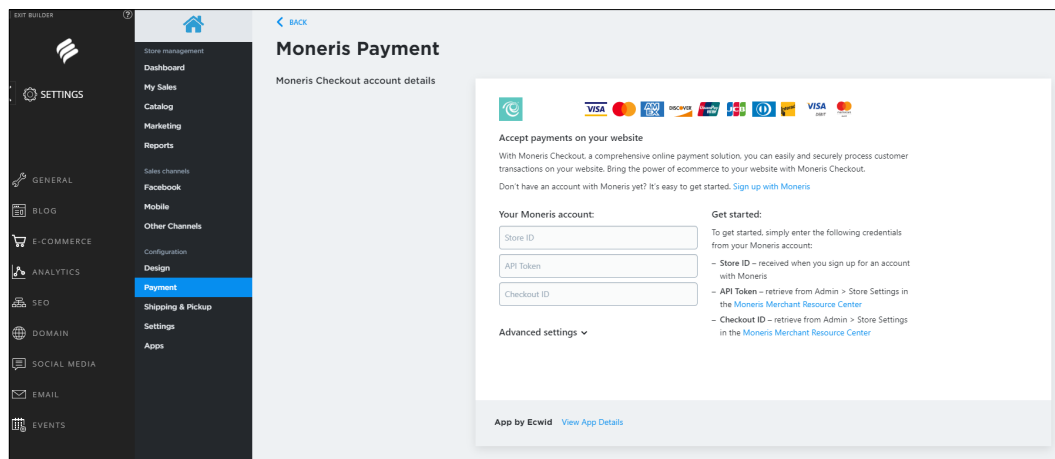
4. From the menu bar on the left, click **SETTINGS**.
5. On the SETTINGS menu, click **E-COMMERCE**.
6. On the ECOMMERCE sub-menu, click **Payment** (or the **Payment** icon ()).



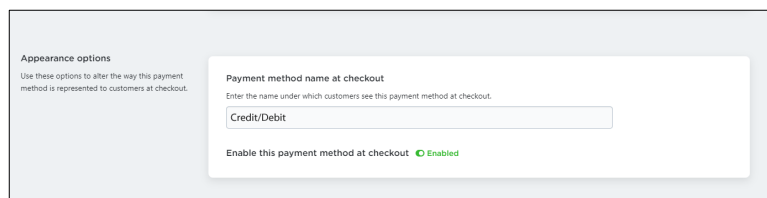
7. In the Payment screen, click inside the **More options to accept online payments in Canada** section.
8. Click the **Choose Payment Method** drop-down menu, and select **Moneris Checkout**.
9. In the Moneris Payment account details page, enter your Moneris Checkout account details to link your Bookmark 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.

A large, light teal spiral graphic that starts from the top right and curves towards the bottom left, occupying the upper right portion of the page.

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](tel: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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