

# PARTNER DIRECT

## Quick Reference Guide



Getting Started: <https://partnerdirect.moneris.com/partnerdirect/logon.jsp>

### To Create Your User ID

1. From the Partner Direct login page, select **Sign Up** located on the bottom left side of the screen. The **User Information** screen will appear.
2. Enter your first and last name.
3. Select your company from the Partner Name drop down list.
4. Select your branch from the Branch Name drop down listing. Your respective transit and division will appear.
5. Enter and confirm your business e-mail address.
6. In the **Security Information** section, enter and confirm your **User ID** following the example provided.
7. Once **Submit** is selected, a system generated temporary password will be sent to your business e-mail address within 15 minutes.
8. Select the **LOGIN** link, on the left toolbar, to continue. Enter your User Id, (created in Step 6), and the system generated password you received via email.

### To Submit a Referral

1. Once logged in, the Referral Screen will appear. Your personal information will be automatically populated in the **Referral Source Information** section.
2. In the **Merchant Information** section, complete all required fields.
3. Ensure a value is entered in the "**Monthly Credit Card Volume**" because a "\$0" entry will not be accepted. If the merchant does not know their monthly credit card volume, you can refer to the Monthly Volume Chart for assistance (located beside the "Monthly Credit Card Volume" field).
4. In the **Additional Information** section, enter bullet point comments that are pertinent to this referral such as information on the current payment processing or language preference.
5. After viewing the Terms and Conditions, select the **I Agree** box and submit the referral.

Successfully submitted referrals will receive a message, as well as an email confirmation containing the Moneris sales rep contact info and a Partner Direct reference number. It is highly recommended to print a hard copy of the email confirmation for status check inquiries or contact with the sales rep.

### To Check the Status of a Referral

1. Select the **Status Update** link on the left toolbar.
2. Input the information you would like to base your search on:
  - **To search for a specific referral:**  
Enter **Registered Name or Operating As Name** and **PD Reference Number**
  - **To search for multiple or all referrals:**  
Enter **Referral Input Date Range and Referral Status**
3. Review the "Referral Status" results to understand where your referral is within the Moneris sales process

**PLEASE NOTE:** As a security measure, Partner Direct will automatically time out after 20 minutes of inactivity

Referral Status	Definition
Assigned to Sales Rep	The referral has been received and assigned to a Moneris Sales Rep to contact the customer.
Contacting Customer	The Moneris Sales Rep is in the process of contacting the customer. A minimum of 3 calls will be made before contacting the partner for assistance.
Closed Lead	Either the customer has declined the Moneris offer or there is no potential for the referral to become a sales application.
Postponed – Call Back Date Set	A Postponed status will be used when the customer has indicated to the Moneris Sales Rep they are not ready to proceed with a sales application within the next 60 days.
Offer Presented – In Progress	The customer has received an offer (written or verbal) from Moneris. Moneris Sales Rep will continue to follow up with the customer to obtain consent to proceed.
Application Submitted	The customer has agreed to proceed and the required documentation has been received.
Credit Adjudication	A credit review is being conducted.
POS Install and Training	Installation and training of POS is in progress.
Sold	Customer application has been sold. Referral rewards, if applicable, are paid at this status.
Declined	The referral will not result in a sale because either Moneris has declined the referral or the customer has cancelled their order.

## Need Support?

### If you have forgotten your User ID or Password

On the Partner Direct login page, links are provided to retrieve your information through **Forgot Password?** and **Forgot User ID?**


- You will be asked to enter your business email address
- The requested User Id or Password will be emailed to you within 10 minutes

## Profile Changes

### If you need to make changes to your Profile

From the **Update Profile** link on the left toolbar, you can make changes to your personal information, including transit number, password, e-mail address, and language preference. Please note, once your User ID is created, it cannot be changed.

## The Partner Support Team is Available to Assist You.

 **1-800-335-0981** Mon – Sat from 8:00 am – 8:00 pm (est)

 **From the Partner Direct Log In Screen: Click on the Escalation Support link**

 **customercare@moneris.com** Mon – Fri from 8:00 am – 8:00 pm (est)

Please visit the **Partner Resource Library** on the left navigation menu for additional help and tips.