Moneris® Checkout and Ecwid®

Integration Guide
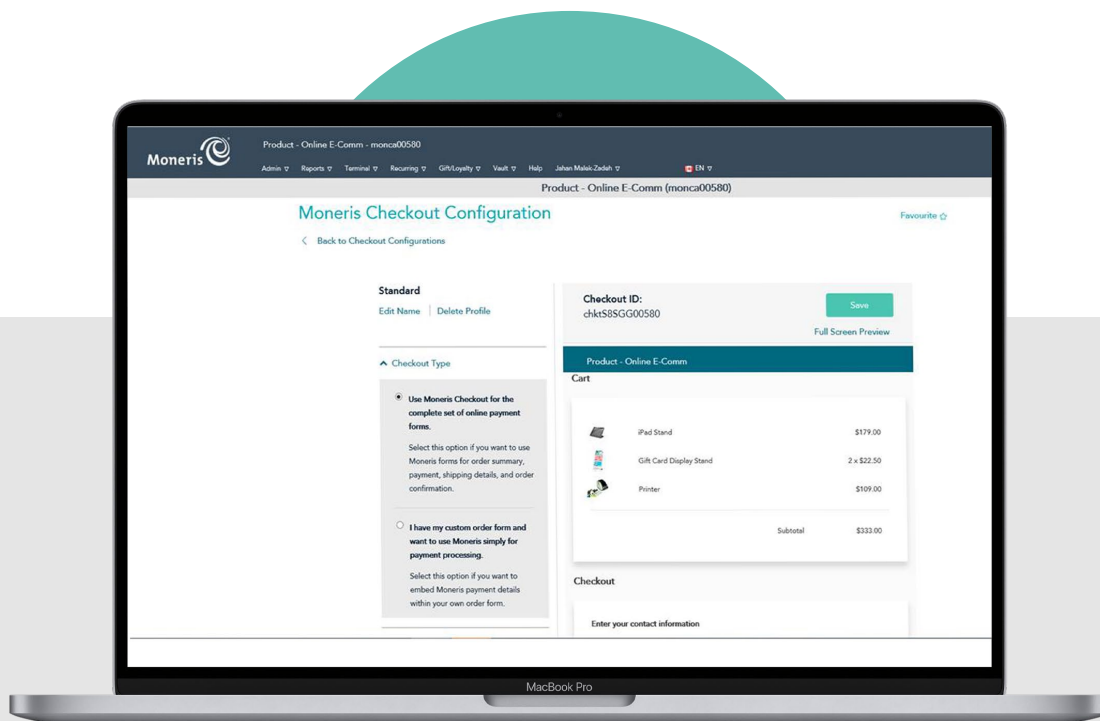
Moneris ®/MD

Record your Moneris merchant ID here:

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Contents

Integrating Moneris Checkout into the Ecwid Plugin

In this section, we go over everything you need to know to integrate Moneris Checkout with the Ecwid plugin to accept payments on your ecommerce website.

Setup and Configuration

The following steps will guide you through the general setup and configuration of a Moneris Checkout profile, and the integration of that profile into Ecwid.

If additional support is required, including information about other Moneris Checkout settings, please refer to the *Moneris® Merchant Resource Center User Manual*, available on the Merchant Resource Center login page, or contact Moneris Customer Care at **1-866-319-7450**.

Set up a Moneris Checkout profile

1. Navigate to one of the two environments in the Merchant Resource Center (MRC):

    ▪ *Testing* environment: **https://esqa.moneris.com/mpg/**
    ▪ *Production* environment: **https://www3.moneris.com/mpg/**

2. Login using your Moneris credentials (**Username**, **Store ID**, and **Password**).

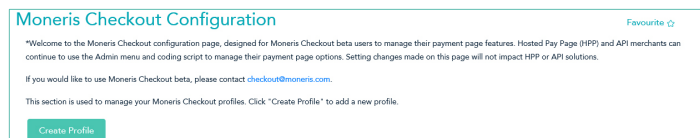3. Click the **Admin** menu, then click **Moneris Checkout Config**.
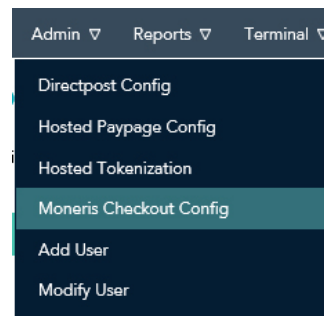
4. Click the **Create Profile** button to create a Moneris Checkout profile.
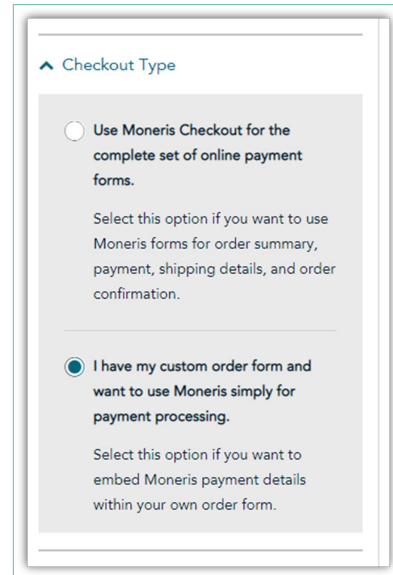
    A Saved dialog box appears.

5. Click the **OK** button.

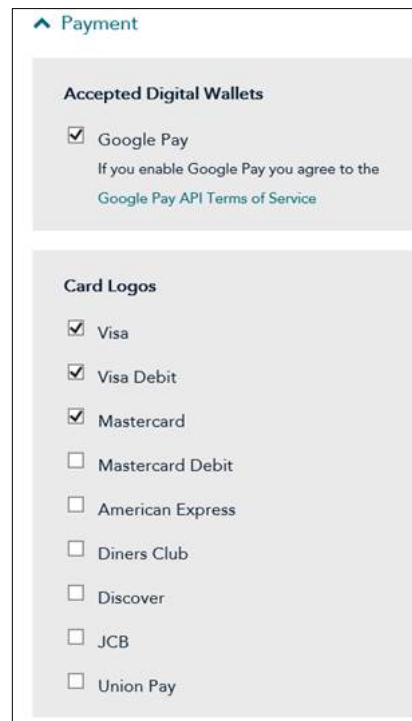   The Moneris Checkout Configuration page appears.

6. On the menu bar on the left side of the screen, under the **Checkout Type** section, ensure that the **I have my custom order form** radio button is selected, then click the **Save** button, then click **OK** in the Success dialog box.

7. Scroll down and expand the **Payment** section.

   ▪ Under the **Accepted Digital Wallets** section enable/disable digital wallet support per your integration requirements.
   ▪ Under the **Card Logos** section enable/disable the display of debit and credit card logos per your integration requirements.
   ▪ Under the **Payment Security** section, select fraud-prevention tools per your integration requirements.

      ▪ Determine whether to allow Moneris to manage auto-decisioning concerning how transaction requests are handled and processed through your checkout:

      Note: *Decisions are based on fraud-prevention response codes from supported fraud-prevention tools such as AVS, CVV, 3-D Secure, and Moneris Kount®. Auto-decisioning may or may not be configurable from your settings panel, and may be enabled/disabled by default*

depending on the fraud-prevention features for which your store is enabled.

- Enable/disable each fraud-prevention tool (**AVS**, **CVV**, **3D Secure**, and **Kount**) if displayed on your settings panel.
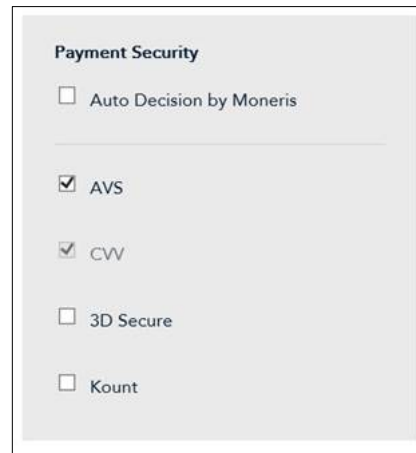
  Note: *The fraud-prevention tools displayed on your settings panel are dependent on the fraud-prevention features for which your store is enabled. Some fraud-prevention tools may be enabled/disabled by default and may or may not be configurable from your settings panel.*

- Scroll down to **Transaction Type** and select **Purchase**.

  Note: *The other transaction types are not currently supported by the Ecwid integration.*
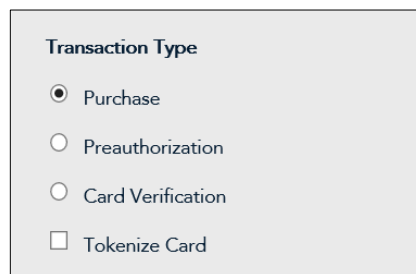
- Under **Transaction Limits** section enable/disable a minimum and maximum transaction dollar limit type.

Note: *Transaction limits control the maximum and minimum dollar amounts that can be charged for any one order submitted by a customer in the checkout. To enable a limit, checkmark the box beside the desired limit type (**Transaction Min ($)** and **Transaction Max ($)**), and then enter a dollar amount (#.##) in the corresponding field. To disable a limit, unmark the box beside the undesired limit type.*

8. Scroll down and expand the **Order Confirmation** section.

  - Under **Order Confirmation Processing**, select the **Use Moneris** option.
  - Under the **Confirmation Page Content** section, select the desired information you wish to be displayed on the confirmation page (when the customer is completing their transaction).

9. Scroll down and expand the **Email Communications** section.
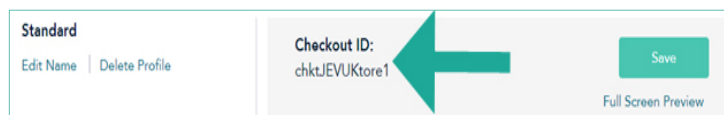
  - Under the **Email Contents** section, select the desired contents that will appear in the order confirmation email the customer will receive.
  - Under the **Customer Emails** section, place a checkmark in the desired checkbox for what event triggers an email to be sent to a customer.

10. Click the **Save** button in the upper right corner.

11. Click **OK** in the Success dialogue box.

12. Make note of the **Checkout ID** in the Checkout profile. This value will need to be entered later during the integration process.

Retrieve the API token

You also require the API token to integrate Moneris Checkout into your Ecwid configuration. To access the API token, follow the steps below.

1. On the Merchant Resource Center main page, click the **Admin** menu.

2. On the Admin menu, click **Store Settings**.

3. On the Store Settings page, record the **API Token** value.
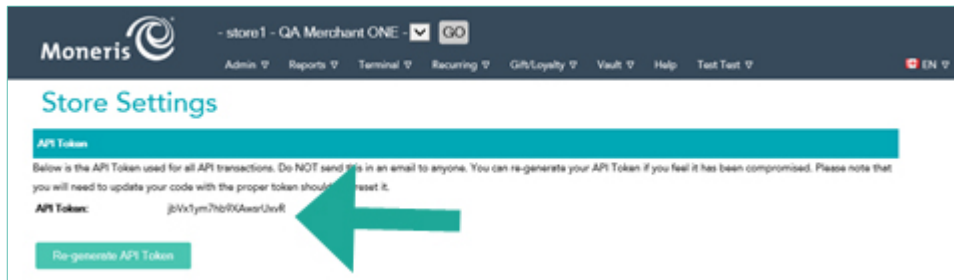
Add Moneris Checkout profile details to the Ecwid configuration

1. Login to the Ecwid Admin Panel.

2. Navigate to **SETTINGS** > **E-COMMERCE**.

3. On the ECOMMERCE sub-menu, click **Payment** (or the **Payment** icon ( )).
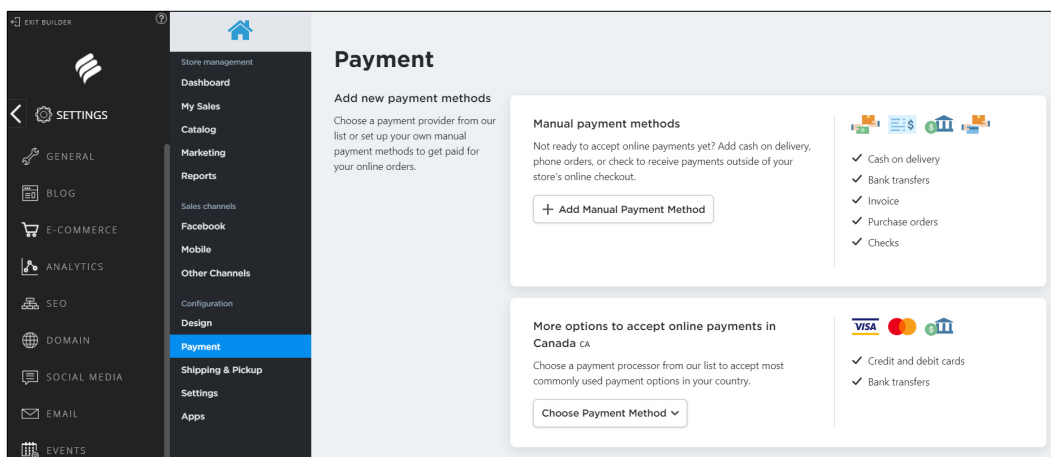
4. In the Payment screen, click inside the **More options to accept online payments in Canada** section.

5. Click the **Choose Payment Method** drop-down menu, and select **Moneris Checkout**.

6. In the Moneris Payment account details page, enter your Moneris Checkout account details to link your Ecwid 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.
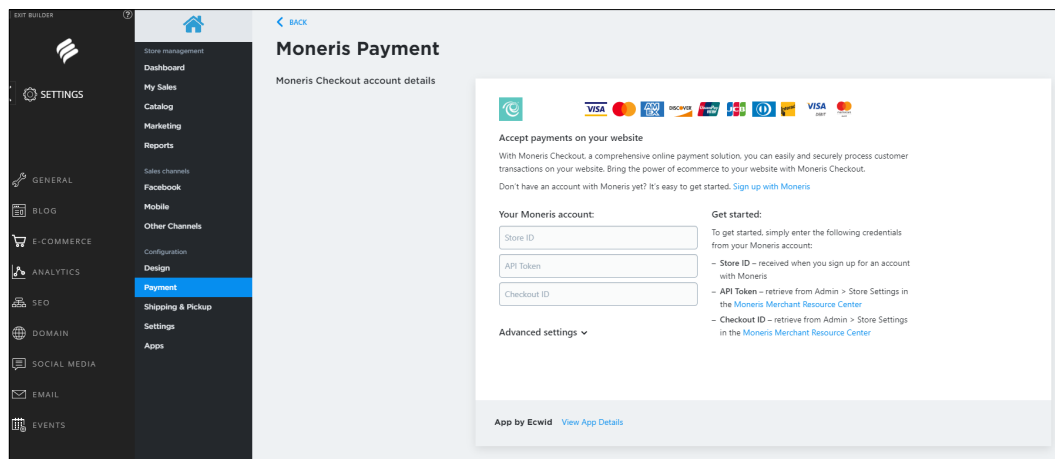
7. Scroll down to the **Appearance options** section, and rename the button that will take your online customers to the Moneris Checkout to process their transaction as follows:

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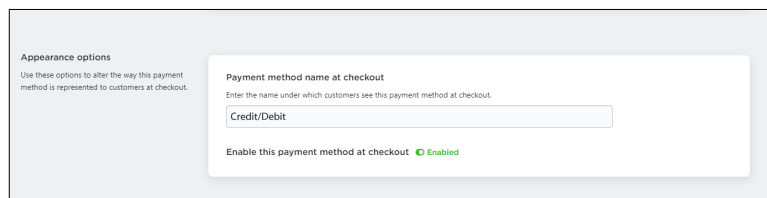
8. Click the **< BACK** link at the top of the page to save your work and return to the configuration.

Perform voids and process refunds in the Merchant Resource Center

The following sections will provide detailed steps for performing voids and processing refunds in the Moneris Merchant Resource Center.

Note: *If additional support is required, beyond the instructions presented in this section, please refer to the* <u>User help</u> *section on page12.*

Process a Refund in the Merchant Resource Center

Follow the steps below to fully or partially reverse (refund) a Merchant Resource Center-referenced credit card Purchase or Capture in a closed batch. The funds are restored to the cardholder's card. The Refund and the original transaction will be referenced on the cardholder's statement.

Note: *To reverse a Merchant Resource Center-referenced debit card transaction, you must do a Void. Refer to the* **Moneris® Merchant Resource Center User Manual** *for instructions on performing a Void.*

1. On the menu bar, click on **Terminal** > **Refund**.

2. On the Refund page, click inside the **Order ID** field and enter the order ID of the original transaction that you want to reverse.

    Note: *If you only have a partial order ID, select the* **begins with** *or the* **ends with** *radio button.*

3. Click on the **Locate Transaction** button.

4. In the "Transaction List" area, click on the **Refund** button beside the transaction that you want to reverse.

5. In the "Transaction Details" area, do the following:

    a. In the **Amount** field, enter the amount to be refunded e.g. 12.50; otherwise, leave the displayed amount as is to refund the full amount of the original transaction.

        - If the **Customer Code** field displays, optionally enter a customer code.
        - If the **Invoice Number** field displays, optionally enter an invoice number.

    b. If the **Add Level 2/3 Details** button displays, ignore it and proceed to step 6.

6. Click on the **Process Transaction** button.

7. When the "APPROVED" or "DECLINED" response displays on the "Refund" page, the transaction is complete.

8. Print or e-mail the debit/credit Refund receipt.

For more information on performing transactions within the MRC, refer to the ***Moneris® Merchant Resource Center User Manual*** for instructions. That manual is available as a PDF on the MRC login page.

Process a Void in the Merchant Resource Center

Follow the steps below to reverse (cancel) a Merchant Resource Center-referenced debit/credit card Purchase, Capture, or Voice Authorization-Advice in an open batch. The funds of the original transaction are fully restored

to the cardholder's card. The Void transaction and the original transaction will not be referenced on the cardholder's statement.

1. On the menu bar, click on **Terminal** > **Void**.

2. Wait for the "Void" page to display.

3. In the **Order ID** field, enter the order ID of the original transaction that you want to reverse.

   Note: *If you only have a partial order ID, select the **begins with** or the **ends with** radio button.*

4. Click on the **Locate Transaction** button.

5. Wait for the "Void" page to display.

6. In the "Transaction List" area, click on the **Void** button beside the transaction that you want to reverse.

7. In the "Transaction Details" area, do the following:

   - If the **Customer Code** field displays, optionally enter a customer code.
   - If the **Invoice Number** field displays, optionally enter an invoice number.

8. Click on the **Process Transaction** button.

9. When the "APPROVED" or "DECLINED" response displays on the "Void" page, the transaction is complete.

For more information on performing transactions within the MRC, refer to the ***Moneris® Merchant Resource Center User Manual*** for instructions. That manual is available as a PDF on the MRC login page.

Merchant support

At Moneris, help is always here for you 24/7.

User help

Should you find you need assistance beyond this integration guide, please reach out to the appropriate team.

For support with the Ecwid plugin, contact our integration partner, Ecwid:

- **support@ecwid.com**

For support with the Moneris Merchant Resource Center and Moneris Checkout, contact Moneris Customer Care:

- Web: **moneris.com/support-gateway**
- Email: **onlinepayments@moneris.com**
- Toll-free: **1-866-319-7450**
- You can also send us a secure message 24/7 by logging in to Merchant Direct® at **moneris.com/mymerchantdirect**.

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