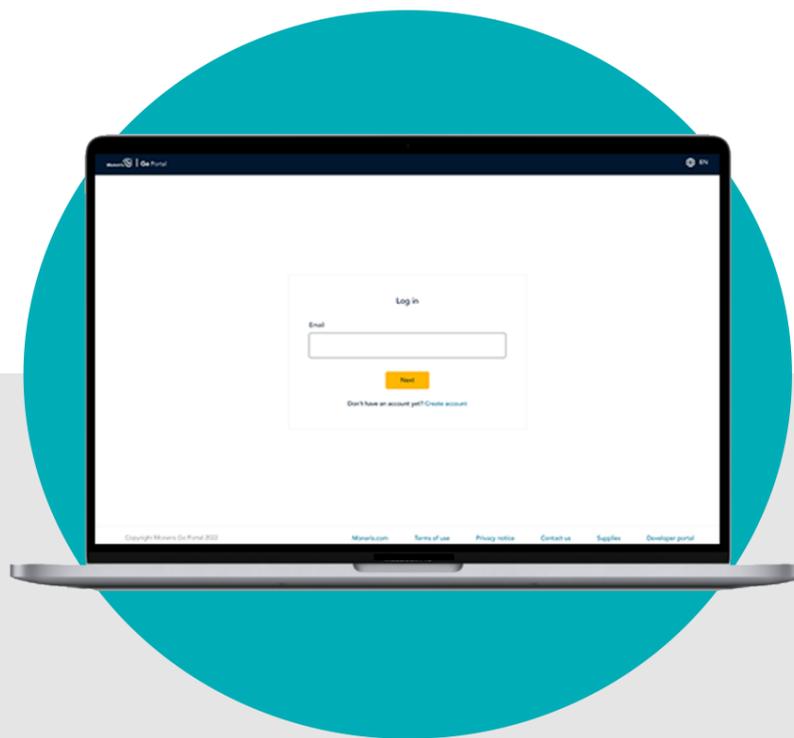




# Moneris® Go portal

## Reference Guide





## Need help (general)?

**Web:** <https://www.moneris.com/en/support/moneris-go/moneris-go-portal>

**Email:** [onlinepayments@moneris.com](mailto:onlinepayments@moneris.com)

**Toll-free:** 1-866-319-7450

## Need help (using Go portal feature/function)?

Log into the Moneris Go portal, and use the portal feedback form  
(see [Sending feedback/requesting assistance while logged in](#) on page 195)

Record your Moneris® merchant ID here:

---

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# Getting Started

In this section, we go over everything you need to do so that you can start using the Moneris Go portal.

## What is Moneris Go portal?

Moneris Go portal is an application that can help you take your business wherever you go. Moneris Go portal gives you a unified experience, whether you choose to log in through a web browser ([www.monerisgo.com](http://www.monerisgo.com)) or your Moneris Go terminal.

Moneris Go portal features include: secure, user-friendly interface; compatibility with all mobile devices (cellphone, tablet, or desktop); compliance with the ***Accessibility for Ontarians with Disabilities Act*** (AODA); support for English and French language; access to a dashboard and real-time sales and transactional reports; virtual terminal to complete and refund transactions and send payment requests; Vault customer profiles management; and user and roles management for terminals and the portal.

## How to use this guide

This guide describes how to use the features and functions of the Moneris Go portal, including how to set up your user account for access to the portal. To begin, please follow the [How to get started](#) steps (page 9).

# How to get started

The following 1-2-3 steps describe what you need to do to set up your user account and start using Moneris Go portal.

## 1 Ensure your mobile device/PC meets the minimum requirements

- Up-to-date supported browser installed (Google Chrome, Microsoft Edge, and Apple Safari)
- Cookies enabled
- Internet access
- Valid email address (for use in setting up your Moneris Go portal user account)

## 2 Set up your account

### Are you the primary user?

The primary user owns the merchant account.

- a. Contact us to establish your Moneris merchant account.
- b. Sign up for Moneris Go portal access (see [Signing up for Moneris Go portal access](#) on page 10).
- c. Activate your Moneris Go portal user account (see [Activating your user account](#) on page 12).

**Note:** Your account is treated as the primary user account, having access to all the major features and functions of the Moneris Go portal.

- d. Add a store to the primary user account (see [Adding the first store to the primary user account](#) on page 14).

**Note:** You will need your 13-digit merchant ID and store ID (these IDs were sent to you in your Moneris welcome email).

### Are you a secondary user?

A secondary user is a person whose Moneris Go portal user account was added/registered by another user.

- a. Activate your Moneris Go portal user account (see [Activating your user account](#) on page 12).

## 3 Ready to log in and use the Moneris Go portal?

You can log in and start using the Moneris Go portal features and functions (e.g., define your store settings, add new users, perform financial transactions, etc.).

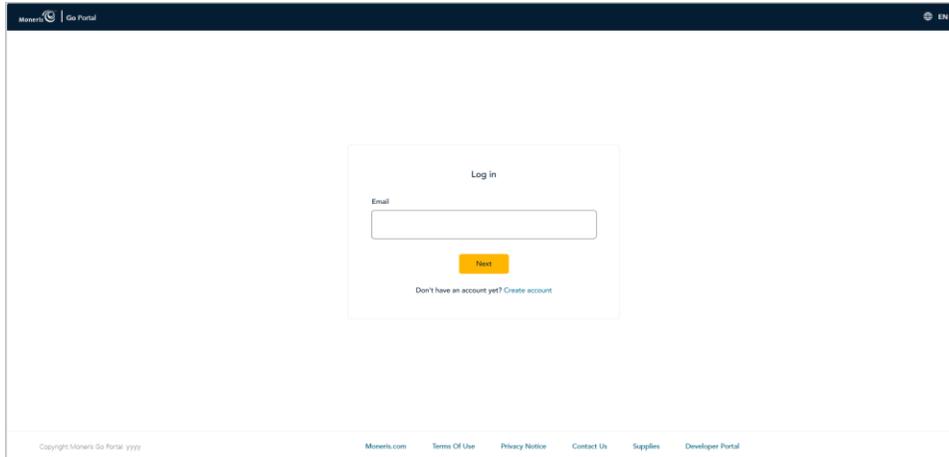
- See [List of Moneris Go portal features and functions](#) (page 16).

## Signing up for Moneris Go portal access

The steps below describe how to sign up for Moneris Go portal access. The sign-up process involves creating your Moneris Go portal user account.

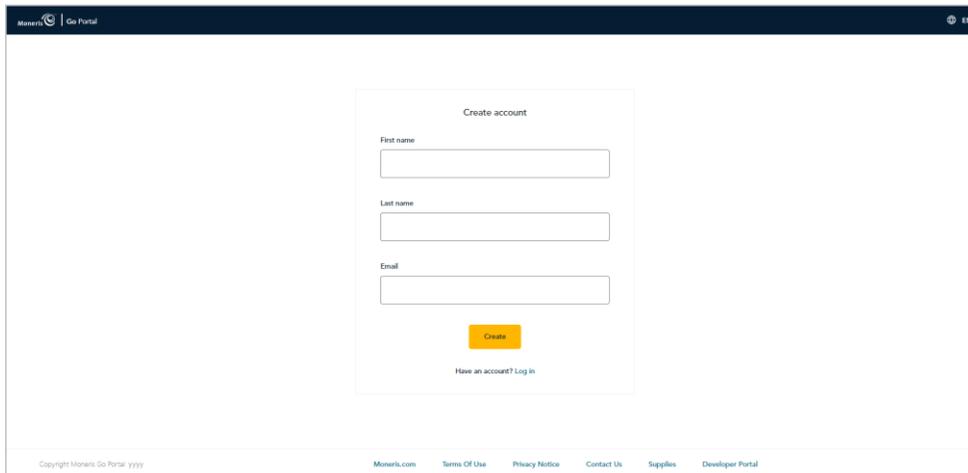
**Important! Before you begin this procedure, please ensure that you have reviewed the [How to get started setup overview \(page 9\)](#).**

1. Visit [www.monerisgo.com](http://www.monerisgo.com) to start on the Moneris Go portal "Log in" page (shown below).



The screenshot shows the Moneris Go portal "Log in" page. At the top left is the Moneris Go logo and "Go Portal". At the top right is a language selector "EN". The main content area is titled "Log in" and contains an "Email" label above a text input field. Below the input field is a yellow "Next" button. Underneath the button is a link: "Don't have an account yet? [Create account](#)". At the bottom of the page, there is a footer with "Copyright Moneris Go Portal yyyy" on the left and a navigation menu with links for "Moneris.com", "Terms Of Use", "Privacy Notice", "Contact Us", "Suppliers", and "Developer Portal" on the right.

2. Click on **Create account**.
3. When the "Create account" page displays (shown below), fill in the required fields:



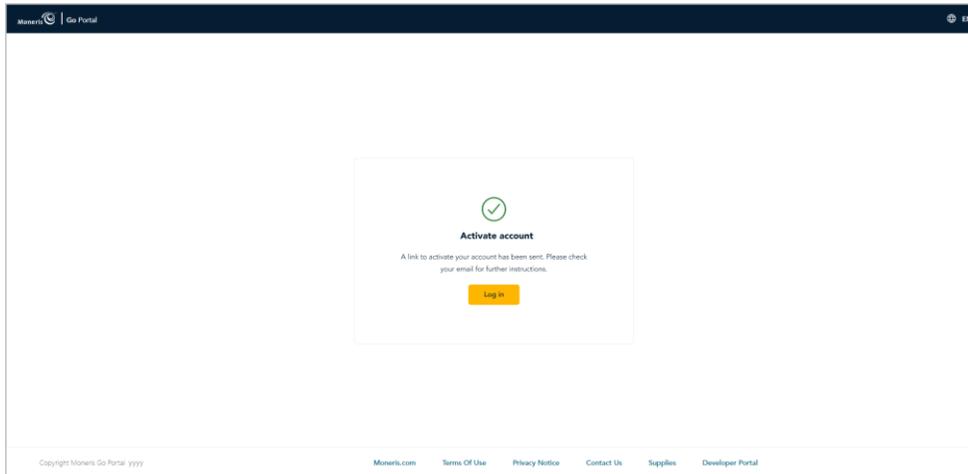
The screenshot shows the Moneris Go portal "Create account" page. At the top left is the Moneris Go logo and "Go Portal". At the top right is a language selector "EN". The main content area is titled "Create account" and contains three input fields: "First name", "Last name", and "Email". Below the "Email" field is a yellow "Create" button. Underneath the button is a link: "Have an account? [Log in](#)". At the bottom of the page, there is a footer with "Copyright Moneris Go Portal yyyy" on the left and a navigation menu with links for "Moneris.com", "Terms Of Use", "Privacy Notice", "Contact Us", "Suppliers", and "Developer Portal" on the right.

- a. In the **First name** field, enter your given name.
- b. In the **Last name** field, enter your surname.
- c. In the **Email** field, enter your email address.

**Note:** Moneris Go will send your account activation link to this address. You will be required to click on this link to activate your account. (This address will also serve as your Moneris Go portal username.)

- d. Click on the **Create** button.

4. When the "Activate account" page displays (shown below), it means a link to activate your account has been sent to you.



5. Check your email inbox to confirm that you received your Moneris Go "User account activation" email.
6. Continue in [Activating your user account](#) (page 12).

# Activating your user account

Merchant account owner/primary user: Once you have successfully created your Moneris Go portal user account (see [Signing up for Moneris Go portal access](#) on page 10) and you have received your Moneris Go activation email in your inbox, follow the steps below to activate your Moneris Go portal user account.

Secondary user: Once you have received your Moneris Go activation email in your inbox, follow the steps below to activate your Moneris Go portal user account.

1. Open the "User account activation" email in your inbox, and click on the message's activation link/button.

**Note:** *If you did not receive your activation email, see [Troubleshooting issues](#) (page 194).*

2. When the "Activate account" page displays (shown below), configure your login credentials:

- a. In the **Password** field, enter a login password.

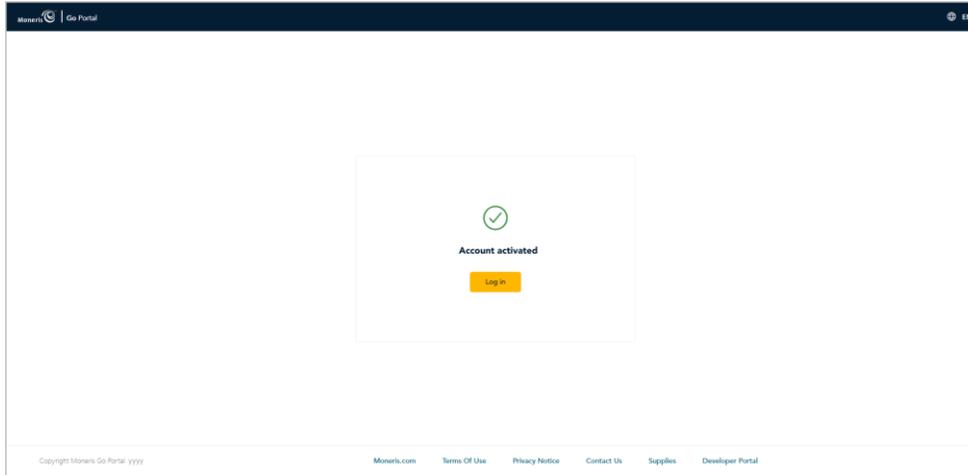
**Note:** *Password fields are case sensitive. The password that you create must adhere to these requirements:*

- *The password must be 8 to 16 characters in length.*
- *The password must start with a letter.*
- *The password must include at least 1 letter, 1 number, and 1 special character.*
- *The password must not include any accented characters (accents are not supported).*

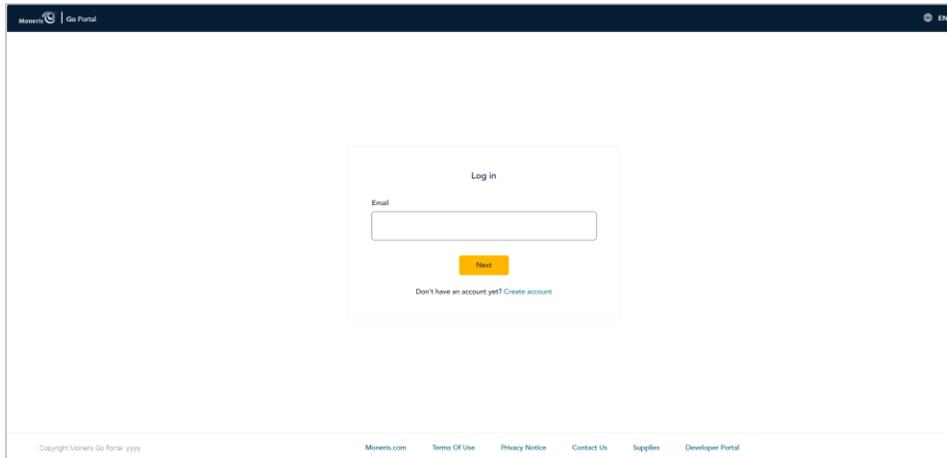
- b. In the **Confirm password** field, re-enter the login password.

- c. Click on the **Activate** button.

- When the "Account activated" response displays (shown below), it means you have successfully activated your Moneris Go portal user account.



- Click on the **Log in** button to return to the Moneris Go portal "Log in" page.
- When the "Log in" page displays (shown below), do one of the following:



**If you are the merchant account owner/primary user:**

- You must add/link the first store to your user account now (see [Adding the first store to the primary user account](#) on page 14).

**If you are a secondary user:**

A secondary user is a person whose Moneris Go portal user account was added/registered by another user.

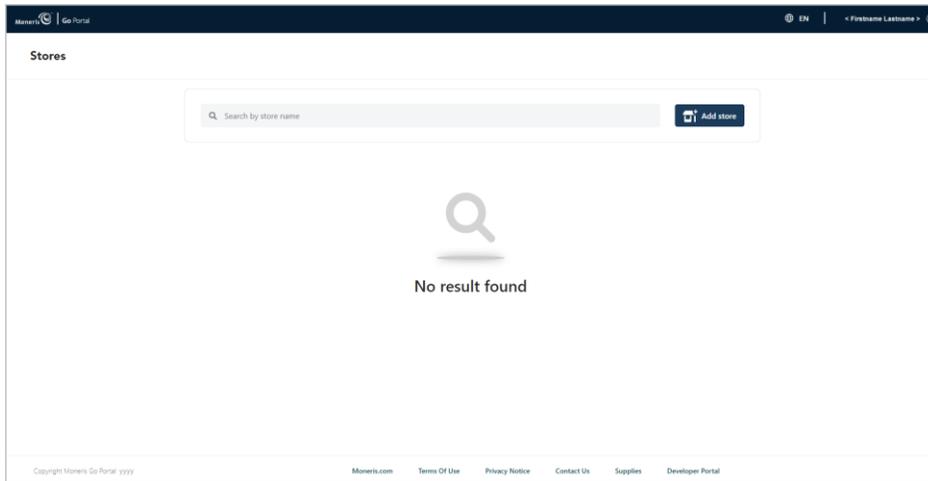
- You may log in and start using the Moneris Go portal features and functions (see [List of Moneris Go portal features and functions](#) on page 16) provided that the primary user has already added/linked a store to their user account and enabled you as a user in this store.

## Adding the first store to the primary user account

If you are the merchant account holder/primary user and you have activated your Moneris Go portal user account (see [Activating your user account](#) on page 12), follow the steps below to add/link the first store to your user account.

**Note:** After you complete this procedure, you will have access to all the features of your Moneris Go portal store, and you can subsequently allow new users to access and use the store.

1. Log into the Moneris Go portal (see [Logging into the Moneris Go portal](#) on page 21).
2. When the "Stores" page displays (shown below), click on the **Add store** button.



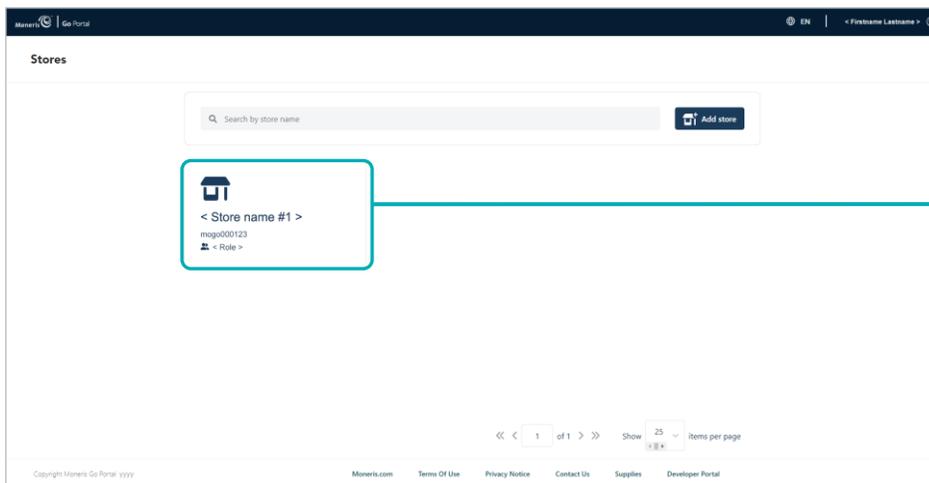
3. When the "Add store" window displays (shown here), fill in the fields with the required IDs as provided by Moneris:
  - a. In the **Store ID** field, enter the store ID of the store that you want to add.
  - b. In the **Merchant ID** field, enter your 13-digit merchant ID.
  - c. Click on the **Submit** button.

The "Add store" modal window is displayed. It features a title bar with "Add store" and a close button (X). Below the title bar, there are two input fields: "Store ID" and "Merchant ID". A mouse cursor is positioned over the "Merchant ID" field. At the bottom of the modal, there is a "Submit" button.

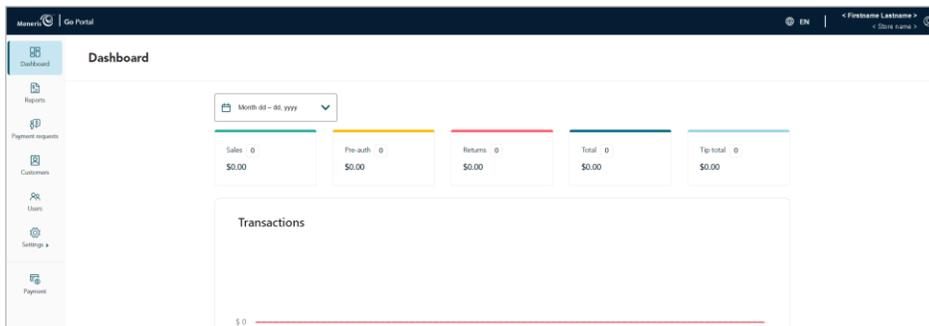
- If the "Terms and conditions" page displays (shown below), scroll through and read the terms, and then click on the **Accept** button.



- If the "Stores" page displays (shown below), click on the store tile.



- When the "Dashboard" page displays (shown below), it means you have successfully added and accessed your store.



- You can start using the store's features and functions (e.g., define your store settings, add new users, perform financial transactions, etc.). See [List of Moneris Go portal features and functions](#) (page 16).

## List of Moneris Go portal features and functions

This section lists supported Moneris Go features and functions, including references to procedures that will guide you on how to use those features and functions.

### Moneris Go portal access / store access

Action	See procedure:
Log in	<a href="#">Logging into the Moneris Go portal</a> (page 21)
Log out	<a href="#">Logging out of the Moneris Go portal</a> (page 33)
Reset login password	<a href="#">Forgot your login password?</a> (page 24)
Add another store	<a href="#">Adding another store to the primary user account</a> (page 31).
Move between stores	<a href="#">Using My Stores</a> (page 29)

### Language

Preference	See procedure:
Change default display language	<a href="#">Changing the default display language</a> (page 28)

### Financial transactions

Transaction type	Tender <sup>1</sup>	See procedure:
Purchase	credit	<a href="#">Purchase with credit card: manual entry</a> (page 35)
Purchase	cash	<a href="#">Purchase with cash</a> (page 37)
Preauthorization	credit	<a href="#">Preauthorization with credit card: manual entry</a> (page 38)
Completion	credit	<a href="#">Completion with credit card: manual entry</a> (page 40)
Void	credit	<a href="#">Void: manual entry</a> (page 44)
Refund	credit/cash	<a href="#">Refund: manual entry</a> (page 47)
Independent Refund	credit	<a href="#">Independent Refund with credit card: manual entry</a> (page 50)

### Reporting & receipts (financial transactions)

Action	See procedure:
View detailed transactions report	<a href="#">Financial transactions report</a> (page 55)
View graphical summary	<a href="#">The dashboard</a> (page 53)
Send/print transaction receipt	<a href="#">Sending/printing a transaction receipt</a> (page 72)

<sup>1</sup> Some debit card brands may support manual entry for this transaction.

## Payment requests

Action	See procedure:
Create payment request	<a href="#">Creating a payment request</a> (page 80)
Cancel payment request	<a href="#">Cancelling a payment request</a> (page 89)
Delete payment request	<a href="#">Deleting a payment request</a> (page 87)
Resend payment request	<a href="#">Resending a payment request</a> (page 84)
Save payment request draft	<a href="#">Saving a payment request as a draft</a> (page 86)
View payment requests report	<a href="#">Payment requests report</a> (page 90)

## Vault customer profiles

Action	See procedure:
Create a profile	<a href="#">Creating a Vault customer profile</a> (page 99)
Update a profile	<a href="#">Updating a Vault customer profile</a> (page 102)
Delete a profile	<a href="#">Deleting a Vault customer profile</a> (page 104)
View profiles report	<a href="#">Vault customer profiles report</a> (page 105)
Export a report	<a href="#">Exporting a Vault customer profiles report</a> (page 107)

## My account preferences

Preference	See procedure:
Change personal name identification	<a href="#">Changing your name information</a> (page 113)
Change default display language	<a href="#">Changing the default display language</a> (page 28)
Change portal login password	<a href="#">Changing your Moneris Go portal login password</a> (page 114)
Change terminal login password	<a href="#">Changing your terminal login password</a> (page 116)
Change terminal login username	<a href="#">Changing your terminal login username</a> (page 117)

## Store settings

Payment field	See procedure:
Billing address (address verification)	<a href="#">Billing address: store settings</a> (page 120)
Postal code (address verification)	<a href="#">Postal code: store settings</a> (page 122)
Customized field	<a href="#">Custom ID: store settings</a> (page 124)

## User accounts/roles management

Action	See procedure:
Add user account	<a href="#">Adding a new user account (page 127)</a>
Modify user account	<a href="#">Modifying an active user account (page 130)</a>
Deactivate user account	<a href="#">Deactivating a user account (page 134)</a>
Reactivate a user account	<a href="#">Reactivating a user account (page 136)</a>
Add a user role	<a href="#">Adding a new user role (page 139)</a>
Delete a user role	<a href="#">Deleting a user role (page 144)</a>
Modify a user role	<a href="#">Modifying a user role (page 141)</a>

## Moneris Go (A920) terminal management

Feature	See procedure:
Automatic sign-out time	<a href="#">Moneris Go terminal: general settings (page 150)</a>
Display timeout	<a href="#">Moneris Go terminal: general settings (page 150)</a>
Sign out after transaction	<a href="#">Moneris Go terminal: general settings (page 150)</a>
Report reset time	<a href="#">Moneris Go terminal: general settings (page 150)</a>
Manual entry transactions	<a href="#">Moneris Go terminal: transaction settings (page 153)</a>
Pass terminal timer	<a href="#">Moneris Go terminal: transaction settings (page 153)</a>
Surcharge settings	<a href="#">Moneris Go terminal: transaction settings (page 153)</a>
Transaction identifier (custom)	<a href="#">Moneris Go terminal: transaction settings (page 153)</a>
Receipts	<a href="#">Moneris Go terminal: receipt settings (page 156)</a>
Print delay (receipt)	<a href="#">Moneris Go terminal: receipt settings (page 156)</a>
Print QR code (receipt)	<a href="#">Moneris Go terminal: receipt settings (page 156)</a>
Receipt format options	<a href="#">Moneris Go terminal: receipt settings (page 156)</a>
No. of Merchant copies (receipt)	<a href="#">Moneris Go terminal: receipt settings (page 156)</a>
Header/footer (Receipt)	<a href="#">Moneris Go terminal: receipt settings (page 156)</a>
Cashback settings	<a href="#">Moneris Go terminal: cashback settings (page 162)</a>
Tip settings	<a href="#">Moneris Go terminal: tip settings (page 165)</a>

## Moneris Go Plus (DX8000) terminal management

Feature	See procedure:
Automatic sign-out time	<a href="#">Moneris Go Plus terminal: general settings (page 169)</a>
Display timeout	<a href="#">Moneris Go Plus terminal: general settings (page 169)</a>
Sign out after transaction	<a href="#">Moneris Go Plus terminal: general settings (page 169)</a>
Report reset time	<a href="#">Moneris Go Plus terminal: general settings (page 169)</a>
Manual entry transactions	<a href="#">Moneris Go Plus terminal: transaction settings (page 172)</a>

Feature	See procedure:
Pass terminal timer	<a href="#">Moneris Go Plus terminal: transaction settings (page 172)</a>
Surcharge settings	<a href="#">Moneris Go Plus terminal: transaction settings (page 172)</a>
Transaction identifier (custom)	<a href="#">Moneris Go Plus terminal: transaction settings (page 172)</a>
Receipts	<a href="#">Moneris Go Plus terminal: receipt settings (page 175)</a>
Print delay (receipt)	<a href="#">Moneris Go Plus terminal: receipt settings (page 175)</a>
Print QR code (receipt)	<a href="#">Moneris Go Plus terminal: receipt settings (page 175)</a>
Receipt format options	<a href="#">Moneris Go Plus terminal: receipt settings (page 175)</a>
No. of Merchant copies (receipt)	<a href="#">Moneris Go Plus terminal: receipt settings (page 175)</a>
Header/footer (Receipt)	<a href="#">Moneris Go Plus terminal: receipt settings (page 175)</a>
Cashback settings	<a href="#">Moneris Go Plus terminal: receipt settings (page 175)</a>
Tip settings	<a href="#">Moneris Go Plus terminal: tip settings (page 184)</a>

### Developer tools

Integration type	See procedure:
Moneris Checkout	<a href="#">Moneris Checkout (page 190)</a>
Hosted tokenization	<a href="#">Hosted tokenization (page 190)</a>
API token (view/copy)	<a href="#">API token (page 191)</a>



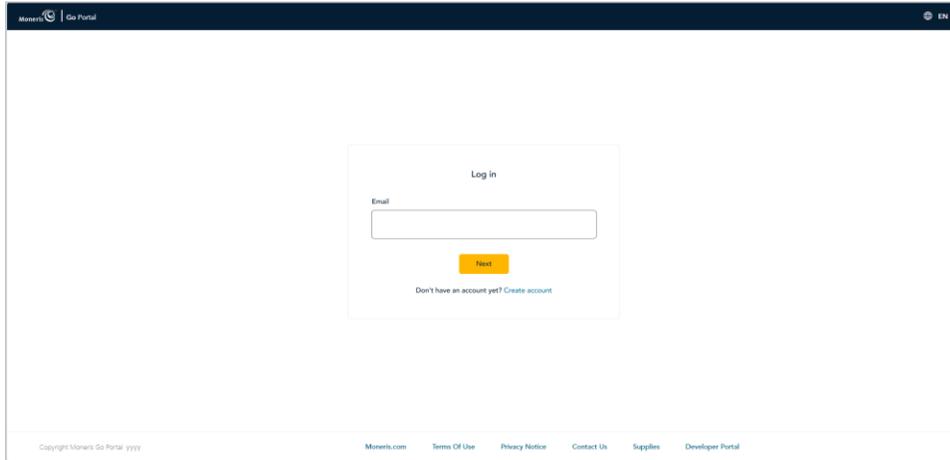
# Logging in/ Logging out

In this section, we go over everything you need to know to log into/log out of the Moneris Go portal.

# Logging into the Moneris Go portal

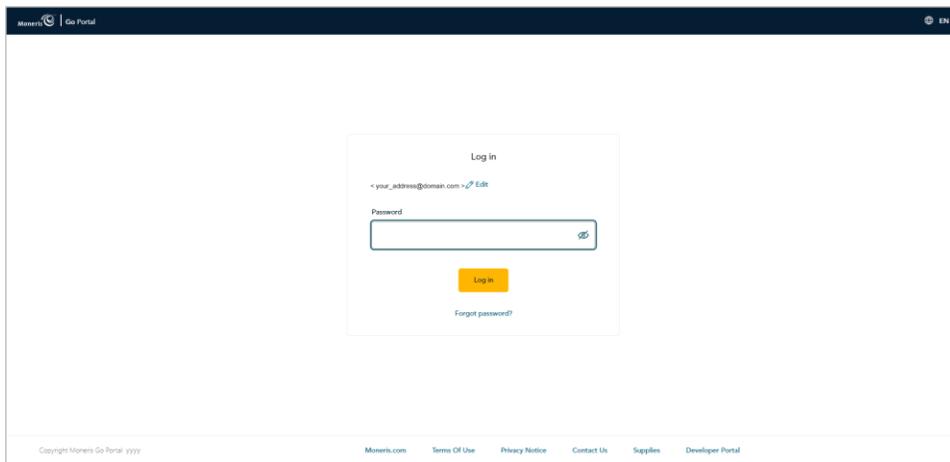
The steps below describe how to start a session on the Moneris Go portal and access your store.

1. Visit [www.monerisgo.com](http://www.monerisgo.com) to start on the Moneris Go portal "Log in" page (shown below).



2. In the **Email** field, enter the email address that was registered to your Moneris Go portal user account when you activated it, and click on the **Next** button.
3. When the **Password** field displays (shown below), enter your Moneris Go portal login password.

**Note:** *If you need to edit your login email first, click on **Edit** (go back to step 2 above). If you cannot remember your login password, see [Forgot your login password?](#) (page 24).*

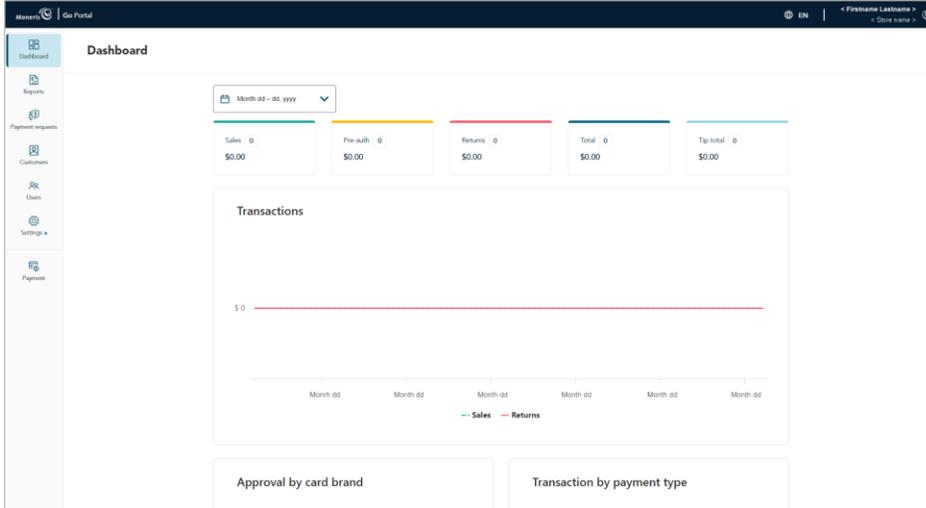


4. Click on the **Log in** button to submit your credentials.

5. When you have successfully logged into the Moneris Go portal, you will see either the "Dashboard" page or the "Stores" page:

**If the "Dashboard" page displays (shown below):**

- a. You have successfully accessed the store linked to your user account (see [The dashboard](#) on page 53).

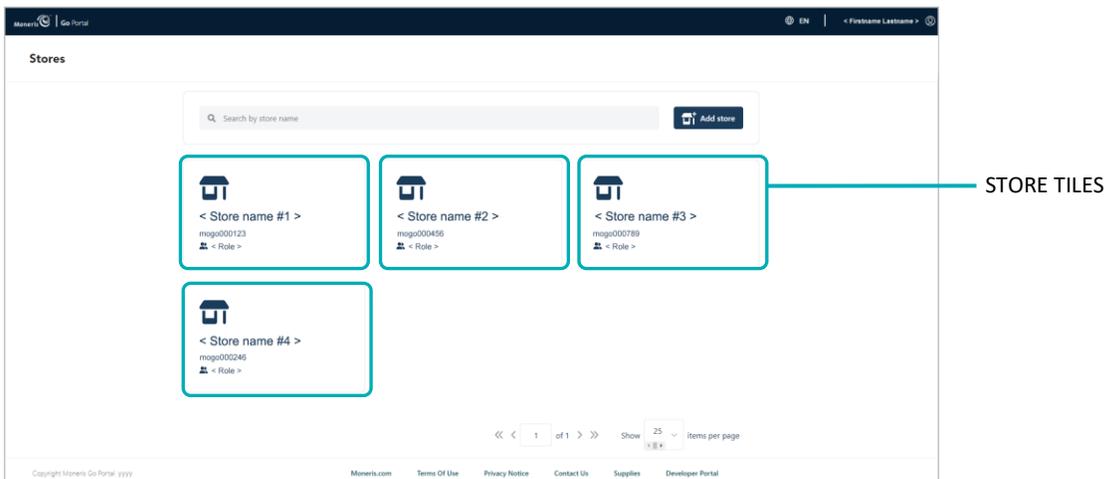


**If the "Stores" page displays, and one or more store tiles are shown (see example below):**

- a. Click on the store tile labelled with the name of the store that you want to access.

**Note:** To search for a specific store, enter the full/partial store name in the **Search by store name** field.

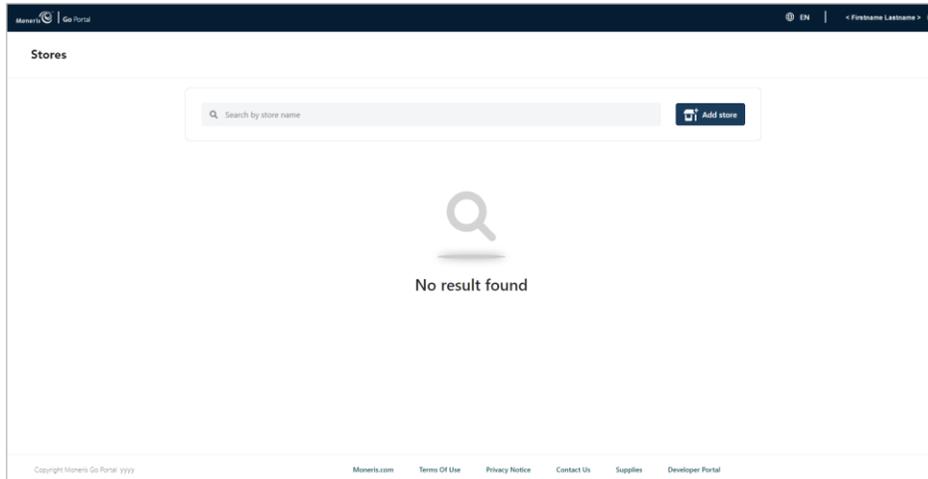
To change the number of hits listed on a page, click on the "Show # items per page" drop-down, and select a number (10, 25, or 50). To advance to the next page or last page, click on the **Next page >** icon or the **Last page >>** icon respectively. To go back to the previous page or the first page, click on the **Previous page <** icon or the **First page <<** icon respectively.



- b. When the "Dashboard" page displays (see [The dashboard](#) on page 53), it means you have successfully accessed the store.

If the "Stores" page displays and no store tiles are shown (see example below):

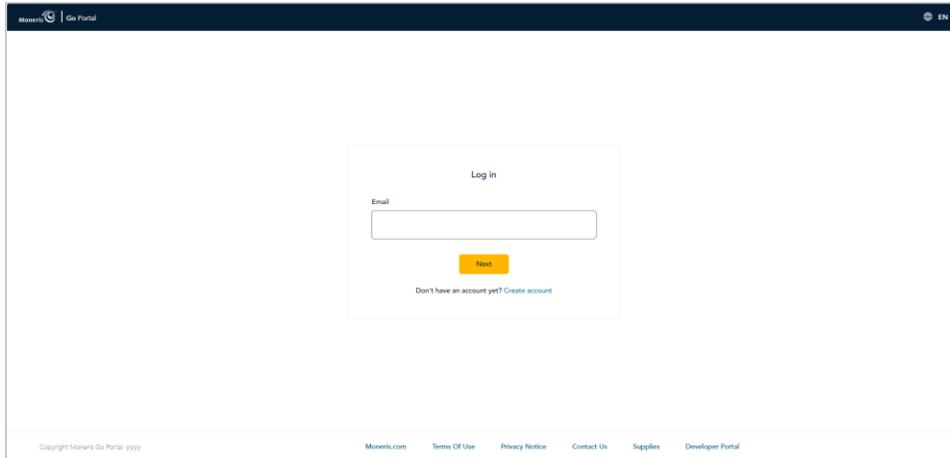
- a. The merchant account holder/primary user must add/link a store to their user account (see [Adding the first store to the primary user account](#) on page 14).



# Forgot your login password?

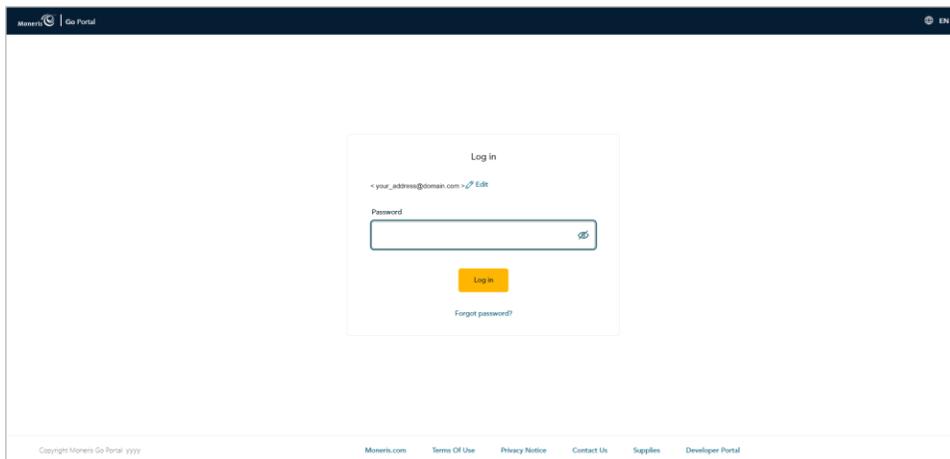
The steps below describe how to reset your Moneris Go portal login password.

1. Visit [www.monerisgo.com](http://www.monerisgo.com) to start on the Moneris Go portal "Log in" page (shown below).

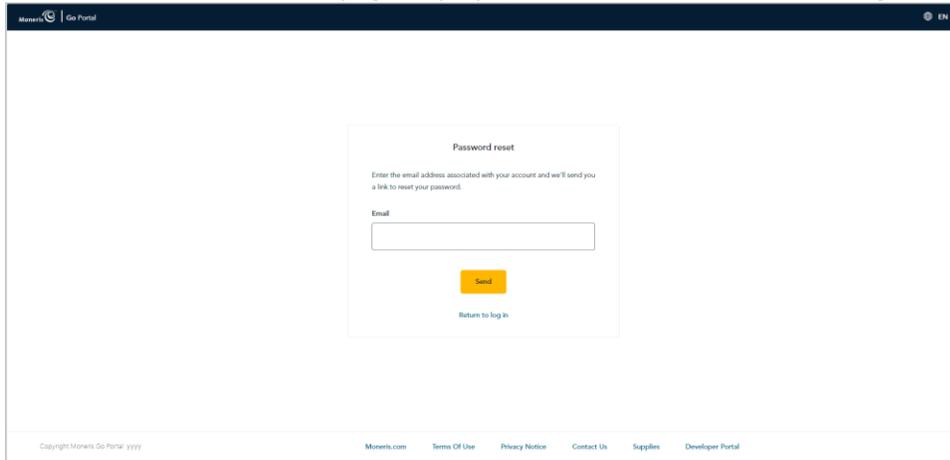


2. In the **Email** field, enter the email address that is registered to your Moneris Go portal user account, and then click on the **Next** button to continue.
3. When the "Password" field displays (shown below), click on **Forgot password?**

**Note:** *If you need to edit your login email first, click on **Edit** (go back to step 2 above).*

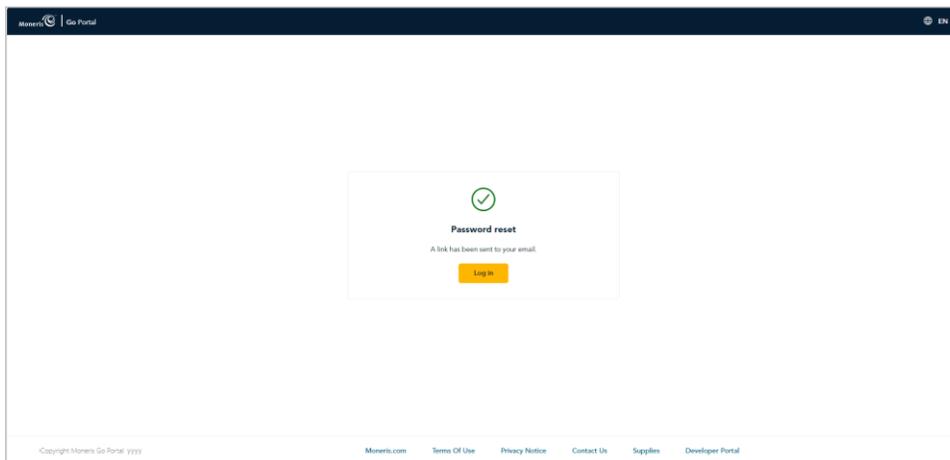


4. When the "Password reset" page displays (shown below), do the following:



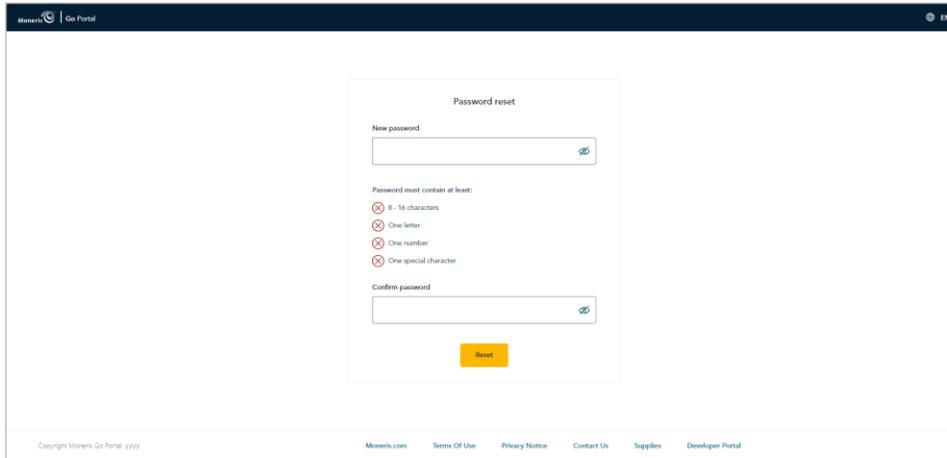
- a. In the **Email** field, enter your Moneris Go portal user account login email address.
- b. Click on the **Send** button.

5. When the "Password reset: A link has been sent to your email" page displays (shown below), confirm that you received the "Moneris Go Password reset" message in your email inbox.



6. Open the email, and click on the **Reset my password** link contained in the message.

7. When your browser displays the "Password reset" fields (shown below), do the following:



The screenshot shows the "Password reset" form in the Moneris Go Portal. The form is centered on a white background with a dark blue header and footer. The header contains the Moneris logo and "Go Portal" on the left, and "EN" on the right. The form itself has a title "Password reset" and a "New password" input field with a toggle icon. Below the input field, it states "Password must contain at least:" followed by four requirements, each with a red 'X' icon: "8-16 characters", "One letter", "One number", and "One special character". There is a "Confirm password" input field with a toggle icon and a yellow "Reset" button below it. The footer contains "Copyright Moneris Go Portal. yyyy" on the left and a navigation menu with "Moneris.com", "Terms Of Use", "Privacy Notice", "Contact Us", "Supplies", and "Developer Portal" on the right.

a. In the **New password** field, enter a new password.

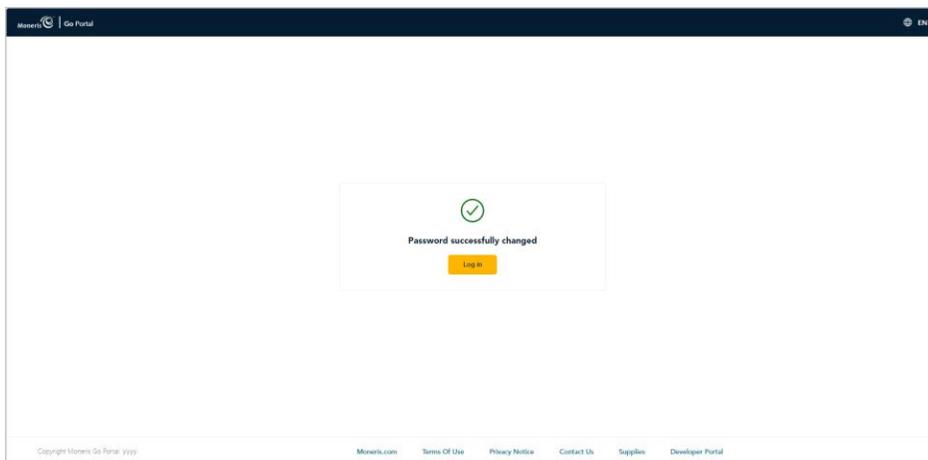
**Note:** Password fields are case sensitive. The password that you create must adhere to these requirements:

- The password must be 8 to 16 characters in length.
- The password must start with a letter.
- The password must include at least 1 letter, 1 number, and 1 special character.
- The password must not include any accented characters (accents are not supported).

b. In the **Confirm password** field, re-enter the password.

c. Click on the **Reset** button.

8. When the "Password successfully changed" page displays (shown below), it means you have successfully reset your login password.



The screenshot shows the "Password successfully changed" page in the Moneris Go Portal. The page is centered on a white background with a dark blue header and footer. The header contains the Moneris logo and "Go Portal" on the left, and "EN" on the right. The main content area features a green checkmark icon, the text "Password successfully changed", and a yellow "Login" button. The footer contains "Copyright Moneris Go Portal. yyyy" on the left and a navigation menu with "Moneris.com", "Terms Of Use", "Privacy Notice", "Contact Us", "Supplies", and "Developer Portal" on the right.

9. Click on the **Log in** button to return to the Moneris Go portal "Log in" page.

**Note:** *When you next attempt to log into Moneris Go portal, enter your newly reset password (see [Logging into the Moneris Go portal](#) on page 21).*

## Changing the default display language

The steps below describe how to change the Moneris Go portal's default display language (English or French) while you are accessing the Moneris Go portal (see [Logging into the Moneris Go portal](#) on page 21).

1. Start on any Moneris Go portal application page.

2. Click on the language  tile in the Moneris Go portal page header (shown below), which runs atop every Moneris Go portal application page.

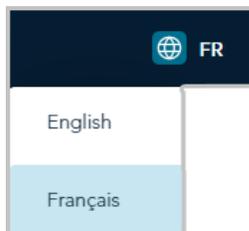


3. When the language menu displays (shown below), do one of the following:

- To set English as the default display language, select **English** (shown below).



- To set French as the default display language, select **Français** (shown below).



# Store navigation

## Using My Stores

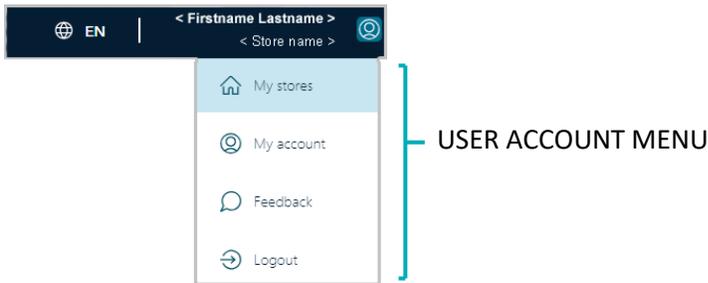
If you are logged into the Moneris Go portal and are already within (accessing) a store, follow the steps below to use the "My Stores" function to access any other store that is linked to your user account.

**Note:** For instructions on how to log in and access a store, see [Logging into the Moneris Go portal](#) (page 21).

1. From any page in your store, click on your user account  tile, which displays in the top right corner of the page header (shown below).



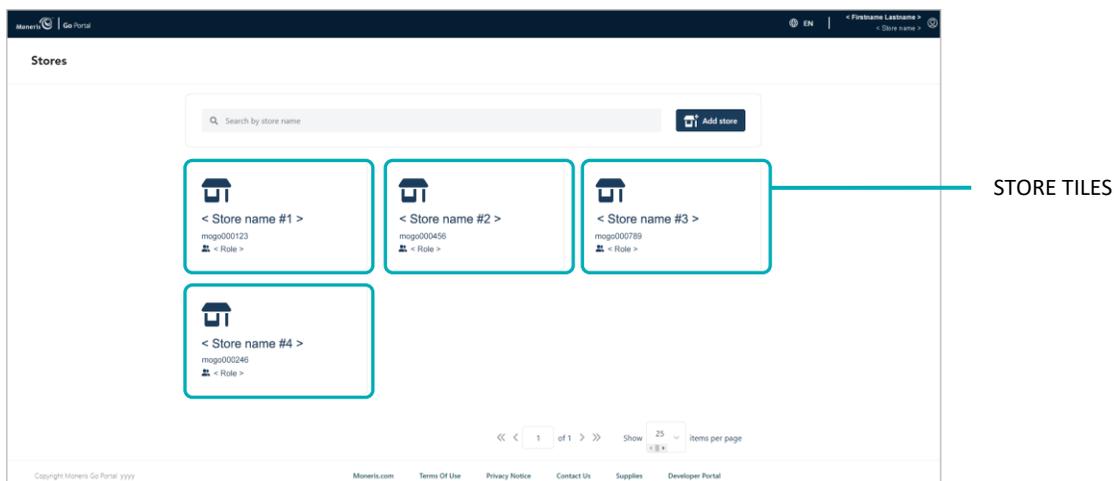
2. When the user account menu displays (shown below), click on **My stores**.



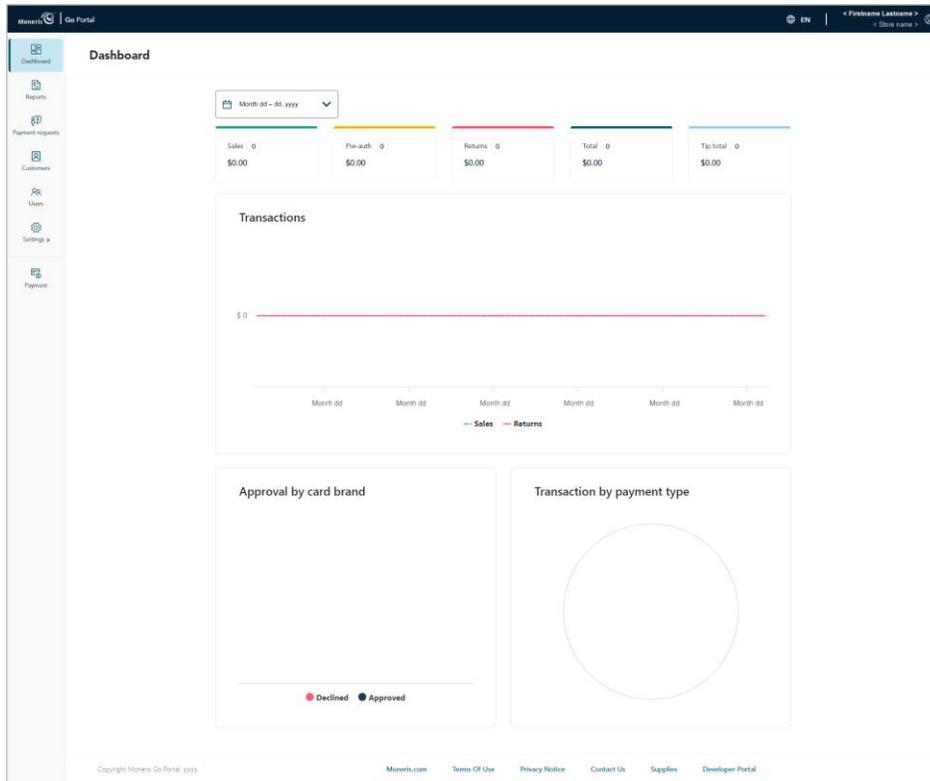
3. When the "Stores" page displays (shown below), locate the store tile labelled with the name of the store (and store ID) that you want to access, then click on that tile.

**Note:** To search for a specific store, enter the full/partial store name in the **Search by store name** field.

To change the number of hits listed on a page, click on the "Show # items per page" drop-down, and select a number (**10**, **25**, or **50**). To advance to the next page or last page, click on the **Next page** > icon or the **Last page** >> icon respectively. To go back to the previous page or the first page, click on the **Previous page** < icon or the **First page** << icon respectively.



4. When the "Dashboard" page displays (shown below), it means you have successfully accessed your store (see [The dashboard](#) on page 53).



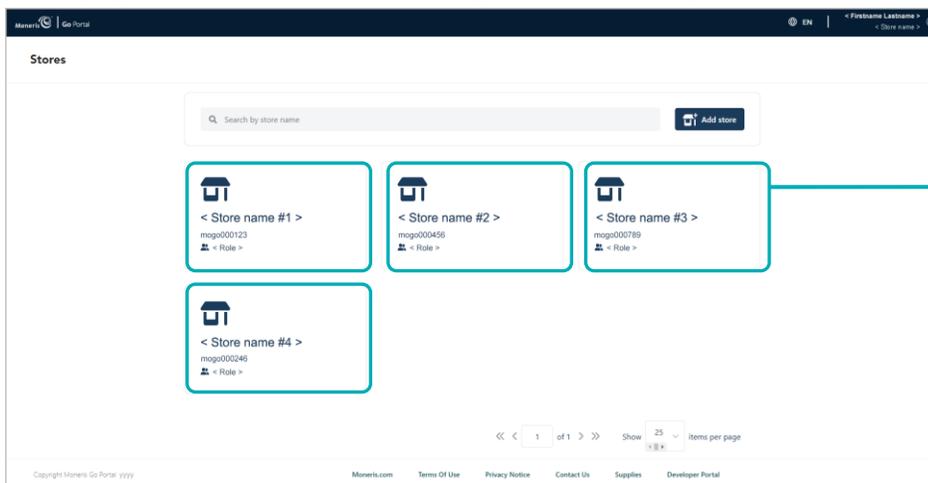
## Adding another store to the primary user account

If you are the merchant account owner/primary user and want to add another store to your user account, follow the steps below to add the store. After you complete this procedure, you will have access to all the features of your Moneris Go portal store, and you can subsequently enable new users to access and use the store.

**Note:** If you do not have any stores linked to your user account, see [Adding the first store to the primary user account](#) on page 14.

1. Log into the Moneris Go portal (see [Logging into the Moneris Go portal](#) on page 21)
2. Ensure that you are on the "Stores" page (the "Stores" page shown below depicts a scenario wherein four stores are already added).

**Note:** If you are not already on the "Stores" page, click on your user account  tile in the Moneris Go portal page header, and then click on **My stores** in the drop-down.



3. On the "Stores" page, click on the **Add store** button.
4. When the "Add store" window displays (shown here), fill in the fields with the required IDs as provided by Moneris:
  - a. In the **Store ID** field, enter the store ID of the store that you want to add.
  - b. In the **Merchant ID** field, enter your 13-digit merchant ID.
  - c. Click on the **Submit** button.

Add store

Store ID

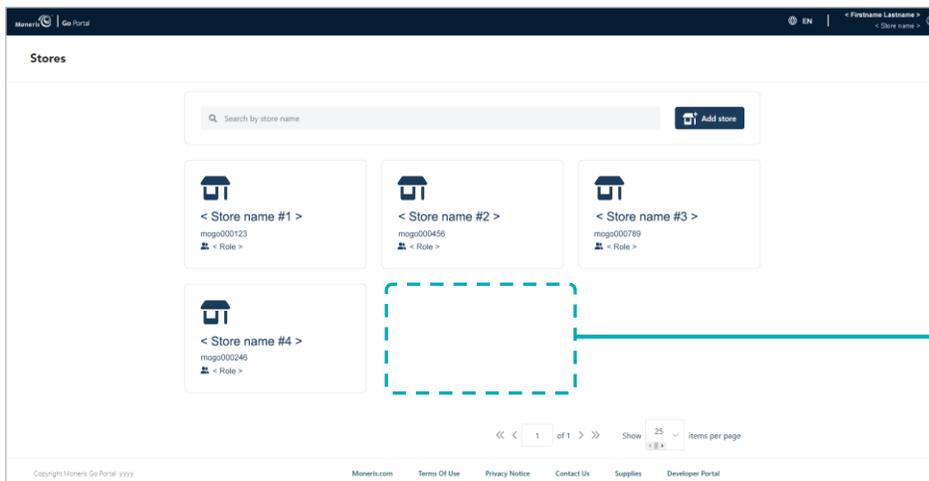
Merchant ID

Submit

- When the "Terms and conditions" page displays (shown below), scroll through and read the terms, and then click on the **Accept** button.



- When the "Stores" page refreshes (shown below), confirm that the new store is added beside the other store tile(s) in the next available slot.



NEWLY ADDED STORE (TILE) DISPLAYS HERE

- The operation is complete. (To access the newly added store, simply click on its store tile.)

**Note:** If you want to permit new or existing users to access/use the features available in the newly added store, you can add the user account(s) as desired (see [Adding a new user account](#) (page 127)). You may duplicate the login credentials of an existing user account in each new store.

# Logging out of the Moneris Go portal

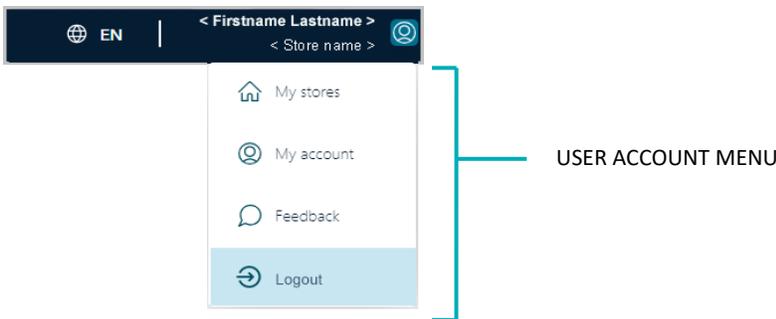
End your current session, and log out of the Moneris Go portal.

1. While you are logged in on any Moneris Go portal page, click on your user account  tile, which displays in the top right corner of the Moneris Go portal page header (shown below).

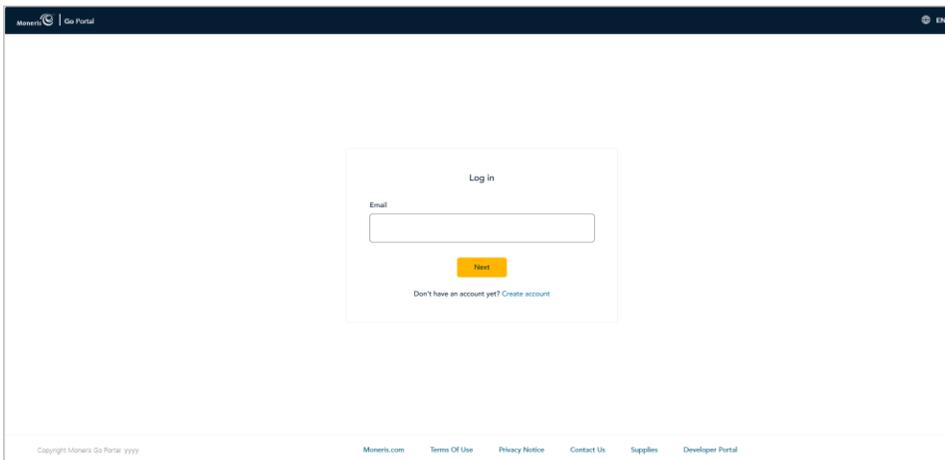


2. When the user account menu displays (shown below), click on **Logout**.

**Note:** The menu items "My stores", "My account", and "Feedback" are listed only if you have accessed one of your stores during the current login session.



3. When the Moneris Go portal "Log in" page displays (shown below), it means you have successfully logged out and ended your session.





# Financial Transactions

In this section, we go over everything you need to know to perform financial transactions through your Moneris Go portal store's virtual terminal.

## Purchase with credit card: manual entry

The steps below describe how to perform a credit card<sup>2</sup> sale of goods and services by entering card data in Moneris Go portal payment fields. A Purchase verifies funds on the cardholder's card, removes the funds, and prepares the funds for deposit into your merchant account.

1. Log into the Moneris Go portal, and access the store through which you want to perform the transaction (see [Logging into the Moneris Go portal](#) on page 21).<sup>3</sup>

**Note:** If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

2. On the sidebar menu (shown here), click on **Payment**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



3. When the "Payment" window displays (shown here), do the following:

- a. Click on the **Credit** button.
- b. In the "Transaction type" drop-down, select **Purchase**.
- c. In the **Amount** field, enter the purchase dollar amount (\$0.00).

4. Enter the credit card data:

- a. In the **Credit Card Number** field, enter the credit card's 16-digit PAN (personal account number).
- b. In the **Expiry date** field, enter the credit card's expiry date (mm/yy).
- c. In the **Security code** field, enter the credit card's 3- or 4-digit card verification value.

5. If the "Billing address" fields display (**Street number, Street name, City, Province, and Postal code**), enter the cardholder billing address data.

**Note:** To configure billing address fields, see [Store settings: payments](#) (page 119).

<sup>2</sup> Some card brands support debit card manual entry for this transaction.

<sup>3</sup> Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 28).

6. If the custom transaction identifier field displays, enter the requested data.

**Note:** To configure a custom transaction identifier, see [Custom ID: store settings](#) (page 124).

7. Click on the **Submit** button to send the transaction for processing.

A screenshot of a web form. It features a text input field at the top, followed by a dropdown menu labeled '< Custom identifier >'. Below the dropdown is another text input field. At the bottom of the form is a dark blue button with the text 'Submit' in white.

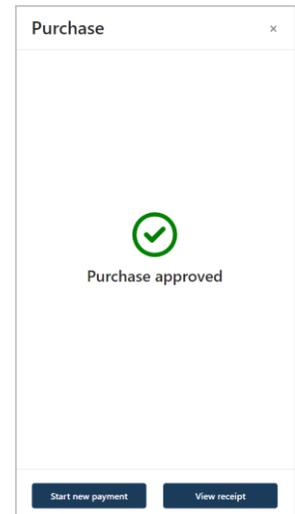
8. When the "Purchase" window displays the "approved" or "declined" response (shown here), the transaction is complete. Do any of the following:

**To view, print, or send (email/text) the transaction receipt:**

- a. Click on the **View receipt** button.
- b. Continue in [Sending/printing a transaction receipt](#) (page 72).

**To initiate a new Purchase, Preauthorization, or independent Refund:**

- a. Click on the **Start New Payment** button.



## Purchase with cash

The steps below describe how to perform a cash sale of goods and services.

1. Log into the Moneris Go portal, and access the store through which you want to perform the transaction (see [Logging into the Moneris Go portal](#) on page 21).<sup>4</sup>

**Note:** If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

2. On the sidebar menu (shown here), click on **Payment**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



3. When the "Payment" window displays, click on the **Cash** button (shown here).

4. In the **Amount** field, enter the purchase dollar amount (\$0.00).

5. If the custom transaction identifier field displays, enter the requested data.

**Note:** To configure a custom transaction identifier, see [Custom ID: store settings](#) (page 124).

6. Click on the **Submit** button to send the transaction for processing.

A screenshot of the 'Payment' window. At the top, there are two buttons: 'Credit' and 'Cash'. The 'Cash' button is selected and highlighted in dark blue. Below the buttons is an 'Amount' field with a dollar sign and a text input area. Underneath is a 'Custom identifier' field with a dropdown arrow. At the bottom of the window is a 'Submit' button.

7. When the "Purchase" window displays the "approved" response (shown here), the transaction is complete. Do any of the following:

**To view, print, or send (email/text) the transaction receipt:**

- a. Click on the **View receipt** button.
- b. Continue in [Sending/printing a transaction receipt](#) (page 72).

**To initiate a new Purchase, Preauthorization, or independent Refund:**

- a. Click on the **Start New Payment** button.

A screenshot of the 'Purchase' window. In the center, there is a large green checkmark icon. Below the checkmark, the text 'Purchase approved' is displayed. At the bottom of the window, there are two buttons: 'Start new payment' and 'View receipt'.

<sup>4</sup> Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 28).

## Preauthorization with credit card: manual entry

The steps below describe how to perform a Preauthorization of goods and services by entering card data in Moneris Go portal payment fields. A Preauthorization verifies and locks funds on the cardholder's credit card.<sup>5</sup> The funds are locked for a specified amount of time based on the card issuer.

**Important! To unlock and receive (or release) funds for this transaction, you must perform a Completion (see [Completion with credit card: manual entry on page 40](#)).**

1. Log into the Moneris Go portal, and access the store through which you want to perform the transaction (see [Logging into the Moneris Go portal on page 21](#)).<sup>6</sup>

**Note:** *If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores on page 29](#)).*

2. On the sidebar menu (shown here), click on **Payment**.

**Note:** *If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*



3. When the "Payment" window displays (shown here), do the following:

- a. Click on the **Credit** button.
- b. In the "Transaction type" drop-down, select **Pre-auth**.
- c. In the **Amount** field, enter the preauthorization dollar amount (\$0.00).

4. Enter the credit card data:

- a. In the **Credit Card Number** field, enter the credit card's 16-digit PAN (personal account number).
- b. In the **Expiry date** field, enter the credit card's expiry date (mm/yy).
- c. In the **Security code** field, enter the credit card's 3- or 4-digit card verification value.

<sup>5</sup> Some card brands support debit card manual entry for this transaction.

<sup>6</sup> Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 28).

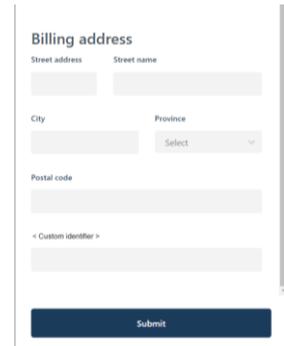
5. If the "Billing address" fields display (**Street number, Street name, City, Province,** and **Postal code**), enter the cardholder billing address data.

**Note:** To configure billing address fields, see [Store settings: payments](#) (page 119).

6. If the custom transaction identifier field displays, enter the requested data.

**Note:** To configure a custom transaction identifier, see [Custom ID: store settings](#) (page 124).

7. Click on the **Submit** button to send the transaction for processing.



The image shows a "Billing address" form with the following fields: "Street address" and "Street name" (text input fields), "City" (text input field), "Province" (dropdown menu with a "Select" button), "Postal code" (text input field), and "< Custom identifier >" (text input field). A dark blue "Submit" button is located at the bottom right of the form.

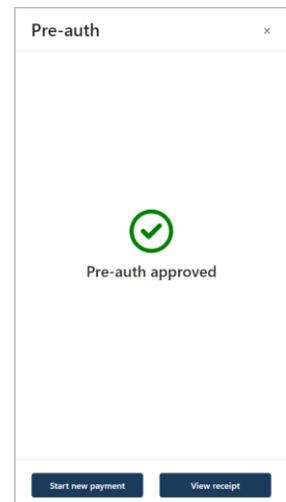
8. When the "Pre-auth" window displays the "approved" or "declined" response (shown here), do one of the following:

**To view, print, or send (email/text) the transaction receipt:**

- a. Click on the **View receipt** button.
- b. Continue in [Sending/printing a transaction receipt](#) (page 72).

**To initiate a new Purchase, Preauthorization, or independent Refund:**

- a. Click on the **Start New Payment** button.



The image shows a "Pre-auth" window with a green checkmark icon and the text "Pre-auth approved". At the bottom of the window, there are two buttons: "Start new payment" and "View receipt".

## Completion with credit card: manual entry

The steps below describe how to perform a Completion to capture a Moneris Go portal-referenced credit Preauthorization for a full or partial amount so that the authorized funds are transferred to your account at settlement. This procedure can also be used to cancel/void a Preauthorization.

1. Log into the Moneris Go portal, and access the store through which the original Preauthorization was processed (see [Logging into the Moneris Go portal](#) on page 21).<sup>7</sup>

**Note:** If you need to identify the store through which the original Preauthorization was processed (i.e., you have multiple stores linked to your account), view/print the receipt and refer to the store name on the receipt (see [Receipts](#) on page 71). This name correlates with the tile label of the Moneris Go portal store that you must access in order to do the Completion. (If you need to move to a different store, see [Using My Stores](#), page 29.)

2. On the sidebar menu (shown here), click on **Reports**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



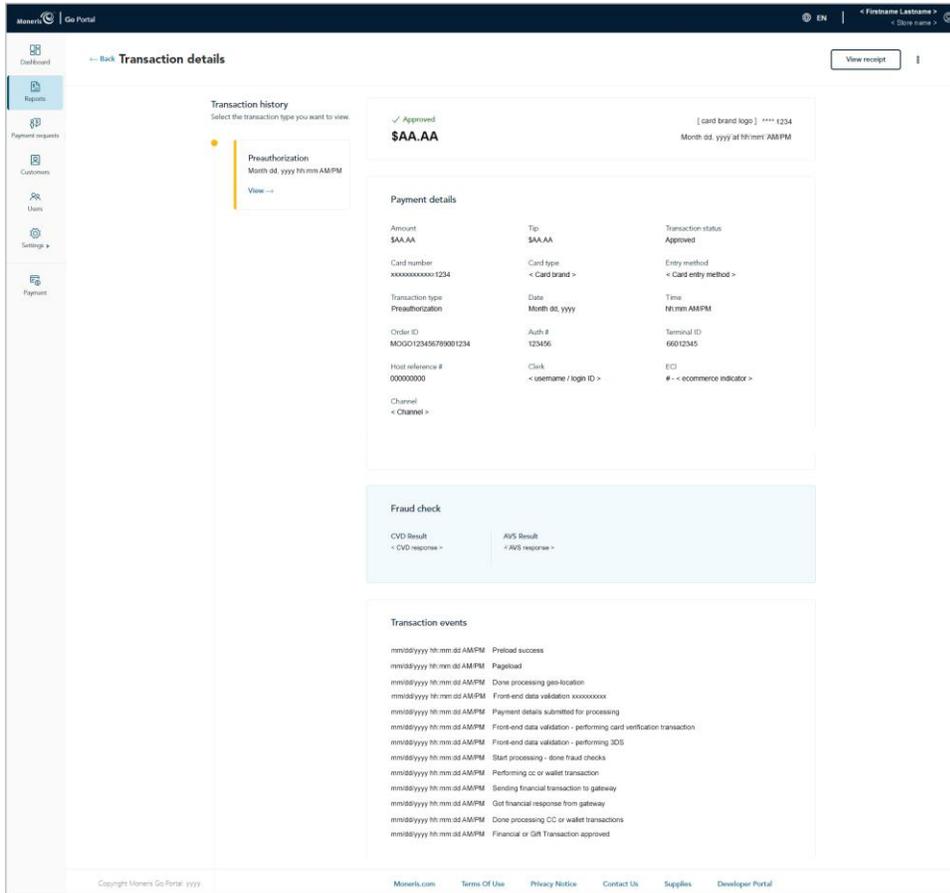
3. When the "Reports" page displays (shown below), locate the Preauthorization that you want to complete, and click on it.

**Note:** The "Order ID" is unique to each transaction. If the desired transaction is not listed, you can do a general search by entering a full or partial amount or order ID in the **Search by amount or order ID** field. You may also use additional filters to refine the search (for details, see [Financial transactions report](#) on page 55).

<sup>7</sup> Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 28).

- When the "Transaction details" page displays (shown below), review the payment details to ensure this is the Preauthorization that you want to complete.

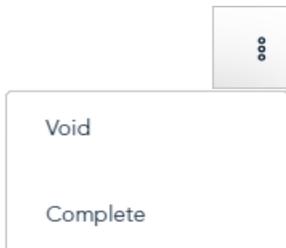
**Note:** For descriptions of payment details, fraud check results, and other line items that may display on the "Transaction details" page, see [Transaction details \(page 57\)](#).



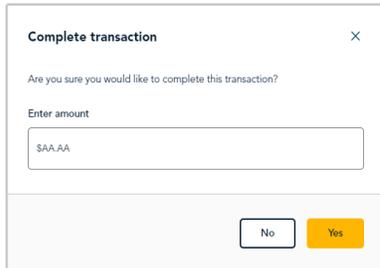
- Complete the Preauthorization for a full/partial amount or cancel/void the transaction:

**To complete the Preauthorization for a full or partial amount:**

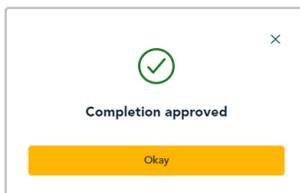
- In the upper right corner on the "Transaction details" page, click on the (more options) ellipsis .
- When the drop-down displays (shown below), click on **Complete**.



- c. When the "Complete transaction" dialog displays (shown below), enter a new dollar value in the **Enter amount** field if you want to change the completion amount. Otherwise, leave the displayed amount unchanged to complete the transaction for the originally authorized amount.



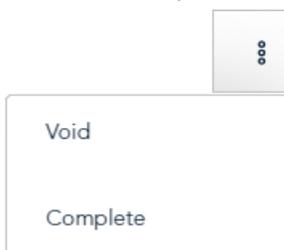
- d. Click on the dialog's **Yes** button, and wait while the transaction is processed.
- e. When the "Completion approved" dialog displays (shown below), click its **Okay** button to close the dialog.



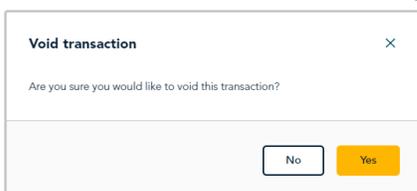
- f. Print or send (email/text) a transaction receipt (see [Sending/printing a transaction receipt](#) on page 72).

**To cancel the Preauthorization and release the authorized funds:**

- a. In the upper right corner on the "Transaction details" page, click on the (more options) ellipsis .
- b. When the drop-down displays (shown below), click on **Void**.

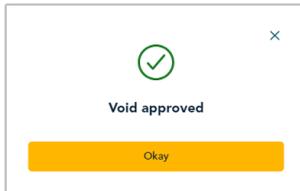


- c. When the "Void transaction" dialog displays, click on its **Yes** button.



d. Wait while the transaction is processed.

e. When the "Void approved" dialog displays (shown below), click on its **Okay** button to close the dialog.



f. Print or send (email/text) a transaction receipt (see [Sending/printing a transaction receipt](#) on page 72).

## Void: manual entry

The steps below describe how to reverse (cancel) a Moneris Go portal-referenced Purchase or Completion transaction for the full amount. The funds of the original Purchase or Completion transaction are fully restored to the cardholder's card. Neither the original transaction nor the Void transaction will appear on the cardholder's statement.

**Note:** Transactions originally processed with an Interac card cannot be voided from the Moneris Go portal.

1. Log into the Moneris Go portal, and access the store through which you want to perform this transaction (see [Logging into the Moneris Go portal](#) on page 21).<sup>8</sup>

**Note:** If you need to identify the store through which the original transaction was processed (i.e., you have multiple stores linked to your account), view/print the receipt and refer to the store name on the receipt (see [Receipts](#) on page 71). This name correlates with the tile label of the Moneris Go portal store that you must access in order to do the Void. (If you need to move to a different store, see [Using My Stores](#) on page 29.)

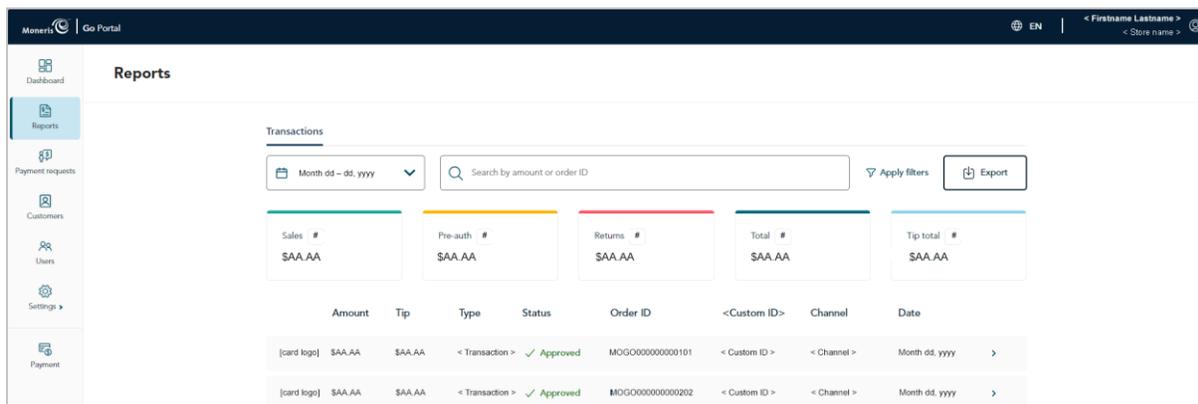
2. On the sidebar menu (shown here), click on **Reports**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



3. When the "Reports" page displays (shown below), locate the Purchase or Completion that you want to void, and click on it.

**Note:** The "Order ID" is unique to each transaction. If the desired transaction is not listed, you can do a general search by entering a full or partial amount or order ID in the **Search by amount or order ID** field. You may also use additional filters to refine the search (for details, see [Financial transactions report](#) on page 55).

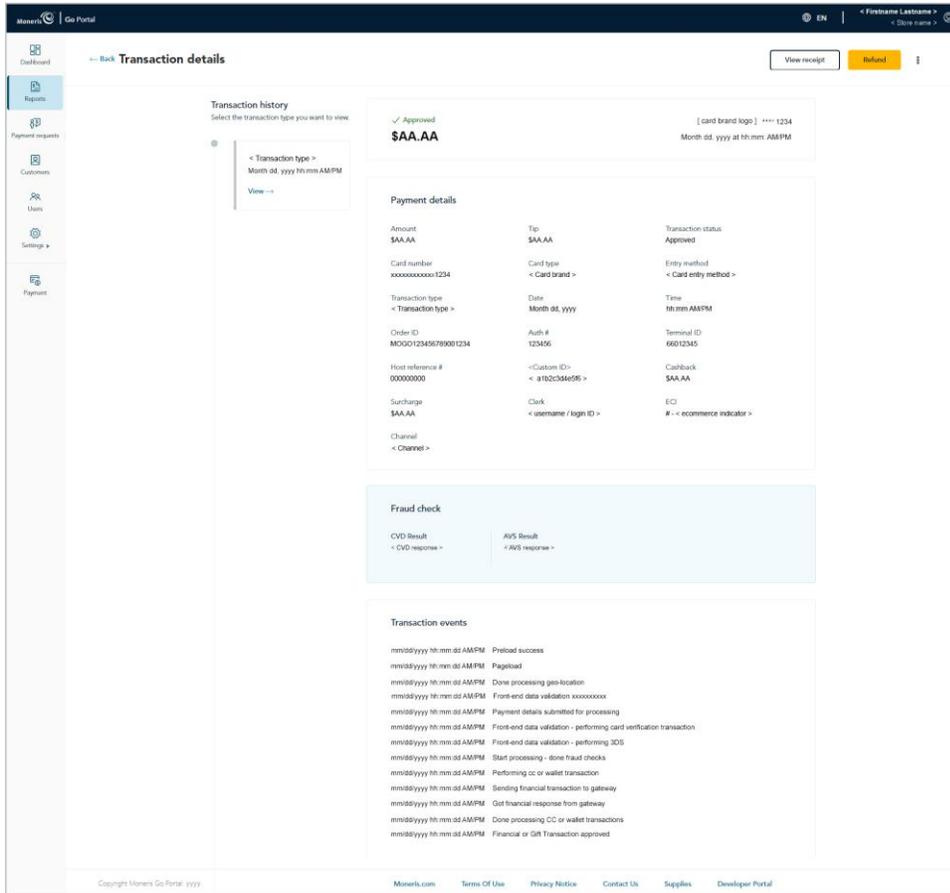


Amount	Tip	Type	Status	Order ID	<Custom ID>	Channel	Date
[card logo] \$AA.AA	\$AA.AA	< Transaction >	✓ Approved	MOGO00000000101	< Custom ID >	< Channel >	Month d1, yyyy >
[card logo] \$AA.AA	\$AA.AA	< Transaction >	✓ Approved	MOGO00000000202	< Custom ID >	< Channel >	Month d1, yyyy >

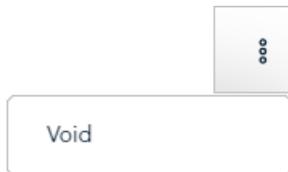
<sup>8</sup> Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 28).

- When the "Transaction details" page displays (shown below), review the payment details to ensure this is the transaction that you want to void.

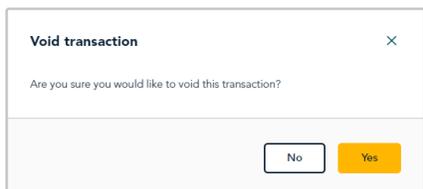
**Note:** For descriptions of payment details, fraud check results, and other line items that may display on the "Transaction details" page, see [Transaction details \(page 57\)](#).



- In the upper right corner on the "Transaction details" page, click on the (more options) ellipsis .
- When the drop-down displays (shown below), click on **Void**.

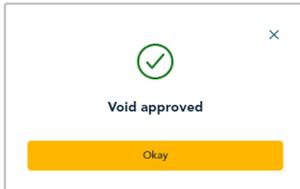


- When the "Void transaction" dialog displays (shown below), click on its **Yes** button.



8. Wait while the transaction is processed.

9. When the "Void approved" dialog displays (shown below), click on its **Okay** button to close the dialog.



10. Print or send (email/text) a transaction receipt (see [Sending/printing a transaction receipt](#) on page 72).

## Refund: manual entry

The steps below describe how to reverse (refund) a Moneris Go portal-referenced Purchase or Completion transaction for a full or partial amount. The funds of the original Purchase or Completion transaction are fully/partially restored to the cardholder's card.<sup>9</sup>

1. Log into the Moneris Go portal, and access the store from which you want to perform this transaction (see [Logging into the Moneris Go portal](#) on page 21).<sup>10</sup>

**Note:** If you need to identify the store through which the original transaction was processed (i.e., you have multiple stores linked to your account), view/print the receipt and refer to the store name on the receipt (see [Receipts](#) on page 71). This name correlates with the tile label of the Moneris Go portal store that you must access in order to do the Refund. (If you need to move to a different store, see [Using My Stores](#) on page 29.)

2. On the sidebar menu (shown here), click on **Reports**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



3. When the "Reports" page displays (shown below), locate the Purchase or Completion that you want to refund, and click on it.

**Note:** The "Order ID" is unique to each transaction. If the desired transaction is not listed, you can do a general search by entering a full or partial amount or order ID in the **Search by amount or order ID** field. You may also use additional filters to refine the search (for details, see [Financial transactions report](#) on page 55).

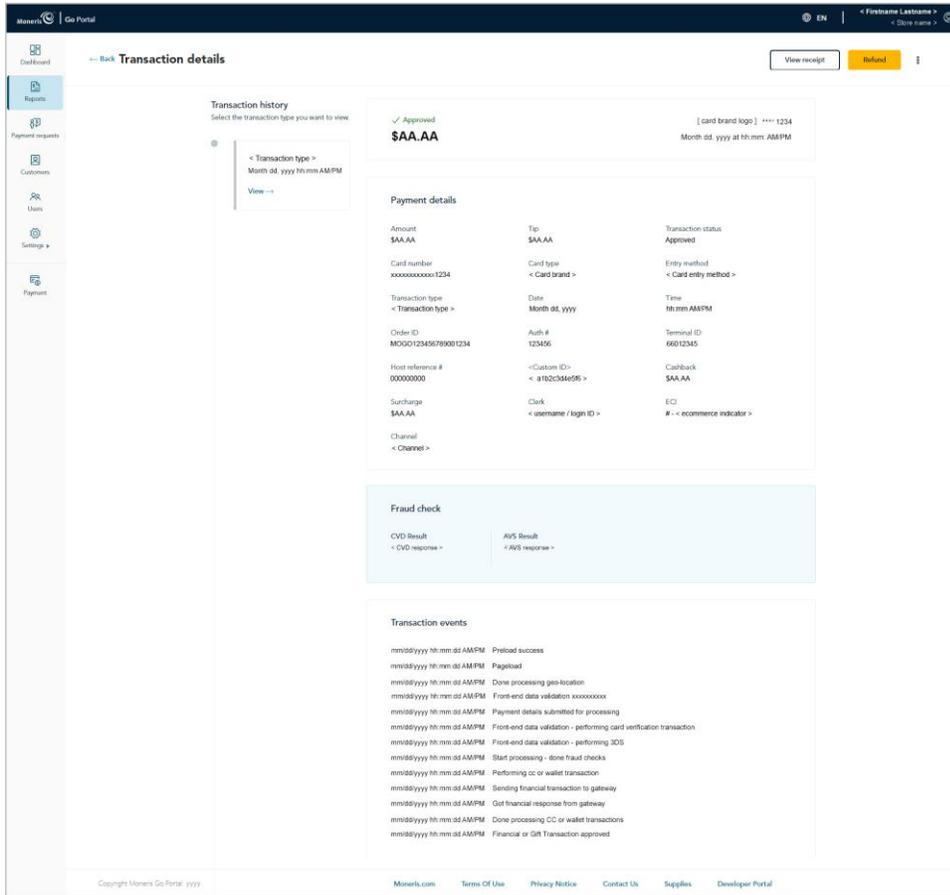
Amount	Tip	Type	Status	Order ID	<Custom ID>	Channel	Date
[card logo] \$AA.AA	\$AA.AA	< Transaction >	✓ Approved	MOGO000000000101	< Custom ID >	< Channel >	Month 01, yyyy >
[card logo] \$AA.AA	\$AA.AA	< Transaction >	✓ Approved	MOGO000000000202	< Custom ID >	< Channel >	Month 01, yyyy >

<sup>9</sup> Transactions originally processed with an *Interac card* cannot be refunded from the Moneris Go portal.

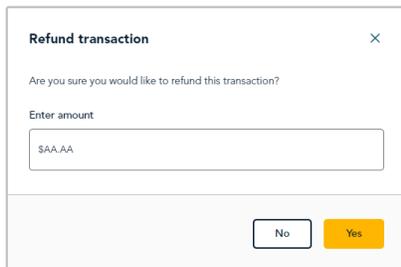
<sup>10</sup> Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 28).

- When the "Transaction details" page displays (shown below), review the payment details to ensure this is the transaction that you want to refund.

**Note:** For descriptions of payment details, fraud check results, and other line items that may display on the "Transaction details" page, see [Transaction details](#) (page 57).

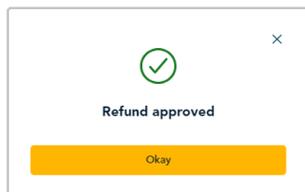


- In the upper right corner on the "Transaction details" page, click on the **Refund** button.
- When the "Refund amount" dialog displays (shown below), leave the displayed amount unchanged or enter a new amount in the **Enter amount** field, and click on the dialog's **Yes** button.



- Wait while the transaction is processed.

- When the "Refund approved" dialog displays (shown below), click on its **Okay** button to close the dialog.



- Print or send (email/text) a transaction receipt (see [Sending/printing a transaction receipt](#) on page 72).

## Independent Refund with credit card: manual entry

The steps below describe how to do an independent Refund of goods and services by entering card data in Moneris Go portal payment fields. The independent Refund fully or partially reverses (refunds) an unreferenced credit card<sup>11</sup> sale and restores funds to a cardholder's credit card.

**Note:** *The independent Refund is disabled by default but can be enabled (temporarily or for a longer period) for your store upon request. If you want to perform independent Refunds through your store, please contact us.*

1. Log into the Moneris Go portal, and access the store through which you want to perform this transaction (see [Logging into the Moneris Go portal](#) on page 21).<sup>12</sup>

**Note:** *If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).*

2. On the sidebar menu (shown here), click on **Payment**.

**Note:** *If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*



3. When the "Payment" window displays (shown here), do the following:

- a. Click on the **Credit** button.
- b. In the "Transaction type" drop-down, select **Refund**.
- c. In the **Amount** field, enter the refund dollar amount (\$0.00).

4. Enter the credit card data:

In the **Credit Card Number** field, enter the credit card's 16-digit PAN (personal account number).

- a. In the **Expiry date** field, enter the credit card's expiry date (mm/yy).
- b. In the **Security code** field, enter the credit card's 3- or 4-digit card verification value.

5. If the "Billing address" fields display (**Street number**, **Street name**, **City**, **Province**, and **Postal code**), enter the cardholder billing address data.

**Note:** *To configure billing address fields, see [Store settings: payments](#) (page 119).*

<sup>11</sup> Some card brands support debit card manual entry for this transaction.

<sup>12</sup> Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 28).

6. If the custom transaction identifier field displays, enter the requested data.

**Note:** To configure a custom transaction identifier, see [Custom ID: store settings](#) (page 124).



7. Click on the **Submit** button to send the transaction for processing.

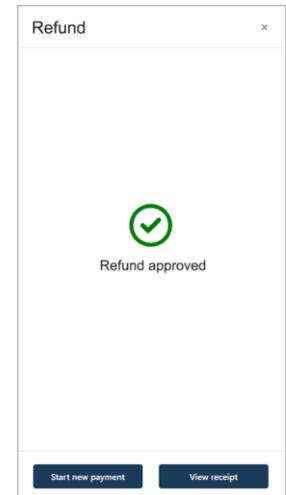
8. When the "Refund" window displays the "approved" or "declined" response (shown here), the transaction is complete. Do one of the following:

**To view, print, or send (email/text) the transaction receipt:**

- a. Click on the **View receipt** button.
- b. Continue in [Sending/printing a transaction receipt](#) (page 72).

**To initiate a new Purchase, Preauthorization, or independent Refund:**

- a. Click on the **Start New Payment** button.





# Reporting & Receipts

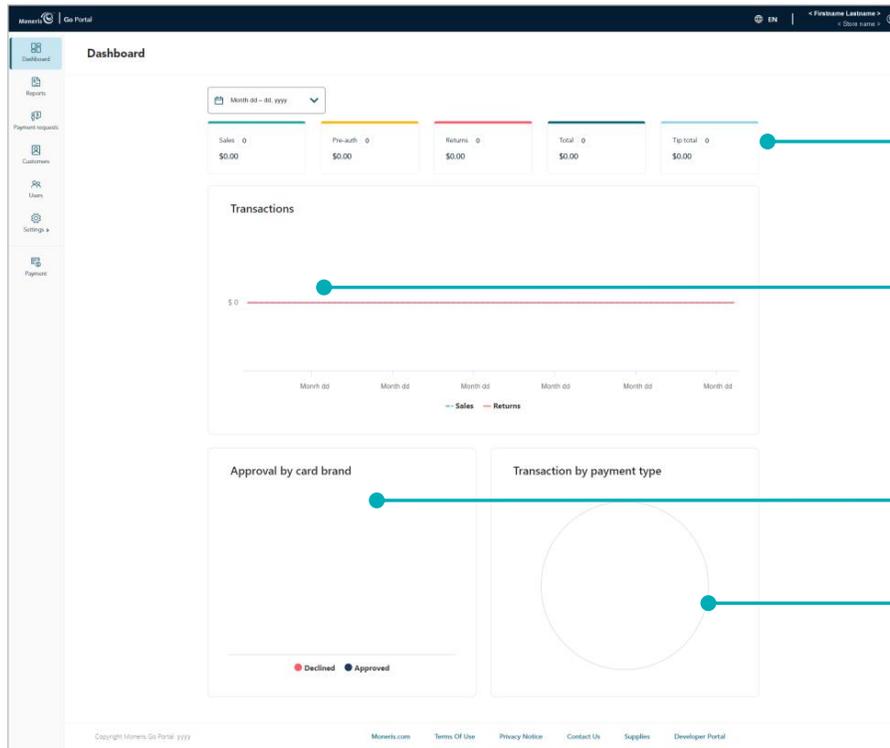
In this section, we go over everything you need to know to generate financial transaction reports and access receipts from your Moneris Go portal store, including reporting and receipt data from any terminal(s) that are synched to your store.

# The dashboard

The "Dashboard" page (shown below) provides an at-a-glance graphical and numeric summary of your store's financial transactions, including net totals for the date range that you specify in the calendar (the default date range is "Current week").

**Note:** The "Dashboard" is the first page that displays when you have successfully accessed your Moneris Go portal store. For a list of Moneris Go portal features and functions that you may now use, see [List of Moneris Go portal features and functions](#) (page 16).

- To change the dashboard reporting period, see [Changing your dashboard's report period](#) (page 54).



- Tabs area displays transaction and tip totals:
- **Sales:** # of Purchases and Completions; with \$ total.
  - **Pre-auth:** # of Preauthorizations; with \$ total.
  - **Returns:** # of Refunds and Voids; with \$ total.
  - **Total:** # of "Sales" and "Returns"; with \$ net total.
  - **Tip total:** # of tips; with \$ total.

"Transactions" module displays line graph charting sales and returns totals (see "Sales" and "Returns" definitions above).

"Approval by card brand" module shows bar chart of approved and declined totals by card brand.

"Transaction by payment type" module displays pie chart of transaction percentages by card brand.

## Returning to your store's dashboard

The steps below describe how to return to your store's "Dashboard" page.

**Note:** If you have multiple stores linked to your user account, you can use the [My Stores](#) function to move between your stores (see [Using My Stores](#) on page 29).

1. On the sidebar menu (shown here), click on **Dashboard**.

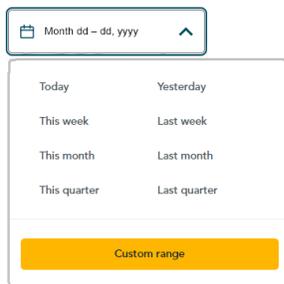
**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



## Changing your dashboard's report period

Follow the steps below to select a new date range for your Moneris Go portal store's dashboard report.

1. Go to your store's "Dashboard" page (see [The dashboard](#) on page 53).
2. On the "Dashboard" page, click on the calendar  icon.
3. When the date range drop-down displays (shown below), select a pre-defined date range, or customize your own date range:



### To select a pre-defined date range:

- a. In the date range drop-down (shown above), click on the desired date range (**Today, Yesterday, This week, Last week, This month, Last month, This quarter, or Last quarter**).
- b. Wait while the dashboard request is processed.

### To customize a date range of your own:

- a. In the date range drop-down (shown above), click on **Custom range**.
- b. When the calendar displays (shown here), click on a start date to highlight it.

**Note:** To roll the calendar date backward or forward, click on the back < icon or the next > icon beside the month or year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down ▼ icon beside the month and/or year, and then select a specific month/year.

- c. Click on an end date to highlight it.

**Note:** To roll the calendar month/year backward or forward, click on the back < icon or the next > icon beside the month/year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down ▼ icon beside the month/year, and then select a specific month/year.



- d. Click on the calendar's **Apply** button.
- e. Wait while the dashboard request is processed.

# Financial transactions report

The steps below describe how to generate a detailed report about financial transactions performed through your Moneris Go portal store, including transactions performed on any terminal that is synched to the store. You can set filters to narrow/widen the report scope and export the report to a spreadsheet file or CSV text file.

1. Log into the Moneris Go portal, and access the store for which you want to generate this report (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

2. On the sidebar menu (shown here), click on **Reports**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.

3. When the "Reports" page displays the report (shown below), it will feature a numeric summary of totals by transaction type and list any transaction processed within the default search period (current week).

**Note:** To narrow the report scope, enter a dollar amount or order ID (a full or partial) in the **Search by amount or order ID** field. You may also use additional filters to refine the search by date, transaction type, card type, user, and channel (see [Changing search filters for your financial transactions report](#) on page 62).



# of active search filters indicated.

Export the report (see [Exporting a financial transactions report](#) on page 70).

Tabs area displays transaction and tip totals:

- **Sales:** # of Purchases + Completions; with \$ total.
- **Pre-auth:** # of Preauthorizations; with \$ total.
- **Returns:** # of Refunds + Voids; with \$ total.
- **Total:** # of "Sales" + "Returns"; with \$ net total.
- **Tip total:** # of tips; with \$ total.

Amount	Tip	Type	Status	Order ID	<Custom ID>	Channel	Date
[card logo] SAA.AA	SAAA	< Transaction >	✓ Approved	MOG0000000000101	< Custom ID >	< Channel >	Month dd, yyyy
[card logo] SAA.AA	SAAA	< Transaction >	✓ Approved	MOG0000000000202	< Custom ID >	< Channel >	Month dd, yyyy
[card logo] SAA.AA	SAAA	< Transaction >	✓ Approved	MOG0000000000303	< Custom ID >	< Channel >	Month dd, yyyy
[card logo] SAA.AA	SAAA	< Transaction >	✓ Approved	MOG0000000000404	< Custom ID >	< Channel >	Month dd, yyyy

Report headers include "Amount", "Tip", "Type", "Status", "Order ID", "Custom ID", "Channel", and "Date" (Month dd, yyyy). For more information about each header, see [Payment details descriptions](#) (page 59).

**Merchant Direct note:** Any data populating under Moneris Go portal's custom ID field/header in a Go portal receipt or report will always be listed under the header "Customer ID" in Merchant Direct's financial transactions reports regardless of the field/header label that is configured in Moneris Go portal.

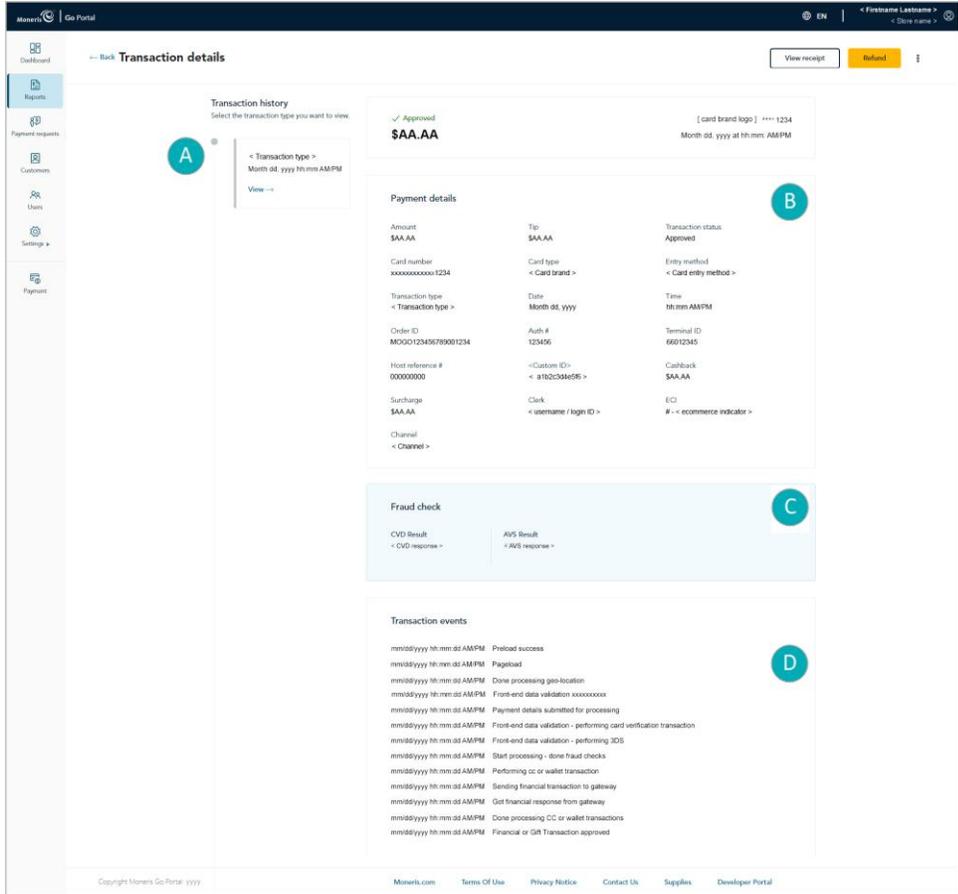
- To view the payment details, or perform a follow-on (Void, Refund, or Completion) transaction, or send/print a transaction receipt, click on the transaction to open its "Transaction details" page (see [Transaction details](#) on page 57).

- To change the number of hits listed on a page, click on the "Show # per page" drop-down, and select a number (**10**, **25**, or **50**). To advance to the next page or last page, click on the **Next page >** icon or the **Last page >>** icon respectively. To go back to the previous page or the first page, click on the **Previous page <** icon or the **First page <<** icon respectively.

# Transaction details

The "Transaction details" page lists all the transaction's attributes as described in the table below. You can view, print, and send (email/text) the transaction receipt; and you can initiate a follow-on Void, Refund, or Completion if applicable. The steps below describe how to view the "Transaction details" page for an approved/declined financial transaction.

1. Initiate a financial transactions report to retrieve the desired transaction (see [Financial transactions report](#) on page 55), and then click on the transaction to open its "Transaction details" page (shown below).



**Note:** The table below describes the labelled "Transactions details" image shown above.

Label	Descriptions
A	The "Transaction history" area chronologically lists any associated follow-on transactions (Void, Refund, and Completion), which are linked to the original transaction via the order ID. (You can click on a listed follow-on transaction to open its own "Transaction details" page.)
B	The "Payment details" module displays the line items "Amount", "Surcharge", "Transaction status", "Card type", "Transaction type", "Time", "Auth #", "Host reference #", "Cashback", "Tip", "Card number", "Entry method", "Date", "Order ID", "Terminal ID", "< Custom ID >", "Clerk", "ECI", and "Channel". For line-item descriptions of payment details, see <a href="#">Payment details descriptions</a> (page 59).
C	The "Fraud check" module displays the "AVS result" (address verification service) and "CVD result" (card verification digits). For line-item descriptions of fraud check results, see <a href="#">Fraud check result descriptions</a> (page 61).
D	The "Transaction events" module displays if the transaction (debit/credit) that was initiated through a Moneris Checkout integration. Transaction events are logged in chronological order.

2. From the "Transaction details" page, you can do any of the following:

**View, print, or send (email/text) the transaction receipt:**

- a. Click on the **View receipt** button.
- b. Continue in [Sending/printing a transaction receipt](#) (page 72).

**Initiate a follow-on transaction:**

- To do a Void, continue at step 4 in [Void: manual entry](#) (page 45).
- To do a Refund, continue at step 4 in [Refund: manual entry](#) (page 48).
- To do a Completion, continue at step 4 in [Completion with credit card: manual entry](#) (page 41).

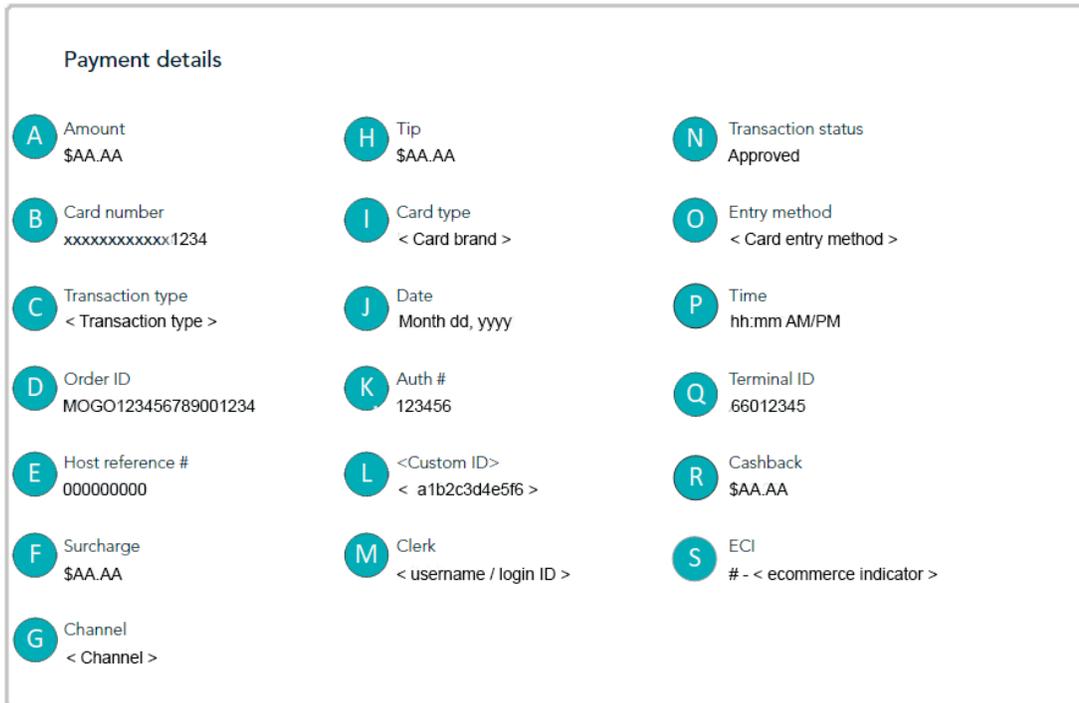
**Return to your financial transactions report:**

- a. Click on **Back** (appears in the top left corner on the "Transaction details" page).

## Payment details descriptions

The "Payment details" module (shown below) displays on the "Transaction details" page of every approved/declined financial transaction (see [Transaction details](#) on page 57). The table below describes each line item that can appear in the "Payment details" module depending on the transaction.

**Note:** Some of these line items are also featured as standard report headers in the financial transactions report (see [Financial transactions report](#) on page 55). These line items are also identified in the table below.



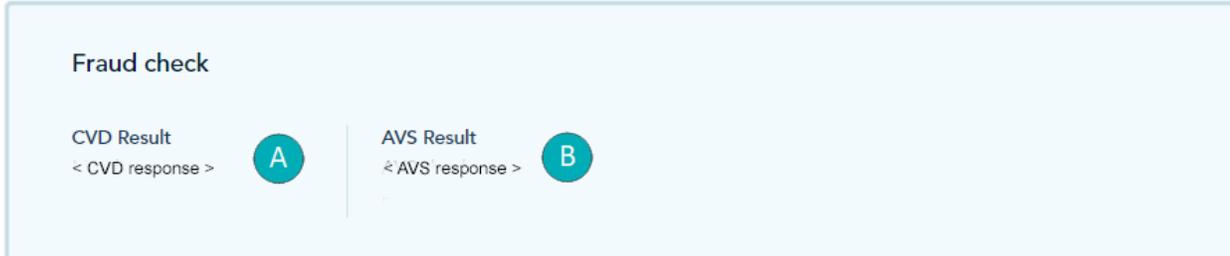
The table below describes the labelled line items in the "Payment details" module image shown above. The circle (●) in the "Header" column indicates the line item is also featured as a standard header in the financial transactions report.

Label	Line item	Report header	Description
<b>A</b>	Amount	●	Total transaction amount, including any tip, cashback, and/or surcharge.
<b>B</b>	Card number		Masked card number of the card used for the transaction.
<b>C</b>	Transaction type	●	Transaction type (e.g., Purchase, Preauthorization, Refund, Void, Completion, or Verification).
<b>D</b>	Order ID	●	Unique transaction identifier (also referred to as "Order #").
<b>E</b>	Host reference #		Host reference number.
<b>F</b>	Surcharge		Configurable surcharge amount (see <a href="#">Moneris Go terminal: transaction settings</a> on page 153; and see <a href="#">Moneris Go Plus terminal: transaction settings</a> on page 172).
<b>G</b>	Channel	●	The device, application, or ecommerce integration through which payment data (debit, credit, gift, or cash) were originally captured prior to being sent to the Moneris host for processing as a transaction. (For a list of channels and descriptions, see <a href="#">Channel indicator descriptions</a> on page 197.)

Label	Line item	Report header	Description
H	Tip	•	Tip amount (see <a href="#">Moneris Go terminal: tip settings</a> on page 165; and see <a href="#">Moneris Go Plus terminal: tip settings</a> on page 184).
I	Card type	•	Card brand (type) used for transaction.
J	Date	•	Date (Month dd, yyyy) of the transaction.
K	Auth #		Authorization number.
L	< Custom ID >	•	<p>Custom transaction identifier (see <a href="#">Custom ID: store settings</a> on page 124; see <a href="#">Moneris Go terminal: transaction settings</a> on page 153; and see <a href="#">Moneris Go Plus terminal: transaction settings</a> on page 172).</p> <p><b>Merchant Direct note:</b> Any data populating under Moneris Go portal's custom ID field/header in a Go portal receipt or report will always be listed under the header "Customer ID" in Merchant Direct's financial transactions reports regardless of the field/header label that is configured in Moneris Go portal.</p>
M	Username		<p>Username/login ID of the user who initiated the transaction.</p> <p><b>Note:</b> If the transaction was initiated through an ecommerce integration (e.g., Moneris Checkout), the integration type is indicated in place of the username/login ID.</p>
N	Transaction status	•	Card issuer response (e.g., "Approved" or "Declined").
O	Entry method		Card entry method used for the transaction.
P	Time		Time (hh:mm AM/PM) of the transaction.
Q	Terminal ID		<p>8-digit device identifier: If the prefix starts with "66" (e.g., 66012345), it indicates the transaction was performed via your store's virtual terminal, a payment request, an ecommerce integration (e.g., Moneris Checkout), or an API.</p> <p>If the prefix starts with "A1" it indicates the transaction was performed on a synched Moneris Go terminal. If the prefix starts with "A2" it indicates the transaction was performed on a synched Moneris Go Plus terminal.</p>
R	Cashback		Cashback amount (see <a href="#">Moneris Go terminal: cashback settings</a> on page 162; and see <a href="#">Moneris Go Plus terminal: cashback settings</a> on page 181).
S	ECI		Ecommerce indicator. Indicates the level of security that was used to obtain the cardholder's payment data. (For a list of ecommerce indicators and descriptions, see <a href="#">Ecommerce indicator descriptions</a> on page 199.)

## Fraud check result descriptions

The "Fraud check" module (shown below) displays on the "Transaction details" page of every approved/declined financial transaction (see [Transaction details](#) on page 57). The table below describes each line item that can display in the "Fraud check" module.



The table below describes the labelled line items in the "Fraud check" module image shown above.

Label	Line item	Description
A	CVD Result	Card verification digits (also known as card verification value) response: Generated when the card issuer receives the CVD/CVV data submitted in a transaction and compares them with the corresponding digits on the cardholder's card.
B	AVS Result	Address verification service response: Generated when the card issuer receives the street number, street name, and postal code data submitted in the transaction and compares them with the corresponding data on the cardholder's statement.

## Changing search filters for your financial transactions report

You can narrow/widen the scope of a Moneris Go portal financial report by changing one or more of the report search filters.

1. Initiate a Moneris Go portal financial transactions report (see [Financial transactions report](#) on page 55).
2. Select your report search filter(s) as desired (see filter list in the table below):

Search filter	See procedure:
Amount	<a href="#">Retrieving transactions by amount or order ID</a> (page 63)
Card type	<p>Manually selecting filter:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">Retrieving transactions by transaction type, card type, user, or channel: manual select</a> (page 66)</li> </ul> <p>Selecting as part of pre-defined filter set:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">Retrieving transactions by using pre-defined filter set</a> (page 68)</li> </ul>
Channel	<p>Manually selecting filter:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">Retrieving transactions by transaction type, card type, user, or channel: manual select</a> (page 66)</li> </ul> <p>Selecting as part of pre-defined filter set:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">Retrieving transactions by using pre-defined filter set</a> (page 68)</li> </ul>
Date range (customized)	<a href="#">Retrieving transactions by custom date range</a> (page 65)
Date range (pre-defined)	<a href="#">Retrieving transactions by pre-defined date range</a> (page 64)
Order ID	<a href="#">Retrieving transactions by amount or order ID</a> (page 63)
Transaction type	<p>Manually selecting filter:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">Retrieving transactions by transaction type, card type, user, or channel: manual select</a> (page 66)</li> </ul> <p>Selecting as part of pre-defined filter set:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">Retrieving transactions by using pre-defined filter set</a> (page 68)</li> </ul>
User	<p>Manually selecting filter:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">Retrieving transactions by transaction type, card type, user, or channel: manual select</a> (page 66)</li> </ul> <p>Selecting as part of pre-defined filter set:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">Retrieving transactions by using pre-defined filter set</a> (page 68)</li> </ul>

## Retrieving transactions by amount or order ID

Follow the steps below to generate a financial transactions report for your Moneris Go portal store by entering a transaction amount or order ID as the search criterion.

1. Initiate a financial transactions report (see [Financial transactions report](#) on page 55).
2. On the "Reports" page, go to the search bar (shown below), and enter a full or partial amount or order ID in the **Search by amount or order ID** field.



The screenshot shows a search interface for transactions. At the top left, there is a dropdown menu for date range selection, currently set to "Month dd - dd, yyyy". To the right of this is a search input field with a magnifying glass icon and the placeholder text "Search by amount or order ID". Further right is a button labeled "Apply filters" with a funnel icon. On the far right is a button labeled "Export" with a download icon.

3. If you need to change the date range:
  - For pre-defined date, continue at step 2 in [Retrieving transactions by pre-defined date range](#) (page 64).
  - For custom date, continue at step 2 in [Retrieving transactions by custom date range](#) (page 65).
4. Wait while the report request is processed.

**Note:** To use a different search filter, see [Changing search filters for your financial transactions report](#) (page 62).

## Retrieving transactions by pre-defined date range

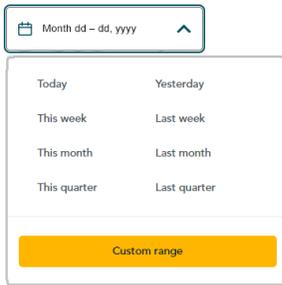
Follow the steps below to generate a financial transactions report for your Moneris Go portal store by selecting a pre-defined report date range such as today, yesterday, week, or quarter.

1. Initiate a financial transactions report (see [Financial transactions report](#) on page 55).
2. On the "Reports" page, click on the calendar  icon in the search bar (shown below).



The screenshot shows the "Transactions" search interface. It includes a date range dropdown menu set to "Month dd - dd, yyyy", a search bar with the placeholder "Search by amount or order ID", an "Apply filters" button, and an "Export" button.

3. When the date range drop-down displays (shown below), click on a date range (**Today, Yesterday, This week, Last week, This month, Last month, This quarter, or Last quarter**).



The screenshot shows the date range dropdown menu expanded. It lists the following options: Today, Yesterday, This week, Last week, This month, Last month, This quarter, and Last quarter. A "Custom range" button is located at the bottom of the menu.

4. Wait while the report request is processed.

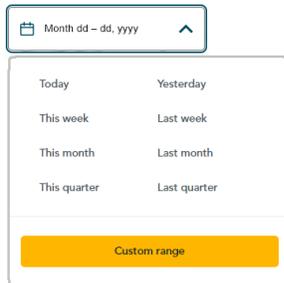
## Retrieving transactions by custom date range

Follow the steps below to generate a financial transactions report for your Moneris Go portal store by selecting your own report date range.

1. Initiate a financial transactions report (see [Financial transactions report](#) on page 55).
2. On the "Reports" page, click on the calendar  icon in the search bar (shown below).



3. When the date range drop-down displays (shown below), click on **Custom range**.



4. When the calendar displays (shown here), click on a start date to highlight it.

**Note:** To roll the calendar month/year backward or forward, click on the back < icon or the next > icon beside the month/year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down ▼ icon beside the month/year, and then select a specific month/year.

5. Click on an end date to highlight it.

**Note:** To roll the calendar month/year backward or forward, click on the back < icon or the next > icon beside the month/year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down ▼ icon beside the month/year, and then select a specific month/year.



6. Click on the calendar's **Apply** button.
7. Wait while the report request is processed.

## Retrieving transactions by transaction type, card type, user, or channel: manual select

Follow the steps below to generate a financial transactions report for your Moneris Go portal store by manually selecting one or more search filters including transaction type, card type, user, and/or channel.

**Note:** To use a pre-defined filter set, see [Retrieving transactions by using pre-defined filter set \(page 68\)](#).

1. Initiate a financial transactions report (see [Financial transactions report](#) on page 55).
2. On the "Reports" page, click on **Apply filters** in the search bar (shown below).

**Note:** If one filter is already active, you will click on **1 filter applied**. If multiple filters are already active, you will click on **# filters applied**.



The screenshot shows a search bar for transactions. On the left, there is a date selector with a calendar icon and the text "Month dd - dd, yyyy" and a dropdown arrow. In the center is a search input field with a magnifying glass icon and the placeholder text "Search by amount or order ID". On the right, there are two buttons: "Apply filters" with a funnel icon and "Export" with a download icon.

3. When the "Filter transactions" window displays (shown here), manually select one or more search filters:

**Note:** To clear all selected filters, click on **Clear all**. To clear an individual filter, click on the "X" beside the filter that you want to disable.

### To search by transaction type:

- a. Click on the "Transaction type" drop-down, and checkmark the box beside one or more transaction types (**Purchase, Refund, Void, Preauthorization, Completion, and Reauthorization**).

**Note:** To clear all selected transaction types, click on **Clear**.

### To search by card type:

- a. Click on the "Card type" drop-down, and checkmark the box beside one or more card types (e.g. **Visa, Mastercard**, etc.).

**Note:** To clear all selected card types, click on **Clear**.

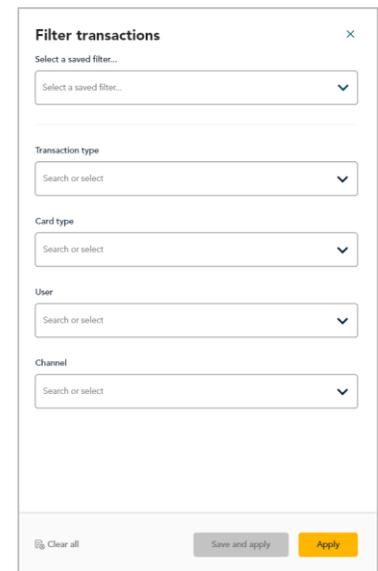
### To search by user account:

- a. Click on the "User" drop-down, and checkmark the box beside one or more users (**Firstname Lastname**).

**Note:** To clear all selected users, click on **Clear**.

### To search by channel type:

- a. Click on the "Channel" drop-down, and checkmark the box beside one or more channels (**Terminal, Virtual Terminal, Vault, E-commerce API, E-commerce (Moneris Checkout), Payment Request, WIX, Cash, and Go Retail POS**).



The screenshot shows a "Filter transactions" dialog box. At the top, there is a close button (X) and a section for "Select a saved filter..." with a dropdown menu. Below this are four filter sections, each with a "Search or select" dropdown: "Transaction type", "Card type", "User", and "Channel". At the bottom of the dialog, there are three buttons: "Clear all" with a trash icon, "Save and apply" in a grey button, and "Apply" in a yellow button.

**Note:** To clear all selected channels, click on **Clear**.

- Click on the **Apply** button, and wait while the report request is processed.
- When the "Reports" page refreshes, the number of active filters is indicated in the search bar (shown below).



## Retrieving transactions by using pre-defined filter set

Follow the steps below to generate a financial transactions report for your Moneris Go portal store by selecting a pre-defined search filter set, which can include any combination of the filters transaction type, card type, user, and/or channel.

**Note:** To define a new filter set, see [Defining a new search filter set \(page 69\)](#).

1. Initiate a financial transactions report (see [Financial transactions report](#) on page 55).

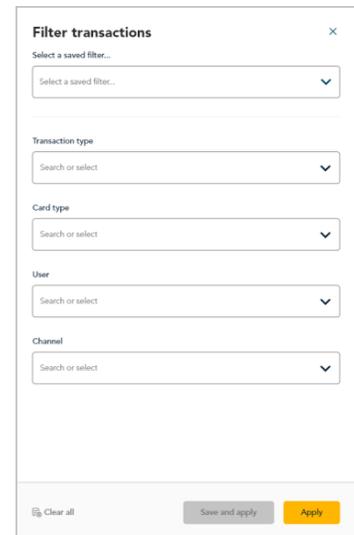
2. On the "Reports" page, click on **Apply filters** in the search bar (shown below).

**Note:** If one filter is already active, you will click on **1 filter applied**. If multiple filters are already active, you will click on **# filters applied**.



3. When the "Filter transactions" window displays (shown here), click on the "Select a saved filter" drop-down, and select a (pre-defined) filter group.

**Note:** To clear all selected filters, click on **Clear all**. To clear an individual filter, click on the "X" beside the filter that you want to disable.



4. Click on the **Apply** button, and wait while the report request is processed.

5. When the "Reports" page refreshes, the number of active filters is indicated in the search bar (shown below).



## Defining a new search filter set

Follow the steps below to generate a financial transactions report for your Moneris Go portal store by defining and saving a new search filter set, which can include any combination of the filters including transaction type, card type, user, and/or channel.

1. Initiate a financial transactions report (see [Financial transactions report](#) on page 55).
2. On the "Reports" page, click on **Apply filters** in the search bar (shown below).

**Note:** If one filter is already active, you will click on **1 filter applied**. If multiple filters are already active, you will click on **# filters applied**.

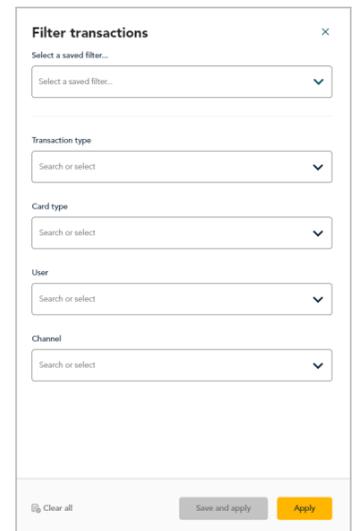


The screenshot shows the 'Transactions' search bar. It includes a date dropdown menu set to 'Month dd - dd, yyyy', a search input field with the placeholder 'Search by amount or order ID', and two buttons: 'Apply filters' and 'Export'.

3. When the "Filter transactions" window displays (shown here), do the following:
  - a. Click on the drop-down for the filter group containing the filter type(s) that you want to add, and then checkmark the box beside the desired filter type(s).

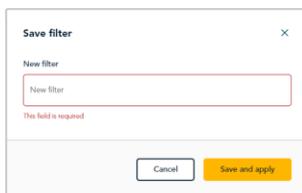
**Note:** To add all filter types in a group, checkmark the **Select all** box. To clear all selected filters in a group, click on **Clear**. To clear an individual filter, click on the "X" beside the filter that you want to disable.

- b. Click on the **Save and apply** button.



The 'Filter transactions' dialog box is shown. It has a title bar with a close button. Below the title bar is a section for 'Select a saved filter...' with a dropdown menu. The main area contains several filter groups, each with a search or select dropdown: 'Transaction type', 'Card type', 'User', and 'Channel'. At the bottom, there are three buttons: 'Clear all', 'Save and apply', and 'Apply'.

4. When the "Save filter" dialog displays (shown below), enter the name to apply to the new filter set, and click on the dialog's **Save and apply** button.



The 'Save filter' dialog box is shown. It has a title bar with a close button. Below the title bar is a section for 'New filter' with a text input field. Below the input field is a red error message: 'This field is required'. At the bottom, there are two buttons: 'Cancel' and 'Save and apply'.

5. Wait while the report request is processed.

6. When the "Reports" page refreshes, the number of active filters is indicated in the search bar (shown below).



The screenshot shows the 'Transactions' search bar. The search input field now displays '# filters applied' next to the search icon. A red line points from the text '# OF ACTIVE FILTERS' to the '# filters applied' text in the search bar. The 'Apply filters' and 'Export' buttons are also visible.

## Exporting a financial transactions report

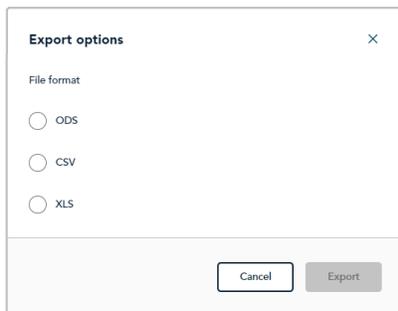
Follow the steps below to export your Moneris Go portal financial transactions report to a spreadsheet file (Excel or open document format) or to a text file (comma separated values format).

1. Initiate a financial transactions report (see [Financial transactions report](#) on page 55).
2. On the "Reports" page, go to the search bar, and click on the **Export** button (shown below).



The screenshot shows a search bar titled "Transactions". On the left, there is a date filter dropdown menu set to "Month dd - dd, yyyy". In the center is a search input field with the placeholder text "Search by amount or order ID". On the right, there is a "Apply filters" button and an "Export" button with a download icon.

3. When the "Export options" dialog displays (shown below), select the radio button beside the desired export file format (**ODS**, **CSV**, or **EXCEL**).



The screenshot shows a dialog box titled "Export options" with a close button (X) in the top right corner. Under the heading "File format", there are three radio button options: "ODS", "CSV", and "XLS". At the bottom of the dialog, there are two buttons: "Cancel" and "Export".

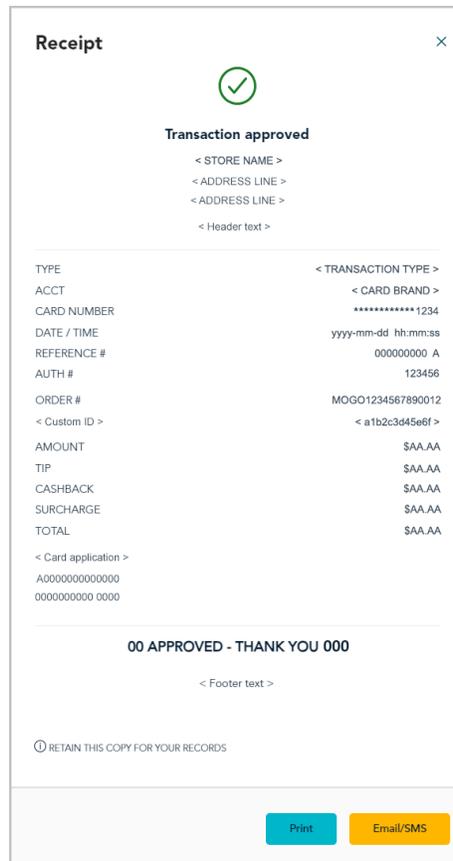
4. Click on the dialog's **Export** button.
5. When "File downloaded successfully" displays, the operation is complete.

**Note:** When your device prompts you to save the downloaded file, save the file to the desired location.

# Receipts

A transaction receipt (shown below) is generated for every approved/declined transaction that is processed through your Moneris Go portal store, including any transaction that was performed on a terminal that is synced to your store.

**Note:** To view, print, or send (email/text) a transaction receipt from the Moneris Go portal, see [Sending/printing a transaction receipt \(page 72\)](#).



## Debit/credit receipt

- For receipt line-item descriptions, see [Receipt example: debit/credit \(page 73\)](#).

## Gift receipt

- For receipt line-item descriptions, see [Receipt example: gift \(page 75\)](#).

## Cash receipt

- For receipt line-item descriptions, see [Receipt example: cash \(page 77\)](#).

# Sending/printing a transaction receipt

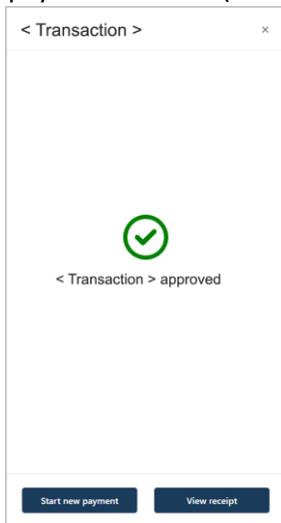
The steps below describe how to view, send, and/or print a financial transaction receipt (see [Receipts](#) on page 71) from the Moneris Go portal.

1. Access the "Transaction details" page of the desired transaction (see [Transaction details](#) on page 57), and then click on the **View receipt** button near the upper right corner on the page (shown below).



OR

If you just submitted a Purchase, Preauthorization, or an independent Refund through the virtual terminal payment window (shown below), click on its **View receipt** button while the window is open.



2. When the "Receipt" window displays (shown here), do any of the following:

### To print the transaction receipt:

- a. In the "Receipt" window (shown here), click on the **Print** button.
- b. Follow the prompts for your device operating system to execute the print job.

### To email/text the transaction receipt:

- a. In the "Receipt" window (shown here), click on the **Email/SMS** button.
- b. When the "Receipt options" dialog displays (shown below), enter the email address or the mobile phone number (include the area code) of the recipient to whom you want to send the receipt.
- c. Click on the **Send** button to close the dialog.
- d. When the response "Email successfully sent" or "SMS successfully sent" displays, the operation is complete.



## Receipt example: debit/credit

The labelled receipt image shown below is a generic example of a Moneris Go portal debit/credit transaction receipt.

**Note:** To view, print, or send (email/text) a transaction receipt from the Moneris Go portal, see [Sending/printing a transaction receipt](#) (on page 72).



The table below describes line items in the labelled receipt image above.

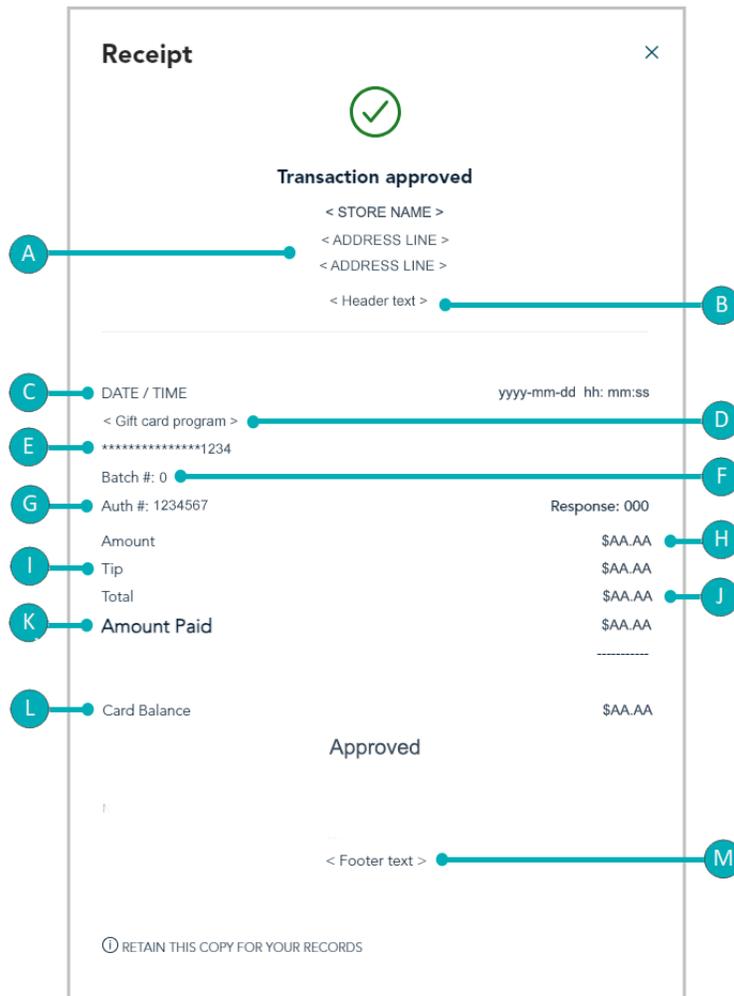
Label	Line item	Description
A	< Store name > < ADDRESS LINE # 1 > < ADDRESS LINE # 2 >	Store name (same as the store tile label on your "Stores" page) and address. <b>Note:</b> The store name can be used to identify the Moneris Go portal store to which a terminal is synced.
B	< Header text >	Customizable message in the header (see <a href="#">Moneris Go terminal: receipt settings</a> on page 156; and see <a href="#">Moneris Go Plus terminal: receipt settings</a> on page 175).
C	TYPE	Transaction type.
D	ACCT	Card brand (type) used for transaction.
E	CARD NUMBER	Masked debit/credit card number.

Label	Line item	Description
F	DATE/TIME	Date (Month dd, yyyy)/time (hh:mm:ss am/pm) of the transaction.
G	REFERENCE #	Host reference number.
H	AUTH #	Authorization number.
I	ORDER #	Unique transaction identifier (also referred to as "Order ID").
J	< Custom ID >	<p>Custom transaction identifier (see <a href="#">Custom ID: store settings</a> on page 124; see <a href="#">Moneris Go terminal: transaction settings</a> on page 153; and see <a href="#">Moneris Go Plus terminal: transaction settings</a> on page 172).</p> <p><b>Merchant Direct note:</b> Any data populating under Moneris Go portal's custom ID field/header in a Go portal receipt or report will always be listed under the header "Customer ID" in Merchant Direct's financial transactions reports regardless of the field/header label that is configured in Moneris Go portal.</p>
K	AMOUNT	Transaction amount, not including any tip, cashback, and surcharge.
L	TIP	Tip amount (see <a href="#">Moneris Go terminal: tip settings</a> on page 165; and see <a href="#">Moneris Go Plus terminal: tip settings</a> on page 184).
M	CASHBACK	Cashback amount (see <a href="#">Moneris Go terminal: cashback settings</a> on page 162; and see <a href="#">Moneris Go Plus terminal: cashback settings</a> on page 181).
N	SURCHARGE	Surcharge amount (see <a href="#">Moneris Go terminal: transaction settings</a> on page 153; and see <a href="#">Moneris Go Plus terminal: transaction settings</a> on page 172).
O	TOTAL	Total transaction amount, including any tip, cashback, and surcharge.
P	< Footer text >	Customizable message in the footer (see <a href="#">Moneris Go terminal: receipt settings</a> on page 156); and <a href="#">Moneris Go Plus terminal: receipt settings</a> on page 175).

## Receipt example: gift

The labelled receipt image shown below is a generic example of a Moneris Go portal gift transaction receipt.

**Note:** To view, print, or send (email/text) a transaction receipt from the Moneris Go portal, see [Sending/printing a transaction receipt](#) (on page 72).



The table below describes line items in the labelled receipt image above.

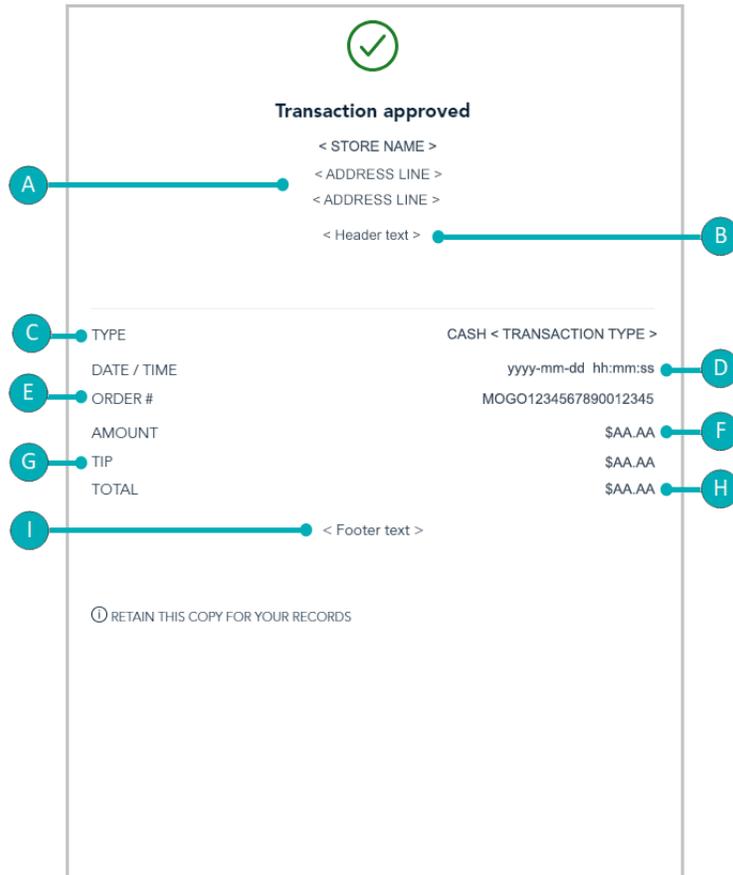
Label	Line item	Description
A	< Store name > < ADDRESS LINE # 1 > < ADDRESS LINE # 2 >	Store name (same as the store tile label on your "Stores" page) and address. <b>Note:</b> The store name can be used to identify the Moneris Go portal store to which a terminal is synched.
B	< Header text >	Customizable message in the header (see <a href="#">Moneris Go terminal: receipt settings</a> on page 156; and see <a href="#">Moneris Go Plus terminal: receipt settings</a> on page 175).
C	DATE/TIME	Date (Month dd, yyyy)/time (hh:mm:ss am/pm) of the transaction.
D	< Gift card program >	Gift card program.
E	*****1234	Masked gift card number.
F	Batch #	Batch number (gift).

Label	Line item	Description
<b>G</b>	Auth #	Authorization number.
<b>H</b>	Amount	Transaction amount, not including any tip.
<b>I</b>	Tip	Tip amount (see <a href="#">Moneris Go terminal: tip settings</a> on page 165; and see <a href="#">Moneris Go Plus terminal: tip settings</a> on page 184).
<b>J</b>	Total	Total transaction amount, including any tip.
<b>K</b>	Amount Paid	Purchase: The dollar amount removed from the gift card to pay for the Purchase. OR Refund: The dollar amount restored to the gift card.
<b>L</b>	Card Balance	The dollar amount remaining on the gift card.
<b>M</b>	< Footer text >	Customizable message in the footer (see <a href="#">Moneris Go terminal: receipt settings</a> on page 156); and <a href="#">Moneris Go Plus terminal: receipt settings</a> on page 175).

## Receipt example: cash

The labelled receipt image (shown below) is a generic example of a Moneris Go portal cash transaction receipt.

**Note:** To view, print, or send (email/text) a transaction receipt from the Moneris Go portal, see [Sending/printing a transaction receipt \(on page 72\)](#).



The table below describes line items in the labelled receipt image shown above.

Label	Line item	Description
A	< Store name > < ADDRESS LINE # 1 > < ADDRESS LINE # 2 >	Store name (same as the store tile label on your "Stores" page) and address. <b>Note:</b> The store name can be used to identify the Moneris Go portal store to which a terminal is synced.
B	< Header text >	Customizable message in the header (see <a href="#">Moneris Go terminal: receipt settings</a> on page 156; and see <a href="#">Moneris Go Plus terminal: receipt settings</a> on page 175).
C	TYPE	Transaction type.
D	DATE/TIME	Date (Month dd, yyyy)/time (hh:mm:ss am/pm) of the transaction.
E	ORDER #	Unique transaction identifier (also referred to as "Order ID").
F	AMOUNT	Transaction amount not including tip.

Label	Line item	Description
G	TIP	Tip amount (see <a href="#">Moneris Go terminal: tip settings</a> on page 165; and see <a href="#">Moneris Go Plus terminal: tip settings</a> on page 184).
H	TOTAL	Total transaction amount, including any tip.
I	< Footer text >	Customizable message in the footer (see <a href="#">Moneris Go terminal: receipt settings</a> on page 156; and see <a href="#">Moneris Go Plus terminal: receipt settings</a> on page 175).



# Payment Requests

In this section, we go over everything you need to know to create and manage your payment requests from your Moneris Go portal store.

# Creating a payment request

The steps below describe how to create a new credit card payment request through your Moneris Go portal store.

1. Log into the Moneris Go portal, and access the store through which you want to perform this action (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

2. On the sidebar menu (shown here), click on **Payment requests**.

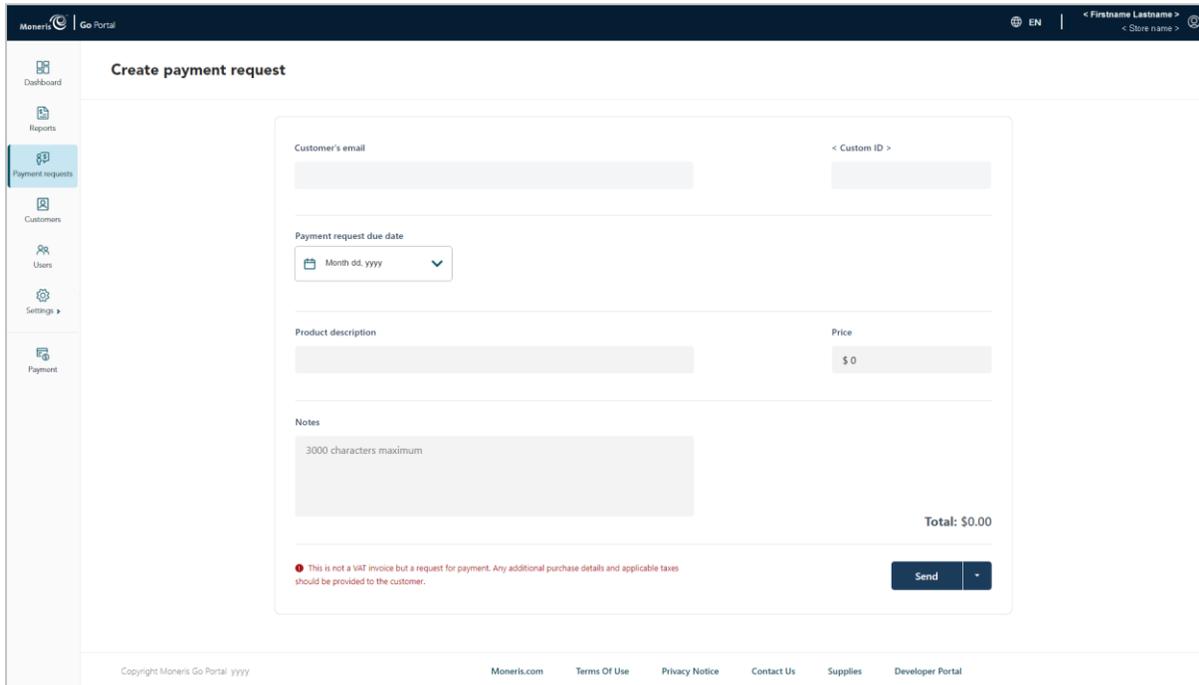
**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



3. When the "Payment requests" page displays (shown below), click on the **Create payment request** button.

Status	Date created	Payment request ID	Customer's email	Total
 Draft	Month dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA  
 Pending	Month dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA 
 Sent	Month dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA 
 Overdue	Month dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA 
 Cancelled	Month dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA 
 Paid	Month dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA 

4. When the "Create payment request" page displays (shown below), continue to the next step.

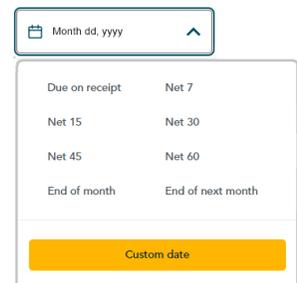


5. Click on the calendar  icon in the "Payment request due date" bar to display the date-range drop-down (shown below), and do one of the following:

**To select a preset due date:**

**Note:** The default due date is "Net 7" (i.e., seven days from date of this payment request's creation).

- a. In the date range drop-down (shown here), click on **Due on receipt** (payment is due the day on which the payment request is created), **Net 7**, **Net 15**, **Net 30**, **Net 45**, **Net 60**, **End of month**, or **End of next month**.



**To select a custom due date:**

- a. In the date range drop-down (shown above), click on the **Custom date** button.
- b. When the calendar displays (shown here), click on a specific calendar date to highlight it.

**Note:** To roll the calendar month/year backward or forward, click on the back < icon or the next > icon beside the month/year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down v icon beside the month/year, and then select a specific month/year.

- c. Click on the calendar's **Apply** button.



6. Fill in the mandatory payment fields:
  - a. In the **Customer email** field, enter the customer's email address (the payment request will be sent to this address).
  - b. In the **Product description** field, enter a description of the product/service for which you are sending the payment request.
  - c. In the **Price** field, enter the payment request amount (\$0.00).
  
7. Fill in the other payment fields as required:
  - a. In the **Notes** field, optionally enter supplementary information about the payment request.  
**Note:** *The information that you enter in the "Notes" field will not be seen by your customer.*
  - b. If the custom transaction identifier field displays, optionally enter the requested data.  
**Note:** *To configure the custom identifier field, see [Custom ID: store settings](#) (page 124).*
  
8. You have the following options with respect to this payment request:  
**To send the payment request to the customer now:**
  - a. Continue in [Sending a payment request](#) (page 83).  
**To save the payment request as a draft without sending it:**
  - a. Continue in [Saving a payment request as a draft](#) (page 86).  
**To delete the payment request:**
  - a. Click on any other menu item on the sidebar, or click on your Web browser's back button to return to a previous page.  
**Note:** *The deleted payment request will not be logged in any Moneris Go portal store report.*

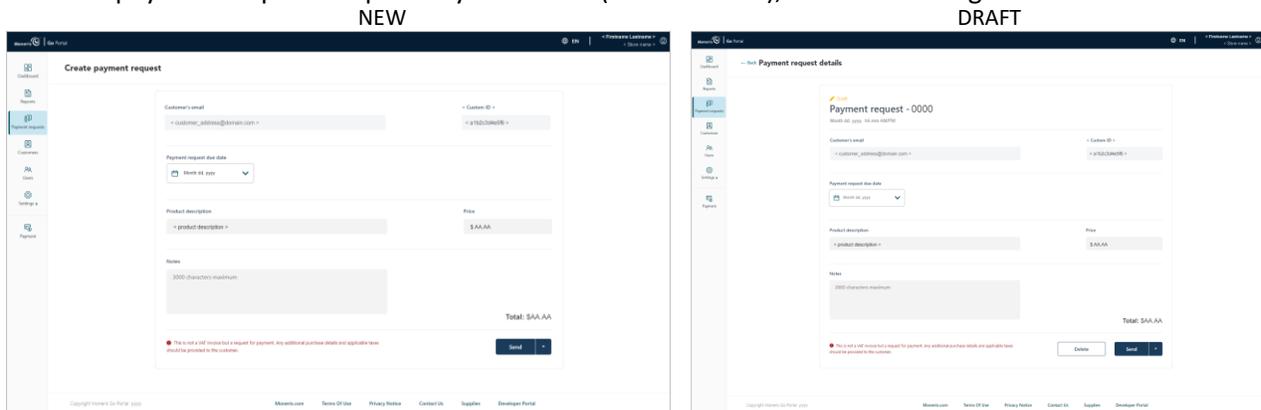
# Send and save options

## Sending a payment request

Once you finalize the details of a new or "draft" payment request (i.e., you filled in the mandatory payment fields), you can proceed to send the payment request to your customer for payment by following the steps below.<sup>13</sup>

**Note:** To start a new payment request, see [Creating a payment request](#) (page 80). To reopen a draft payment request, see [Payment request details](#) (page 92).

1. While the payment request is open on your screen (shown below), do the following:



- a. Click on the payment request's **Send** button.
- b. When the "Payment request sent successfully" response displays, the operation is complete.

**Note:** When your screen transitions to the "Payment requests" page, the payment request that you just sent will have a status indicating "Sent" or "Pending". (For status definitions, see [Payment request status indicators defined](#) on page 91.)

2. You have the following options with respect to this payment request:

**Wait for the customer to make the payment:**

- a. See [Paying a payment request](#) (page 95).

**Resend the payment request to the customer:**

- a. See [Resending a payment request](#) (see page 84).

**Cancel the payment request:**

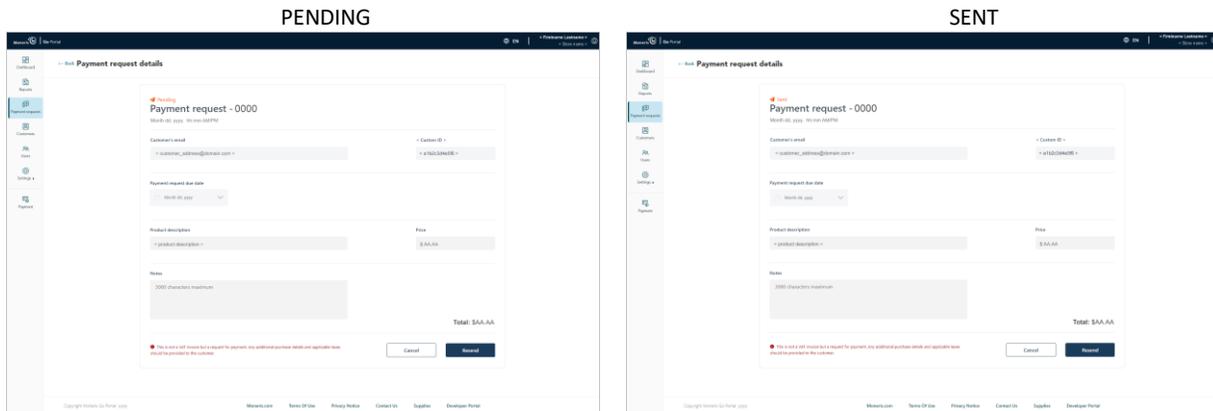
- a. See [Cancelling a payment request](#) (page 89).

<sup>13</sup> Your user account's current default display language determines the language format of the payment request your customer receives. If you want to change your default display language before sending this payment request, see [Changing the default display language](#) (page 28).

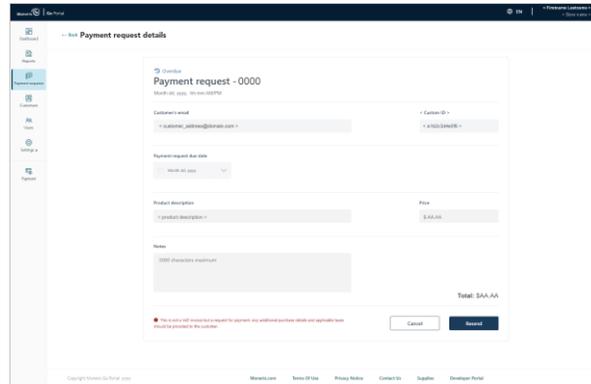
## Resending a payment request

If you reopen a payment request that has the status "Pending", "Sent", or "Overdue", you can opt to resend the same payment request to the customer although you cannot alter any of payment request details. The steps below describe how to resend an overdue/sent/pending payment request.<sup>14</sup>

1. Initiate a payment requests report, and retrieve the record of the payment request that you want to resend (see [Payment requests report](#) on page 90).
2. Once you retrieve the desired record, click on it to view its "Payment request details" page (shown below):



### OVERDUE



- a. Click on the payment request's **Resend** button.
- b. When the "Payment request sent successfully" response displays, the operation is complete.

**Note:** Your screen will transition back to the "Payment requests" page. The status of the newly re-sent payment request should indicate "Overdue" or "Sent". However, it may indicate "Pending". (For status definitions, see [Payment request status indicators defined](#) on page 91.)

3. You now have the following options with respect to this payment request:

---

<sup>14</sup> Your user account's current default display language determines the language format of the payment request your customer receives. If you want to change your default display language before resending this payment request, see [Changing the default display language](#) (page 28).

**Wait for the customer to make the payment:**

- a. See [Paying a payment request](#) (page 95).

**Resend the payment request to the customer:**

- a. See [Resending a payment request](#) (see page 84).

**Cancel the payment request:**

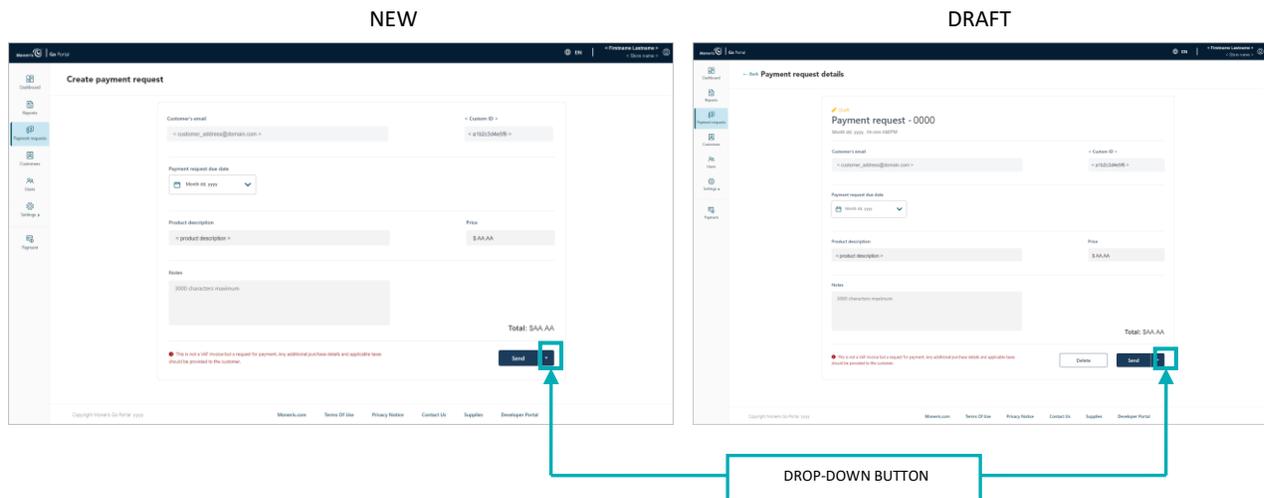
- a. See [Cancelling a payment request](#) (page 89).

## Saving a payment request as a draft

If you are working on a new or draft payment request but you are not ready to send the payment request to a customer (e.g., because you have not finalized the payment request details), you can proceed to save/re-save the payment request as a draft by following the steps below.

**Note:** The steps for creating a new payment request are described in [Creating a payment request](#) (page 80). The steps to reopen a draft payment request are described in [Payment request details](#) (page 92).

1. While the payment request is open on your screen (shown below), do the following:



- a. Click on the drop-down  button (shown above).
- b. When the drop-down displays (shown below), click on **Save as draft**.



2. When the "Payment request saved as draft successfully" response displays, the operation is complete.

**Note:** When your screen transitions to the "Payment requests" page, the status of this payment request will indicate "Draft" (see [Payment requests report](#) on page 90).

## Deleting a payment request

If you discard (delete) a "draft" payment request, all record of it is also deleted from your Moneris Go portal store's logs. The steps below describe how to delete a draft payment request that was created through your Moneris Go portal store.

**Note:** If you want to rescind a payment request that has already been sent to a customer, see [Cancelling a payment request](#) (page 89).

1. Initiate a payment requests report, and retrieve the record of the "draft" payment request that you want to delete (see [Payment requests report](#) on page 90).
2. Once the desired payment request record is retrieved (shown below), you have two deletion options:

Status	Date created	Payment request ID	Customer's email	Total	
Draft	Month, dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA	>

### Delete the payment request now:

- a. Click on the payment request record's **Delete** icon (shown above).
- b. When the "Delete payment request" dialog displays (shown below), click on the **Yes** button.

Delete payment request ×

Are you sure you want to delete this payment request?

- c. When the "Payment request successfully deleted" response displays, the operation is complete.

### View the payment details first, and then delete the payment request:

- a. Click on the payment request record to view its "Payment request details" (shown below).

Payment request details

**Draft** Payment request - 0000

Month dd, yyyy | Month dd, yyyy

Customer's email: < customer\_address@domain.com > | Customer ID: 123456789

Payment request due date: Month dd, yyyy

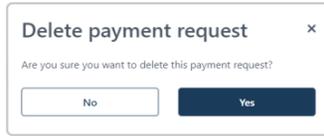
Product description: < product description > | Price: \$AA.AA

Notes: 2000 characters maximum

Total: \$AA.AA

- b. Click on the payment request's **Delete** button.

- c. When the "Delete payment request" dialog displays (shown below), click on the **Yes** button.

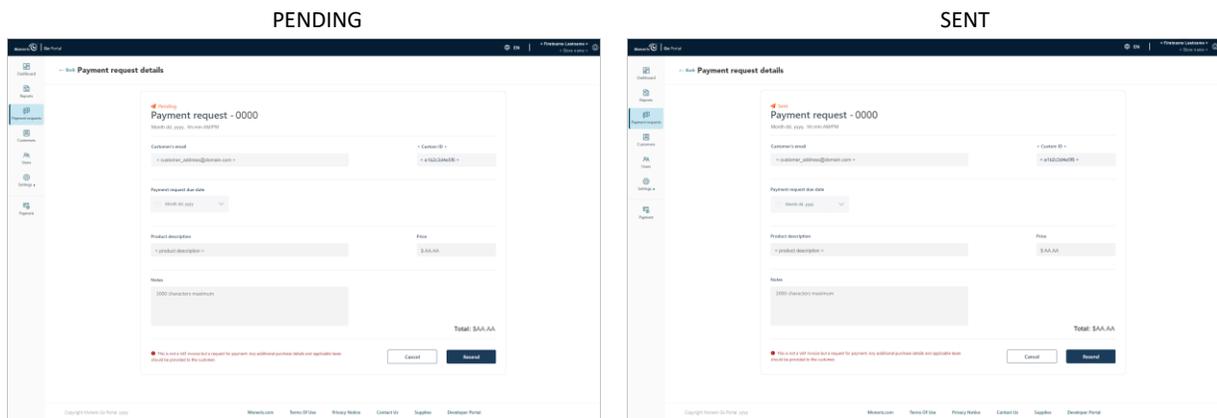


- d. When the "Payment request successfully deleted" response displays, the operation is complete.

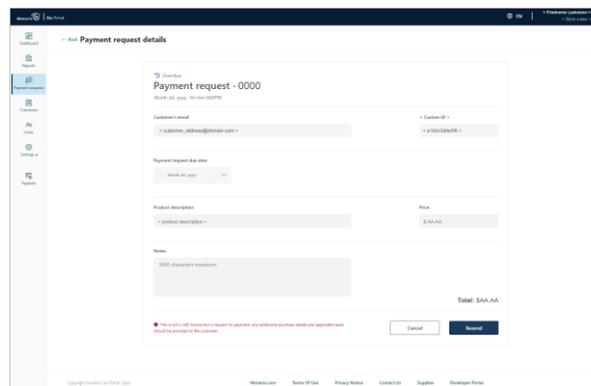
## Cancelling a payment request

You can rescind (cancel) a payment request that has the status "Pending", "Sent", or "Overdue" (i.e., the customer has not yet made the payment). When you cancel a payment request, it permanently deactivates the payment request link that your customer received (or will receive) in their payment request email, thereby preventing the possibility of payment. The steps below describe how to cancel a payment request that was sent through your Moneris Go portal store.

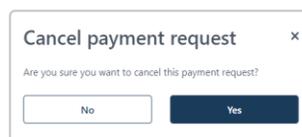
1. Initiate a payment requests report, and retrieve the record of the payment request that you want to cancel (see [Payment requests report](#) on page 90).
2. Once you retrieve the desired record, click on it to view its "Payment request details" page (shown below).



### OVERDUE



3. Click on the payment request's **Cancel** button.
4. When the "Cancel payment request" dialog displays (shown below), click on the **Yes** button.



5. When the "Payment request successfully cancelled" response displays, the operation is complete.  
**Note:** When your screen transitions to the "Payment requests" page, the status of this payment request will indicate "Cancelled".

# Payment requests report

The payment requests report lists the payment requests that were processed through your Moneris Go portal store. Report data include status, creation date, payment request ID, customer email, and total amount. From this report, you may view/edit the details of a payment request, or start a new payment request. The steps below describe how to initiate a payment requests report.

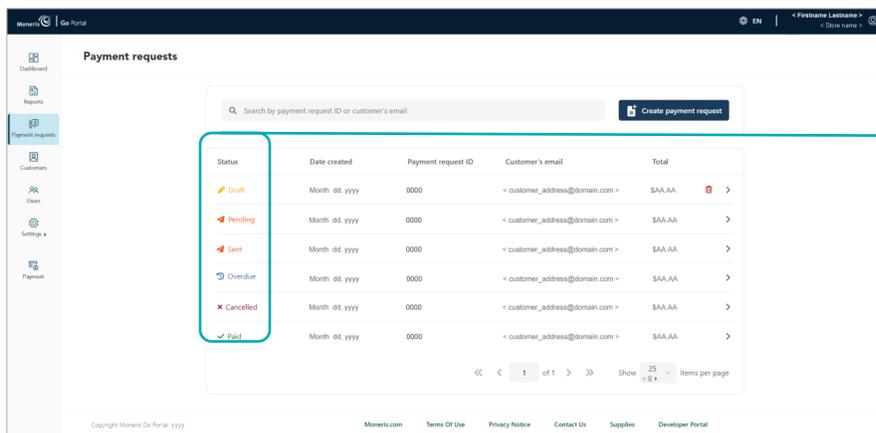
1. Log into the Moneris Go portal, and access the store through which you want to perform this action (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If you have multiple stores linked to your user account, you can use the *My Stores* function to move between your stores (see [Using My Stores](#) on page 29).

2. On the sidebar menu (shown here), click on **Payment requests**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.

3. When the "Payment requests" page displays, it lists your store's payment requests.



Status indicators include "Draft", "Pending", "Sent", "Overdue", "Cancelled", and "Paid".

(For status definitions, see [Payment request status indicators defined](#) on page 91).

4. From this report, you can do any of the following:

- To narrow the report scope, enter a full payment request ID or a full/partial customer email in the **Search by payment request ID or customer's email** field.
- To view the details of a specific payment request record, see [Payment request details](#) (page 92).
- To change the number of hits listed on a page, click on the "Show # items per page" drop-down, and select a number (**10**, **25**, or **50**). To advance to the next page or last page, click on the **Next page >** icon or the **Last page >>** icon respectively. To go back to the previous page or the first page, click on the **Previous page <** icon or the **First page <<** icon respectively.
- To start a new payment request, click on the **Create payment request** button (continue at step 4 in [Creating a payment request](#) on page 81).

## Payment request status indicators defined

Any payment request that you process through your Moneris Go portal store is appended with a status indicator that describes the current state of the payment request.

The payment request status indicator is listed beside every payment request that is logged in your payment requests report (see [Payment requests report](#) on page 90) and displays on the "Payment request details" page of each payment request (see [Payment request details](#) on page 92).

The status indicators are described in the table below.

Status indicator	Description
<b>Cancelled</b>	The payment request was sent to the customer but subsequently cancelled prior to payment (see <a href="#">Cancelling a payment request</a> on page 89).
<b>Draft</b>	The payment request is saved but has not yet been sent to a customer. The payment request can be reopened to be edited, saved/sent, or deleted (see <a href="#">Payment request details</a> on page 92).  <i>Note: A draft can be saved indefinitely until you opt to send it or delete it.</i>
<b>Overdue</b>	The payment request was sent and emailed to the customer, but the due date elapsed, and the customer has not made their payment. The payment request will remain in this state indefinitely until either the customer makes the payment (see <a href="#">Paying a payment request</a> on page 95) or you cancel the payment request first (see <a href="#">Cancelling a payment request</a> on page 89).  <i>Note: You can also resend an overdue payment request (see <a href="#">Resending a payment request</a> on page 84).</i>
<b>Pending</b>	The payment request was sent but the Moneris Go portal server has not yet emailed the payment request to the customer.  <i>Note: This status will change once the server retries and successfully emails the payment request. In the interim, you can opt to manually initiate a resend (see <a href="#">Resending a payment request</a> on page 84).</i>
<b>Paid</b>	The customer made their payment (see <a href="#">Payment request details</a> on page 92).
<b>Sent</b>	The payment request was sent, the Moneris Go portal server was able to successfully email the payment request to the customer, and payment is pending before the due date.  <i>Note: You can allow the customer to make their payment (see <a href="#">Paying a payment request</a> on page 95), you can cancel the request to prevent the customer from making the payment (see <a href="#">Cancelling a payment request</a> on page 89), or you can resend the payment request (see <a href="#">Resending a payment request</a> on page 84).</i>



## Payment details: paid payment request

The "Payment details" module (shown below) displays on the "Payment request details" page (see [Payment request details](#) on page 92) of every paid payment request.

Payment details

<p><b>A</b> Amount \$AAA.AA</p> <p><b>B</b> Card number xxxxxxxxxxxx1234</p> <p><b>C</b> Transaction type Purchase</p> <p><b>D</b> Order ID MOGO123456789001234</p> <p><b>E</b> Host reference # 000000000</p> <p><b>F</b> ECI # - &lt; ecommerce indicator &gt;</p>	<p><b>G</b> Tip \$AA.AA</p> <p><b>H</b> Card type &lt; Card brand &gt;</p> <p><b>I</b> Date Month dd, yyyy</p> <p><b>J</b> Auth # 123456</p> <p><b>K</b> &lt; Custom ID &gt; &lt; a1b2c3d4e5f6 &gt;</p> <p><b>L</b> Channel Payment Request</p>	<p><b>M</b> Transaction status Approved</p> <p><b>N</b> Entry method Manual entry</p> <p><b>O</b> Time hh:mm AM/PM</p> <p><b>P</b> Terminal ID 66012345</p> <p><b>Q</b> Clerk checkout</p>
--	---	--

The table below describes line items in the labelled "Payment details" image above.

Label	Line item	Description
A	Amount	Total transaction amount.
B	Card number	Masked card number of the card used for the transaction.
C	Transaction type	Transaction type (i.e., "Purchase").
D	Order ID	Unique transaction identifier (also referred to as "Order #").
E	Host reference #	Host reference number.
F	ECI	Ecommerce indicator. Indicates the level of security that was used to obtain the cardholder's payment data. (For a list of ecommerce indicators and descriptions, see <a href="#">Ecommerce indicator descriptions</a> on page 199.)
G	Tip	This is a default field. Tip entry is not supported for payment requests.
H	Card type	Card type (brand) used for the transaction.
I	Date	Date (Month dd, yyyy) of the transaction.
J	Auth #	Authorization number.
K	< Custom ID >	Custom transaction identifier (see <a href="#">Custom ID: store settings</a> on page 124). <b>Merchant Direct note:</b> Any data populating under Moneris Go portal's custom ID field/header in a Go portal receipt or report will always be listed under the header "Customer ID" in Merchant Direct's financial transactions reports regardless of the field/header label that is configured in Moneris Go portal.
L	Channel	The device, application, or ecommerce integration (i.e., "Payment Request") through which payment data were originally captured prior to being sent to the Moneris host for processing as a transaction.
M	Transaction status	Response from card issuer (e.g., "Approved" or "Declined").
N	Entry method	Card entry method (i.e., "Manual entry").
O	Time	Time (hh:mm AM/PM) of the transaction.
P	Terminal ID	8-digit device identifier ("66" prefix indicates the transaction was processed through the Moneris Go portal and the checkout).
Q	Clerk	Username (always referenced as "checkout" for payment requests).

# Cross-referencing a paid payment request with its Purchase record

When a customer completes a payment on a payment request, the payment request's status changes to "Paid" while the payment is logged as a credit Purchase in your store's financial transactions report.

**Note:** If you access the Purchase record, you can view additional transaction details, send a transaction receipt to the customer, and perform a follow-on Refund or Void transaction if required.

The steps below describe how to cross-reference a paid payment request with its Purchase record:

1. Retrieve the desired "Paid" payment request record (see [Payment requests report](#) on page 90), and click on it to open its "Payment request details" page (shown below).

Payment request details

✓ Paid  
Payment request - 0000  
Month dd, yyyy, hh:mm AM/PM

Customer's email: < customer\_address@domain.com >      Custom ID: < a1b2c3d4e5f6 >

Payment request due date: Month dd, yyyy

Product description: < product description >      Price: \$ AA.AA

Notes: 3000 characters maximum

Total: SAA.AA

Transaction history

Purchase  
Month dd, yyyy, hh:mm AM/PM  
Approved  
MGO012345678901234

Payment details

Amount: SAA.AA	Tip: SAA.AA	Transaction status: Approved
Card number: xxxxxxxxxxxx1234	Card type: < Card brand >	Entry method: Manual entry
Transaction type: Purchase	Date: Month dd, yyyy	Time: hh:mm AM/PM
Order ID: <b>MGO012345678901234</b>	Auth #: 123456	Terminal ID: 66012345
Host reference #: 00000000	< Custom ID >: < a1b2c3d4e5f6 >	Clerk: checkout
ECI #: < e-commerce indicator >	Channel: Payment Request	

"ORDER ID": The alphanumeric string beginning with "MOGO" or "MGO".

2. Go to the "Payment details" module, and copy the "Order ID" (shown above) to your clipboard.
3. Initiate a financial transactions report, and use the order ID as your search filter to retrieve the corresponding Purchase transaction (see [Financial transactions report](#) on page 55).

# Customer actions

## Paying a payment request

When you send a payment request through your Moneris Go portal store (see [Sending a payment request](#) on page 83), the recipient customer/cardholder must follow the steps below to make their payment.

1. When the customer receives the "Payment request - 0000" email in their inbox, they open it.
2. When the payment request is open on their screen (shown below), the customer clicks on the **Complete your purchase** hyperlink.

The screenshot shows an email interface for a payment request. At the top, it says "< Store name >". Below that is the amount "\$ AA.AA" and a blue hyperlink "Complete your purchase". The email body includes the following information:

- Date: < mm/dd/yy >
- Payment request ID: 0000
- Due date: < mm/dd/yy >
- Order Summary table with columns "Item" and "Amount":

Item	Amount
< Product description >	\$AA.AA
- Subtotal: \$ AA.AA
- Thank you, The Moneris Team
- A blue hyperlink "Continue to payment"
- Footer: "Please contact us at [moneris@moneris.com](mailto:moneris@moneris.com) or [unsubscribe](#)"

3. When the "Checkout" page displays (shown below), the customer fills in the following fields:

### Contact information:

- a. In the **First Name** field, the customer enters their given name.
- b. In the **Last Name** field, the customer enters their surname.
- c. In the **Email** field, the customer enters their email address.
- d. In the **Phone Number** field, the customer enters their contact phone number.

### Card information:

- a. In the **Cardholder Name** field, the customer enters the name on their credit card.
- b. In the **Card Number** field, the customer enters their credit card's 16-digit PAN (personal account number).
- c. In the **MMYY** field, the customer enters their credit card's due date (mm/yy).
- d. In the **CVV** field, the customer enters their credit card's 3- or 4-digit card verification number.

The screenshot shows the checkout page with the following sections:

- Header: "< Store name >" and "Payment request - 0000"
- Checkout title
- Contact information form with fields for First Name, Last Name, Email, and Phone Number.
- Cart summary showing "< Product description >" for \$ AA.AA and a Subtotal of AA.AA.
- Card information section with fields for Cardholder Name, Card Number, MMY, CVV, Billing Address (Address Line 1, Address Line 2 (optional)), City, Country, Province, and Postal Code.
- Order Summary table:

Item	Amount
Subtotal	AA.AA
Total	\$AA.AA
- A blue "Checkout" button at the bottom.

**Billing address:**

- a. In the **Address Line 1** field, the customer enters their street address.
  - b. In the **Address Line 2** field, the customer optionally enters additional address information.
  - c. In the **City** field, the customer enters the city.
  - d. In the **Country** drop-down, the customer enters their country.
  - e. In the **Province** drop-down, the customer enters their province/state.
  - f. In the **Postal** code field, the customer enters their postal code.
4. The customer clicks on the **Checkout** button to submit their payment.
  5. When the transaction is processed, the "Completed payment request Thank you" response displays, but note the following:

**About the transaction:**

- The transaction is processed as a credit card Purchase.
- In your payment requests report, the status of the original payment request will now indicate "Paid" (see [Payment requests report](#) on page 90).

**Viewing/sending a transaction receipt:**

- You can opt to send a transaction receipt to the customer. To do this, you need to retrieve the corresponding Purchase transaction so that you can access/view its transaction receipt (see [Cross-referencing a paid payment request with its Purchase record](#) on page 94).

**Unsubscribing from your mailing list:**

- The customer can opt to unsubscribe from your mailing list (see [Unsubscribing from your mailing list](#) on page 97).

## Unsubscribing from your mailing list

If the recipient of your payment request does not wish to receive email from your business, they must follow the steps below to unsubscribe from your mailing list.

**Note:** *The recipient (customer) can unsubscribe before or after they make their payment.*

1. When the customer receives the "Payment request - 0000" email in their inbox, they open it.
2. When the payment request is open on their screen (shown below), the customer clicks on the **unsubscribe** hyperlink.

< Store name >	
\$ AA.AA	
<a href="#">Complete your purchase</a>	
Date: < mm/dd/yy > Payment request ID: 0000 Due date: < mm/dd/yy >	
<b>Order Summary</b>	
<b>Item</b>	<b>Amount</b>
<hr/>	
< Product description >	\$AA.AA
<hr/>	
	Subtotal: \$AA.AA
Thank you, The Moneris Team	<a href="#">Continue to payment</a>
<small>Please contact us at <a href="mailto:moneris@moneris.com">moneris@moneris.com</a> or <a href="#">unsubscribe</a></small>	

3. When "The merchant has been notified of your request to be removed from their mailing list" response displays, the operation is complete.

**Note:** *We will notify you about the customer's request so that you can take the appropriate action to remove them from your mailing list.*

4. If the customer still needs to make their payment, they must follow the steps in [Paying a payment request](#) (page 95).



# **Vault Customer Profiles Management**

In this section, we go over everything you need to know to manage your Vault customer profiles from the Moneris Go portal.

# Creating a Vault customer profile

The steps below describe how to generate an alpha-numeric data key (Moneris Vault token) that is associated with a customer profile you will create by capturing payment card details, billing address details, and personal customer details, including a customer ID and contact information.

**Note:** When you save the profile, your Moneris Go portal store simultaneously processes a zero-dollar Verification transaction, which sends captured payment details, including billing address details (if submitted) to the card issuer and an address verification service (AVS). You can subsequently view the results of the Verification transaction and decide whether to retain or delete the profile.

1. Log into the Moneris Go portal, and access the store in which you want to create the Vault customer profile (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

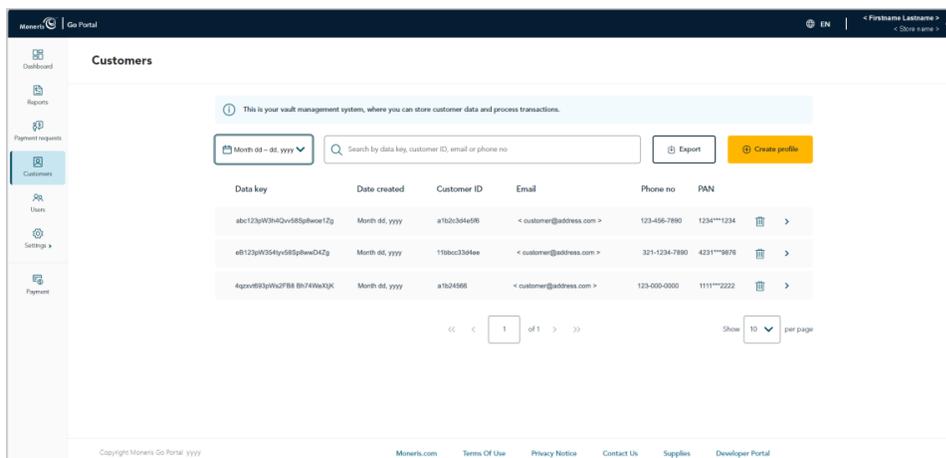
2. On the sidebar menu (shown here), click on **Customers**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



3. When the "Customers" page displays (shown below), click on the **Create profile** button.

**Note:** Any profile that was created within the date range specified in the calendar will be listed in the report.



4. When the "Create profile" page displays (shown below), go to the next step.

The screenshot shows the "Create profile" page in the Moneris Go Portal. The page is divided into three main sections, each highlighted with a red box and a corresponding label to its right:

- "CUSTOMER DETAILS" MODULE:** This section contains four input fields: "Customer ID", "Phone number", "Email address", and "Special instructions".
- "PAYMENT DETAILS" MODULE:** This section contains three input fields: "Credit card number", "Expiry date", and "Security code".
- "ADDRESS VERIFICATION" MODULE:** This section contains two input fields: "Street address" and "Postal code".

A "Save" button is located in the top right corner of the form area. The footer of the page contains copyright information and links to Moneris.com, Terms Of Use, Privacy Notice, Contact Us, Supplies, and Developer Portal.

5. Go to the "Customer details" module (shown above), and optionally fill in the fields:

**Note:** If you fill in the "Customer ID", "Phone number", and "Email address" fields, it will make it easier to subsequently retrieve the profile in a report should you ever need to update/delete the profile.

- a. In the **Customer ID** field, optionally enter a customer identifier.

**Note:** Any data that you enter in this field will populate the "Custom ID" field of the Verification transaction that results when you save this profile.

- b. In the **Phone number** field, optionally enter the customer's phone number.
- c. In the **Email address** field, optionally enter the customer's email address.
- d. In the **Special instructions** field, optionally enter additional information about the profile.

6. Go to the "Payment details" module (shown above), and fill in all the fields:

- a. In the **Credit card number** field, enter the customer's/cardholder's credit card number. (Some card brands support debit card manual entry in this field.)
- b. In the **Expiry date** field, enter the credit card's expiry date (mm/yy).
- c. In the **Security code** field, enter the credit card's 3- or 4-digit card verification number (this number will not be stored in the profile).

7. Go to the "Address verification" module (shown above), and optionally enter the customer's/cardholder's billing address:

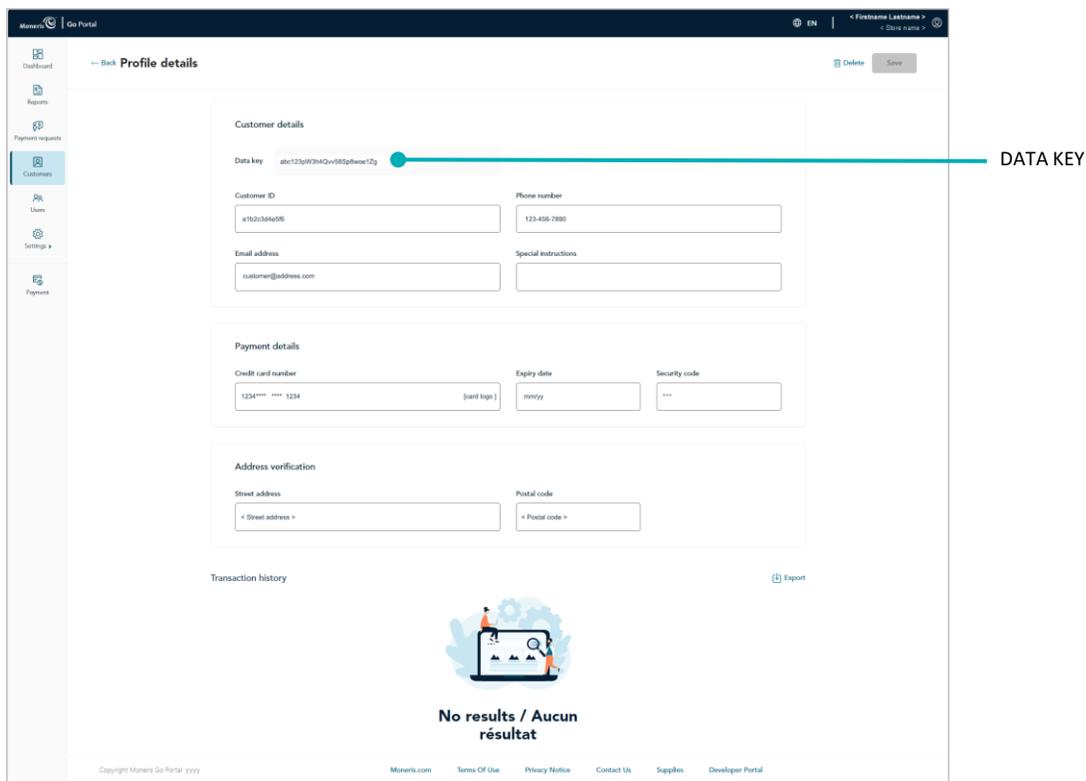
- a. In the **Street address** field, enter the cardholder billing street address.
- b. In the **Postal code** field, enter the cardholder billing postal code.

8. When you are finished capturing the profile details, click on the **Save** button.

**Note:** This action triggers Moneris Go portal to initiate a Verification transaction, which is sent to the Moneris host for processing as a zero-dollar transaction. If the Verification transaction is approved, the Vault customer profile will be successfully created (see Verification transaction: Vault customer profile on page 110).

9. When the "Profile successfully created" response displays, the operation is complete.

10. When the page refreshes into the "Profile details" page (shown below), the profile's unique data key will be listed in the "Customer details" module.

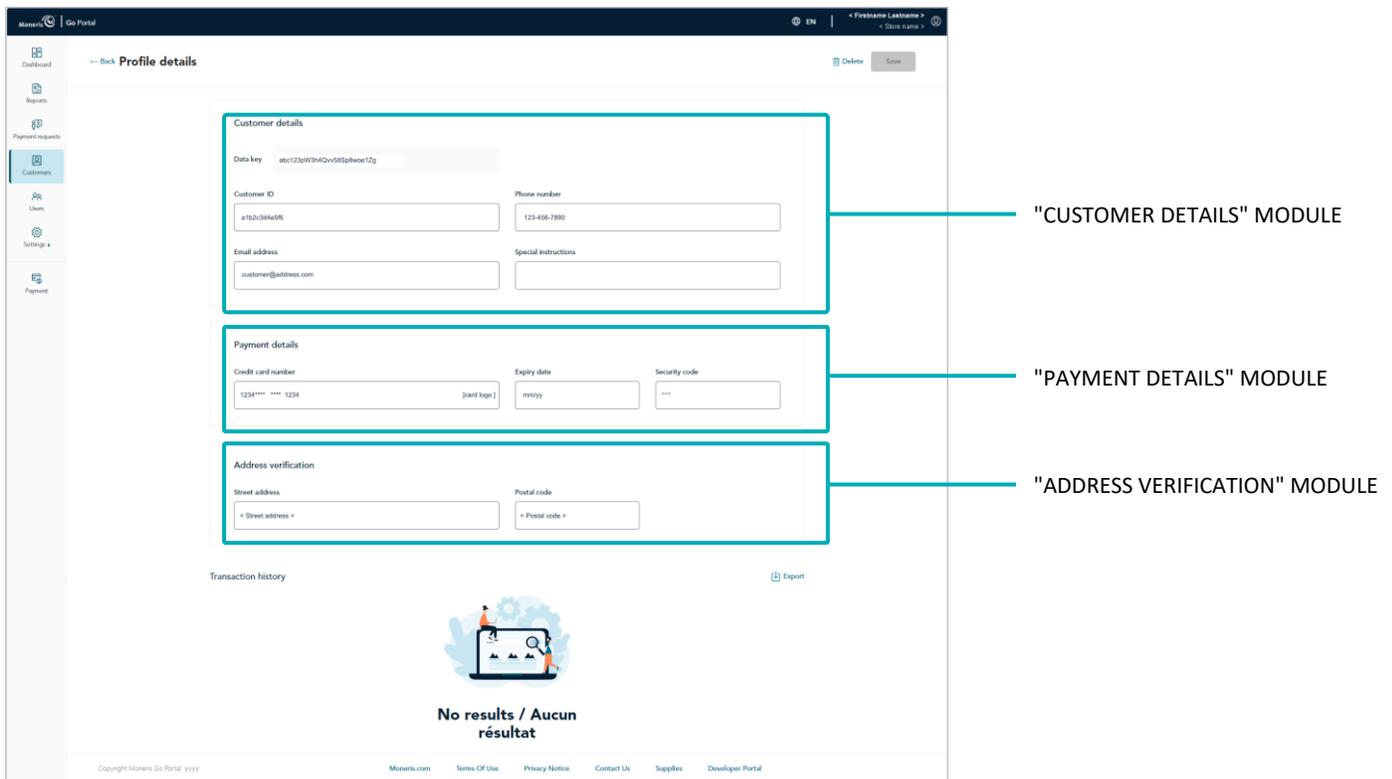


# Updating a Vault customer profile

The steps below describe how to update the details (customer, payment, and/or address) of a saved Vault customer profile in your Moneris Go portal store.

**Note:** When you save the updated profile, your Moneris Go portal store simultaneously processes a zero-dollar Verification transaction, which sends captured payment details, including billing address details (if submitted) to the card issuer and an address verification service (AVS). You can subsequently view the results of the Verification transaction and decide whether to retain or delete the profile.

1. Initiate a Vault customer profiles report to retrieve the profile that you want to update (see [Vault customer profiles report](#) on page 105), and then click on the desired profile to open it.
2. When the "Profile details" page displays (shown below), update the customer, payment, and/or address verification details as desired:



## Updating the customer details:

- a. Go to the "Customer details" module (shown above), and update the desired field(s):

**Note:** If you fill in the "Customer ID", "Phone number", and "Email address" fields, it will make it easier to subsequently retrieve the profile in a report should you ever need to update/delete the profile.

- In the **Customer ID** field, optionally enter a customer identifier.

**Note:** Any data that you enter in this field will populate the "Custom ID" field of the Verification transaction that results when you save this profile.

- In the **Phone number** field, optionally enter the customer's phone number.
- In the **Email address** field, optionally enter the customer's email address.
- In the **Special instructions** field, optionally enter additional information about the profile.

#### Updating the payment details:

- a. Go to the "Payment details" module (shown on previous page), and update all the field(s):
  - In the **Credit card number** field, enter the customer's/cardholder's credit card number.  
**Note:** *Some card brands support debit card manual entry in this field.*
  - In the **Expiry date** field, enter the credit card's expiry date (mm/yy).
  - In the **Security code** field, enter the credit card's 3- or 4-digit card verification number (this number will not be saved in the profile).

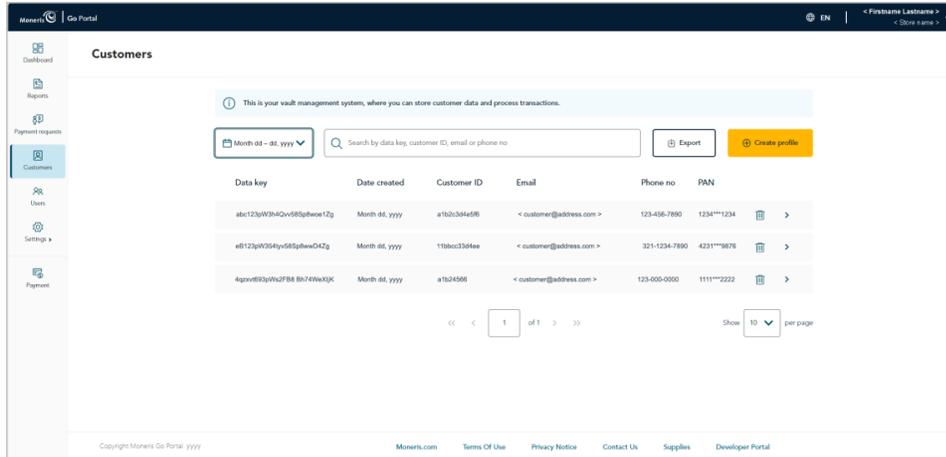
#### Updating the address verification details:

- a. Go to the "Address verification" module (shown on previous page), and update the customer's/cardholder's billing address field(s):
  - In the **Street address** field, enter the cardholder billing street address.
  - In the **Postal code** field, enter the cardholder billing postal code.
3. When you are finished updating the profile details, click on the **Save** button.  
**Note:** *This action triggers Moneris Go portal to initiate a Verification transaction, which is sent to the Moneris host for processing as a zero-dollar transaction. If the Verification transaction is approved, the profile will be successfully updated (see [Verification transaction: Vault customer profile](#) on page 110).*
4. When the "Profile successfully updated" response displays, the operation is complete.

## Deleting a Vault customer profile

The steps below describe how to delete a saved Vault customer profile in your Moneris Go portal store.

1. Initiate a Vault customer profiles report, and retrieve the profile that you want to delete (see [Vault customer profiles report](#) on page 105).
2. When the desired profile is listed on the "Customers" page (shown below), do one of the following:



### Delete the profile without opening it:

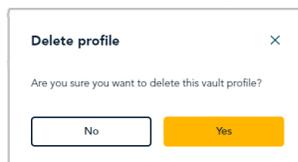
- a. On the "Customers" page (shown above), click on the **Delete**  icon corresponding to the profile that you want to delete.

### Open the profile, and then delete it:

- a. On the "Customers" page (shown above), click on the profile that you want to delete to open it.
- b. When the "Profile details" page displays (shown partially below), click on **Delete**.



3. When the "Delete profile" dialog displays (shown below), click on its **Yes** button.



4. When "Profile deleted successfully" response displays, the operation is complete.

**Note:** The deleted profile will no longer be listed on the "Customers" page.

# Vault customer profiles report

The steps below describe how to view/initiate a Vault customer profiles report listing all saved profiles created in your Moneris Go portal store. Report headers include "Data key" (alpha-numeric Vault token string), "Date created", "Customer ID", "Email", "Phone no", and "PAN" (first four and last four digits of the card number).

1. Log into the Moneris Go portal, and access the store in which you want to view/initiate the Vault customer profiles report (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

2. On the sidebar menu (shown here), click on **Customers**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.

3. When the "Customers" page displays (shown below), it will list any profile that was created within the calendar week (Sunday to Saturday):

**Note:** To narrow the search by data key, customer ID, email, or phone number, enter a full or partial data key, customer ID, email, or phone number in the **Search by data key, customer ID, email, or phone number** field.



Data key	Date created	Customer ID	Email	Phone no	PAN
abc123pW3hQv58Sp8wae1Zg	Month d4, yyyy	a1b2c3d4e5f6	< customer@address.com >	123-456-7890	1234****1234
e8123pW354y58Sp8waeD4Zg	Month d4, yyyy	11b0cc33d4ee	< customer@address.com >	321-1234-7890	4231****9876
4qxv893pWz2F8B Bn74fWxJK	Month d4, yyyy	a1b2456f	< customer@address.com >	123-000-0000	1111****2222

- To view the details of a listed profile, click on the desired profile to open it.

**Note:** To export the report results, see [Exporting a Vault customer profiles report](#) (page 107). To update the details of a profile, see [Updating a Vault customer profile](#) (page 102). To delete a profile, see [Deleting a Vault customer profile](#) (page 104).

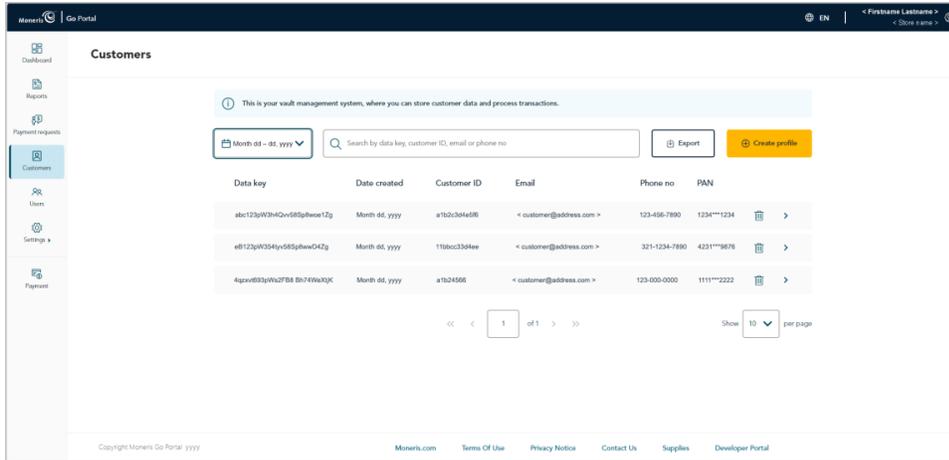
- To change the report calendar date, click on the calendar  icon, and select a date, or customize a date range of your own (for instructions, see [Selecting a Vault customer profiles calendar date](#) on page 108).

- To change the number of hits listed on a page, click on the "Show # per page" drop-down, and select a number (**10**, **25**, or **50**). To advance to the next page or last page, click on the **Next page >** icon or the **Last page >>** icon respectively. To go back to the previous page or the first page, click on the **Previous page <** icon or the **First page <<** icon respectively.

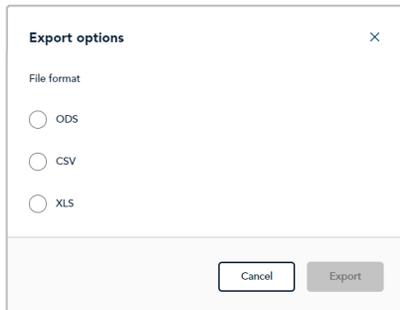
## Exporting a Vault customer profiles report

The steps below describe how to export your Moneris Go portal store's Vault customer profiles report to a spreadsheet file (Excel or open document format) or to a text file (comma separated values format).

1. Initiate a Vault customer profiles report (see [Vault customer profiles report](#) on page 105).
2. When the "Customers" page displays (shown below), click on the **Export** button.



3. When the "Export options" dialog displays (shown below), select the radio button beside the desired export file format (**ODS**, **CSV**, or **EXCEL**).



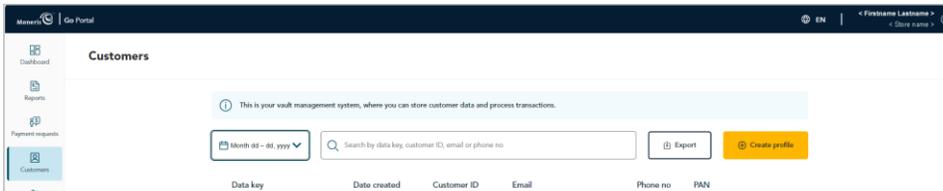
4. Click on the dialog's **Export** button.
5. When "File downloaded successfully" displays, the operation is complete.

**Note:** When your device prompts you to save the downloaded file, save the file to the desired location.

## Selecting a Vault customer profiles calendar date

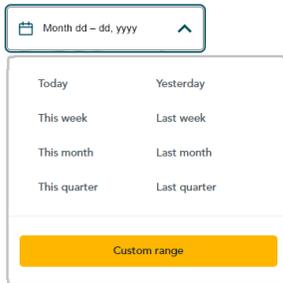
The steps below describe how to use the Vault customer profiles report calendar functions to specify a desired profile creation date or date range.

1. Initiate a Vault customer profiles report (see [Vault customer profiles report](#) on page 105).
2. When the "Customers" page displays (shown partially below), click on the calendar  icon to display the date-range drop-down. Do one of the following:



### To select a pre-defined date range:

- a. When the date range drop-down displays (shown below), click on the desired date range (**Today**, **Yesterday**, **This week**, **Last week**, **This month**, **Last month**, **This quarter**, or **Last quarter**)



- b. Wait while the request is processed.

### To customize a date range of your own:

- a. In the date range drop-down (shown above), click on **Custom range**.
- b. When the calendar displays (shown here), click on a start date to highlight it.

**Note:** To roll the calendar date backward or forward, click on the back < icon or the next > icon beside the month or year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down v icon beside the month and/or year, and then select a specific month/year.

- c. Click on an end date to highlight it.

**Note:** To roll the calendar month/year backward or forward, click on the back < icon or the next > icon beside the month/year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down v icon beside the month/year, and then select a specific month/year.



- d. Click on the calendar's **Apply** button.
- e. Wait while the request is processed.

## Verification transaction: Vault customer profile

Whenever you execute a save action in a Vault customer profile, (see [Creating a Vault customer profile](#) on page 99; and see [Updating a Vault customer profile](#) on page 102), it triggers your Moneris Go portal store to initiate a Verification transaction, which is immediately sent to the Moneris host for processing as a zero-dollar transaction. If the Verification transaction is approved, the profile is saved/updated successfully.

Through the Verification transaction, the payment card details and billing address details (if submitted) are sent to one or more anti-fraud services for assessment. Card data are sent to the card issuer. Billing address data are sent to an address verification service (AVS), which allows the card issuer compare the submitted billing address with the billing address they have on file.

- To view the Verification transaction that is associated with a Vault customer profile, see [Cross-referencing a Verification transaction with a Vault customer profile](#) below.

## Cross-referencing a Verification transaction with a Vault customer profile

To retrieve/view the Verification transaction that is associated with a saved/updated Vault customer profile in your Moneris Go portal store, initiate a financial transactions report from the store (see [Financial transactions report](#) on page 55). Please note the following:

- The Verification transaction's "Channel" indicator will show "Vault" in your financial transactions report.
- Each time you update and save an existing profile (see [Updating a Vault customer profile](#) on page 102), it triggers your Moneris Go portal store to initiate a new Verification transaction.



# My Account

In this section, we go over everything you need to know to manage your own user account preferences.

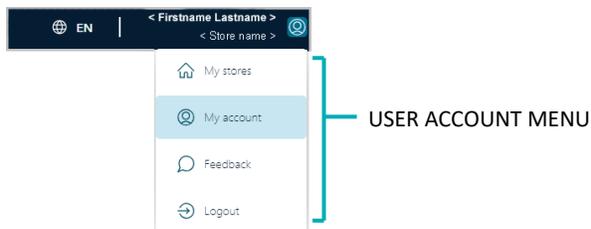
# "My account" settings

The steps below describe how to configure your Moneris Go portal/terminal user account settings, including name information and login credentials.

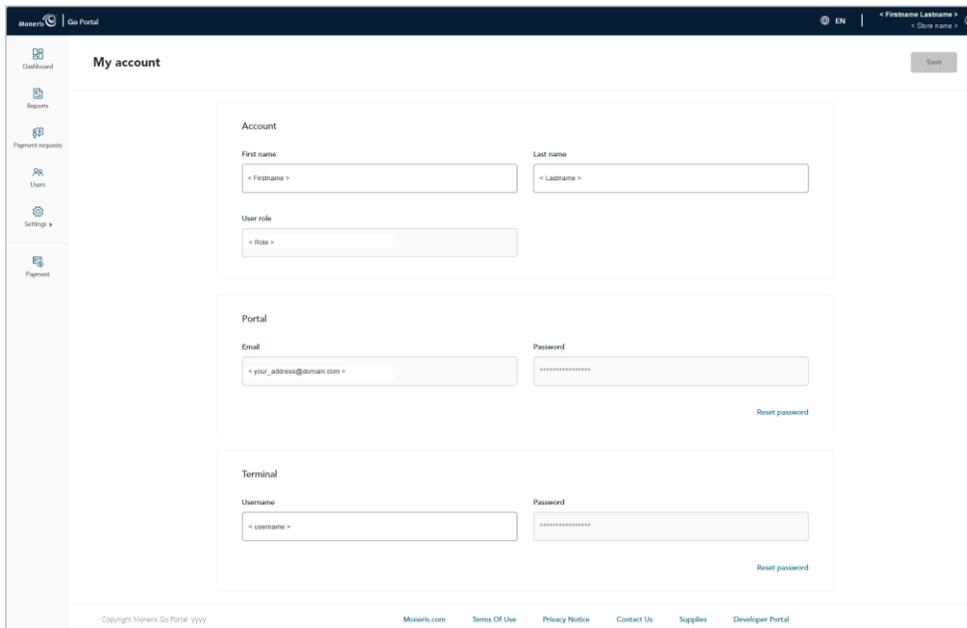
1. Log into the Moneris Go portal, and access any store (see [Logging into the Moneris Go portal](#) on page 21).
2. From any page in your store, click on your user account  tile, which displays in the top right corner of the Moneris Go portal page header (shown below).



3. When the user account menu displays (shown below), click on **My account**.



4. When the "My account" page displays (shown below), configure your user account preferences as desired:



## Moneris Go portal

- To update your name information, see [Changing your name information](#) (page 113).
- To change your login password, see [Changing your Moneris Go portal login password](#) (page 114).

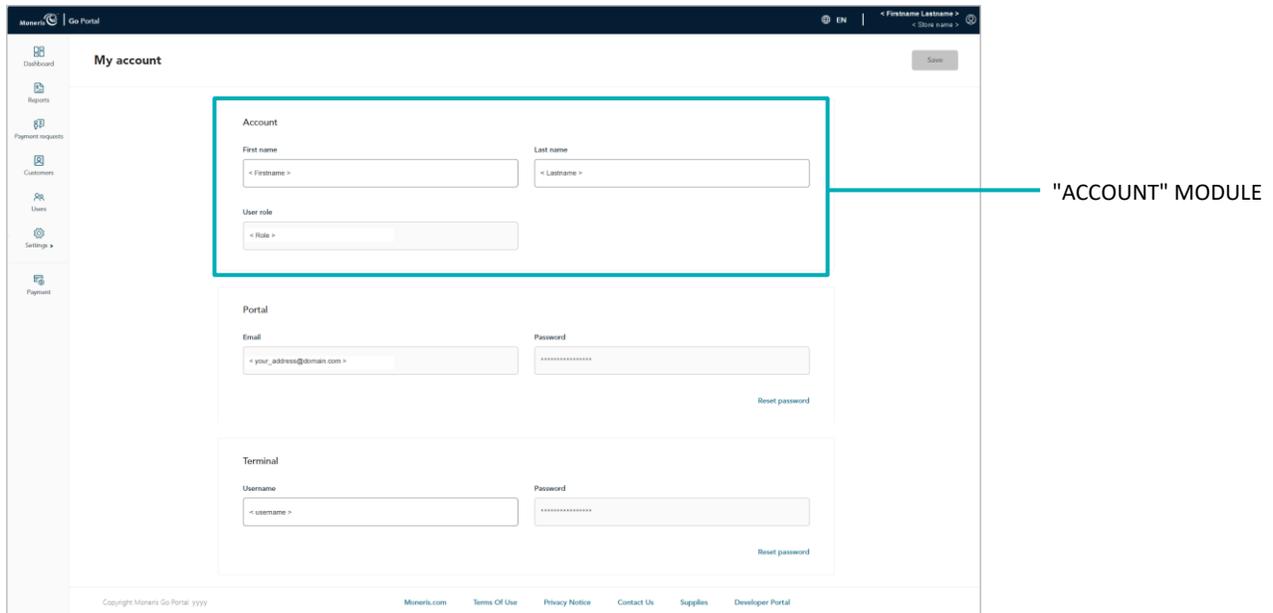
## Terminal

- To change your login password, see [Changing your terminal login password](#) (page 116).
- To change your login username, see [Changing your terminal login username](#) (page 117).

## Changing your name information

The steps below describe how to update the first name and last name associated with your Moneris Go portal user account.

1. Access your user account settings (see "[My account](#)" settings on page 112).
2. On the "My account" page, scroll to the "Account" module (shown below).

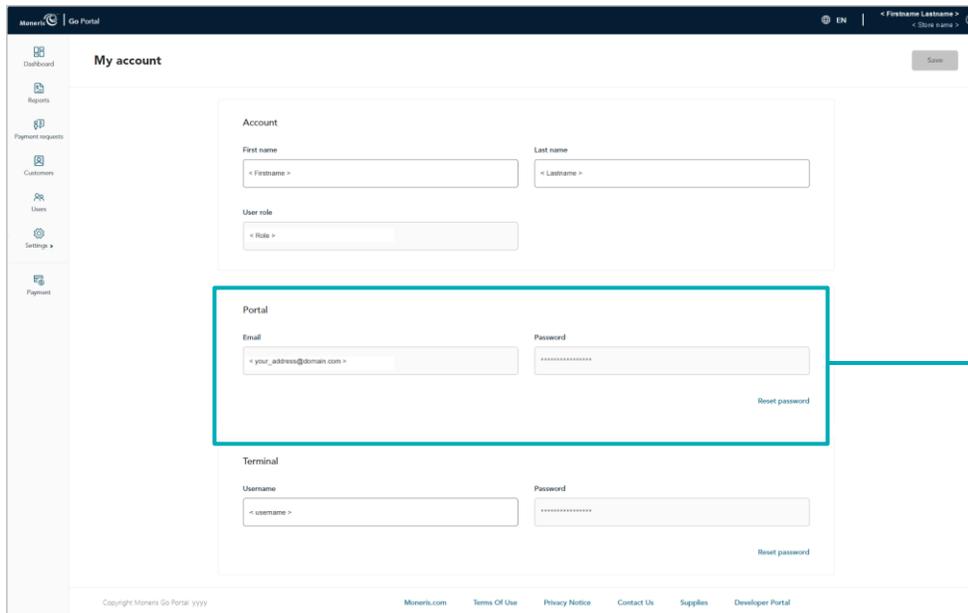


3. Edit your name information as desired:
  - In the **First name** field, enter your first name.
  - In the **Last name** field, enter your surname.
4. Click on the **Save** button.
5. When the "User updated successfully" response displays, the operation is complete.

# Changing your Moneris Go portal login password

The steps below describe how to change your Moneris Go portal login password.

1. Access your user account settings (see "[My account](#)" settings on page 112).
2. On the "My account" page, scroll to the "Portal" module (shown below).



"PORTAL" MODULE

3. In the "Portal" module, click on **Reset password**.
4. When the "Portal password reset" window displays (shown here), do the following:
  - a. In the **Portal login password** field, enter your current Moneris Go portal login password.
  - b. In the **New password** field, enter the new Moneris Go portal login password.

**Note:** Password fields are case sensitive. The password that you create must adhere to these requirements:

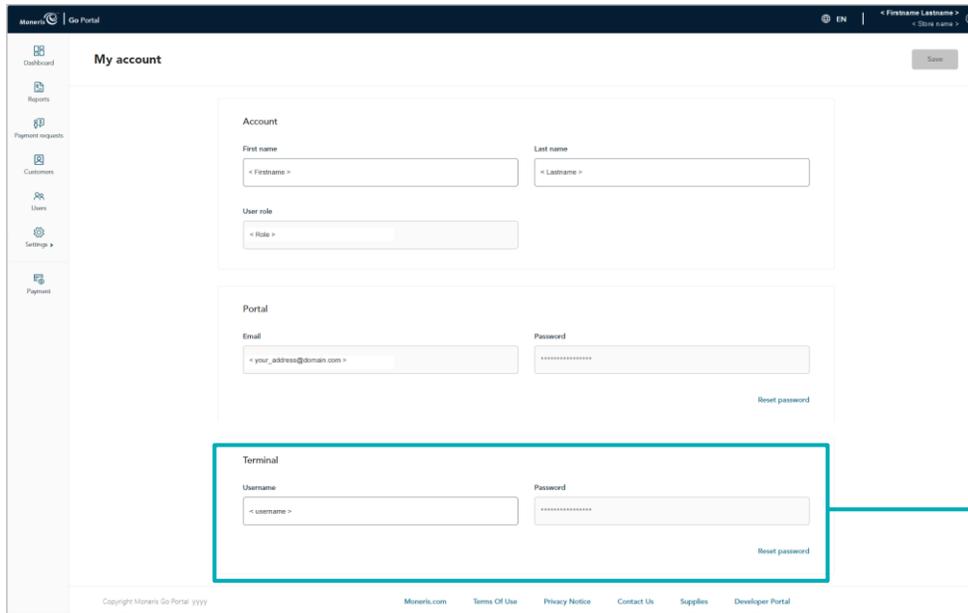
- The password must be 8 to 16 characters in length.
- The password must start with a letter.
- The password must include at least 1 letter, 1 number, and 1 special character.
- The password must not include any accented characters (accents are not supported).

- c. In the **Confirm password** field, re-enter the new Moneris Go portal login password.
- d. Click on the **Save password** button.
- e. When the "User updated successfully" response displays, the operation is complete.

## Changing your terminal login password

The steps below describe how to change your terminal login password. (The change applies to any terminal that is synched to the store through which you are resetting your terminal login password. <sup>15</sup>)

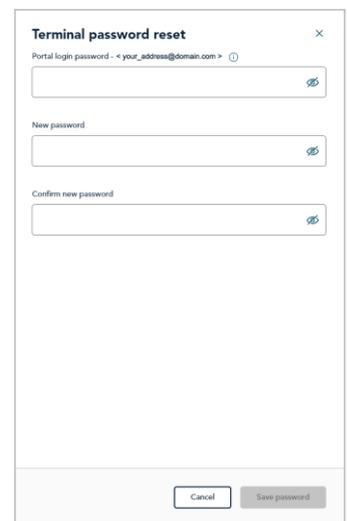
1. Access your user account settings (see "[My account](#)" settings on page 112).
2. On the "My account" page, scroll to the "Terminal" module (shown below).



The screenshot shows the 'My account' page with a sidebar on the left containing navigation options: Dashboard, Reports, Payment requests, Customers, Users, Settings, and Payment. The main content area is divided into three sections: 'Account', 'Portal', and 'Terminal'. The 'Terminal' section is highlighted with a red rectangular box. It contains a 'Username' field with a placeholder '<username>' and a 'Password' field with a placeholder '\*\*\*\*\*'. A 'Reset password' link is located below the password field. The 'Portal' section above it has an 'Email' field with a placeholder '<your\_address@domain.com>' and a 'Password' field with a placeholder '\*\*\*\*\*', also featuring a 'Reset password' link. The 'Account' section has 'First name' and 'Last name' fields with placeholders '<Firstname>' and '<Lastname>', and a 'User role' field with a placeholder '<Role>'. A 'Save' button is in the top right corner of the page.

"TERMINAL" MODULE

3. In the "Terminal" module, click on **Reset password**.
4. When the "Terminal password reset" window displays (shown here), do the following:
  - a. In the **Portal login password** field, enter your current Moneris Go portal login password.
  - b. In the **New password** field, enter the new login password for your terminal.
  - c. In the **Confirm password** field, re-enter the new login password for your terminal.
  - d. Click on the **Save password** button.
  - e. When the "User updated successfully" response displays, the operation is complete.



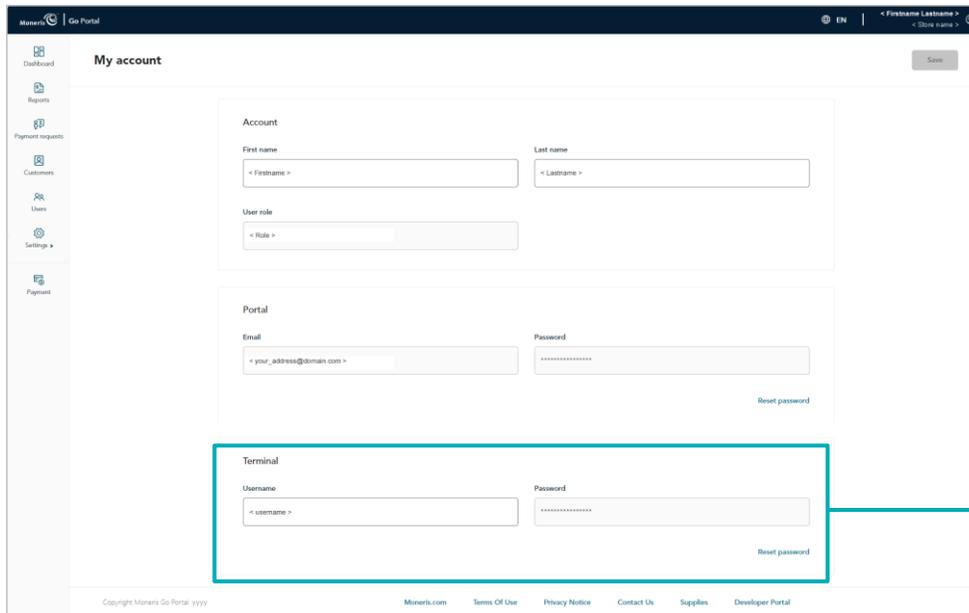
The 'Terminal password reset' dialog box has a title bar with a close button (X). It contains three input fields: 'Portal login password' with a placeholder '<your\_address@domain.com>' and a copy icon, 'New password' with a copy icon, and 'Confirm new password' with a copy icon. At the bottom, there are 'Cancel' and 'Save password' buttons.

<sup>15</sup> If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

## Changing your terminal login username

The steps below describe how to change your terminal login username. (The change applies to any terminal that is synched to the store through which you are resetting your terminal login username.<sup>16</sup>)

1. Access your user account settings (see "[My account](#)" settings on page 112).
2. On the "My account" page, scroll to the "Terminal" module (shown below).



"TERMINAL" MODULE

3. In the **Username** field, enter a new terminal login username.
4. Click on the **Save** button.
5. When the "User updated successfully" response displays, the operation is complete.

<sup>16</sup> If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).



# Store Settings

In this section, we go over everything you need to know to manage your Moneris Go portal store's optional payment fields.

# Store settings: payments

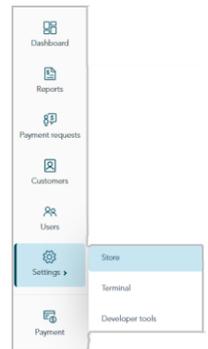
The steps below describe how to configure billing address payment fields (including the postal code field) and a custom ID payment field for manual or optional data entry during Purchases, Preauthorizations, and independent Refunds that you initiate from your Moneris Go portal store's virtual terminal. (Billing address and postal code fields are used for address verification.) The custom ID field can be used to append an identifier of your own to virtual terminal transactions, reports, transaction receipts, and payment requests.

1. Log into the Moneris Go portal, and access the store for which you want to configure the payment fields (see [Logging into the Moneris Go portal](#) on page 21).

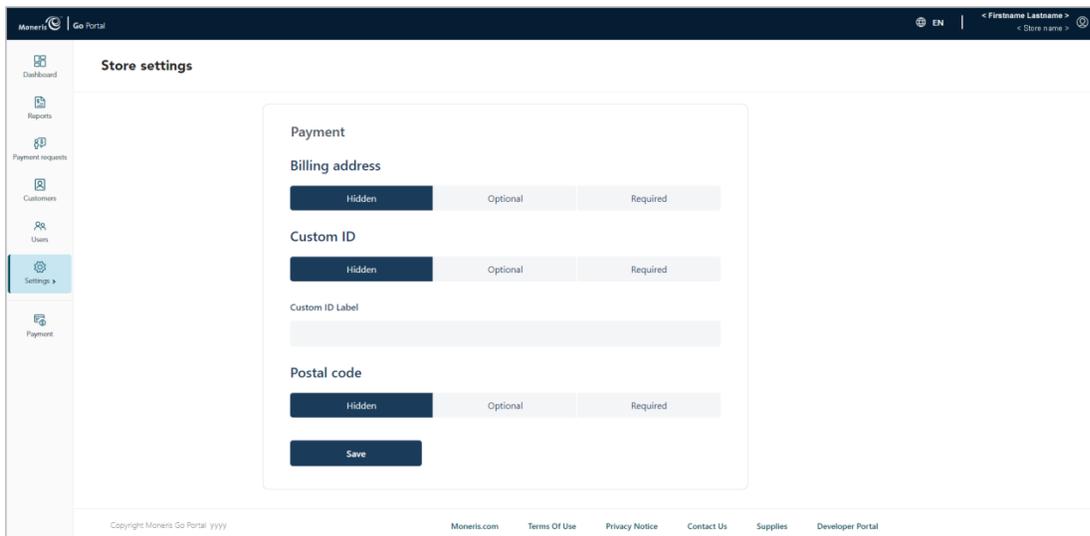
**Note:** If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

2. On the sidebar menu (shown here), click on **Settings > Store**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



3. When the "Store settings" page displays (shown below), configure the payment field settings as desired:



## Billing address fields

- See [Billing address: store settings](#) (page 120).

## Postal code field

- See [Postal code: store settings](#) (page 122).

## Custom ID field

- See [Custom ID: store settings](#) (page 124).

## Billing address: store settings

The steps below describe how to collectively enable/disable the "Street number", "Street name", "City", and "Province" fields, which can display as billing address payment fields in the virtual terminal "Payment" window through which you perform Purchases (see [Purchase with credit card: manual entry](#) on page 35), Preauthorizations (see [Preauthorization with credit card: manual entry](#) on page 38), and independent Refunds (see [Independent Refund with credit card: manual entry](#) on page 50) in your Moneris Go portal store. Billing address capture is used for address verification.<sup>17</sup>

1. Access your Moneris Go portal store's payment settings (see [Store settings: payments](#) on page 119).
2. On the "Store settings" page (shown below), click on a "Billing address" option:

The screenshot shows the 'Store settings' page in the Moneris Go Portal. The 'Payment' section is active, and the 'Billing address' settings are visible. The 'Hidden' option is selected for 'Billing address', 'Custom ID', and 'Postal code'. The 'Optional' and 'Required' options are also present for each. There is a 'Save' button at the bottom of the form.

Option	Description
<b>Hidden</b>	Disables the billing address fields so that they do not display as payment fields in the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.
<b>Optional</b>	Enables the billing address fields so that they display as payment fields (optional data entry) in the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.

<sup>17</sup> Address verification service (AVS) is a fraud-prevention feature that enables the card issuer to compare the street number, street name, and postal code data entered during a transaction with the corresponding data that appears on the cardholder's statement. It is strongly recommend that you include AVS details with all of your manually entered (keyed) transactions (MOTO/ecommerce). Doing so will ensure transactions are qualifying at the best possible interchange rate and may minimize costs to accept credit cards. If AVS data are not present, the transaction may be assessed a higher interchange fee. AVS is not supported for UnionPay cards.

Option	Description
<b>Mandatory</b>	Enables the billing address fields so that they display as payment fields (mandatory data entry) in the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.

3. Click on the **Save** button.
4. When the "Payment settings updated" response displays, the operation is complete.

## Postal code: store settings

The steps below describe how to enable/disable the "Postal code" field, which can display as a payment field in the virtual terminal "Payment" window through which you perform Purchases (see [Purchase with credit card: manual entry](#) on page 35), Preauthorizations (see [Preauthorization with credit card: manual entry](#) on page 38), and independent Refunds (see [Independent Refund with credit card: manual entry](#) on page 50) in your Moneris Go portal store. Postal code capture is used for address verification.<sup>18</sup>

1. Access your Moneris Go portal store's payment settings (see [Store settings: payments](#) on page 119).
2. On the "Store settings" page (shown below), click on a "Postal code" option:

The screenshot shows the 'Store settings' page in the Moneris Go Portal. The 'Payment' section is expanded, showing three options: 'Billing address', 'Custom ID', and 'Postal code'. Each option has three radio buttons: 'Hidden', 'Optional', and 'Required'. The 'Postal code' option is currently set to 'Optional'. A 'Save' button is located at the bottom of the form. The page also includes a sidebar with navigation options like Dashboard, Reports, Payment requests, Customers, Users, Settings, and Payment. The footer contains copyright information and links to Moneris.com, Terms Of Use, Privacy Notice, Contact Us, Supplies, and Developer Portal.

Option	Description
<b>Hidden</b>	Disables the "Postal code" field so that it does not display as one of the payment fields in the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.
<b>Optional</b>	Enables the "Postal code" field so that it displays as one of the payment fields (optional data entry) in the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.
<b>Mandatory</b>	Enables the "Postal code" field so that it displays as one of the payment fields (mandatory data entry) in the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.

<sup>18</sup> Address verification service (AVS) is a fraud-prevention feature that enables the card issuer to compare the street number, street name, and postal code data entered during a transaction with the corresponding data that appears on the cardholder's statement. It is strongly recommend that you include AVS details with all of your manually entered (keyed) transactions (MOTO/ecommerce). Doing so will ensure transactions are qualifying at the best possible interchange rate and may minimize costs to accept credit cards. If AVS data are not present, the transaction may be assessed a higher interchange fee. AVS is not supported for UnionPay cards.

3. Click on the **Save** button.
4. When the "Payment settings updated" response displays, the operation is complete.

## Custom ID: store settings

The steps below describe how to configure and enable/disable a custom transaction identifier (custom ID) field. If enabled, the custom ID field can be appended to payment requests and transactions that are initiated from the virtual terminal "Payment" window in your Moneris Go portal store. The custom ID also appears as a header<sup>19</sup> in your store's financial transaction report and can appear as a line item on the "Transaction details" page and in transaction receipts.

**Note:** For a complete list of transactions, reports, and receipt types that feature the custom ID, see [Custom ID: list of transactions and reports](#) (page 200).

1. Access your Moneris Go portal store's payment settings (see [Store settings: payments](#) on page 119).
2. On the "Store settings" page (shown below), click on a "Custom ID" option:

The screenshot shows the 'Store settings' page in the Moneris Go Portal. The 'Payment' section is active, displaying configuration options for 'Billing address', 'Custom ID', and 'Postal code'. Each option has three radio buttons: 'Hidden', 'Optional', and 'Required'. The 'Custom ID' section also includes a text input field for 'Custom ID Label' and a 'Save' button at the bottom.

Option	Description
<b>Hidden</b>	Hides/disables the custom ID field in payment requests and the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.  <b>Note:</b> The default label "Custom ID" continues to be used as a header in your store's financial transactions report. If you enter your own custom label in step 3, it will be used as the header.
<b>Optional</b>	The custom ID field displays (optional data entry) in payment requests and the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.  <b>Note:</b> The custom ID field displays as a header in the financial transactions report and as line item on the transaction receipt (debit/credit only) and the "Transaction details" page of every logged transaction.

<sup>19</sup> For all Verification transactions, the "Custom ID" header in your financial transaction report populates with data from the associated Vault customer profile's "Customer ID" field (see [Verification transaction: Vault customer profile](#) on page 110).

Option	Description
<b>Mandatory</b>	<p>The custom ID displays as a payment field (mandatory data entry) in payment requests and the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.</p> <p><b>Note:</b> <i>The custom ID field displays as a header in the financial transactions report and as line item on the transaction receipt (debit/credit only) and the "Transaction details" page of every logged transaction.</i></p>

3. Do one of the following:

- If you selected "Optional" or "Mandatory" in step 2, enter a custom label in the **Custom ID Label** field.
- If you selected "Hidden" in step 2, leave the **Custom ID Label** field unfilled (blank).

**Note:** *If you leave the field unfilled, the default label "Custom ID" will be used as a header only in your store's financial transactions report. If you enter your own custom label, it will be used as the header in your store's financial transactions report.*

4. Click on the **Save** button.

5. When the "Payment settings updated" response displays, the operation is complete.

**Note:** *If you opted to configure/enable a customized identifier field of your own and you have one or more terminals synched to your store, you should also enable the equivalent custom "Transaction identifier" feature on the terminals (see [Moneris Go terminal: transaction settings](#) on page 153; and see [Moneris Go Plus terminal: transaction settings](#) on page 172).*



# User Management

In this section, we go over everything you need to know to manage user accounts for your Moneris Go portal store, including user accounts for any Moneris Go terminal(s) that are synched to your store.

# User accounts

## Adding a new user account

The steps below describe how to add a new user account to a Moneris Go portal store and define the user's access to store features and functions, including any terminal that is synched to the store.

**Important! Each user account must be assigned with a user role. Ensure that you configure your store's user roles appropriately (i.e., enable/disable portal and terminal permissions as desired) before you attempt to assign them to user accounts. For instructions on how to add, modify, or delete user roles, see the [User roles section \(pages 139 to 147\)](#).**

1. Log into the Moneris Go portal, and access the store through which you want to add the new user account (see [Logging into the Moneris Go portal](#) on page 21).

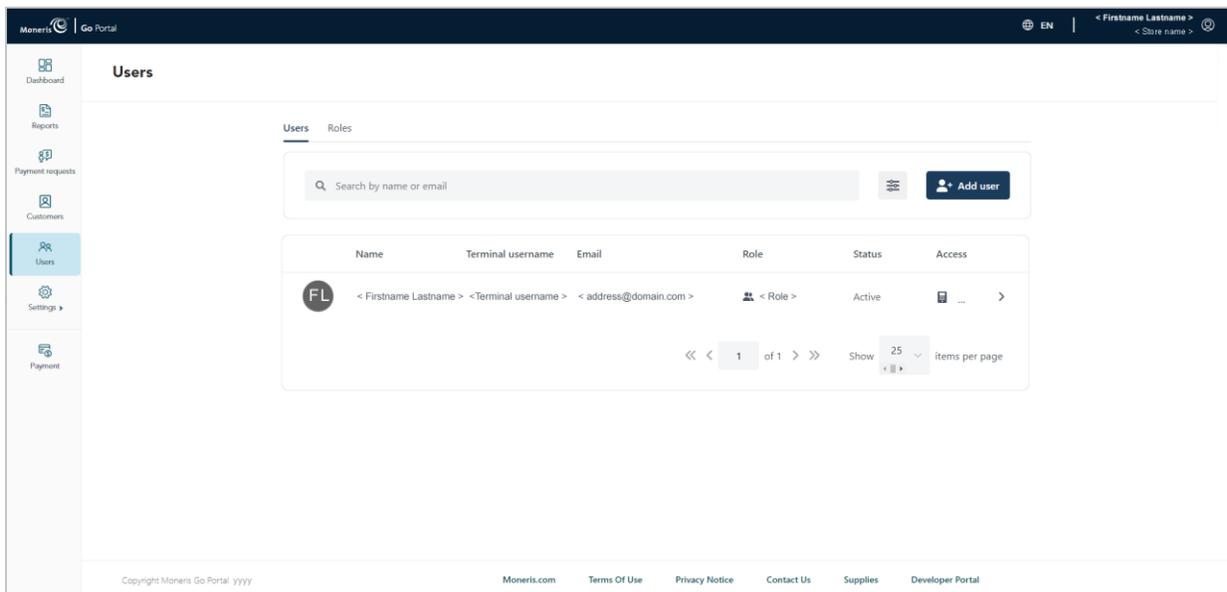
**Note:** *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).*

2. On the sidebar menu (shown here), click on **Users**.

**Note:** *If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*



3. When the "Users" page displays (shown below), click on the **Add user** button.



4. When the "Add user" window displays (shown here), configure the account settings:
  - a. In the **First name** field, enter the user's given name.
  - b. In the **Last name** field, enter the user's surname.
  - c. Under "Language", click on language button (**English** or **French**) to select the Moneris Go portal display language for when the user first logs in to activate their account.
  - d. Click on the "User role" drop-down, and select the role that you want to assign to this user:

**Note:** Default user roles and descriptions are listed in the table below. To view/modify the parameters of a user role (e.g., change role name or define new permissions for a role) or add/delete a user role, see the [User roles](#) section (pages 139 to 147).

User role	Portal access	Terminal access	Description
<b>Admin</b>	Yes	Yes	Access to all functionality in the application.
<b>High</b>	No	Yes	Access to all transactions types and reports but limited access to settings.
<b>Low</b>	No	Yes	Access to all transaction types but limited to their own transactions within reports.

The screenshot shows the 'Add user' window with the following fields and options:

- First name:** Text input field.
- Last name:** Text input field.
- Language:** Two buttons: 'English' (selected) and 'French'.
- User role:** A dropdown menu with 'Select' as the current option.
- Terminal access:** A toggle switch currently turned off (grey).
- Add user:** A button at the bottom right.

5. If the "Add user" window displays the **Terminal access** switch (shown below), toggle it to the right ("yes"/blue) to enable terminal access, or toggle it to the left ("no"/grey) to disable terminal access.

**If "Terminal access" is toggled to "Yes":**

The user will have access to specific terminal functions as defined by the role's permissions.

- a. In the **Username** field, enter the user name credential this user needs to enter to log into any terminal that is synched to this store.
- b. In the **Password** field, enter the user password credential this user needs to enter to log into any terminal that is synched to this store.
- c. In the **Confirm Password** field, re-enter the user's terminal login password.

The screenshot shows the 'Add user' window with the following fields and options:

- Terminal access:** A toggle switch currently turned on (blue).
- Username:** Text input field.
- Password:** Text input field.
- Confirm password:** Text input field.
- Add user:** A button at the bottom right.

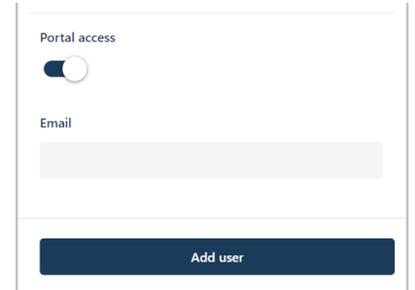
6. If the "Add user" window displays the **Portal access** switch (shown below), toggle it to the right ("yes"/blue) to enable Moneris Go portal access, or toggle it to the left ("no"/grey) to disable portal access.

**If "Portal access" is toggled to "Yes":**

This option is supported only if the role assigned to this user is configured with the "Access to portal" permission enabled. The user will have access to specific Moneris Go portal functions as defined by the role's other permissions.

- a. In the **Email** field, enter the user's email address.

**Note:** Once the new user account is added to the system, an email containing an activate hyperlink will be sent to the user so that they can activate and complete the setup of their user account. The email address will also serve as the user's Moneris Go portal login ID/username.



The screenshot shows a user configuration form. At the top, there is a section labeled "Portal access" with a blue toggle switch turned to the right. Below this is an "Email" field with a light grey input box. At the bottom of the form is a dark blue button labeled "Add user".

7. Click on the **Add user** button to add the new user account.
8. When the new user account is listed on the "Users" page, the operation is complete. But note:
  - If you granted the user portal access and their email address has not previously been registered to an active account, their account status will indicate "Pending" until the user receives their email and sets up their account per the steps documented in [Activating your user account](#) (page 12).

**Note:** If the user did not receive their activation email, advise them to check their email spam filter. If this does not work, confirm that you entered a valid email address in the "Portal Access" **Email** field. If necessary, repeat the [Add a new user account](#) procedure, but try registering a different email address.
  - If you granted the user portal access and their email address is already registered to an active account, the user will not receive an activation email. Rather, the user has immediate access to the store when they log in.
9. If you want this user to have access to another store, access the desired store and repeat the [Add a new user account](#) procedure (you can configure the same login credentials for the other store).

# Modifying an active user account

The steps below describe how to modify a Moneris Go portal user account's name profile, assign a new user role, enable Moneris Go portal access, and update the user's terminal login credentials.

1. Log into the Moneris Go portal, and access the store containing the active user account that you want to modify (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If you have multiple stores linked to your user account, you can use the *My Stores* function to move between your stores (see [Using My Stores](#) on page 29).

2. On the sidebar menu (shown here), click on **Users**.

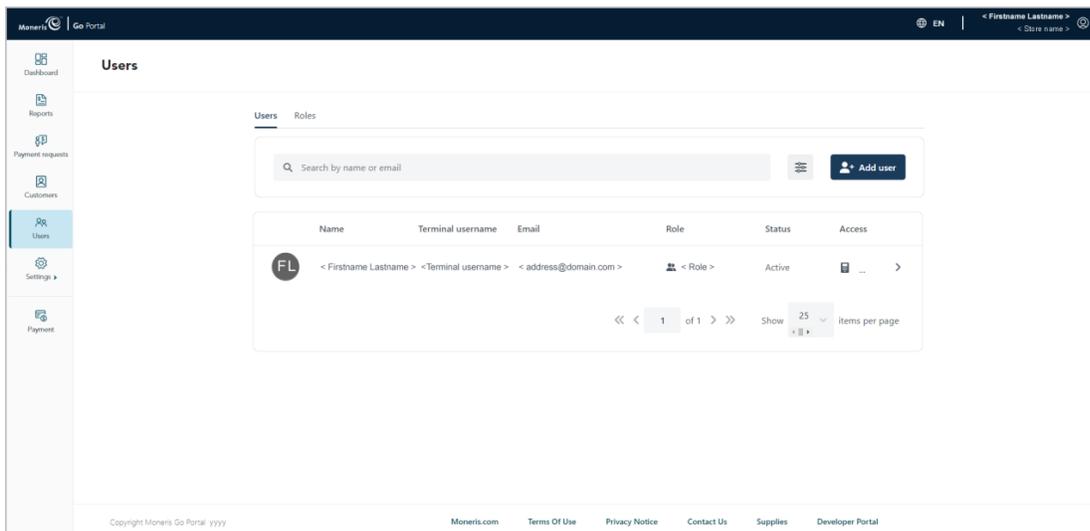
**Note:** If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



3. When the "Users" page displays (shown below), locate the user account that you want to modify, and click on it.

**Note:** To do a general search for an account, enter a full/partial name or a full email address in the **Search by name or email** field. To use filters to refine the search, see [Using filters to search for users](#) (page 138).

To change the number of hits listed on a page, click on the "Show # items per page" drop-down, and select a number (**10**, **25**, or **50**). To advance to the next page or last page, click on the **Next page** > icon or the **Last page** >> icon respectively. To go back to the previous page or the first page, click on the **Previous page** < icon or the **First page** << icon respectively.



4. When the "Edit user" window displays (shown below), edit the user account profile as desired:

**To change username information:**

- a. In the **First name** field, enter the user's given name.
- b. In the **Last name** field, enter the user's surname.
- c. Click on a "Language" button (**English** or **French**) to change the user's default display language when they activate their account for the first time.
- d. Click on the **Update** button.
- e. When the "User updated successfully" response displays, the operation is complete.

**To change the user role:**

- a. Click on the "User role" drop-down, and select the new role that you want to assign to this user:

**Note:** Default user roles and descriptions are listed in the table below. To view/modify the parameters of a user role (e.g., change role name or define new permissions for a role) or add/delete a user role, see the [User roles](#) section (pages 139 to 147).

User role	Portal access	Terminal access	Description
<b>Admin</b>	Yes	Yes	Access to all functionality in the application.
<b>High</b>	No	Yes	Access to all transactions types and reports but limited access to settings.
<b>Low</b>	No	Yes	Access to all transaction types but limited to their own transactions within reports.

- b. Click on the **Update** button.
- c. When the "User updated successfully" response displays, the operation is complete.

The screenshot shows the "Edit user" interface. It includes a close button (X) in the top right corner. The form contains the following elements:
 

- First name:** A text input field with a placeholder "< Firstname >".
- Last name:** A text input field with a placeholder "< Lastname >".
- Language:** Two buttons, "English" (highlighted in dark blue) and "French" (light grey).
- User role:** A dropdown menu with a placeholder "< Role >" and a downward arrow.
- Portal/Terminal:** Two tabs, "Portal" (selected) and "Terminal".
- Email:** A status indicator "Active" in a green box with a small info icon, and a text input field with a placeholder "< address@domain.com >" and a clear button (X).
- Buttons:** A large grey "Update" button and a smaller "Deactivate" button below it.

**To update the existing terminal login credentials:**

- a. Click on the **Terminal** tab (shown here).
- b. Click on the **Reset password >** button to display the password fields.
- c. In the **Portal login password** field, enter your current Moneris Go portal login password.
- d. In the **Username** field, enter the user's new terminal login username.
- e. In the **Password** field, enter the user's new terminal login password.
- f. In the **Confirm new password** field, re-enter the user's new terminal login password.
- g. Click on the **Save password** button.
- h. When the "Password changed successfully" response displays, the operation is complete.

**Note:** *The user must enter these new credentials to log into any terminal that is synched to this store.*

The screenshot shows the 'Terminal' tab selected. It contains a form with the following elements: a 'Username' field with a placeholder '< username >', a 'Reset password' dropdown menu, a 'Portal login password <your\_address@domain.com >' field with a placeholder, a 'New password' field, and a 'Confirm new password' field. Below these fields are two buttons: 'Save password' and 'Update'. At the bottom of the form is a 'Deactivate' button.

**To enable terminal access:**

- a. Click on the **Terminal** tab (shown here).
- b. In the **Username** field, enter the user's terminal login username.
- c. In the **Password** field, enter the user's terminal login password.
- d. In the **Confirm password** field, re-enter the user's terminal login password.
- e. Click on the **Update** button.
- f. When the "User updated successfully" response displays, the operation is complete.

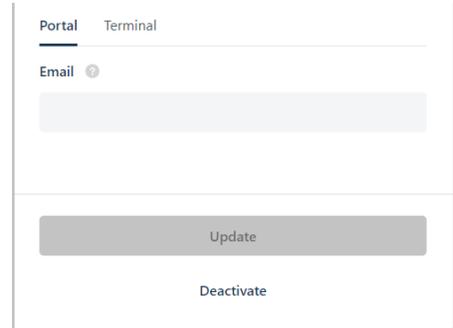
**Note:** *The user must enter these credentials to log into any terminal that is synched to this store.*

The screenshot shows the 'Terminal' tab selected. It contains a form with the following elements: a 'Username' field with a help icon, a 'Password' field, and a 'Confirm password' field. Below these fields are two buttons: 'Update' and 'Deactivate'.

**To enable Moneris Go portal access:**

**Note:** This option is supported only if the role assigned to this user is configured with the "Access to portal" permission enabled (see [To change the user role on page 131](#)).

- a. Click on the **Portal** tab (shown here).
- b. In the **Email** field, enter the user's email address.  
**Note:** The email address will serve as the user's Moneris Go portal login ID/username.
- c. Click on the **Update** button.
- d. When the "User updated successfully" response displays, the operation is complete.



The screenshot shows a user management interface with two tabs: 'Portal' (selected) and 'Terminal'. Below the tabs is an 'Email' field with a help icon. A large grey button labeled 'Update' is positioned below the field, and a smaller 'Deactivate' button is located further down.

**Note:** An email containing an activate hyperlink will be sent to the user so that they can activate and complete the setup of their user account. If the user did not receive their activation email, advise them to check their email spam filter.

## Deactivating a user account

The steps below describe how to deactivate a Moneris Go portal user account. Once the account is deactivated, the user associated with it will be unable to use their login credentials to start a session on the Moneris Go portal nor any terminal synced to your Moneris Go portal store.

1. Log into the Moneris Go portal, and access the store containing the user account that you want to deactivate (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If you have multiple stores linked to your user account, you can use the *My Stores* function to move between your stores (see [Using My Stores](#) on page 29).

2. On the sidebar menu (shown here), click on **Users**.

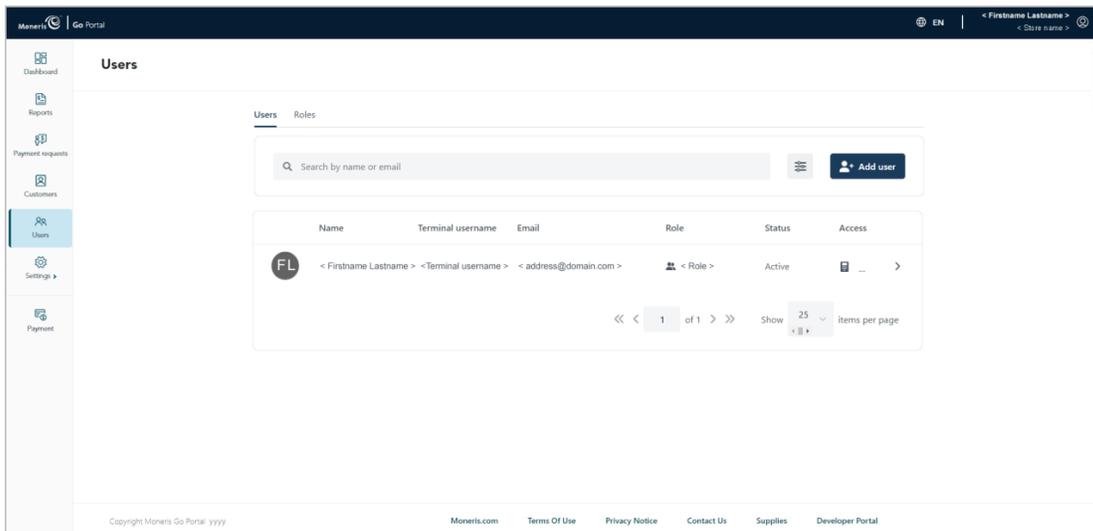
**Note:** If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



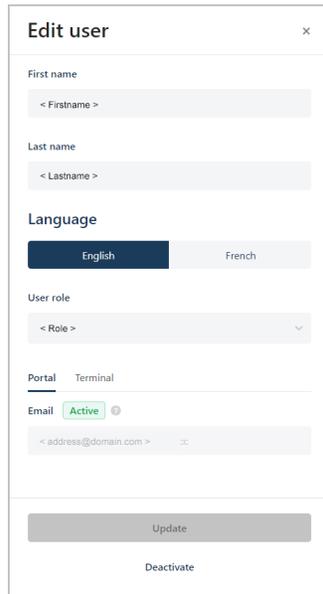
3. When the "Users" page displays (shown below), locate the user account that you want to deactivate, and click on it.

**Note:** To do a general search for an account, enter a full/partial name or a full email address in the **Search by name or email** field. To use filters to refine the search, see [Using filters to search for users](#) (page 138).

To change the number of hits listed on a page, click on the "Show # items per page" drop-down, and select a number (**10**, **25**, or **50**). To advance to the next page or last page, click on the **Next page** > icon or the **Last page** >> icon respectively. To go back to the previous page or the first page, click on the **Previous page** < icon or the **First page** << icon respectively.



4. When the "Edit user" window displays (shown below), click on the **Deactivate** button.



5. When the "Are you sure you want to deactivate this user?" dialog displays (shown below), click on the **Deactivate** button to close the dialog.



6. When the "User updated successfully" response displays, the operation is complete. But note:
- The user account status will indicate "Inactive" until you reactivate the account (see [Reactivating a user account](#) (page 136)).
  - Once the user logs out, they will be unable to use the deactivated user account credentials to start a new session on the Moneris Go portal nor any terminal that is synched to the store.

## Reactivating a user account

The steps below describe how to reactivate an existing Moneris Go portal user account. Once the user account is reactivated, the user reacquires their previous access to the Moneris Go portal store and/or terminal functionality.

1. Log into the Moneris Go portal, and access the store containing the user account that you want to reactivate (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If you have multiple stores linked to your user account, you can use the [My Stores](#) function to move between your stores (see [Using My Stores](#) on page 29).

2. On the sidebar menu (shown here), click on **Users**.

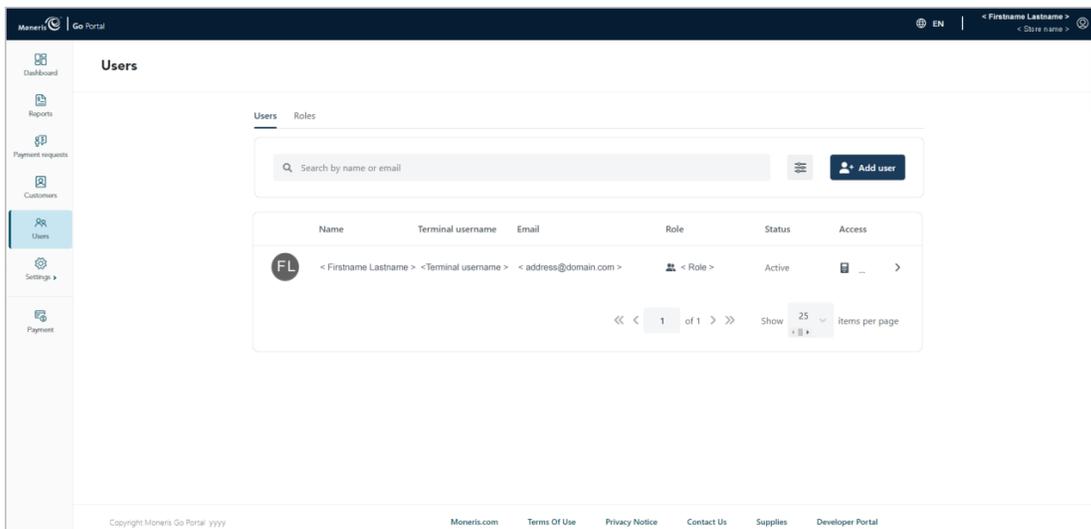
**Note:** If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



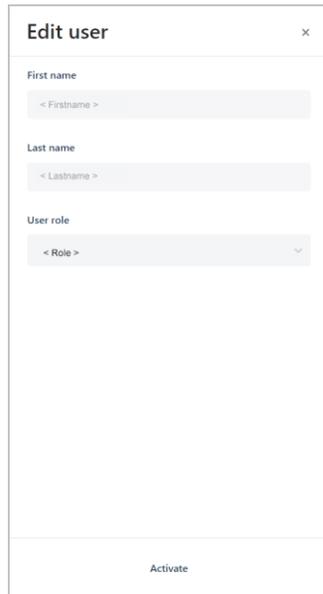
3. When the "Users" page displays (shown below), locate the user account that you want to reactivate, and click on it.

**Note:** To do a general search for an account, enter a full/partial name or a full email address in the **Search by name or email** field. To use filters to refine the search, see [Using filters to search for users](#) (page 138).

To change the number of hits listed on a page, click on the "Show # items per page" drop-down, and select a number (**10**, **25**, or **50**). To advance to the next page or last page, click on the **Next page >** icon or the **Last page >>** icon respectively. To go back to the previous page or the first page, click on the **Previous page <** icon or the **First page <<** icon respectively.

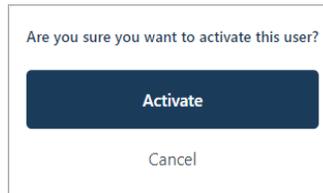


4. When the "Edit user" window displays (shown below), click on the **Activate** button.



The screenshot shows a dialog box titled "Edit user" with a close button (X) in the top right corner. It contains three input fields: "First name" with a placeholder "< Firstname >", "Last name" with a placeholder "< Lastname >", and "User role" with a dropdown menu showing "< Role >". At the bottom center of the dialog is an "Activate" button.

5. When the "Are you sure you want to activate this user?" dialog displays (shown below), click on the **Activate** button to close the dialog.



The screenshot shows a confirmation dialog box with the text "Are you sure you want to activate this user?". It features two buttons: a dark blue "Activate" button and a light gray "Cancel" button.

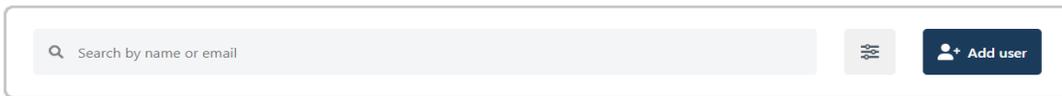
6. When the "User updated successfully" response displays, the operation is complete. But note:
- The account status will indicate "Active", and the user will again be able to log into the Moneris Go portal store or any terminal that is synched to the store.

## Using filters to search for users

If you are attempting to locate a specific user account that you want to configure (e.g., to modify, deactivate, or reactivate), follow the steps below to employ filters to narrow the scope of your search and retrieve the desired user account. Search filters include user role, status, and access type.

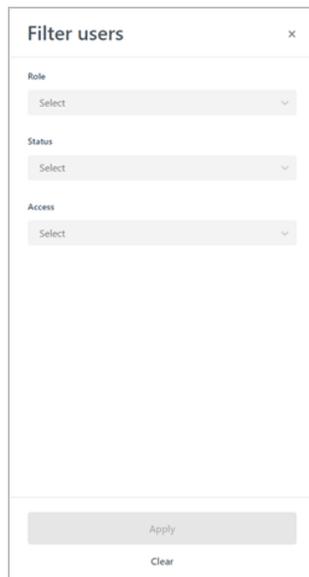
1. Start on the "Users" page:
  - See [Modifying an active user account](#) (page 130).
  - See [Deactivating a user account](#) (page 134).
  - See [Reactivating a user account](#) (page 136).

2. On the "Users" page, click on the **Filter**  icon in the search bar (shown below).



A search bar with a magnifying glass icon and the text "Search by name or email". To the right of the search bar is a filter icon (three vertical lines) and a dark blue button with a white plus sign and the text "Add user".

3. When the "Filter users" window displays (shown below), click on one or more of the desired filter drop-downs (**Role**, **Status**, and/or **Access**).



A "Filter users" window with a close button (x) in the top right corner. It contains three filter sections: "Role" with a "Select" dropdown, "Status" with a "Select" dropdown, and "Access" with a "Select" dropdown. At the bottom of the window are two buttons: "Apply" and "Clear".

4. Click on the **Apply** button.
5. When the desired user account is retrieved, do one of the following:
  - If you are modifying an active user account, continue at step 3 on page 130 ([Modifying an active user account](#)).
  - If you are deactivating an active user account, continue at 3 on page 134 ([Deactivating a user account](#)).
  - If you are reactivating an inactive user account, continue at step 3 on page 136 ([Reactivating a user account](#)).

# User roles

## Adding a new user role

The steps below describe how to add a new user role. Each Moneris Go portal user account must be assigned with a user role. The user role defines which features and functions a user can utilize during their login session in a specific Moneris Go portal store and/or any terminal that is synched to that store.

1. Log into the Moneris Go portal, and access the store through which you want to create the new role (see [Logging into the Moneris Go portal on page 21](#)).

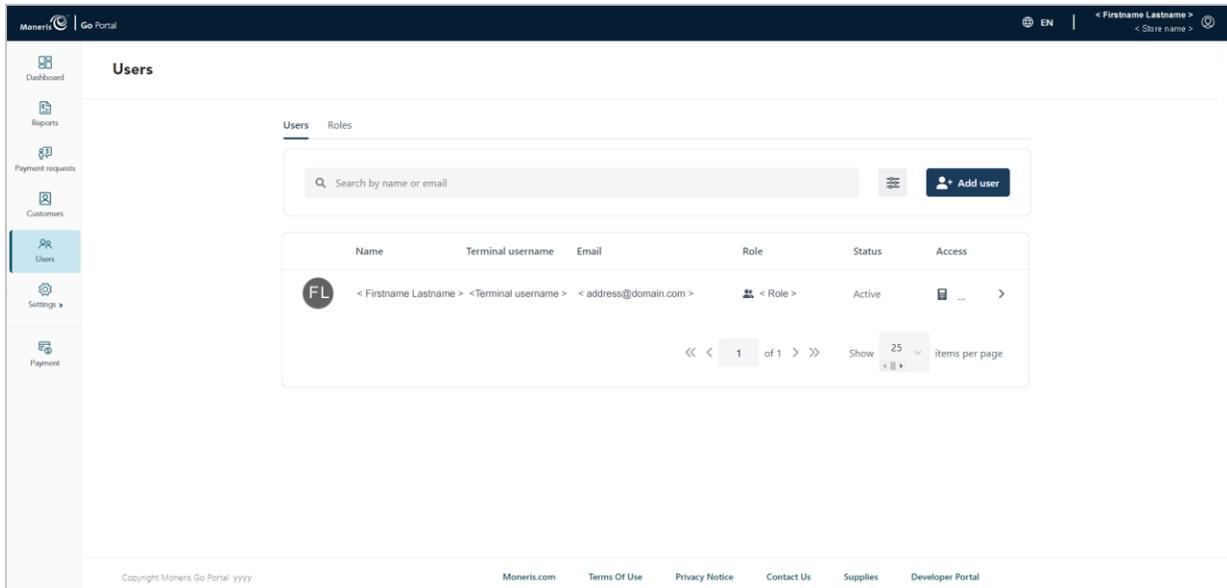
**Note:** *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores on page 29](#)).*

2. On the sidebar menu (shown here), click on **Users**.

**Note:** *If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*

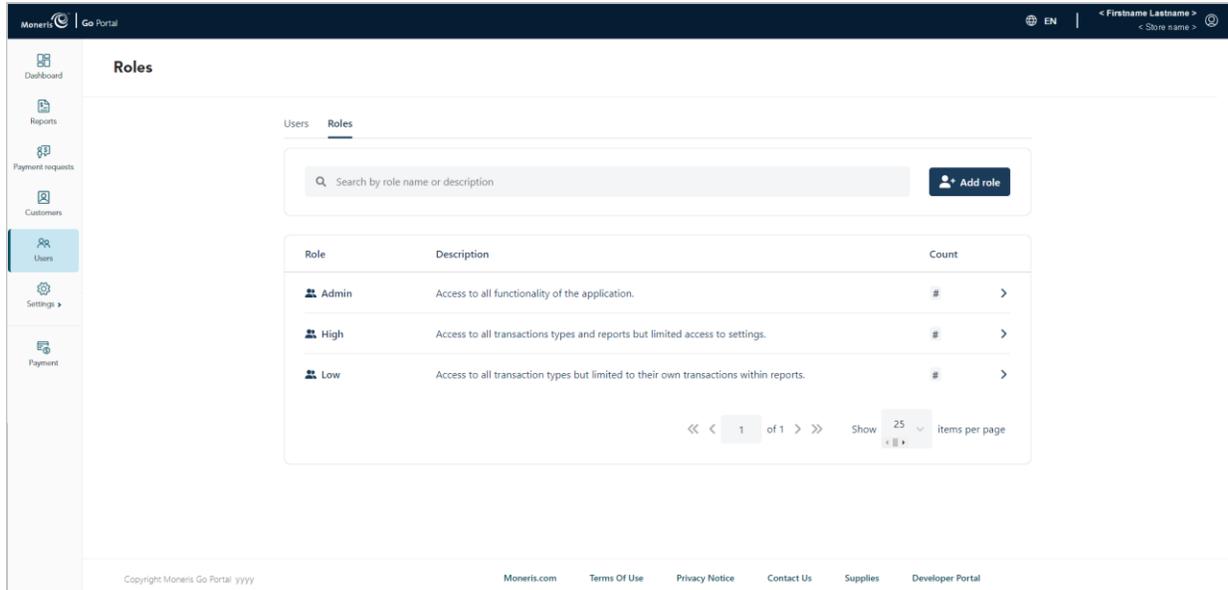


3. When the "Users" page displays (shown below), click on the **Roles** tab.



- When the "Roles" page displays (shown below), click on the **Add role** button.

**Note:** The default user roles are "Admin", "High", and "Low".



- When the "Add role" window display (shown here), configure the new user role's description and permissions:

- In the **Name** field, enter the user role name.
- In the **Description** field, enter the user role description.

**To enable/disable user role permissions for the Moneris Go portal:**

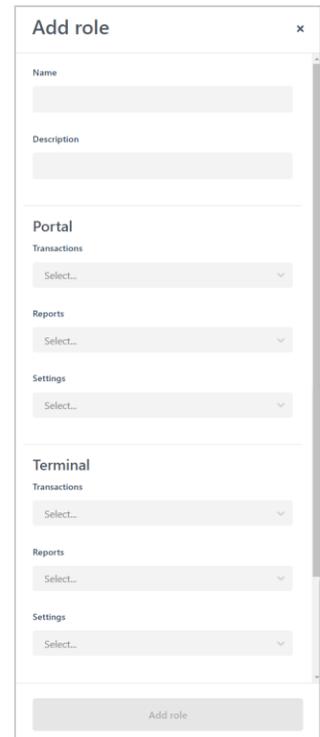
- In the "Portal" area, click on the "Transactions", "Reports", and/or "Settings" drop-down, and select one or more permissions to enable (add) them as desired. Click on the "X" beside a permission to disable (remove) it.

**Note:** For a list of supported permissions, see [List of user role permissions on page 147](#).

**To enable/disable user role permissions for the terminal:**

- In the "Terminal" area, click on the "Transactions", "Reports", and/or "Settings" drop-down, and select one or more permissions to enable (add) them as desired. Click on the "X" beside a permission to disable (remove) it.

**Note:** For a list of supported permissions, see [List of user role permissions on page 147](#).



- Click on the **Add role** button.
- When the "User role added successfully" response displays, the operation is complete.

# Modifying a user role

The steps below describe how to modify a user role's parameters, including name, description, and user permissions.

1. Log into the Moneris Go portal, and access the store containing the user role that you want to edit (see [Logging into the Moneris Go portal](#) on page 21).

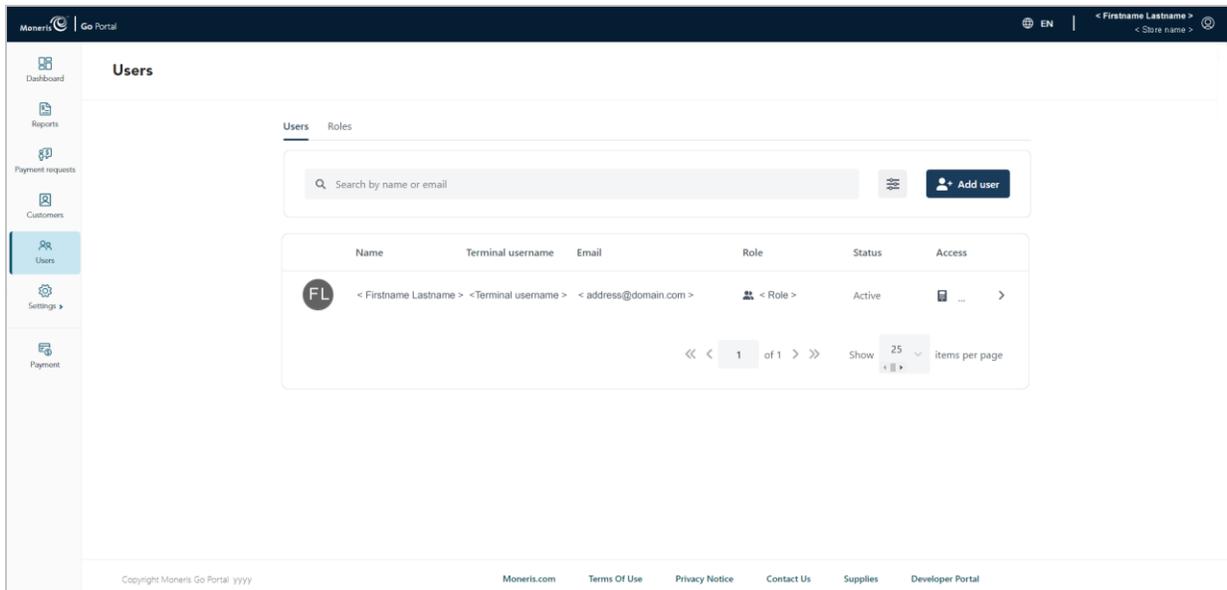
**Note:** If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

2. On the sidebar menu (shown here), click on **Users**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



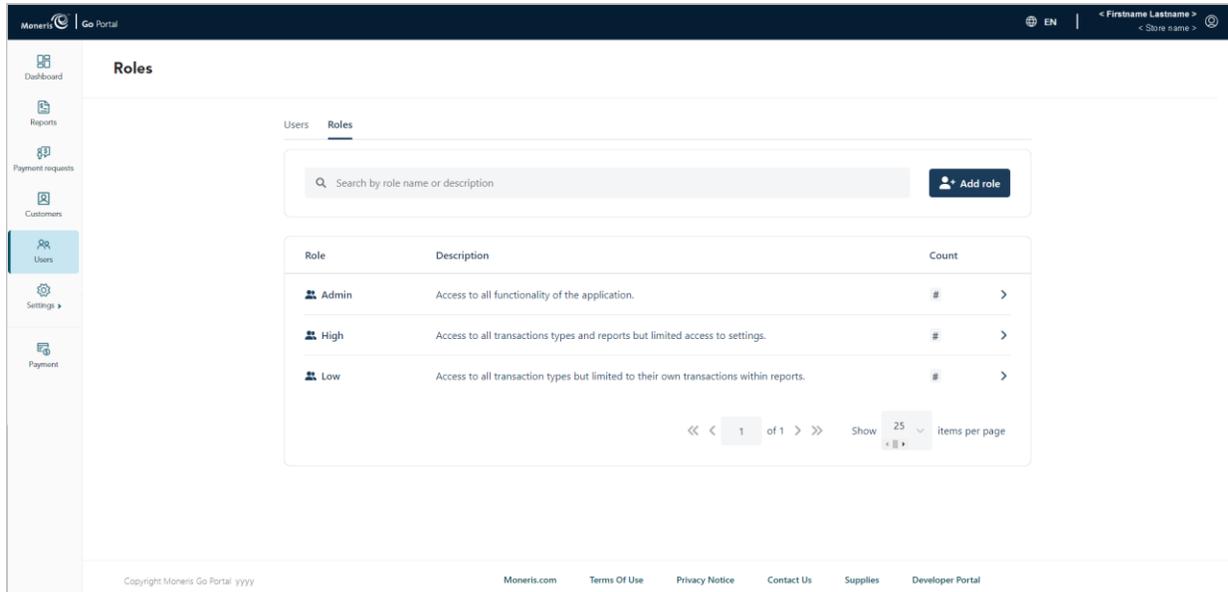
3. When the "Users" page displays (shown below), click on the **Roles** tab.



- When the "Roles" page displays (shown below), locate and click on the user role that you want to modify.

**Note:** To search for a user role, enter a full/partial role name or a full role description in the **Search by role name or description** field.

To change the number of hits listed on a page, click on the "Show # items per page" drop-down, and select a number (10, 25, or 50). To advance to the next page or last page, click on the **Next page** > icon or the **Last page** >> icon respectively. To go back to the previous page or the first page, click on the **Previous page** < icon or the **First page** << icon respectively.



- When the "Edit role" window displays (shown here), edit the parameters of the user role:

**To edit the user role name/description:**

- In the **Name** field, enter the new name of the user role.
- In the **Description** field, enter the new description for the user role.

**To enable/disable user role permissions for the Moneris Go portal:**

- In the "Portal" fields, click on the "X" beside a permission to disable (remove) it. OR Click on the drop-down icon, and click on the desired permission to enable (add) it.

**Note:** If no permission is currently enabled, select one or more from the "Transactions", "Settings", and/or "Reports" drop-down as desired. (For a list of supported permissions, see [List of user role permissions on page 147.](#))

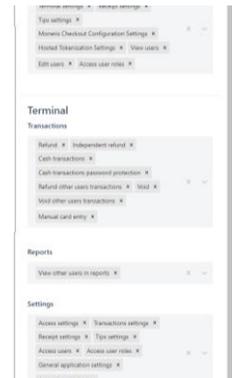


### To enable/disable user role permissions for the terminal:

- a. In the "Terminal" fields, click on the "X" beside a permission to disable (remove) it. OR Click on the drop-down  icon, and click on the desired permission to enable (add) it.

**Note:** *If no permission is currently enabled, select one or more from the "Transactions", "Settings", and/or "Reports" drop-down as desired. (For a list of supported permissions, see [List of user role permissions](#) on page 147.)*

6. Click on the **Update** button.
7. When the "User successfully updated" response displays, the operation is complete.



## Deleting a user role

The steps below describe how to delete a user role so that it cannot be assigned to a Moneris Go portal user account.

1. Log into the Moneris Go portal, and access the store containing the user role that you want to delete (see [Logging into the Moneris Go portal](#) on page 21).

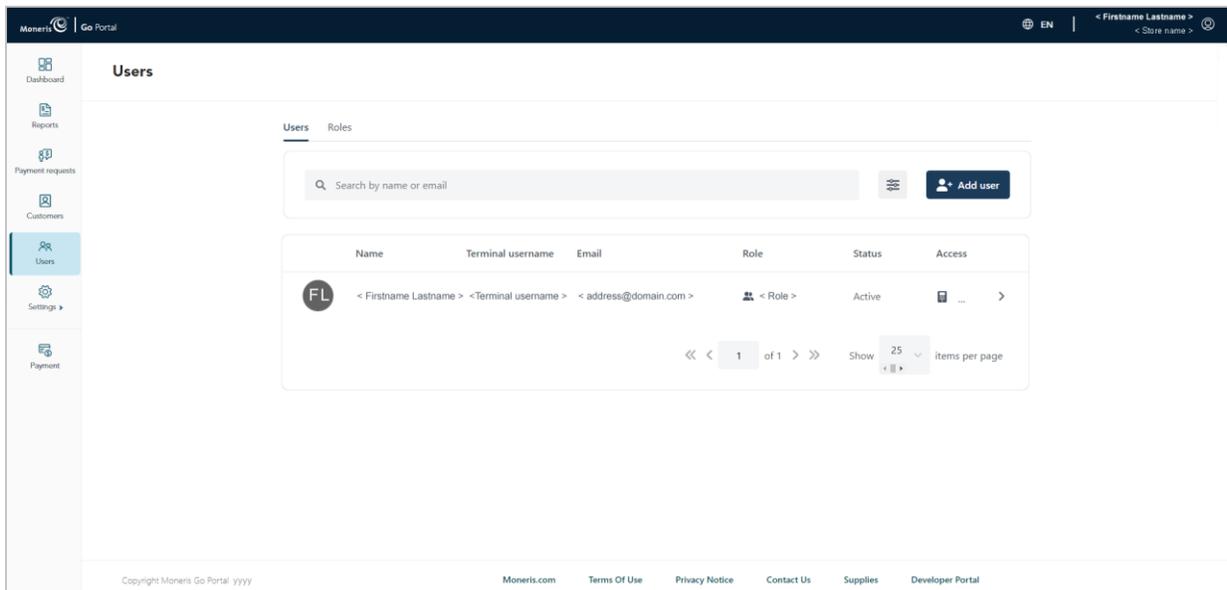
**Note:** If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

2. On the sidebar menu (shown here), click on **Users**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



3. When the "Users" page displays (shown below), click on the **Roles** tab.

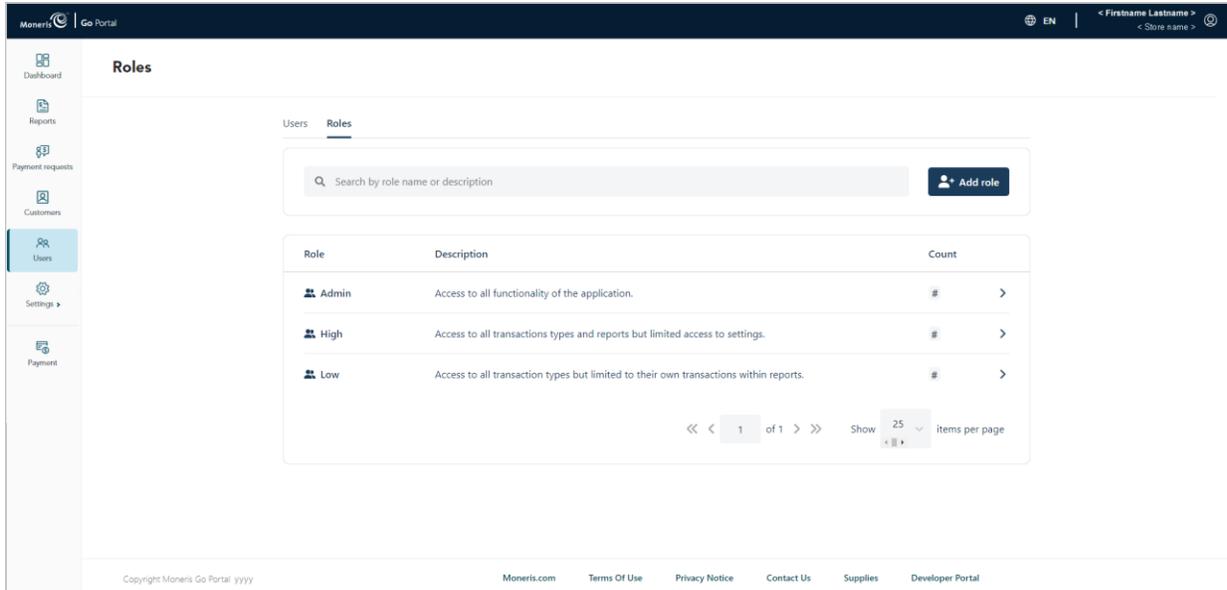


Name	Terminal username	Email	Role	Status	Access
FL < Firstname Lastname >	< Terminal username >	< address@domain.com >	< Role >	Active	...

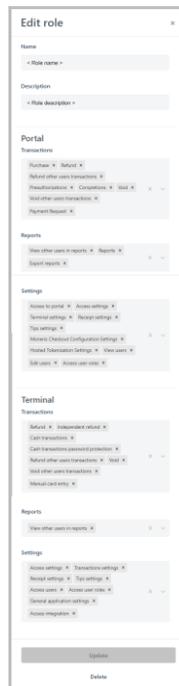
- When the "Roles" page displays (shown below), locate and click on the user role that you want to delete.

**Note:** To search for a user role, enter a full/partial role name or a full role description in the **Search by role name or description** field.

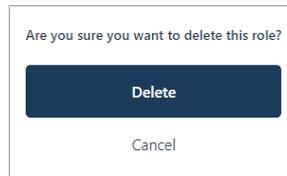
To change the number of hits listed on a page, click on the "Show # items per page" drop-down, and select a number (**10, 25, or 50**). To advance to the next page or last page, click on the **Next page >** icon or the **Last page >>** icon respectively. To go back to the previous page or the first page, click on the **Previous page <** icon or the **First page <<** icon respectively.



- When the "Edit role" window displays (shown below), on the **Delete** button.



- When the "Are you sure you want to delete this role?" dialog displays (shown below), click on the **Delete** button.



- When the "User role successfully deleted" response displays, the operation is complete.

## List of user role permissions

You can configure a user role by enabling/disabling the permissions listed in the tables below:

- For instructions on how to add a new user role, see [Adding a new user role](#) (page 139).
- For instructions on how to modify an existing user role, see [Modifying a user role](#) (page 141).

### Portal

Group	Permission
Transactions	Completions
	Payment Request
	Preauthorizations
	Purchase
	Refund
	Refund other users transactions
	Void
	Void other users transactions

Group	Permission
Reports	Export reports
	Reports
	View other users in reports

Group	Permission
Settings	Access API Token
	Access settings
	Access to portal
	Access user roles
	Customer Management
	Edit users
	Hosted Tokenization settings
	Moneris Checkout Configuration settings
	Receipt settings

### Terminal

Group	Permission
Transactions	Cash transactions
	Cash transactions password protection
	Independent refund
	Manual card entry
	Purchase
	Refund
	Refund other users transactions
	Void
	Void other users transactions

Group	Permission
Reports	View other users in reports

Group	Permission
Settings	Access integration
	Access settings
	Access user roles
	Access users
	General Application Settings
	Receipt settings
	Transactions settings
	Tips settings

**Portal (continued...)**

Group	Permission
Settings	Terminal settings
	Tips settings
	View users



# Moneris Go (A920) Terminal Management

In this section, we go over everything you need to know to manage the Moneris Go portal settings that govern the behaviour of your Moneris Go terminals.

(For information and resources on how to use your Moneris Go terminal to process transactions, visit <https://www.moneris.com/en/support/moneris-go/monerisgo>.)

# Moneris Go terminal: general settings

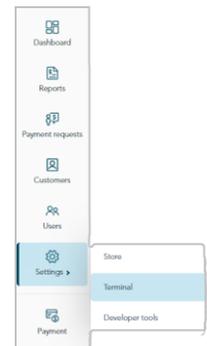
The steps below describe how to access the general settings for all Moneris Go terminals that are synced to your Moneris Go portal store. General settings include automatic sign-out time, automatic sign-out after transaction, report reset time, and display timeout.

1. Log into the Moneris Go portal, and access the store that is synced to the Moneris Go terminal(s) that you want to modify (see [Logging into the Moneris Go portal on page 21](#)).

**Note:** *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores on page 29](#)).*

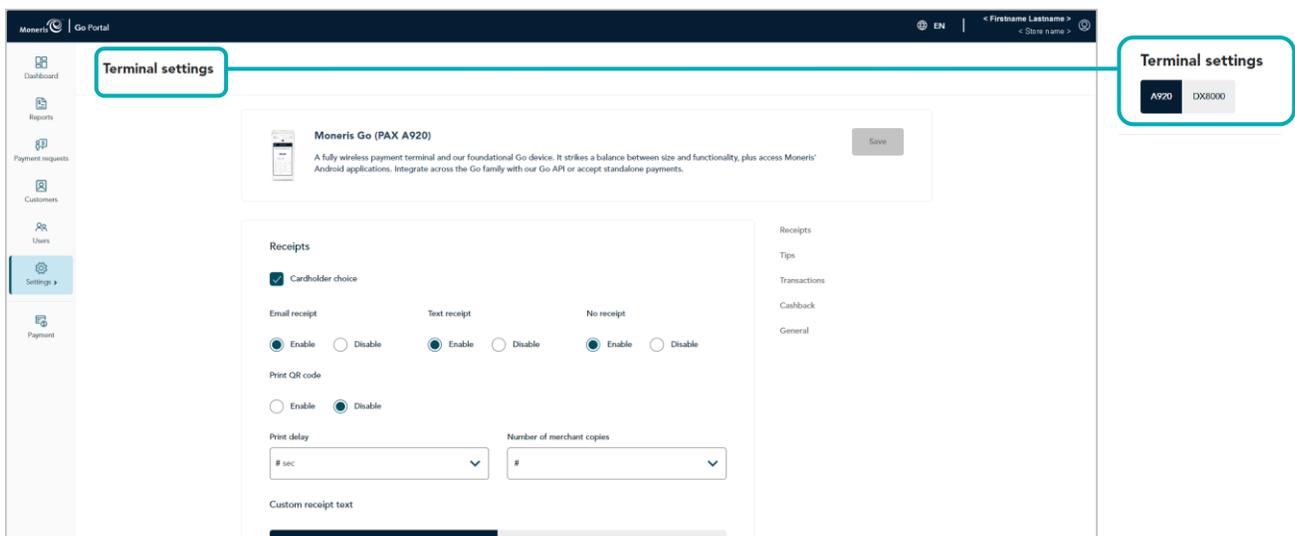
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

**Note:** *If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*



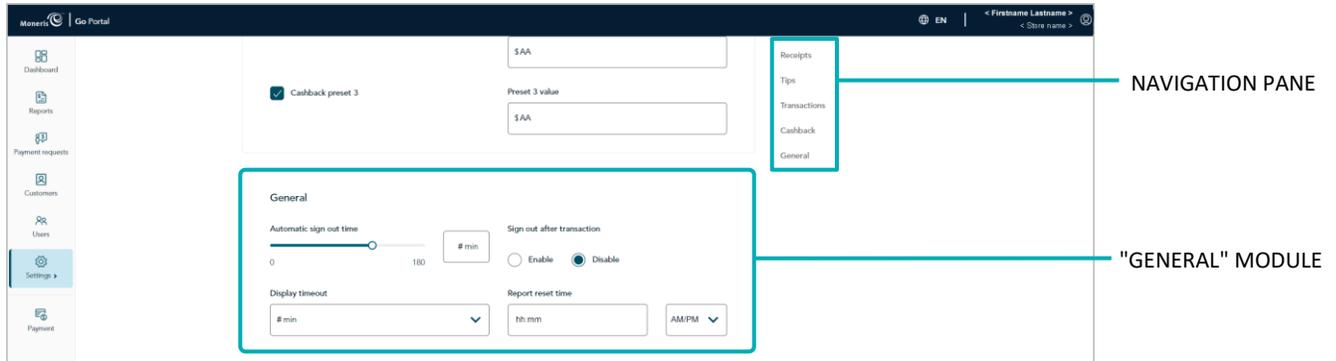
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "Moneris Go (PAX A920)" terminal before continuing to the next step.

**Note:** *If two or more different device types are synced to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **A920** tab to display the settings for the "Moneris Go (PAX A920)" terminal.*



4. Scroll to the "General" module (shown below), and configure the general settings as desired:

**Note:** To jump directly to the "General" module, click on **General** in the navigation pane (shown below).



### Automatic sign-out time

Configure when the Moneris Go terminal automatically logs off a user after X seconds of inactivity:

- a. Move the **Automatic sign-out time** slider to the desired value (0 sec to 180 sec).
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Display timeout

Set the number of minutes of inactivity after which the Moneris Go terminal enters into sleep mode to conserve battery power.

- a. Click on the **Display timeout** drop-down, and select the desired value (1 min, 2 min, or 5 min).
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Sign out after transaction

Enable/disable automatic logoff after a user performs a Moneris Go terminal transaction:

- a. Go to the "Sign out after transaction" setting, and do one of the following:
  - To enable, select the **Enable** radio button.
  - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal.*

### Report reset time

Set the 23-hour and 59-second period starting at time X, when Moneris Go terminal reports reset to \$0:

**Note:** *If you change this setting, contact us so that we can change your batch close time to reflect your report reset time. This will ensure the time period covered in your batch file matches the time period covered in your reports.*

- a. In the **Report reset time** field, enter a reset time; then select **AM** (morning) /**PM** (night).
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

# Moneris Go terminal: transaction settings

The steps below describe how to access the transaction settings for all Moneris Go terminals that are synched to your Moneris Go portal store. Transaction settings include, pass terminal time, debit surcharging, manual entry transactions, and custom transaction identifier.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

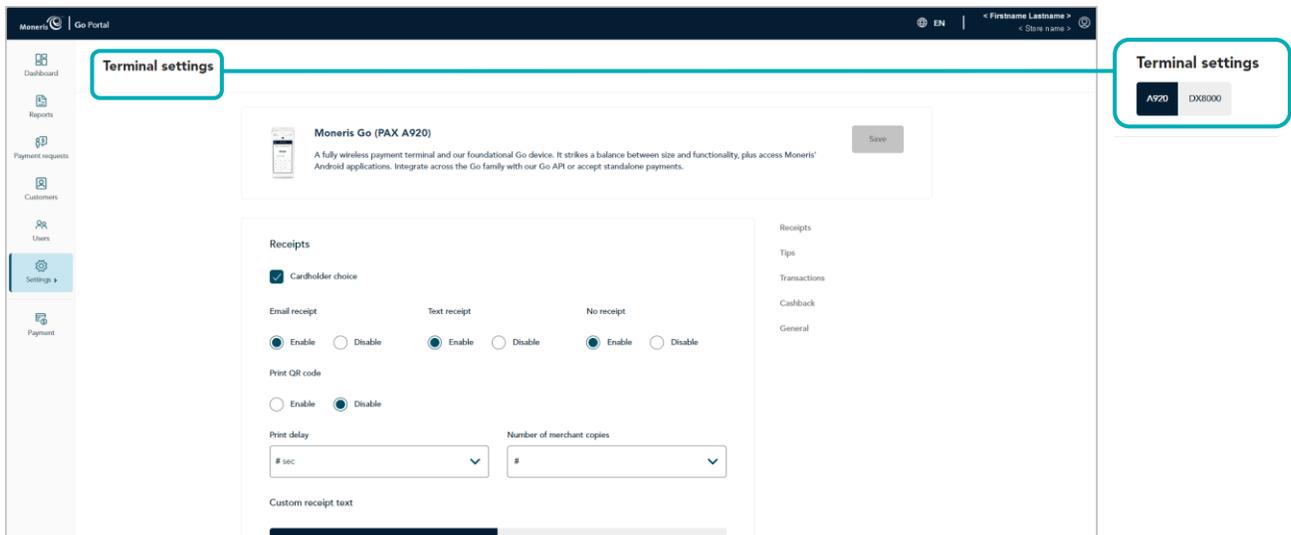
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



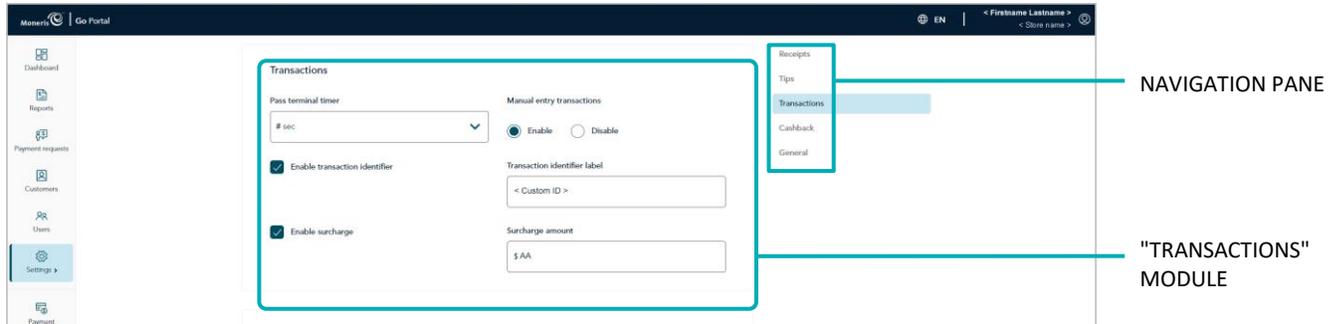
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "Moneris Go (PAX A920)" terminal before continuing to the next step.

**Note:** If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **A920** tab to display the settings for the "Moneris Go (PAX A920)" terminal.



4. Scroll to the "Transactions" module (shown below), and configure the transaction settings as desired:

**Note:** To jump directly to the "Transactions" module, click on **Transactions** in the navigation pane (shown below).



### Manual entry transactions

Enable/disable keying in transactions on the Moneris Go terminal:

- Go to the "Manual entry transactions" setting, and do one of the following:
  - To enable, select the **Enable** radio button.
  - To disable, select the **Disable** radio button.
- Click on the **Save** button.
- When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Pass terminal timer

Configure how long the Moneris Go terminal displays the "Please pass the terminal to your customer" prompt (e.g., this prompt would display when tip prompting is enabled):

- Click on the **Pass terminal timer** drop-down, and select a value (0 sec to 10 sec).
- Click on the **Save** button.
- When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

## Surcharge

- a. Enable/disable the addition of a fixed dollar amount (surcharge) to debit Purchase transactions on the Moneris Go terminal:

**Note:** *Surcharging is applicable only to Purchase transactions processed with an Interac debit card.*

- To enable, checkmark the **Enable surcharge** box, and enter the surcharge amount in the **Surcharge amount** field.
- To disable, unmark the **Enable surcharge** box.

- b. Click on the **Save** button.

- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

## Transaction identifier

Enable/disable the option to append a custom transaction identifier to debit/credit/cash Purchases, Preauthorizations, and independent Refunds performed on the Moneris Go terminal. If enabled, the custom transaction identifier field will appear as a line item in reports and receipts.

**Note:** *If you opt to enable this feature on the terminal, you should also enable the equivalent "Custom ID" feature on the virtual terminal (see [Custom ID: store settings](#) on page 124).*

- a. Go to the "Transaction identifier" setting, and do one of the following:

- To enable, checkmark the **Enable transaction identifier** box, and enter your custom identifier in the **Transaction identifier label** field.
- To disable, unmark the **Enable transaction identifier** box.

- b. Click on the **Save** button.

- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

# Moneris Go terminal: receipt settings

The steps below describe how to access the settings for receipts issued from all Moneris Go terminals that are synced to your Moneris Go portal store. Receipt settings include transaction receipt format choice, print QR code, print delay, and customizable greeting headers and footers.

1. Log into the Moneris Go portal, and access the store that is synced to the Moneris Go terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

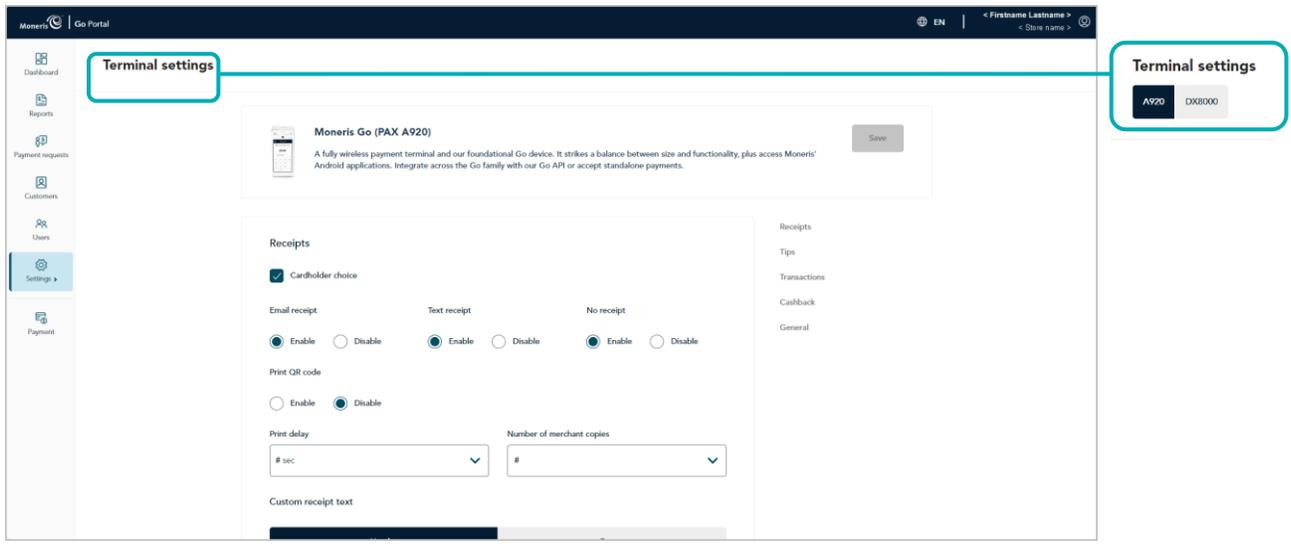
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



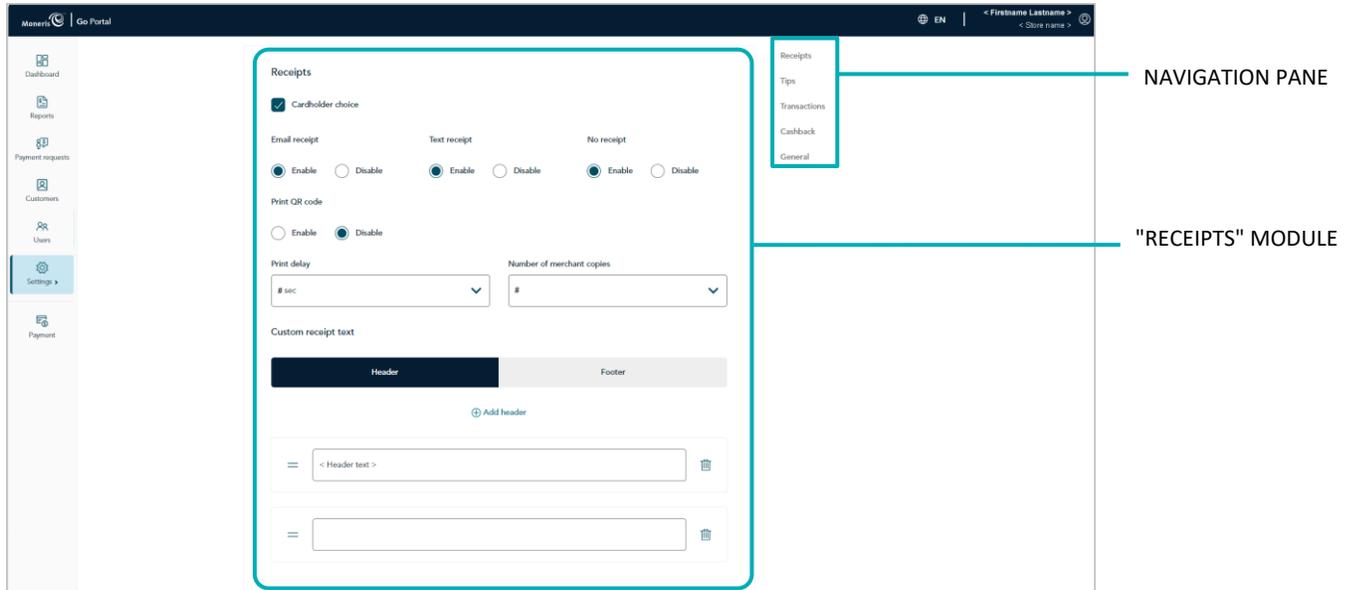
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "Moneris Go (PAX A920)" terminal before continuing to the next step.

**Note:** If two or more different device types are synced to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **A920** tab to display the settings for the "Moneris Go (PAX A920)" terminal.



4. Scroll to the "Receipts" module (shown below), and configure the receipt settings as desired:

**Note:** To jump directly to the "Receipts" module, click on **Receipts** in the navigation pane (shown below).



### Cardholder choice

- a. Enable/disable receipt format prompting on the Moneris Go terminal:
  - To enable, checkmark the **Cardholder choice** box.
  - To disable, unmark the **Cardholder choice** box.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Email receipt<sup>20</sup>

Enable/disable the "Email receipt" option on the Moneris Go terminal.

- a. Go to the "Email receipt" setting, and do one of the following:
  - To enable, select the **Enable** radio button.
  - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.

<sup>20</sup> This option is supported only if "Cardholder choice" is enabled (see [Cardholder choice](#) above).

- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

### **Text receipt<sup>21</sup>**

Enable/disable the "Text receipt" option on the Moneris Go terminal.

- a. Go to the "Text receipt" setting, and do one of the following:
  - To enable, select the **Enable** radio button.
  - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

### **No receipt<sup>22</sup>**

Enable/disable the "No receipt" option on the Moneris Go terminal.

- a. Go to the "No receipt" setting, and do one of the following:
  - To enable, select the **Enable** radio button.
  - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

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<sup>21</sup> This option is supported only if "Cardholder choice" is enabled (see [Cardholder choice](#) on page 157).

<sup>22</sup> This option is supported only if "Cardholder choice" is enabled (see [Cardholder choice](#) on page 157).

### Number of merchant copies

Set the number of merchant copy receipts that the Moneris Go terminal prints for each transaction:

- a. Click on the **Number of merchant copies** drop-down, and select a number (0 to 2).
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

### Print QR code

Enable/disable the appearance of a QR code on Moneris Go terminal transaction receipts. (If the QR code is printed on a receipt, you can use the terminal to scan the receipt and retrieve the transaction record.)

- a. Go to the "Print QR code" setting, and do one of the following:
  - To enable, select the **Enable** radio button.
  - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

### Print delay

Set the delay time (in seconds) between when the Moneris Go terminal prints the cardholder copy receipt and when it prints the merchant copy receipt.

- a. Click on the **Print delay** drop-down, and select a value (2 sec to 5 sec).
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

## Header

Configure a customized greeting message in the header line(s) on Moneris Go terminal transaction receipts.<sup>23</sup>

To configure a header line:

- a. Go to the "Custom receipt text" area, and click on the **Header** button to display the header settings.
  - To add a new header line, click on **Add header**, and enter your greeting text in the new header field (or leave the field unfilled if you want to add a blank header line).
  - To reposition a header line, click on it and drag the header line to the desired position above/below another header line.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

To remove one or more header lines:

- a. Go to the "Custom receipt text" area, and click on the **Header** button to display the header settings.
- b. Locate any header line that you want to remove, and click on its **Delete**  icon.
- c. Click on the **Save** button.
- d. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal.*

## Footer

Configure a customized greeting message in the footer line(s) on Moneris Go terminal transaction receipts.<sup>24</sup>

- a. Go to the "Custom receipt text" area, and click on the **Footer** button to display the footer settings.
  - To add a new footer line, click on **Add footer**, and enter your greeting text in the new footer field (or leave the field unfilled if you want to add a blank footer line).
  - To reposition a footer line, click on it and drag the footer line to the desired position above/below another footer line.

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<sup>23</sup> If you want to configure a customizable header greeting for your virtual terminal transaction receipts, please contact us.

<sup>24</sup> If you want to configure a customizable footer greeting for your virtual terminal transaction receipts, please contact us.

- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

To remove one or more footer lines:

- a. Go to the "Custom receipt text" area, and click on the **Footer** button to display the footer settings.
- b. Locate any footer line that you want to remove, and click on its **Delete**  icon.
- c. Click on the **Save** button.
- d. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

# Moneris Go terminal: cashback settings

The steps below describe how to access the settings for cashback prompting on all Moneris Go terminals that are synched to your Moneris Go portal store. When enabled, cashback prompting displays during contact-based debit Purchase transactions performed on the Moneris Go terminal.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

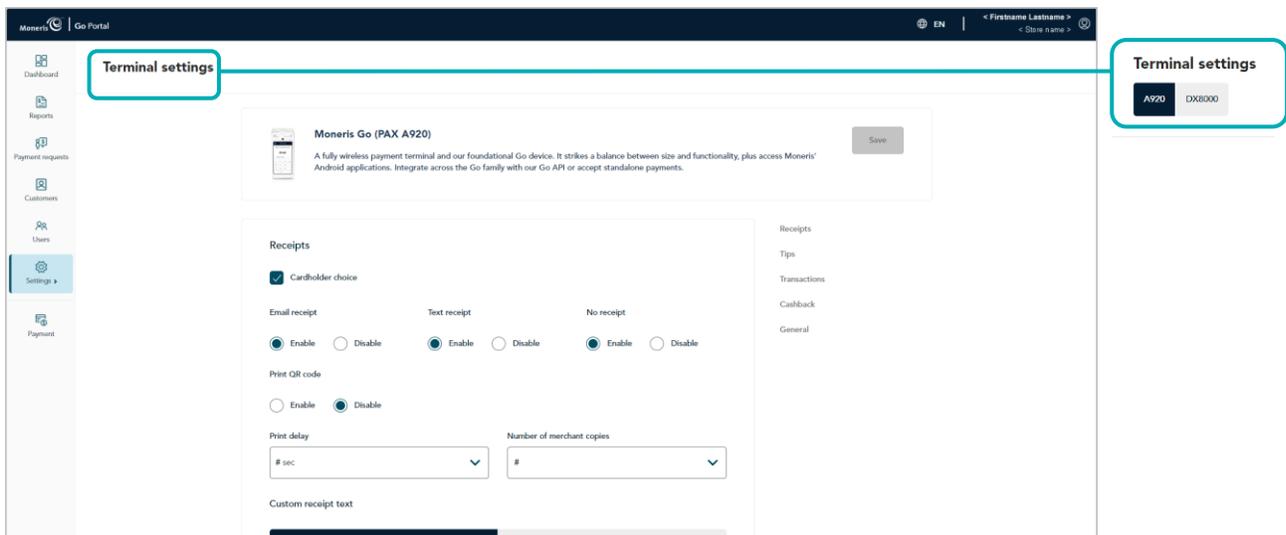
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



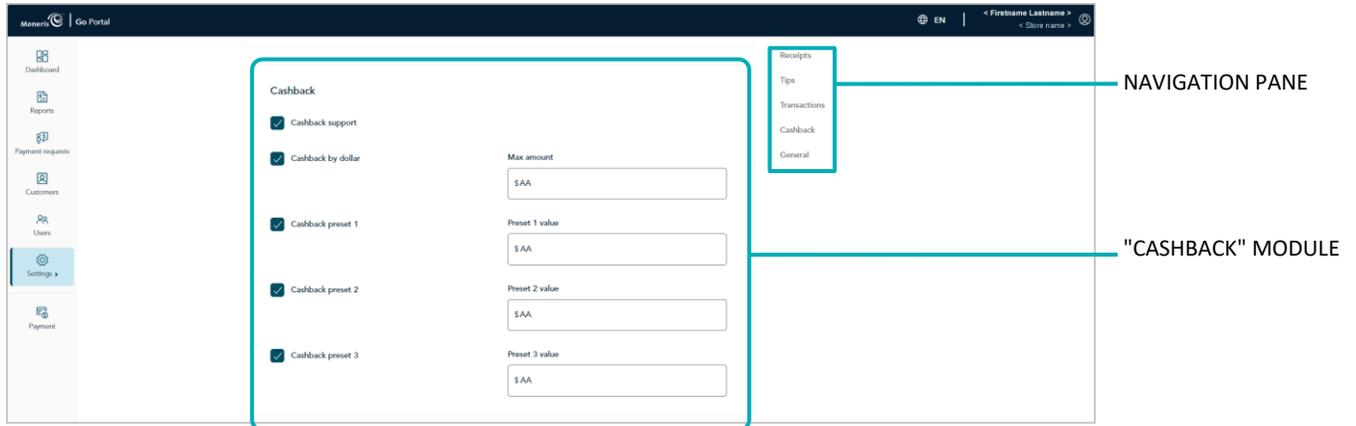
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "Moneris Go (PAX A920)" terminal before continuing to the next step.

**Note:** If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **A920** tab to display the settings for the "Moneris Go (PAX A920)" terminal.



4. Scroll to the "Cashback" module (shown below), and configure the cashback settings as desired:

**Note:** To jump directly to the "Cashback" area, click on **Cashback** in the navigation pane (shown below).



### Cashback support

- Enable/disable cashback prompting on the Moneris Go terminal:
  - To enable, checkmark the **Cashback support** box.
  - To disable, unmark the **Cashback support** box.
- Click on the **Save** button.
- When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Cashback by dollar<sup>25</sup>

- Enable/disable the option for cardholders to enter a cashback amount on the Moneris Go terminal to a maximum dollar amount that you define:
  - To enable, checkmark the **Cashback by dollar** box, and enter the maximum dollar amount limit in the **Max amount** field.
  - To disable, unmark the **Cashback by dollar** box.
- Click on the **Save** button.
- When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated

<sup>25</sup> This option is supported only if "Cashback support" is enabled (see [Cashback support](#) above).

*terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

### **Cashback by preset<sup>26</sup>**

- a. Enable/disable the option for cardholders to select a pre-defined cashback dollar amount on the Moneris Go terminal:

**Note:** *There are three pre-defined dollar amount settings; each can be configured/enabled independently.*

- To enable, checkmark the **Cashback preset #** box, and enter a dollar amount in the corresponding **Preset value** field.
- To disable, unmark the **Cashback preset #** box.

- b. Click on the **Save** button.

- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

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<sup>26</sup> This option is supported only if "Cashback support" is enabled (see [Cashback support](#) on page 163).

# Moneris Go terminal: tip settings

The steps below describe how to access the settings for tip prompting on all Moneris Go terminals that are synched to your Moneris Go portal store. When enabled, tip prompting displays during Purchase and Preauthorization transactions.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go terminal(s) that you want to modify (see [Logging into the Moneris Go portal on page 21](#)).

**Note:** *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores on page 29](#)).*

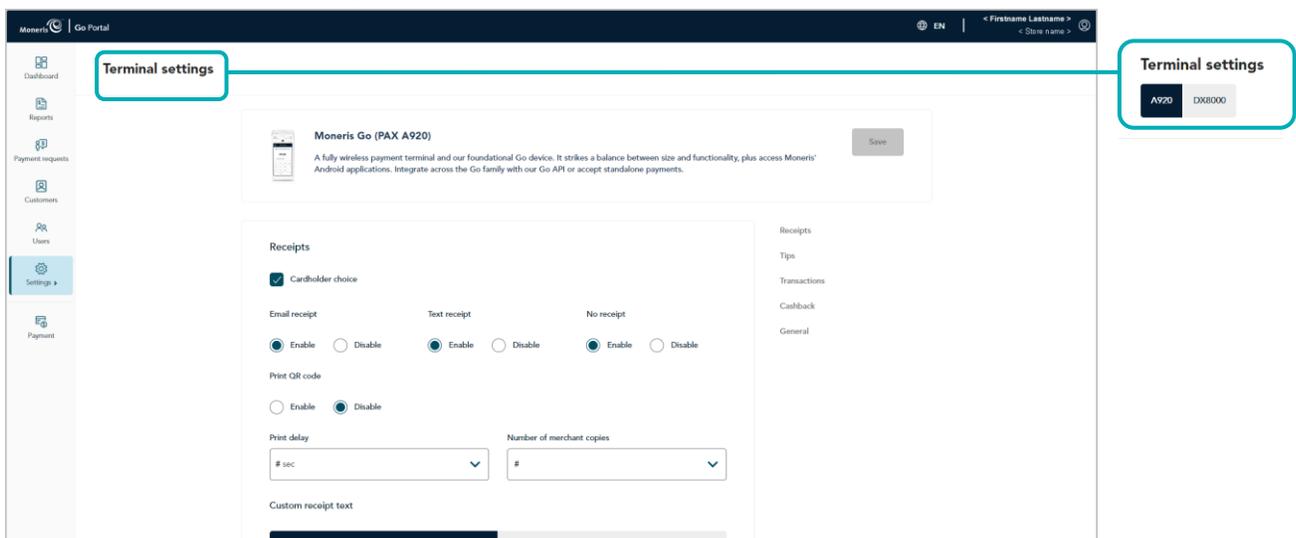
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

**Note:** *If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*



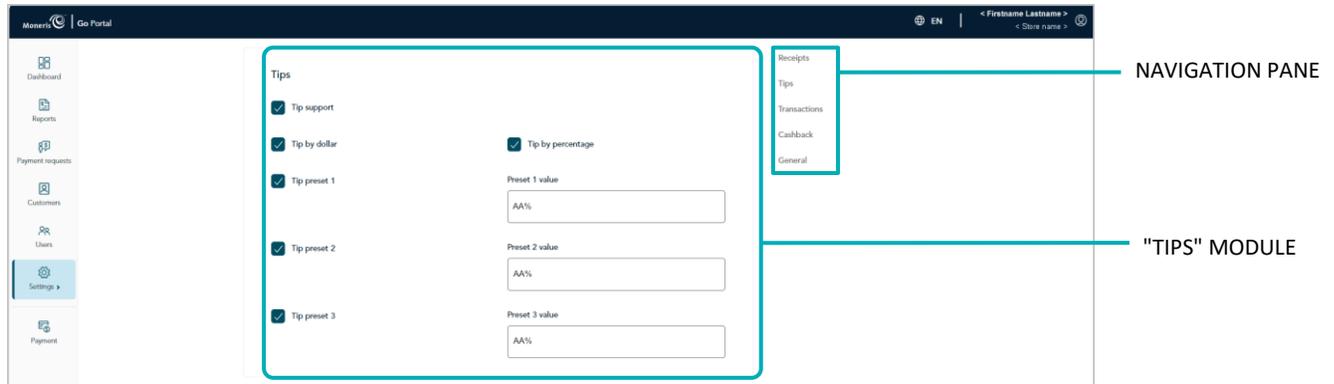
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "Moneris Go (PAX A920)" terminal before continuing to the next step.

**Note:** *If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **A920** tab to display the settings for the "Moneris Go (PAX A920)" terminal.*



4. Scroll to the "Tips" module (shown below), and configure the tip settings as desired:

**Note:** To jump directly to the "Tips" module, click on **Tips** in the navigation pane (shown below).



### Tip support

- Enable/disable tip prompting on the Moneris Go terminal:
  - To enable, checkmark the **Tip support** box.
  - To disable, unmark the **Tip support** box.
- Click on the **Save** button.
- When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Tip by dollar<sup>27</sup>

- Enable/disable the option for customers to enter a tip as a dollar amount on the Moneris Go terminal:
  - To enable, checkmark the **Tip by dollar** box.
  - To disable, unmark the **Tip by dollar** box.
- Click on the **Save** button.
- When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

<sup>27</sup> This option is supported only if "Tip support" is enabled (see [Tip support](#) above).

### Tip by percent<sup>28</sup>

- a. Enable/disable the option for customers to enter a tip as a percentage on the Moneris Go terminal:
  - To enable, checkmark the **Tip by percent** box.
  - To disable, unmark the **Tip by percent** box.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

### Tip by preset percentage<sup>29</sup>

- a. Enable/disable the option for customers to select a pre-defined tip percentage on the Moneris Go terminal:

**Note:** *There are three pre-defined tip percentage settings; each can be configured/enabled independently.*

- To enable, checkmark the **Tip preset #** box, and enter a percentage value in the corresponding **Preset # value** field.
  - To disable, unmark the **Tip preset #** box.
- b. Click on the **Save** button.
  - c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

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<sup>28</sup> This option is supported only if "Tip support" is enabled (see [Tip support](#) on page 166).

<sup>29</sup> This option is supported only if "Tip by percent" is enabled (see [Tip by percent](#) above).



# Moneris Go Plus (DX8000) Terminal Management

In this section, we go over everything you need to know to manage the Moneris Go portal settings that govern the behaviour of your Moneris Go Plus terminals.

(For information and resources on how to use your Moneris Go Plus terminal to process transactions, visit <https://www.moneris.com/en/support/moneris-go/moneris-go-plus>.)

# Moneris Go Plus terminal: general settings

The steps below describe how to access the general settings for all Moneris Go Plus terminals that are synced to your Moneris Go portal store. General settings include automatic sign-out time, automatic sign-out after transaction, report reset time, and display timeout.

1. Log into the Moneris Go portal, and access the store that is synced to the Moneris Go Plus terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).*

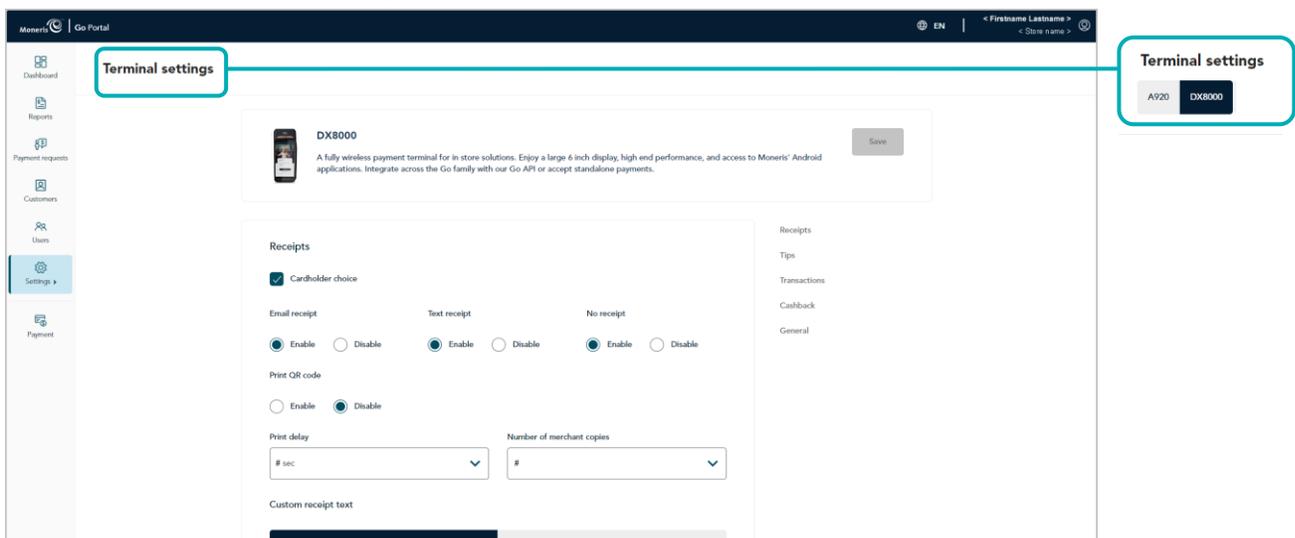
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

**Note:** *If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*



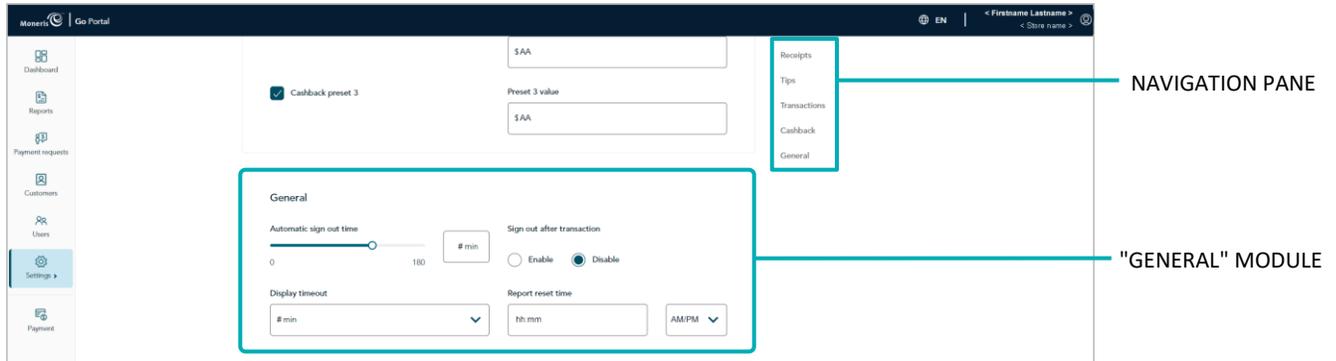
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "DX8000" terminal (Moneris Go Plus) before continuing to the next step.

**Note:** *If two or more different device types are synced to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **DX8000** tab to display the settings for the "DX8000" terminal.*



4. Scroll to the "General" module (shown below), and configure the general settings as desired:

**Note:** To jump directly to the "General" module, click on **General** in the navigation pane (shown below).



### Automatic sign-out time

Configure when the Moneris Go Plus terminal automatically logs off a user after X seconds of inactivity:

- a. Move the **Automatic sign-out time** slider to the desired value (0 sec to 180 sec).
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Display timeout

Set the number of minutes of inactivity after which the Moneris Go Plus terminal enters into sleep mode to conserve battery power.

- a. Click on the **Display timeout** drop-down, and select the desired value (1 min, 2 min, or 5 min).
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Sign out after transaction

Enable/disable automatic logoff after a user performs a Moneris Go Plus terminal transaction:

- a. Go to the "Sign out after transaction" setting, and do one of the following:
  - To enable, select the **Enable** radio button.
  - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal.*

### Report reset time

Set the 23-hour and 59-second period starting at time X, when Moneris Go Plus terminal reports reset to \$0:

**Note:** *If you change this setting, contact us so that we can change your batch close time to reflect your report reset time. This will ensure the time period covered in your batch file matches the time period covered in your reports.*

- a. In the **Report reset time** field, enter a reset time; then select **AM** (morning) /**PM** (night).
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

# Moneris Go Plus terminal: transaction settings

The steps below describe how to access the transaction settings for all Moneris Go Plus terminals that are synched to your Moneris Go portal store. Transaction settings include, pass terminal time, debit surcharging, manual entry transactions, and custom transaction identifier.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go Plus terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

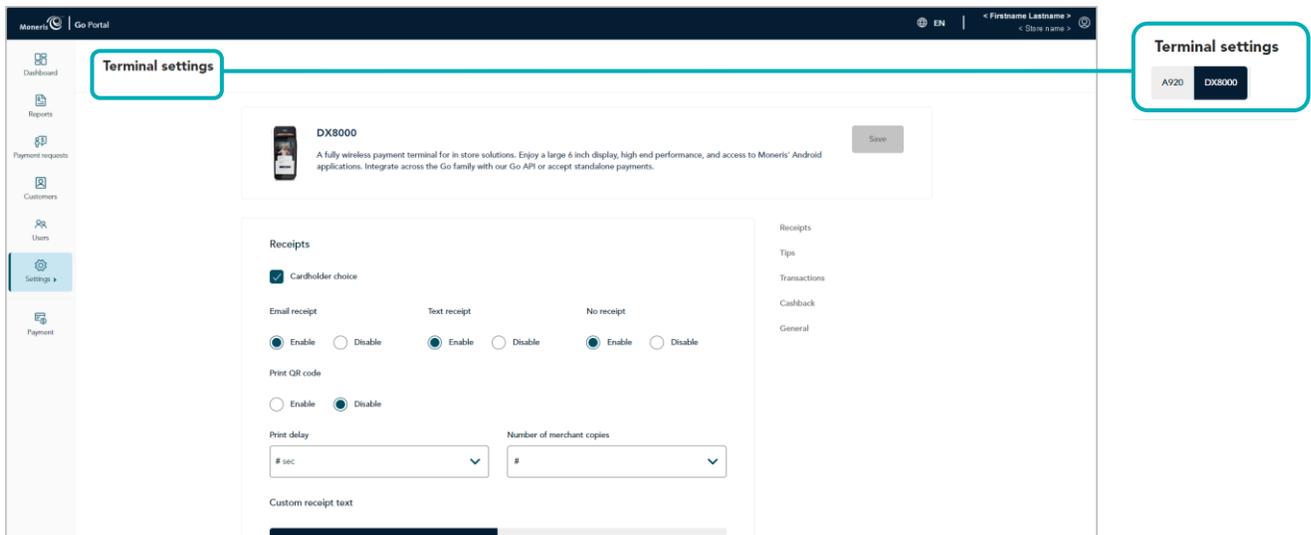
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



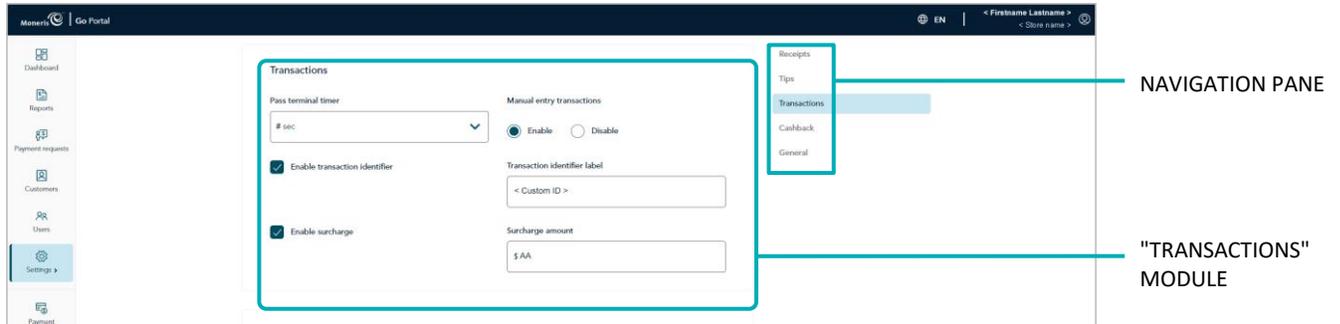
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "DX8000" terminal (Moneris Go Plus) before continuing to the next step.

**Note:** If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **DX8000** tab to display the settings for the "DX8000" terminal.



4. Scroll to the "Transactions" module (shown below), and configure the transaction settings as desired:

**Note:** To jump directly to the "Transactions" module, click on **Transactions** in the navigation pane (shown below).



### Manual entry transactions

Enable/disable keying in transactions on the Moneris Go Plus terminal:

- Go to the "Manual entry transactions" setting, and do one of the following:
  - To enable, select the **Enable** radio button.
  - To disable, select the **Disable** radio button.
- Click on the **Save** button.
- When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Pass terminal timer

Configure how long the Moneris Go Plus terminal displays the "Please pass the terminal to your customer" prompt (e.g., this prompt would display when tip prompting is enabled):

- Click on the **Pass terminal timer** drop-down, and select a value (0 sec to 10 sec).
- Click on the **Save** button.
- When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

## Surcharge

- a. Enable/disable the addition of a fixed dollar amount (surcharge) to debit Purchase transactions on the Moneris Go Plus terminal:

**Note:** *Surcharging is applicable only to Purchase transactions processed with an Interac debit card.*

- To enable, checkmark the **Enable surcharge** box, and enter the surcharge amount in the **Surcharge amount** field.
- To disable, unmark the **Enable surcharge** box.

- b. Click on the **Save** button.

- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

## Transaction identifier

Enable/disable the option to append a custom transaction identifier to debit/credit/cash Purchases, Preauthorizations, and independent Refunds performed on the Moneris Go Plus terminal. If enabled, the custom transaction identifier field will appear as a line item in reports and receipts.

**Note:** *If you opt to enable this feature on the terminal, you should also enable the equivalent "Custom ID" feature on the virtual terminal (see [Custom ID: store settings](#) on page 124).*

- a. Go to the "Transaction identifier" setting, and do one of the following:

- To enable, checkmark the **Enable transaction identifier** box, and enter your custom identifier in the **Transaction identifier label** field.
- To disable, unmark the **Enable transaction identifier** box.

- b. Click on the **Save** button.

- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

# Moneris Go Plus terminal: receipt settings

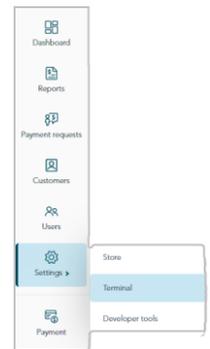
The steps below describe how to access the settings for receipts issued from all Moneris Go Plus terminals that are synched to your Moneris Go portal store. Receipt settings include transaction receipt format choice, print QR code, print delay, and customizable greeting headers and footers.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go Plus terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

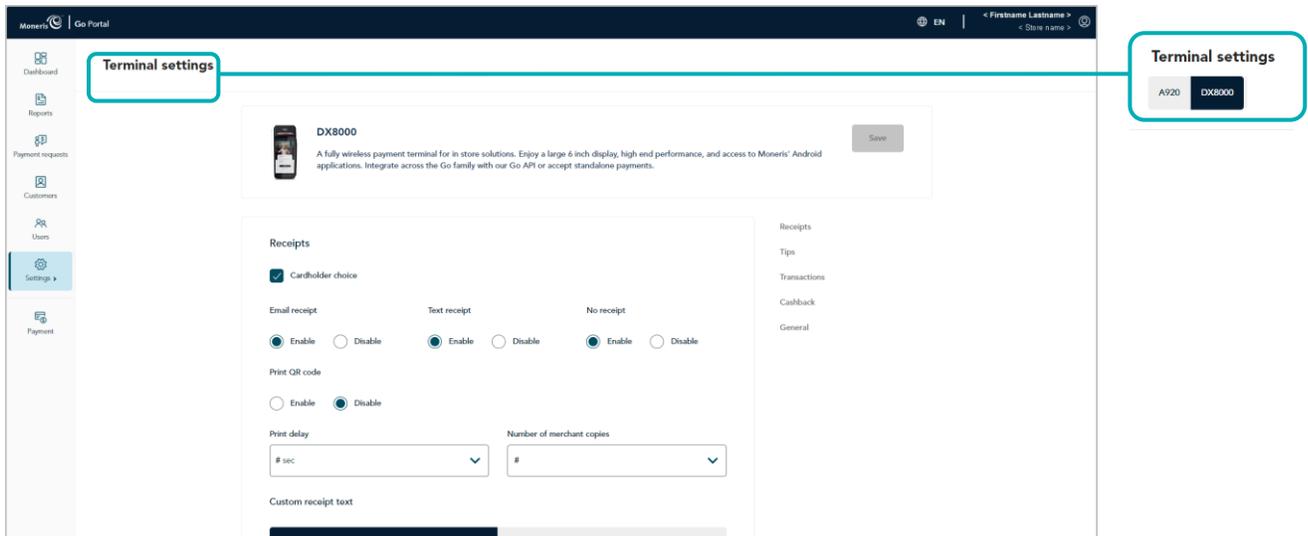
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



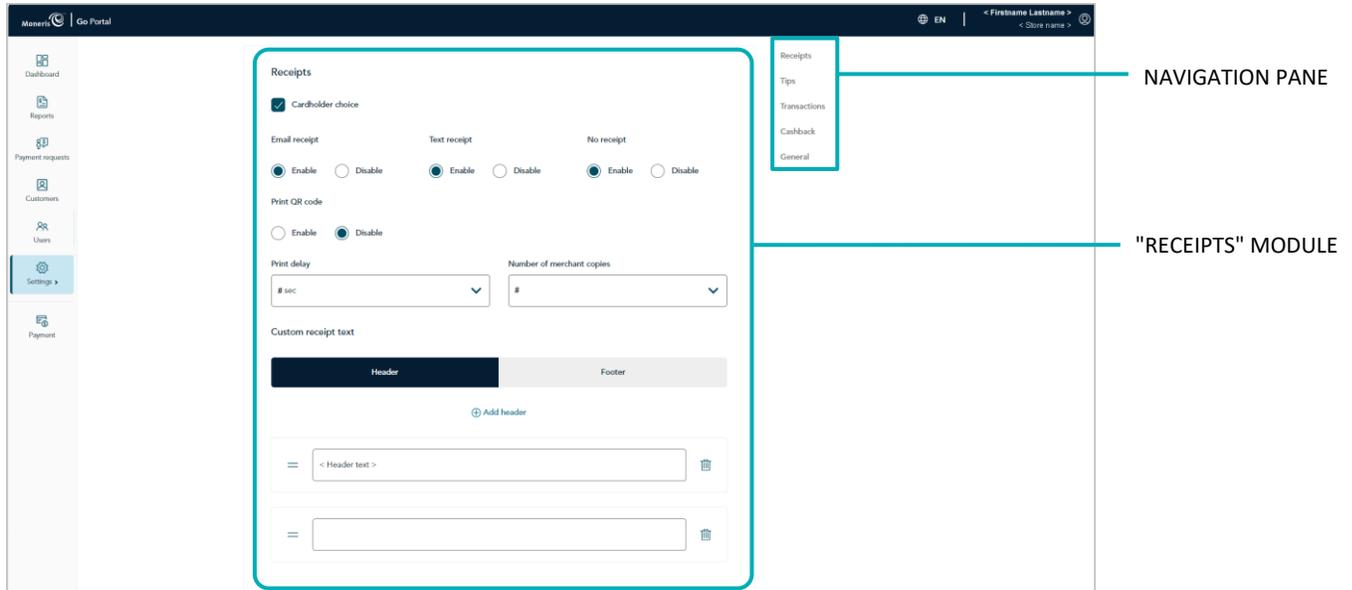
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "DX8000" terminal (Moneris Go Plus) before continuing to the next step.

**Note:** If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **DX8000** tab to display the settings for the "DX8000" terminal.



4. Scroll to the "Receipts" module (shown below), and configure the receipt settings as desired:

**Note:** To jump directly to the "Receipts" module, click on **Receipts** in the navigation pane (shown below).



### Cardholder choice

- a. Enable/disable receipt format prompting on the Moneris Go Plus terminal:
  - To enable, checkmark the **Cardholder choice** box.
  - To disable, unmark the **Cardholder choice** box.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Email receipt<sup>30</sup>

Enable/disable the "Email receipt" option on the Moneris Go Plus terminal.

- a. Go to the "Email receipt" setting, and do one of the following:
  - To enable, select the **Enable** radio button.
  - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

<sup>30</sup> This option is supported only if "Cardholder choice" is enabled (see [Cardholder choice](#) above).

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Text receipt<sup>31</sup>

Enable/disable the "Text receipt" option on the Moneris Go Plus terminal.

- a. Go to the "Text receipt" setting, and do one of the following:
  - To enable, select the **Enable** radio button.
  - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### No receipt<sup>32</sup>

Enable/disable the "No receipt" option on the Moneris Go Plus terminal.

- a. Go to the "No receipt" setting, and do one of the following:
  - To enable, select the **Enable** radio button.
  - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Number of merchant copies

Set the number of merchant copy receipts that the Moneris Go Plus terminal prints for each transaction:

- a. Click on the **Number of merchant copies** drop-down, and select a number (0 to 2).
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

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<sup>31</sup> This option is supported only if "Cardholder choice" is enabled (see [Cardholder choice](#) on page 176).

<sup>32</sup> This option is supported only if "Cardholder choice" is enabled (see [Cardholder choice](#) on page 176).

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Print QR code

Enable/disable the appearance of a QR code on Moneris Go Plus terminal transaction receipts. (If the QR code is printed on a receipt, you can use the terminal to scan the receipt and retrieve the transaction record.)

- a. Go to the "Print QR code" setting, and do one of the following:
  - To enable, select the **Enable** radio button.
  - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal.

### Print delay

Set the delay time (in seconds) between when the Moneris Go Plus terminal prints the cardholder copy receipt and when it prints the merchant copy receipt.

- a. Click on the **Print delay** drop-down, and select a value (2 sec to 5 sec).
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

## Header

Configure a customized greeting message in the header line(s) on Moneris Go Plus terminal transaction receipts.<sup>33</sup>

To configure a header line:

- a. Go to the "Custom receipt text" area, and click on the **Header** button to display the header settings.
  - To add a new header line, click on **Add header**, and enter your greeting text in the new header field (or leave the field unfilled if you want to add a blank header line).
  - To reposition a header line, click on it and drag the header line to the desired position above/below another header line.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

To remove one or more header lines:

- a. Go to the "Custom receipt text" area, and click on the **Header** button to display the header settings.
- b. Locate any header line that you want to remove, and click on its **Delete**  icon.
- c. Click on the **Save** button.
- d. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

---

<sup>33</sup> If you want to configure a customizable header greeting for your virtual terminal transaction receipts, please contact us.

## Footer

Configure a customized greeting message in the footer line(s) on Moneris Go Plus terminal transaction receipts.<sup>34</sup>

- a. Go to the "Custom receipt text" area, and click on the **Footer** button to display the footer settings.
  - To add a new footer line, click on **Add footer**, and enter your greeting text in the new footer field (or leave the field unfilled if you want to add a blank footer line).
  - To reposition a footer line, click on it and drag the footer line to the desired position above/below another footer line.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

To remove one or more footer lines:

- a. Go to the "Custom receipt text" area, and click on the **Footer** button to display the footer settings.
- b. Locate any footer line that you want to remove, and click on its **Delete**  icon.
- c. Click on the **Save** button.
- d. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

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<sup>34</sup> If you want to configure a customizable header greeting for your virtual terminal transaction receipts, please contact us.

# Moneris Go Plus terminal: cashback settings

The steps below describe how to access the settings for cashback prompting on all Moneris Go Plus terminals that are synched to your Moneris Go portal store. When enabled, cashback prompting displays during contact-based debit Purchase transactions performed on the Moneris Go Plus terminal.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go Plus terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).

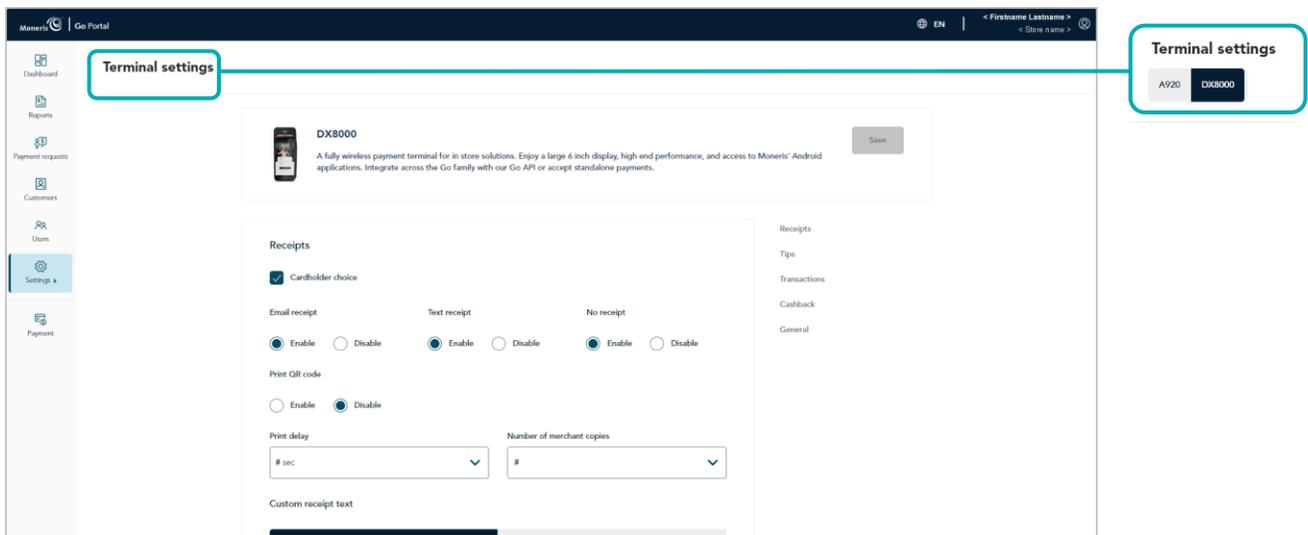
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

**Note:** If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



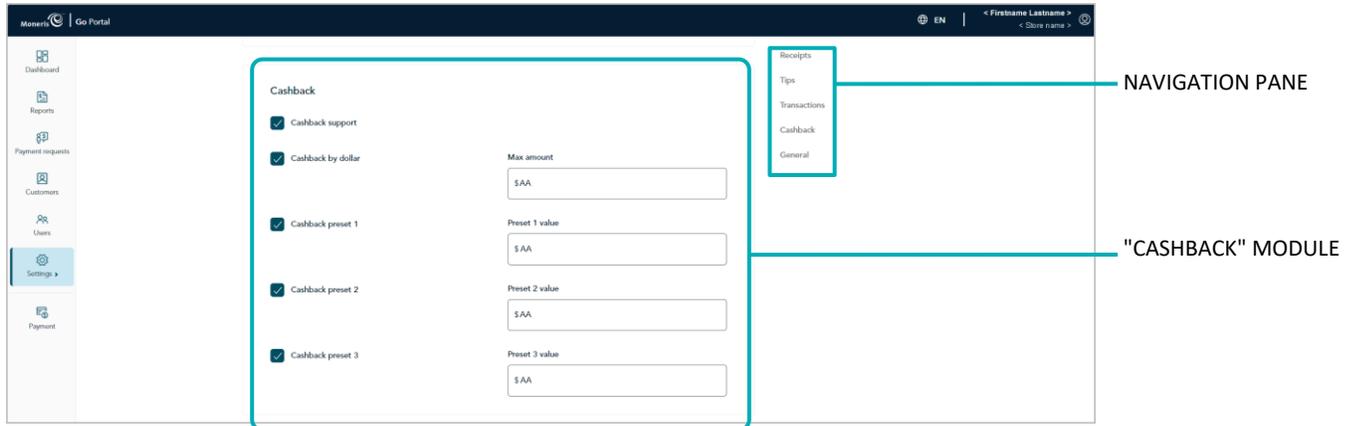
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "DX8000" terminal (Moneris Go Plus) before continuing to the next step.

**Note:** If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **DX8000** tab to display the settings for the "DX8000" terminal.



4. Scroll to the "Cashback" module (shown below), and configure the cashback settings as desired:

**Note:** To jump directly to the "Cashback" area, click on **Cashback** in the navigation pane (shown below).



### Cashback support

- a. Enable/disable cashback prompting on the Moneris Go Plus terminal:
  - To enable, checkmark the **Cashback support** box.
  - To disable, unmark the **Cashback support** box.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Cashback by dollar<sup>35</sup>

- a. Enable/disable the option for cardholders to enter a cashback amount on the Moneris Go Plus terminal to a maximum dollar amount that you define:
  - To enable, checkmark the **Cashback by dollar** box, and enter the maximum dollar amount limit in the **Max amount** field.
  - To disable, unmark the **Cashback by dollar** box.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated

<sup>35</sup> This option is supported only if "Cashback support" is enabled (see [Cashback support](#) above).

*terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

### **Cashback by preset**<sup>36</sup>

- a. Enable/disable the option for cardholders to select a pre-defined cashback dollar amount on the Moneris Go Plus terminal:

**Note:** *There are three pre-defined dollar amount settings; each can be configured/enabled independently.*

- To enable, checkmark the **Cashback preset #** box, and enter a dollar amount in the corresponding **Preset value** field.
- To disable, unmark the **Cashback preset #** box.

- b. Click on the **Save** button.

- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

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<sup>36</sup> This option is supported only if "Cashback support" is enabled (see [Cashback support](#) on page 182).

# Moneris Go Plus terminal: tip settings

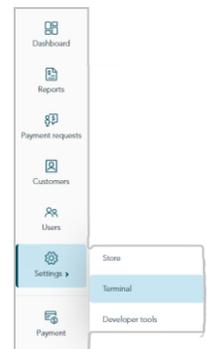
The steps below describe how to access the settings for tip prompting on all Moneris Go Plus terminals that are synched to your Moneris Go portal store. When enabled, tip prompting displays during Purchase and Preauthorization transactions.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go Plus terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 21).

**Note:** *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 29).*

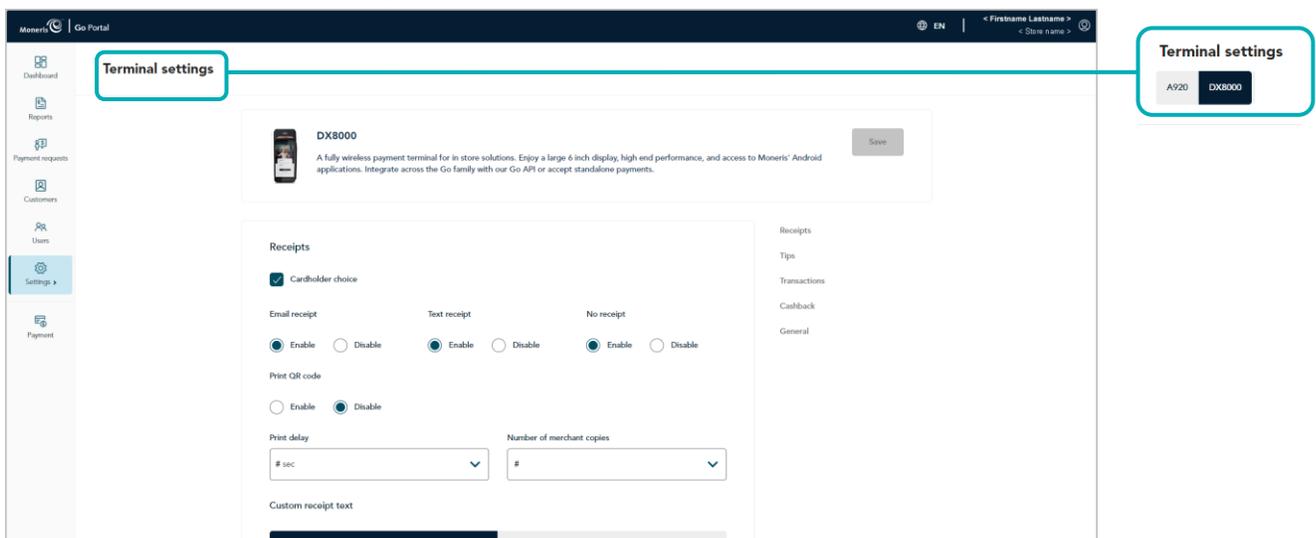
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

**Note:** *If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*



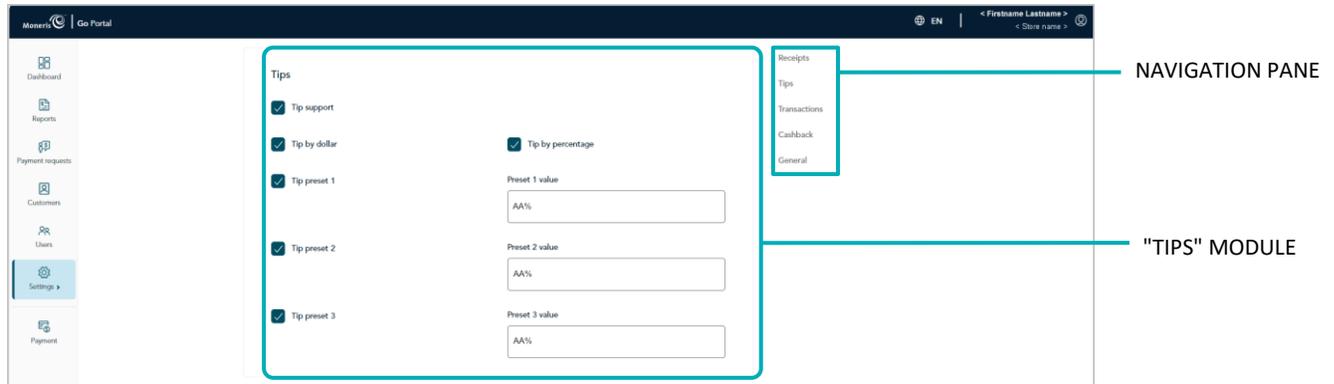
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "DX8000" terminal (Moneris Go Plus) before continuing to the next step.

**Note:** *If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **DX8000** tab to display the settings for the "DX8000" terminal.*



4. Scroll to the "Tips" module (shown below), and configure the tip settings as desired:

**Note:** To jump directly to the "Tips" module, click on **Tips** in the navigation pane (shown below).



### Tip support

- Enable/disable tip prompting on the Moneris Go Plus terminal:
  - To enable, checkmark the **Tip support** box.
  - To disable, unmark the **Tip support** box.
- Click on the **Save** button.
- When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

### Tip by dollar<sup>37</sup>

- Enable/disable the option for customers to enter a tip as a dollar amount on the Moneris Go Plus terminal:
  - To enable, checkmark the **Tip by dollar** box.
  - To disable, unmark the **Tip by dollar** box.
- Click on the **Save** button.
- When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

<sup>37</sup> This option is supported only if "Tip support" is enabled (see [Tip support](#) above).

### Tip by percent<sup>38</sup>

- a. Enable/disable the option for customers to enter a tip as a percentage on the Moneris Go Plus terminal:
  - To enable, checkmark the **Tip by percent** box.
  - To disable, unmark the **Tip by percent** box.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

### Tip by preset percentage<sup>39</sup>

- a. Enable/disable the option for customers to select a pre-defined tip percentage on the Moneris Go Plus terminal:

**Note:** *There are three pre-defined tip percentage settings; each can be configured/enabled independently.*

- To enable, checkmark the **Tip preset #** box, and enter a percentage value in the corresponding **Preset # value** field.
  - To disable, unmark the **Tip preset #** box.
- b. Click on the **Save** button.
  - c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

**Note:** *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

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<sup>38</sup> This option is supported only if "Tip support" is enabled (see [Tip support](#) on page 185).

<sup>39</sup> This option is supported only if "Tip by percent" is enabled (see [Tip by percent](#) above).



# End-of-Day Procedures

In this section, we go over everything you need to know to reconcile financial transactions in your daily batch.

## Verifying your daily batch totals

Debit, credit, and gift transactions that are processed through your Moneris Go portal store<sup>40</sup> are stored in a batch that closes automatically each day, usually at 11 pm based on your account region. Once the batch closes, Moneris can settle the transactions and transfer the funds to your business account.

To verify the daily batch total for your store, follow the steps below.

1. Any time after 7:00 am the next day (i.e., following the batch close date of the batch that you want to verify), log into the Merchant Direct<sup>®</sup> web portal (visit [moneris.com/mymerchantdirect](https://moneris.com/mymerchantdirect)).
2. Once you are logged in, select **Daily Transaction Report Menu**, and then select **Daily Batch Summary Report** to view the report.

**Moneris Go portal note:** Any data populating under Moneris Go portal's custom ID field/header in a Go portal receipt or report will always be listed under the header "Customer ID" in Merchant Direct's financial transactions reports regardless of the field/header label that is configured in Moneris Go portal (see [Custom ID: store settings](#) on page 124).

3. Compare the batch summary report with your receipts or other business records:

**If there are no discrepancies between the report and your records:**

- a. No further action is required.

**If there are discrepancies between the report and your records:**

- a. Call Moneris Customer Care toll-free at **1-866-319-7450** now or the next business day to obtain assistance with reconciliation.

---

<sup>40</sup> Includes all transactions performed on terminals that are synched to your store and transactions initiated through a Moneris Checkout integration.



# Developer Tools

In this section, we present some of our  
ecommerce integration options.

## Integration options

### Moneris Checkout

For information on Moneris Checkout integration, please refer to the ***Moneris Checkout Using the Moneris Go portal's MCO Configurator Reference Guide***, available for download from <https://www.moneris.com/en/support/moneris-go/moneris-go-portal>

### Hosted tokenization

For information on Moneris hosted tokenization integration, please refer to the ***Moneris Hosted Tokenization Creating a profile in Moneris Go portal Reference Guide***, available for download from <https://www.moneris.com/en/support/moneris-go/moneris-go-portal>



4. If you want to copy the API token to your device's clipboard:

a. Click on the **Copy**  icon.

b. When the "API Token copied" response displays, the operation is complete.

**Important! To prevent your API token from being compromised, do not share it over email, text message, etc.**



# Troubleshooting

In this section, we go over everything you need to know to troubleshoot your Moneris Go portal issues.

## Troubleshooting issues

Review the table below to find a solution to your Moneris Go portal issue. If you cannot find a resolution to your issue, please use the Moneris Go portal feedback form to submit a request for assistance (see [Sending feedback/requesting assistance while logged in](#) on page 195).

Issue	Solution
<p>You did not receive your Moneris Go portal activation email.</p>	<ol style="list-style-type: none"> <li>1. Confirm that your email spam filter is not blocking the activation email.</li> <li>2. If you still have not received your email, confirm that your Moneris Go portal store administrator added a user account for you and they registered the correct email address.  <b>Note:</b> To verify your account setup, your administrator can click on <b>Users</b> in the sidebar menu, locate your user account listing, and review the email registered to your account.</li> <li>3. If your administrator registered the incorrect email address, have them add a new account for you with the correct email address.  <b>Note:</b> To add the new user account, the administrator must follow the <a href="#">Adding a new user account</a> procedure (page 127).</li> </ol>
<p>You added a new user account through your Moneris Go portal store, but the user account status indicates "Pending".</p>	<ol style="list-style-type: none"> <li>1. A user account's status will indicate "Pending" until the intended user receives/opens their activation email, clicks on the link contained in the message, and follows the activation prompts to activate the account.</li> <li>2. Once the user account is activated, its status as shown on the "Users" page will indicate the account is "Active".  <b>Note:</b> To verify the account status, click on <b>Users</b> in the sidebar menu, locate the user account listing, and review its "STATUS" indicator.</li> </ol>
<p>You forgot your Moneris Go portal login password.</p>	<ol style="list-style-type: none"> <li>1. Reset your password (see <a href="#">Forgot your login password?</a> on page 24).</li> </ol>

## Sending feedback/requesting assistance while logged in

If you are logged into the Moneris Go portal and are already within (accessing) a store, <sup>41</sup> follow the steps below to use the Moneris Go portal feedback form to send us your feedback and/or request assistance.

**Note:** You can also find solutions to issues related to activation emails, user accounts, and password resets. For these solutions and more, please review the [Troubleshooting issues](#) section (page 194).

1. From any page in your store, click on your user account  tile, which displays in the top right corner of the page header (shown below).

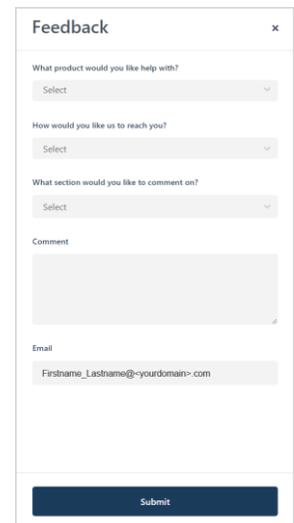


2. When the user account menu displays (shown below), click on **Feedback**.



3. When the "Feedback" window displays (shown here), fill in the information fields to complete the form:

- a. Click on the "What product would you like help with?" drop-down, and select the desired product (**Moneris Go Portal** or **Moneris Go Terminal**).
- b. Click on the "How would you like us to reach you?" drop-down, and select the desired contact method (**Phone**, **Email**, or **No Response Required**).
- c. Click on the "What section would you like to comment on?" drop-down, and select the comment descriptor (**General comment/inquiry**, **Technical issues**, or **Enhancement suggestions**).
- d. In the **Comment** field, enter additional supporting information.
- e. If you selected "Phone" as the contact method (step 3b), enter your contact phone number in the **Phone** field.

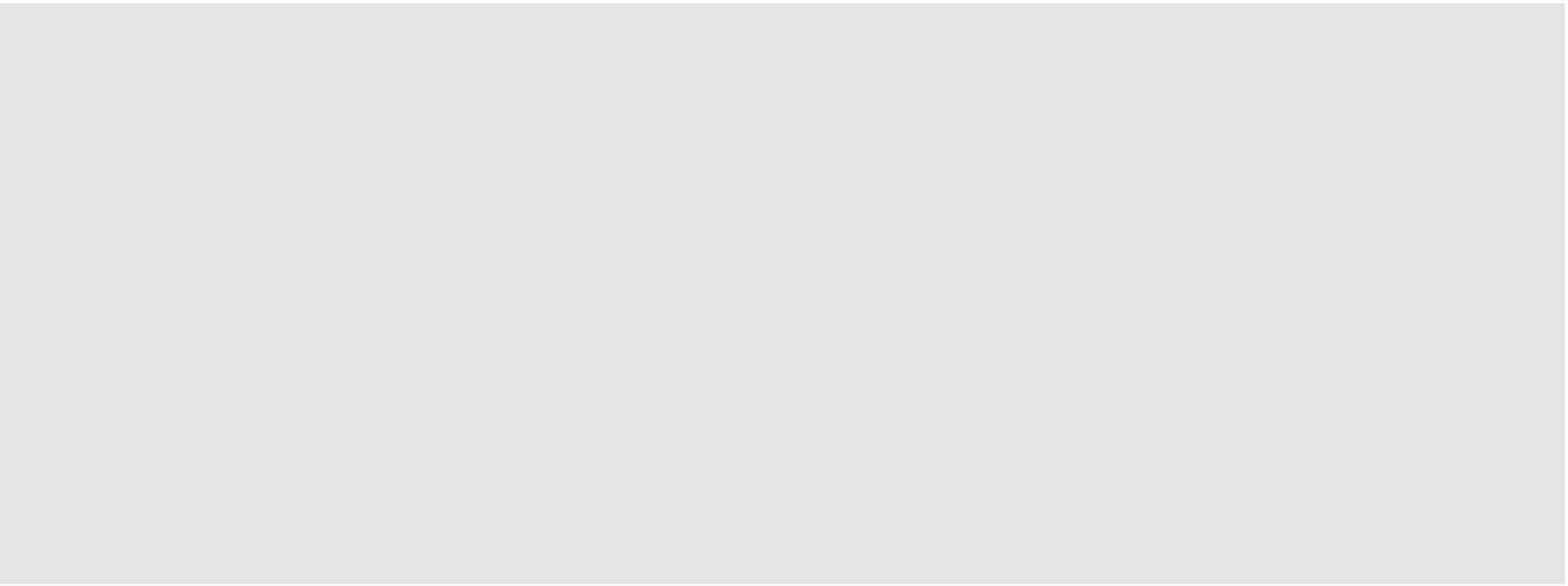
A screenshot of the "Feedback" form. It has a title "Feedback" and a close button "x". The form contains three drop-down menus: "What product would you like help with?", "How would you like us to reach you?", and "What section would you like to comment on?". Below these is a "Comment" text area, an "Email" field with a pre-filled address "Firstname\_Lastname@-yourdomain-.com", and a "Submit" button at the bottom.

4. Click on the **Submit** button to send us the completed form.

<sup>41</sup> For instructions on how to log in and access a store, see [Logging into the Moneris Go portal](#) (page 21).



# Appendix



## Channel indicator descriptions

The "Channel" is defined as the device, application, or ecommerce integration through which payment data were originally captured prior to being sent to the Moneris host for processing as a transaction. The table below describes the channel indicators supported in Moneris Go portal.

### Where to locate the "Channel" indicator in Moneris Go portal

The "Channel" indicator displays as a standard header in the financial transaction report (see [Financial transactions report](#) on page 55) and as line item on the "Transaction details" page of any transaction (see [Transaction details](#) on page 57) and on the "Payment request details" page of a paid payment request (see [Payment request details](#) on page 92).

Channel	Description
<b>Cash</b>	The approved/declined cash transaction (Purchase or Refund) was originally initiated via your Moneris Go portal store's virtual terminal (see <a href="#">Purchase with cash</a> on page 37; and see <a href="#">Refund: manual entry</a> on page 47), or the cash transaction was initiated via a POS device (Go terminal or Go Plus terminal) that is synchronized to your store.
<b>E-commerce (Moneris Checkout)</b>	The approved/declined transaction (debit, credit, or gift) was initiated via a Moneris Checkout integration with your Moneris Go portal store (see <a href="#">Moneris Checkout</a> on page 190).
<b>E-commerce API</b>	The approved/declined transaction (debit, credit, or gift) was initiated via an ecommerce integration with your Moneris Go portal store using a third-party plug-in or cartridge (e.g., Shopify, SAP Digital Payments, or Salesforce B2C Commerce) to facilitate the integration.
<b>Go Retail POS</b>	The approved/declined transaction (debit, credit, or gift) was initiated via a POS device (Go terminal or Go Plus terminal) that is synchronized to your Moneris Go portal store, and this store is enabled for Go Retail POS.
<b>Payment request</b>	The approved/declined Purchase (credit) was originally initiated via a customer paying a payment request that was issued from your Moneris Go portal store (see <a href="#">Paying a payment request</a> on page 95).
<b>Terminal</b>	The approved/declined transaction (debit, credit, or gift) was originally initiated via a POS device (Go terminal or Go Plus terminal) that is synchronized to your Moneris Go portal store, and this store is not enabled for Go Retail POS.
<b>Vault</b>	The approved/declined Verification transaction (zero-dollar credit) was originally auto-initiated when a Vault customer profile was saved in your Moneris Go portal store (see <a href="#">Verification transaction: Vault customer profile</a> on page 110).

Channel	Description
<b>Virtual terminal</b>	<p>The approved/declined transaction (credit) was originally initiated from your Moneris Go portal store's virtual terminal:</p> <ul style="list-style-type: none"> <li>▪ see <a href="#">Purchase with credit card: manual entry</a> (page 35)</li> <li>▪ see <a href="#">Preauthorization with credit card: manual entry</a> (page 38)</li> <li>▪ see <a href="#">Completion with credit card: manual entry</a> (page 40)</li> <li>▪ see <a href="#">Void: manual entry</a> (page 44)</li> <li>▪ see <a href="#">Refund: manual entry</a> (page 47)</li> <li>▪ see <a href="#">Independent Refund with credit card: manual entry</a> (page 50)</li> </ul>
<b>WIX payment</b>	<p>The approved/declined transaction was originally initiated via a WIX ecommerce integration with your Moneris Go portal store.</p>

## Ecommerce indicator descriptions

The ecommerce indicator (ECI) specifies the level of security that was used to obtain the cardholder's payment data. The table below describes the electronic commerce indicators supported in Moneris Go portal.

### Where to locate the ecommerce indicator in Moneris Go portal

The ecommerce indicator displays as a standard line item on the "Transaction details" page of any transaction (see [Transaction details](#) on page 57) and on the "Payment request details" page of a paid payment request (see [Payment request details](#) on page 92).

ECI	Description
<b>M - Manually Keyed Card Present</b>	-
<b>0 - Not an electronic commerce transaction</b>	-
<b>1 - Mail/Telephone Order - Single</b>	Cardholder provides credit card details via phone or on paper. Authorizes the use of the card for one payment.
<b>2 - Mail/Telephone Order - Recurring</b>	Cardholder provides credit card details via phone or on paper. Authorizes the use of the card for multiple payments processed at predetermined intervals.
<b>3 - Mail/Telephone Order - Instalment</b>	Cardholder provides credit card details via phone or on paper. Authorizes the use of the card for a single payment of goods or services billed to the card in multiple segments over a period of time.
<b>4 - Mail/Telephone Order</b>	Unknown classification: Cardholder provides credit card details via phone or on paper. Transaction type is unknown at time of authorization – may be one time or multiple payments.
<b>5 - Fully Authenticated - 3D Secure</b>	Applicable to ecommerce transactions whereby the cardholder provides their card data over the Internet on a secure site and authenticates their identity via 3-D Secure.
<b>6 - Authentication Attempted - 3D Secure</b>	Applicable to ecommerce transactions whereby the cardholder provides their card data over the Internet on a secure site and attempts to authenticate their identity via 3-D Secure.
<b>7 - SSL Transaction (Not Authenticated)</b>	Applicable to ecommerce transactions whereby the cardholder provides their card data over the Internet on a secure site.

## Custom ID: list of transactions and reports

The custom transaction identifier (custom ID) field/header is configurable from your Moneris Go portal "Store settings" page (see [Custom ID: store settings](#) on page 124). The custom ID may be featured in the following Moneris Go portal financial transactions, reports, and receipts as described below:

### Virtual terminal transactions

If a custom ID is enabled, you will have the opportunity to enter/append a custom ID during these transactions:

- Purchase (see [Purchase with credit card: manual entry](#) on page 35; see [Purchase with cash](#) on page 37).
- Preauthorization (see [Preauthorization with credit card: manual entry](#) on page 38).
- Independent Refund (see [Independent Refund with credit card: manual entry](#) on page 50).

Follow-on transactions (listed below) inherit the custom ID from their predecessor transaction:

- Void (see [Void: manual entry](#) on page 44).
- Refund (see [Refund: manual entry](#) on page 47).
- Completion (see [Completion with credit card: manual entry](#) on page 40).

### Payment requests

If a custom ID is enabled, you will have the opportunity to enter/append a custom ID to a new or draft payment request prior to sending it (see [Sending a payment request](#) on page 83).

### Reports/receipts

The custom ID appears as a header or line-item in reports, transaction details, and receipts:

- Transactions report (see [Financial transactions report](#) on page 55).
- "Transaction details" page (see [Transaction details](#) on page 57).

Debit/credit receipt (see [Receipt example: debit/credit](#) on page 73).



# 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 <https://www.moneris.com/en/support/moneris-go/moneris-go-portal> to download copies of this reference guide and to access the online help version of this documentation.
- Visit [shop.moneris.com](https://shop.moneris.com) to purchase point-of-sale supplies and receipt paper.
- Visit [moneris.com/insights](https://moneris.com/insights) for business and payment news, trends, customer success stories, and quarterly reports & insights.

Need us on-site? We'll be there.

One call and a knowledgeable technician can be on the way. Count on minimal disruptions to your business as our Field Services provide assistance with your payment terminals.

Can't find what you are looking for?

- Email [onlinepayments@moneris.com](mailto:onlinepayments@moneris.com) or call Moneris Customer Care toll-free (available 24/7) at **1-866-319-7450**. We'll be happy to help.
- You can also send us a secure message 24/7 by logging into Merchant Direct at [moneris.com/mymerchantdirect](https://moneris.com/mymerchantdirect).



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(05/2024)