Moneris® Go portal

Reference Guide

Don't have an account yet? Create account

(11/2024)

Need help (general)?

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

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 194)

Record your Moneris® merchant ID here:

____

Contents

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 or your 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
- Pop-up blocker disabled
- Internet access
- Valid email address (for use in setting up your user account)

2 Set up your account

Are you the primary user?

The primary user holds the merchant account.

Signing up for a merchant account via digital enrollment (self-enrollment)	Signing up for a merchant account via open enrollment
a. If you are a prospective Moneris merchant, please enroll for your merchant account using the Moneris online order portal (visit **https://ordernow.moneris.com/**). OR If you are already self-enrolled as a Merchant Direct user, proceed to Activating a Moneris Go portal user account: Merchant Direct user (page 21).	a. Contact us to establish your Moneris merchant account. b. **If you DO NOT have a Merchant Direct user account:** ▪ Proceed to Enabling Moneris Go portal access via Moneris Portal's "create account" tool (page 10). **If you HAVE a Merchant Direct user account:** ▪ Proceed to Activating a Moneris Go portal user account: Merchant Direct user (page 21).

Are you a secondary user?

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

a. Activate your user account (see Activating your Moneris Go portal user account via activation email on page 16).

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

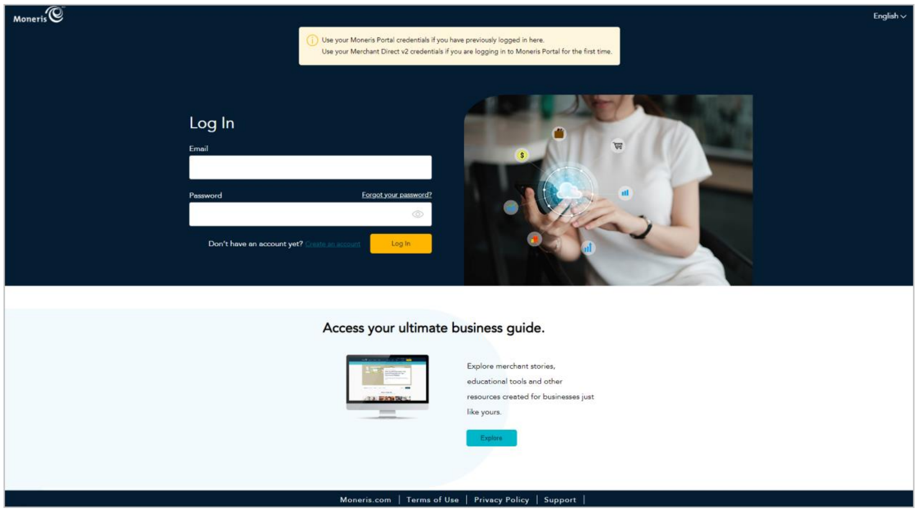
You can log in and start using the Moneris Go portal features and functions (e.g., define your store settings, add new users, perform financial transactions, etc.).

- See List of Moneris Go portal features and functions (page 26).

Enabling Moneris Go portal access via Moneris Portal's "create account" tool

If you enrolled for your Moneris merchant account via the open enrollment process (see How to get started on page 9) and you DO NOT have a Merchant Direct user account, follow the steps below to simultaneously create your Moneris Go portal user account and enable access to Moneris Portal, our single sign-on platform. Through Moneris Portal, you will have access to the Moneris Go portal application.

1. Before you begin, please ensure that you have your 13-digit merchant ID and store ID (these IDs were sent to you in your Welcome letter/email or can be found in your Moneris statement).
2. Visit **https://login.moneris.com/en/login** to start on the Moneris Portal "Log In" page (shown below).

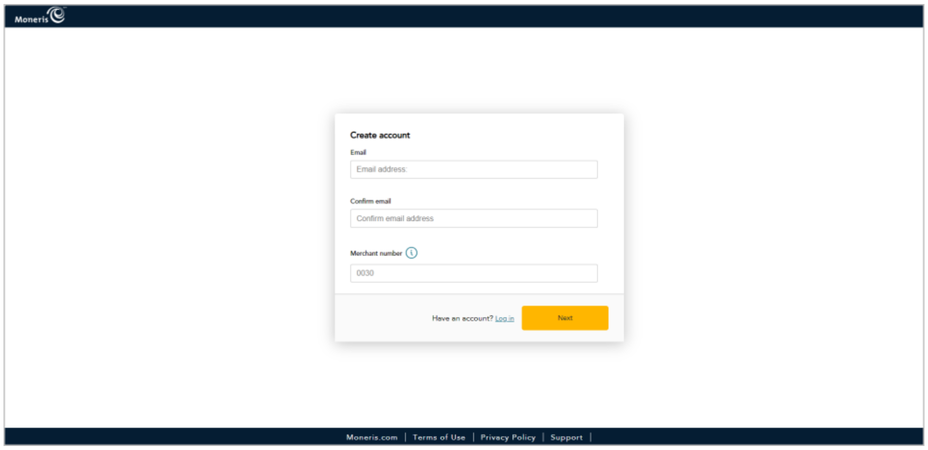


Use your Moneris Portal credentials if you have previously logged in here.
Use your Merchant Direct v2 credentials if you are logging in to Moneris Portal for the first time.

Explore merchant stories, educational tools and other resources created for businesses just like yours.

3. Click on **Create an account**.

4. When the "Create account" page displays (shown below), fill in the fields:



   a. In the **Email** field, enter your email address.
   b. In the **Confirm email** field, re-enter the email address that you entered in the previous step.

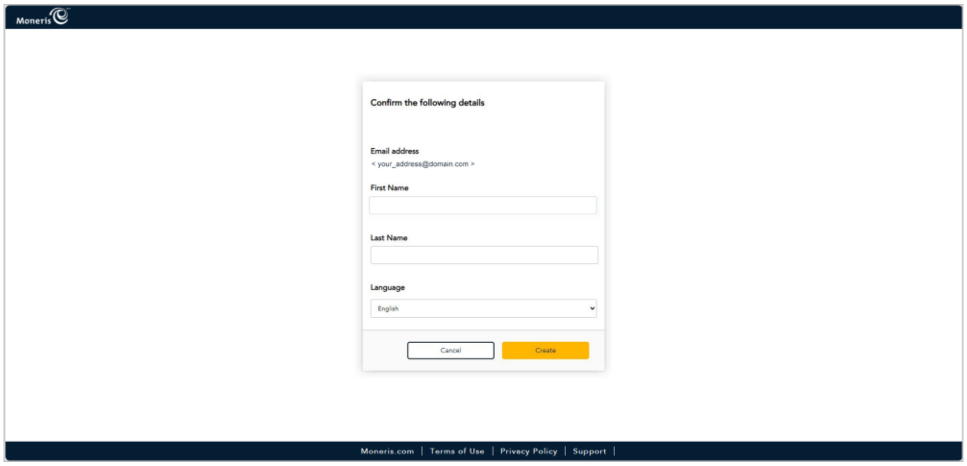
   Note: *When your Moneris Portal user account is created, this address will serve as your Moneris Portal login ID.*

c. In the **Merchant number** field, enter only the last nine digits of your 13-digit merchant ID (do not enter the first four digits "0030" of the merchant ID).

   Note: *Please refer to your Moneris statement or Welcome letter/email for your merchant ID.*

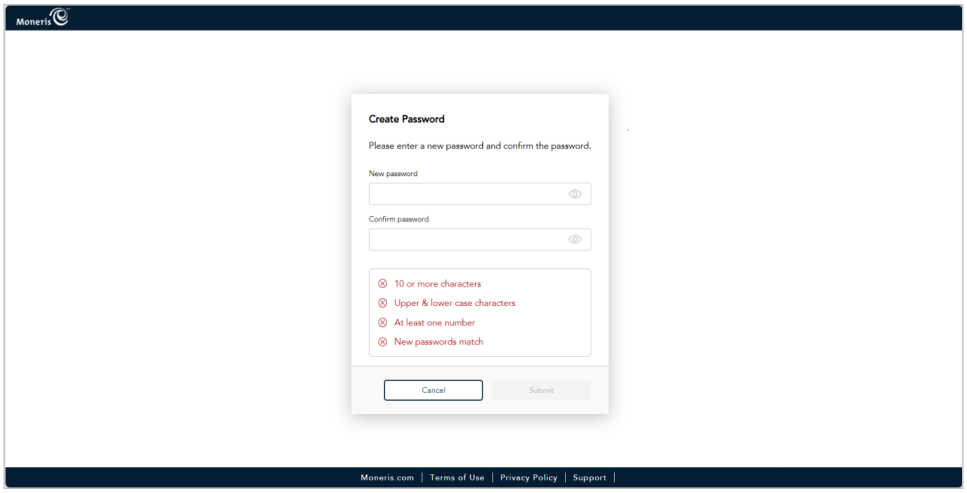
d. Click on the **Next** button.

5. When the "Confirm the following details" dialog displays (shown below), do the following:



   a. In the **First Name** field, enter your first name.
   b. In the **Last Name** field, enter your surname.
   c. In the "Language" drop-down, select the default display language (**English** or **French**) in which to continue the account setup.
   d. Click on the **Create** button, and wait for a response.

6. When the "Create Password" dialog displays (shown below), create your Moneris Portal login password:



a. In the **New password** field, enter the password that you will use to log into Moneris Portal.

   Note: *The password must adhere to these requirements:*

   - *10 or more characters in length*
   - *Include uppercase and lowercase characters*
   - *Include at least one number*

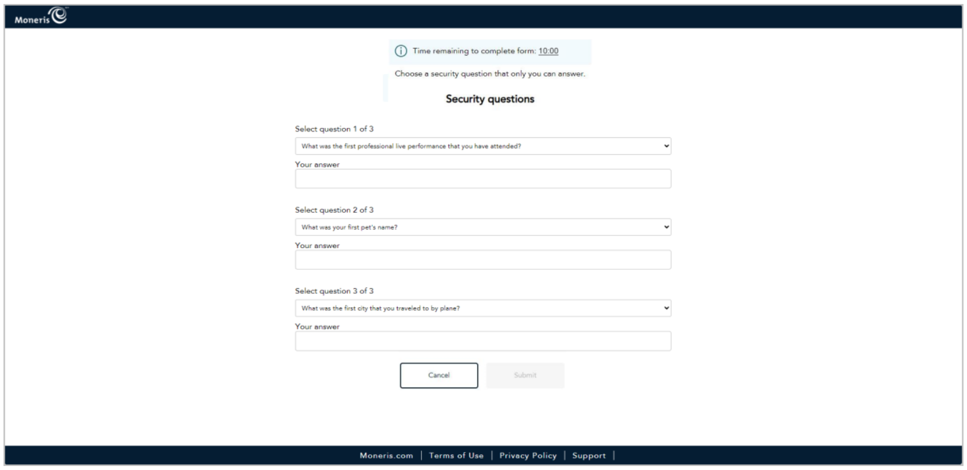
b. In the **Confirm new password** field, re-enter the password.

   Note: *The data in the "Confirm new password" field must match the data in the "New password" field.*

c. Click on the **Submit** button, and wait for a response.

7. When the "Security questions" page displays (shown below), configure your security questions and answers:

   Note: *You have up to 10:00 minutes to configure your security questions answers. If you cannot configure your security questions before the time elapses, you will be directed to restart the migration process again.*



Time remaining to complete form: 10:00

Choose a security question that only you can answer.

Select question 1 of 3: What was the first professional live performance that you have attended?

Your answer

Select question 2 of 3: What was your first pet's name?

Your answer

Select question 3 of 3: What was the first city that you traveled to by plane?

Your answer

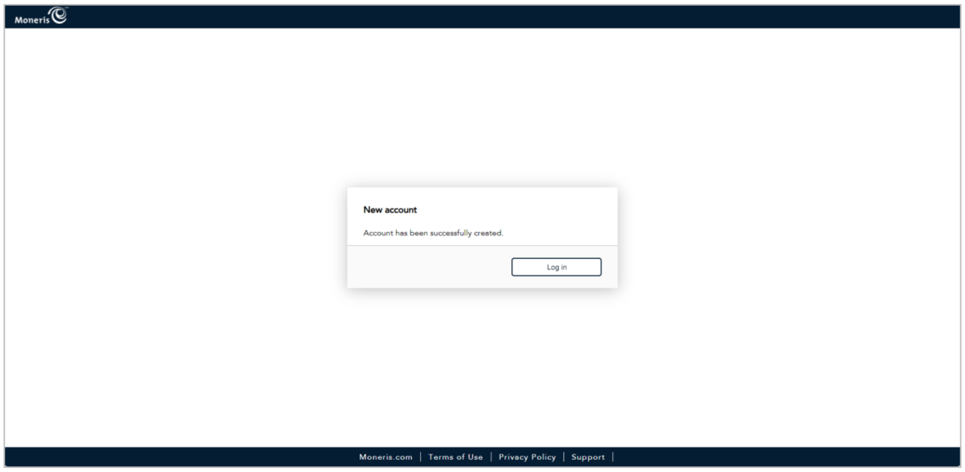
a. Click on each of the **Security question # of #** drop-downs, and select a security question.

b. In each **Your answer** field, enter an answer to the corresponding security question you selected.

   Note: *If you need to reset your Moneris Portal password, Moneris Portal will prompt you to answer one of these security questions as a means of authenticating your identity.*

c. Click on the **Submit** button, and wait for a response.

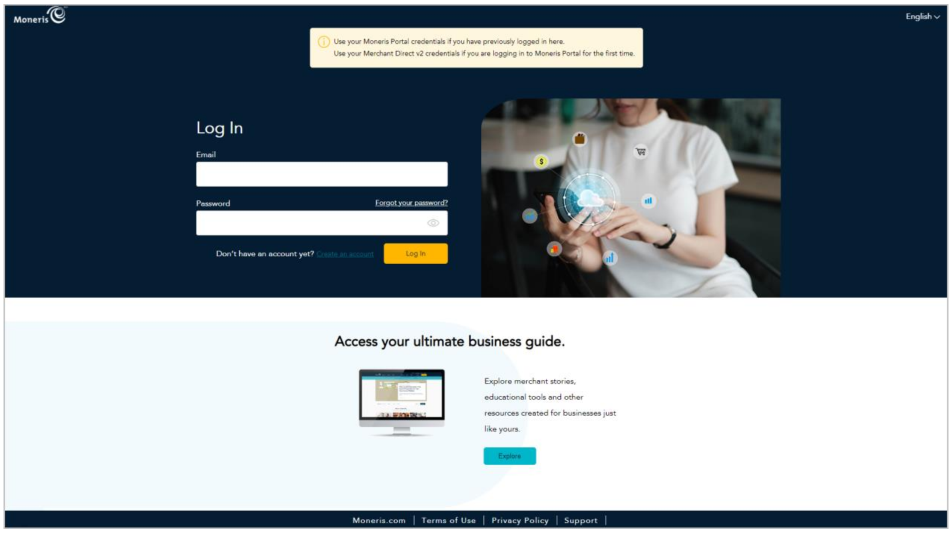
8. When the "Account has been successfully created" dialog displays (shown below), click on its **Log in** button.



Account has been successfully created.

9. When the Moneris Portal "Log In" page displays (shown below), enter your Moneris Portal credentials:

   Note: *You can access this page by visiting **https://login.moneris.com/en/login**.*



Use your Moneris Portal credentials if you have previously logged in here.
Use your Merchant Direct v2 credentials if you are logging in to Moneris Portal for the first time.

Explore merchant stories, educational tools and other resources created for businesses just like yours.

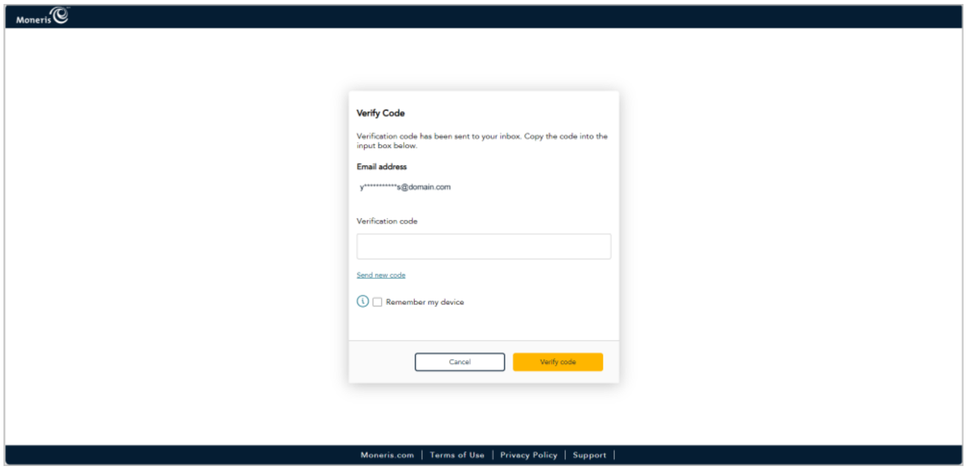
   a. In the **Email** field, enter the email address that you registered during your account setup in step 4 (page 10) of this procedure.

   b. In the **Password** field, enter the password that you created in step 6 (page 11) of this procedure.

   c. Click on the **Log In** button, and wait for a response.

10. When the "Verify Code" dialog displays (shown below), it means we have sent a 6-digit authentication code to the inbox for your Moneris Portal login email address. Do the following:

    Note: *If you want us to send a new code, click on **Send new code**.*



Verify Code

Verification code has been sent to your inbox. Copy the code into the input box below.

Email address

y************s@domain.com

Verification code

a. Open the "Moneris verification code" message in your inbox, and copy the 6-digit code (shown below) to your device's clipboard.

English version *** La version française suit ***

Secure your account

Your Moneris Portal verification code is:

123456

If you did not request the account setup, please contact Moneris at 1-866-319-7450.

This is automated message. Please do not reply.

Have questions?

We're here to help

Get online support

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Version française *** The English version precedes ***

Sécurisez votre compte

Votre code de vérification Moneris:

123456

Si vous n'avez pas demandé la création d'un compte, veuillez contacter Moneris à 1-866-319-7450.

Ceci est un message automatique. Veuillez ne pas y répondre.

Vous avez des questions?

Nous sommes là pour vous aider.

Obtenir de l'aide en ligne

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6-DIGIT CODE

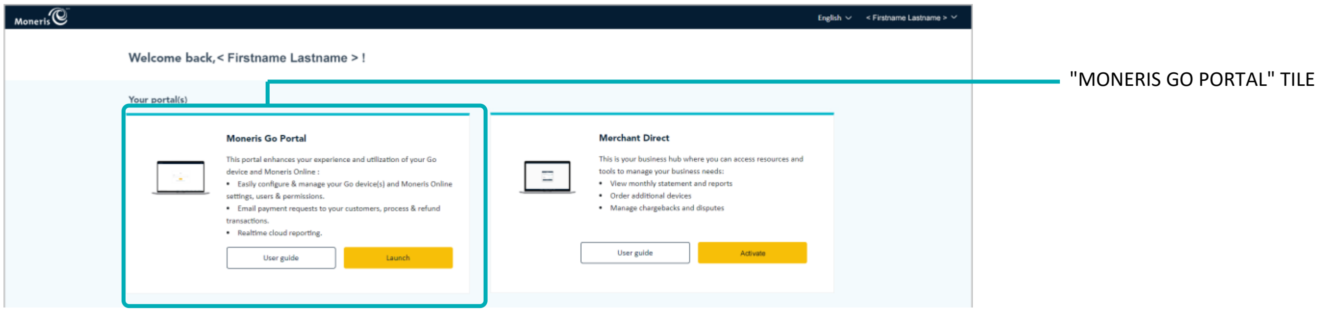
b. Paste the code in the "Verify Code" dialog's **Verification code** field.

    - If you do not want to be prompted to enter a verification code each time you log in from the same device and browser, checkmark the **Remember my device** box in the dialog.

      Note: *If enabled (checkmarked), this setting is effective up to 30 days so long as you log in from the same device and browser. After 30 days has elapsed, Moneris Portal will again prompt you for 2-factor authentication. When this happens, you may opt to re-enable the "Remember my device" setting.*

c. Click on the **Verify code** button in the "Verify Code" dialog, and wait for a response.

11. When the "Your portal(s)" page displays (shown partially below), click on the "Moneris Go Portal" tile's **Launch** button to launch the Moneris Go portal application.



Welcome back,< Firstname Lastname > !

Your portal(s)

Moneris Go Portal

This portal enhances your experience and utilization of your Go device and Moneris Online :

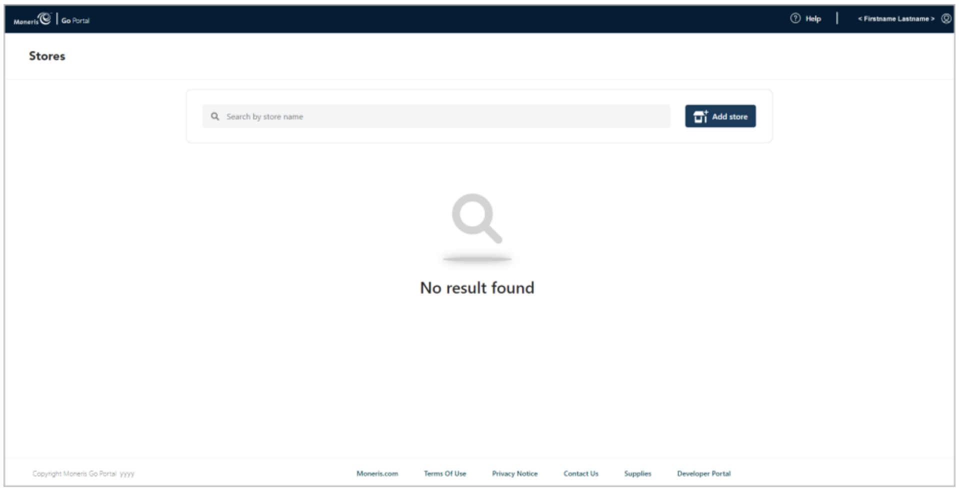
- Easily configure & manage your Go device(s) and Moneris Online settings, users & permissions.
- Email payment requests to your customers, process & refund transactions.
- Realtime cloud reporting.

Merchant Direct

This is your business hub where you can access resources and tools to manage your business needs:

- View monthly statement and reports
- Order additional devices
- Manage chargebacks and disputes

12. When the "Stores" page displays (shown below), continue in Adding the first store to the primary user account (page 24).



Stores

No result found

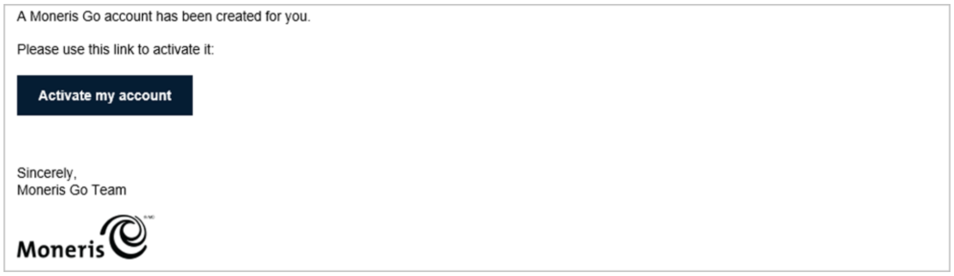
Copyright Moneris Go Portal yyyy

Activating your Moneris Go portal user account via activation email

If you received a Moneris Go activation email in your inbox (see How to get started on page 9), follow the steps below to activate your Moneris Go portal user account. Once your user account is activated, you will access the Moneris Go portal application through Moneris Portal, our single sign-on platform.

1. Open the "User account activation" email in your inbox, and click on the **Activate my account** link/button contained in the message (shown below).

   Note: *If you did not receive your activation email, see Troubleshooting issues (page 193).*

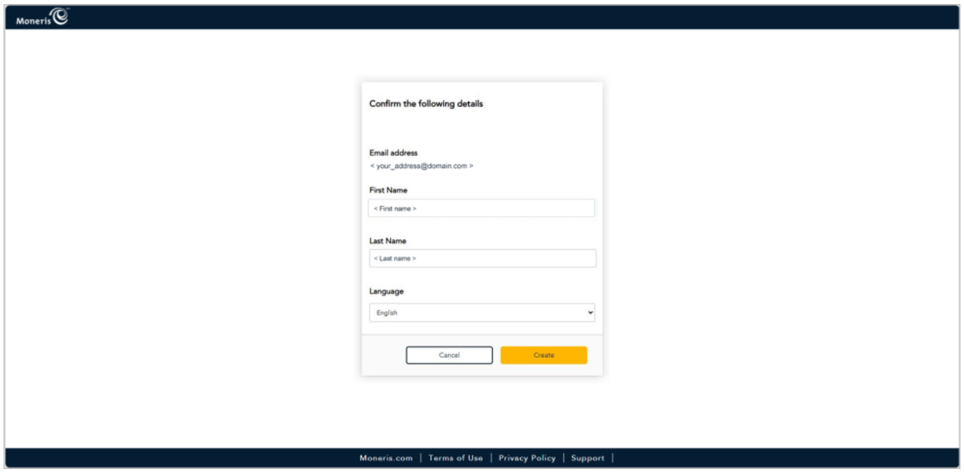


A Moneris Go account has been created for you.

Please use this link to activate it:

Sincerely,
Moneris Go Team

2. When the "Confirm the following details" dialog displays (shown below), do the following:



Confirm the following details

Email address
< your_address@domain.com >

First Name
< First name >

Last Name
< Last name >

Language
English

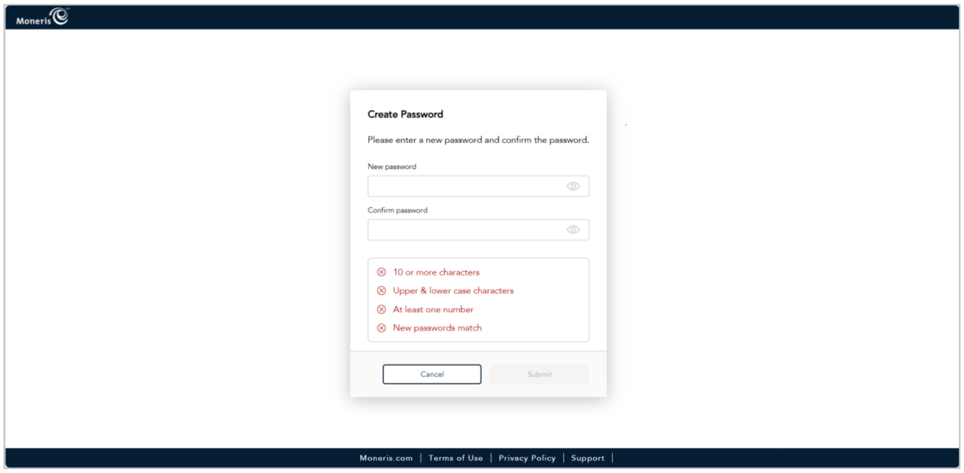
   a. Confirm that the information pre-filling the **First Name** field and the **Last Name** field is correct.

      Note: *If desired, you can edit the information in any of these data fields.*

   b. In the "Language" drop-down, select the default display language (**English** or **French**) in which to continue the migration.

   c. Click on the **Create** button, and wait for a response.

3. When the "Create Password" dialog displays (shown below), do the following:



Please enter a new password and confirm the password.

⊗ 10 or more characters
⊗ Upper & lower case characters
⊗ At least one number
⊗ New passwords match

   a. In the **New password** field, enter the password that you will use to log into Moneris Portal.

      Note: *The password must adhere to these requirements:*

      - *10 or more characters in length*
      - *Include uppercase and lowercase characters*
      - *Include at least one number*

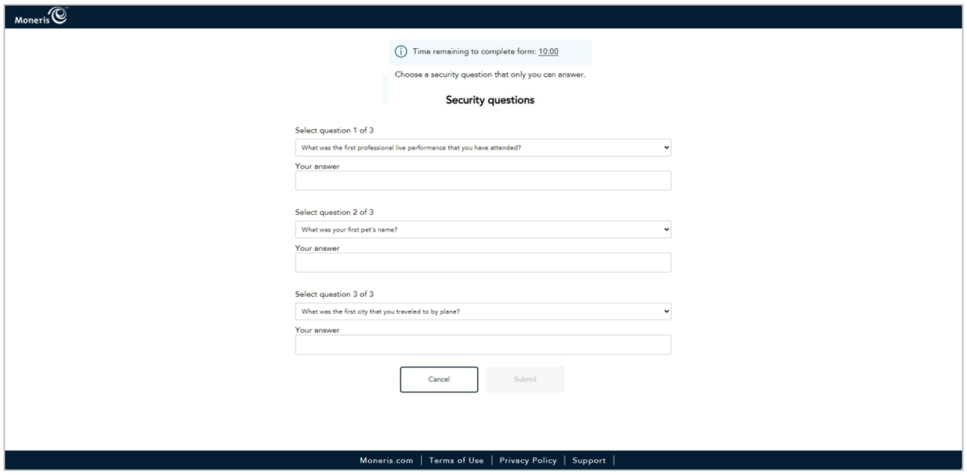
   b. In the **Confirm new password** field, re-enter the password.

      Note: *The data in the "Confirm new password" field must match the data in the "New password" field.*

   c. Click on the **Submit** button, and wait for a response.

4. When the "Security questions" page displays (shown below), configure your security questions and answers:

   Note: *You have up to 10:00 minutes to configure your security questions answers. If you cannot configure your security questions before the time elapses, you will be directed to restart the migration process again.*



Time remaining to complete form: 10:00

Choose a security question that only you can answer.

Security questions

Select question 1 of 3: What was the first professional live performance that you have attended?

Your answer

Select question 2 of 3: What was your first pet's name?

Your answer

Select question 3 of 3: What was the first city that you traveled to by plane?

Your answer

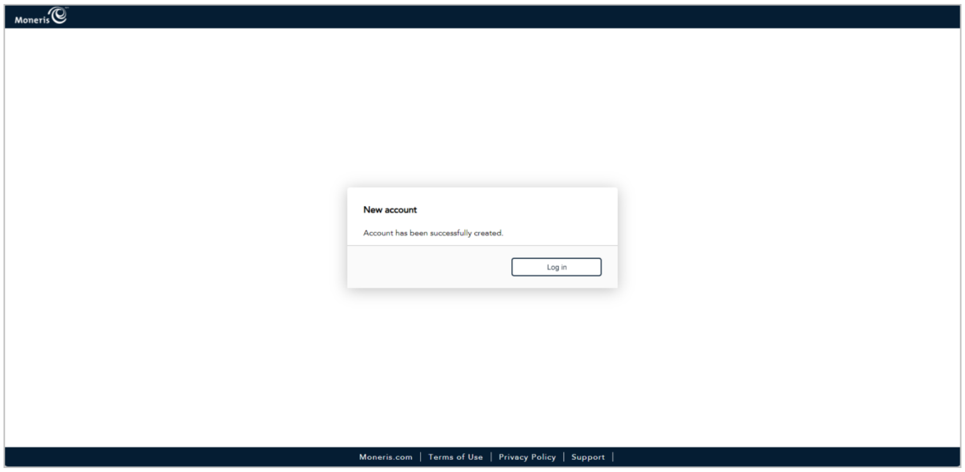
   a. Click on each of the **Security question # of #** drop-downs, and select a security question.

   b. In each **Your answer** field, enter an answer to the corresponding security question you selected.

      Note: *If you need to reset your Moneris Portal password, Moneris Portal will prompt you to answer one of these security questions as a means of authenticating your identity.*

   c. Click on the **Submit** button, and wait for a response.

5. When the "Account has been successfully created" dialog displays (shown below), click on its **Log in** button.

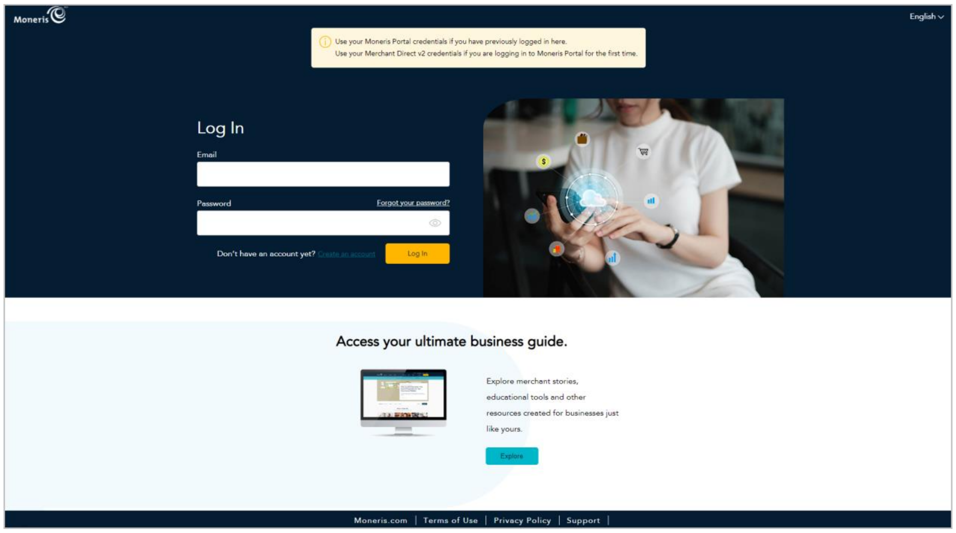


New account

Account has been successfully created.

6. When the Moneris Portal "Log In" page displays (shown below), enter your Moneris Portal credentials:

   Note: *You can access this page by visiting **https://login.moneris.com/en/login**.*



Use your Moneris Portal credentials if you have previously logged in here.
Use your Merchant Direct v2 credentials if you are logging in to Moneris Portal for the first time.

Access your ultimate business guide.

Explore merchant stories, educational tools and other resources created for businesses just like yours.

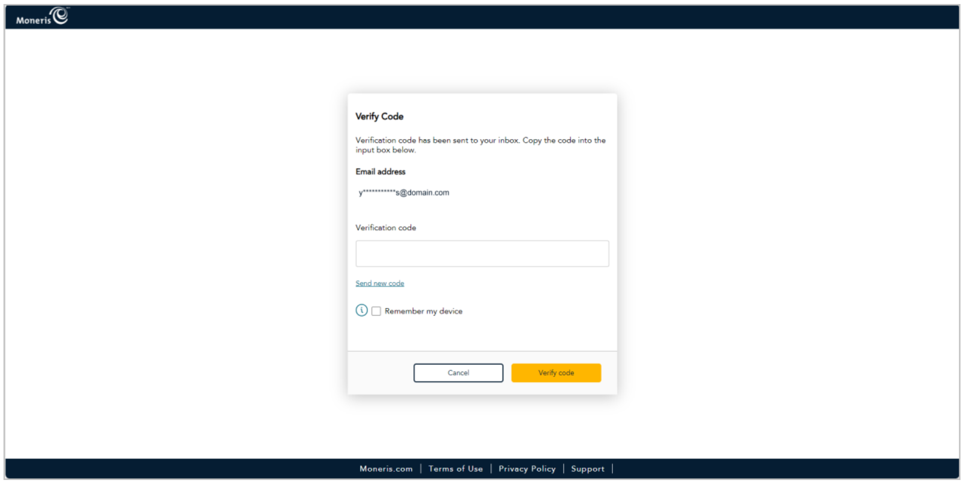
   a. In the **Email** field, enter the email address to which we sent your account activation email.

   b. In the **Password** field, enter the password that you created in step 2 of this procedure.

   c. Click on the **Log In** button, and wait for a response.

7. When the "Verify Code" dialog displays (shown below), it means we have sent a 6-digit authentication code to the inbox for your Moneris Portal login email address. Do the following:

   Note: *If you want us to send a new code, click on **Send new code**.*



Verify Code

Verification code has been sent to your inbox. Copy the code into the input box below.

Email address: y************s@domain.com

a. Open the "Moneris verification code" message in your inbox, and copy the 6-digit code (shown below) to your device's clipboard.

b. Paste the code in the "Verify Code" dialog's **Verification code** field.

   - If you do not want to be prompted to enter a verification code each time you log in from the same device and browser, checkmark the **Remember my device** box in the dialog.

     Note: *If enabled (checkmarked), this setting is effective up to 30 days so long as you log in from the same device and browser. After 30 days has elapsed, Moneris Portal will again prompt you for 2-factor authentication. When this happens, you may opt to re-enable the "Remember my device" setting.*

c. Click on the **Verify code** button in the "Verify Code" dialog, and wait for a response.

English version *** La version française suit ***

Secure your account

Your Moneris Portal verification code is:

123456

If you did not request the account setup, please contact Moneris at 1-866-319-7450.

This is automated message. Please do not reply.

Have questions?

We're here to help

Get online support

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Version française *** The English version precedes ***

Sécurisez votre compte

Votre code de vérification Moneris:

123456

Si vous n'avez pas demandé la création d'un compte, veuillez contacter Moneris à 1-866-319-7450.

Ceci est un message automatique. Veuillez ne pas y répondre.

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Nous sommes là pour vous aider.

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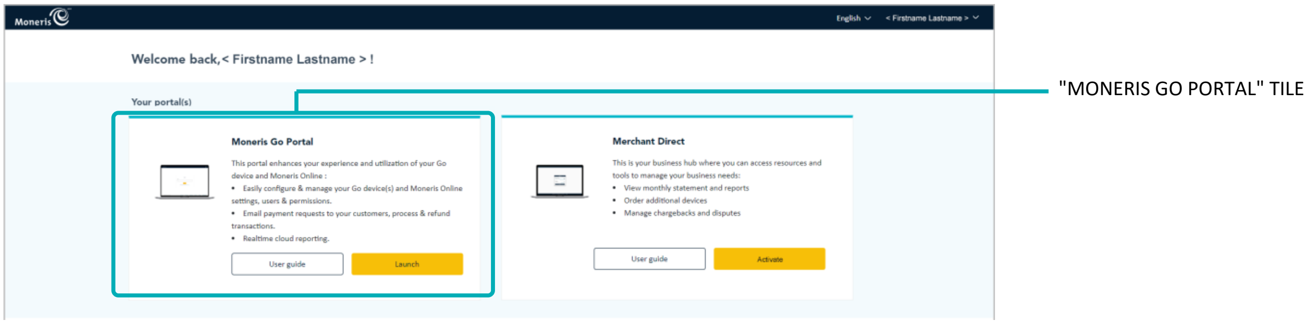
8. When the "Your portal(s)" page displays (shown partially below), click on the "Moneris Go portal" tile's **Launch** button to start a login session in the Moneris Go portal application.



Welcome back,< Firstname Lastname > !

Your portal(s)

Moneris Go Portal

This portal enhances your experience and utilization of your Go device and Moneris Online :
- Easily configure & manage your Go device(s) and Moneris Online settings, users & permissions.
- Email payment requests to your customers, process & refund transactions.
- Realtime cloud reporting.

Merchant Direct

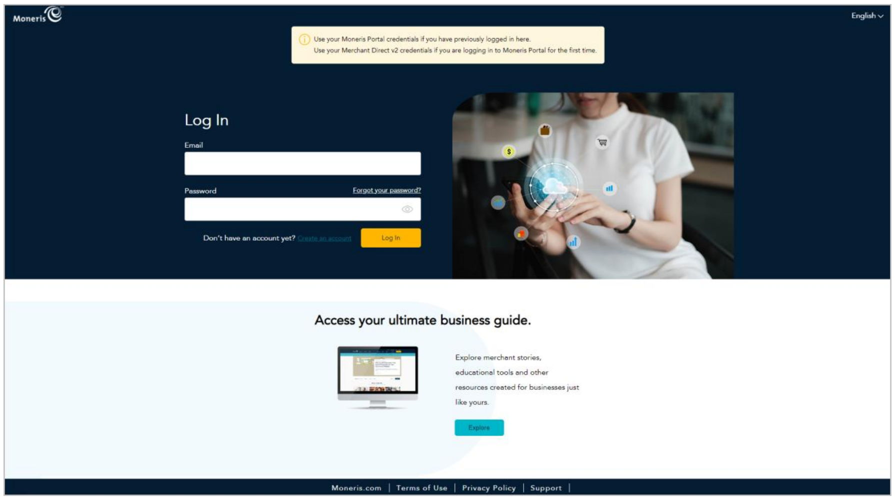
This is your business hub where you can access resources and tools to manage your business needs:
- View monthly statement and reports
- Order additional devices
- Manage chargebacks and disputes

9. Continue in Accessing a store after logging into Moneris Go portal (page 32).

Activating a Moneris Go portal user account: Merchant Direct user

If YOU ARE a Merchant Direct user (see How to get started on page 9), follow the steps below to activate your Moneris Go portal user account.

1. Start on the Moneris Portal "Log In" page shown below (visit **https://login.moneris.com/en/login**).



Use your Moneris Portal credentials if you have previously logged in here.
Use your Merchant Direct v2 credentials if you are logging in to Moneris Portal for the first time.

Don't have an account yet? Create an account

Explore merchant stories, educational tools and other resources created for businesses just like yours.

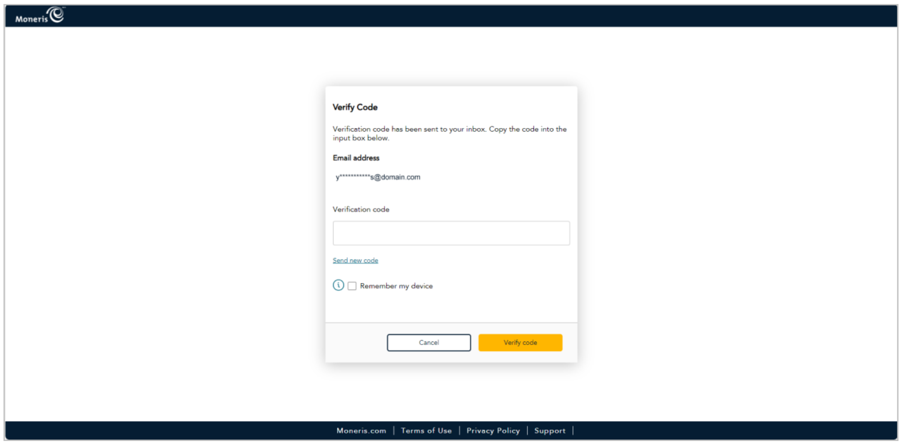
   a. In the **Email** field, enter the email address that you registered when you activated your Merchant Direct account (i.e., this is the same address that you use to log into Moneris Portal or Merchant Direct).

   b. In the **Password** field, enter the password that you use to log into Moneris Portal or Merchant Direct.

   c. Click on the **Log In** button, and wait for a response.

2. When the "Verify Code" dialog displays (shown below), it means we have sent a 6-digit authentication code to your inbox. Do the following:

   Note: *If you want a new code, click on **Send new code**.*



Verification code has been sent to your inbox. Copy the code into the input box below.

Email address: y***********s@domain.com

Verification code:

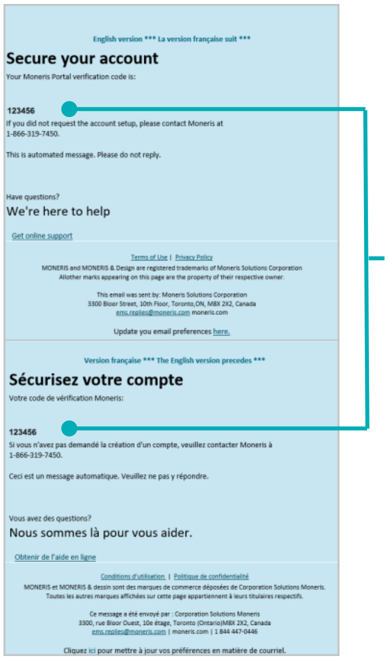
a. Open the "Moneris verification code" message in your inbox, and copy the 6-digit code (shown below) to your device's clipboard.

b. Paste the code in the "Verify Code" dialog's **Verification code** field.

- If you do not want to be prompted to enter a verification code each time you log in from the same device and browser, checkmark the **Remember my device** box in the dialog.

  Note: *If enabled (checkmarked), this setting is effective up to 30 days so long as you log in from the same device and browser. After 30 days has elapsed, Moneris Portal will again prompt you for 2-factor authentication. When this happens, you may opt to re-enable the "Remember my device" setting.*

c. Click on the **Verify code** button in the "Verify Code" dialog, and wait for a response.



English version *** La version française suit ***

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123456

If you did not request the account setup, please contact Moneris at 1-866-319-7450.

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3300 Bloor Street, 10th Floor, Toronto,ON, M8X 2X2, Canada
ems.replies@moneris.com moneris.com

Update you email preferences here.

Version française *** The English version precedes ***

Sécurisez votre compte

Votre code de vérification Moneris:

123456

Si vous n'avez pas demandé la création d'un compte, veuillez contacter Moneris à 1-866-319-7450.

Ceci est un message automatique. Veuillez ne pas y répondre.

Vous avez des questions?

Nous sommes là pour vous aider.

Obtenir de l'aide en ligne

Conditions d'utilisation | Politique de confidentialité

MONERIS et MONERIS & dessin sont des marques de commerce déposées de Corporation Solutions Moneris.
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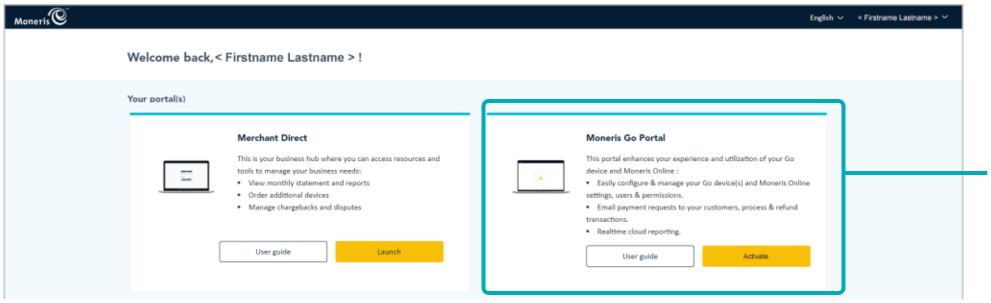
3300, rue Bloor Ouest, 10e étage, Toronto (Ontario)M8X 2X2, Canada
ems.replies@moneris.com | moneris.com | 1 844 447-0446

Cliquez ici pour mettre à jour vos préférences en matière de courriel.

6-DIGIT CODE

3. When the "Your portal(s)" page displays (shown partially below), click on the "Moneris Go Portal" tile's **Activate** button.



Welcome back,< Firstname Lastname > !

Your portal(s)

Merchant Direct

This is your business hub where you can access resources and tools to manage your business needs:
- View monthly statement and reports
- Order additional devices
- Manage chargebacks and disputes

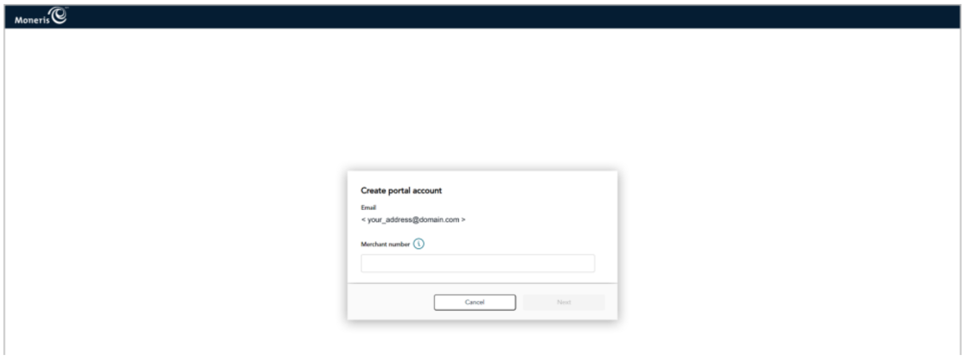
Moneris Go Portal

This portal enhances your experience and utilization of your Go device and Moneris Online :
- Easily configure & manage your Go device(s) and Moneris Online settings, users & permissions.
- Email payment requests to your customers, process & refund transactions.
- Realtime cloud reporting.

"MONERIS GO PORTAL" TILE

4. When the "Create portal account" dialog displays (shown below), enter your 13-digit merchant number in the **Merchant Number** field, and click on the **Next** button.

Note: *You can locate this ID in your Moneris statement or Welcome email/letter.*

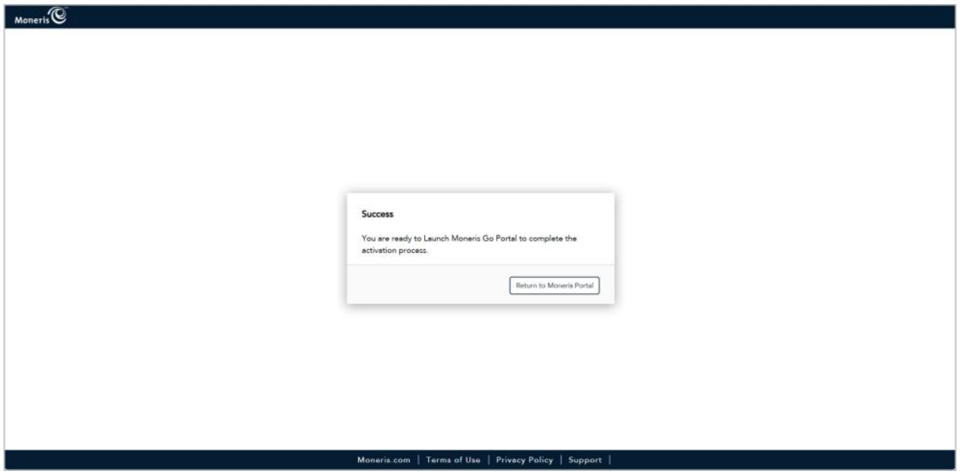


Create portal account

Email
< your_address@domain.com >

Merchant number

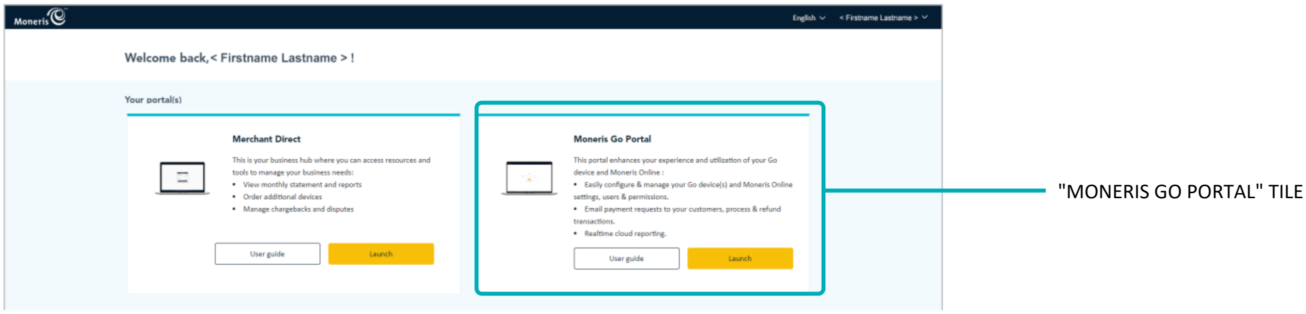
5. When the "Success" dialog displays (shown below), click on its **Return to Moneris Portal** button.



Success

You are ready to Launch Moneris Go Portal to complete the activation process.

6. When the "Your portal(s)" page displays (shown partially below), click on the "Moneris Go Portal" tile's **Launch** button to start a login session in the Moneris Go portal application.



Welcome back, < Firstname Lastname > !

Your portal(s)

Merchant Direct

This is your business hub where you can access resources and tools to manage your business needs:

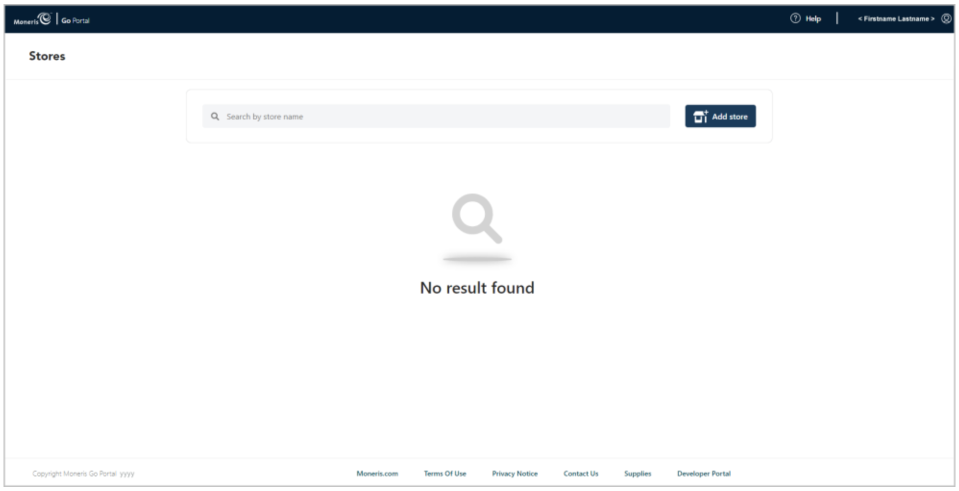
- View monthly statement and reports
- Order additional devices
- Manage chargebacks and disputes

Moneris Go Portal

This portal enhances your experience and utilization of your Go device and Moneris Online :

- Easily configure & manage your Go device(s) and Moneris Online settings, users & permissions.
- Email payment requests to your customers, process & refund transactions.
- Realtime cloud reporting.

7. When the "Stores" page displays (shown below), continue in <u>Adding the first store to the primary user account</u> (page 24).



No result found

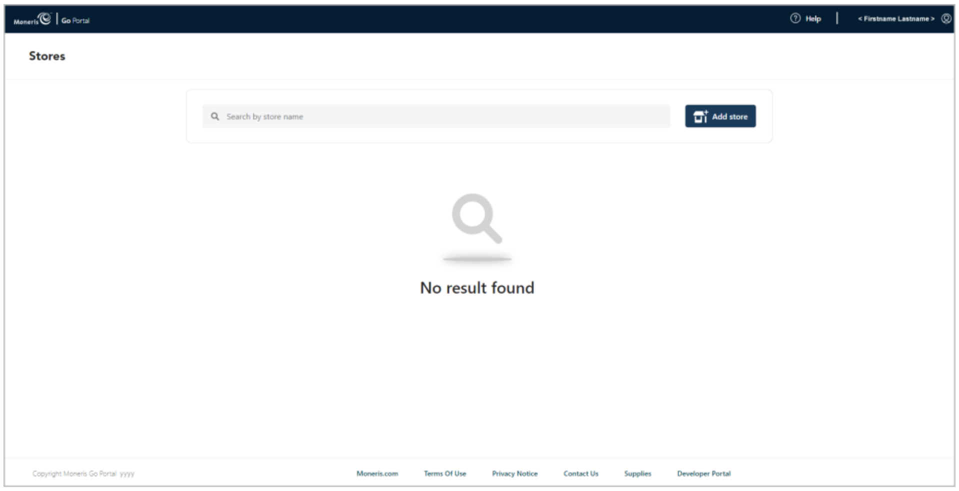
Adding the first store to the primary user account

If you are the merchant account holder/primary user and you have just activated your Moneris Go portal account (see How to get started on page 9), follow the steps below to add/link the first store to your Moneris Go portal user account.

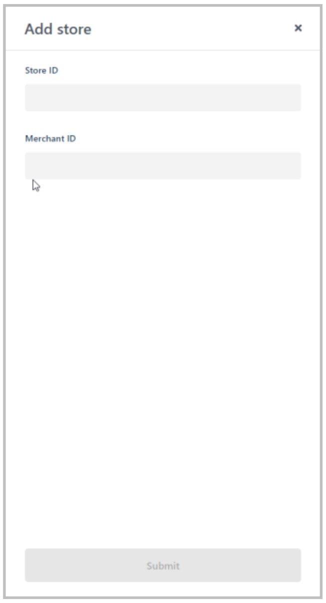
Note: *After you complete this procedure, you will have access to all the features of your Moneris Go portal store, and you can subsequently allow new users to access and use the store.*

1. On the "Stores" page (shown below), click on the **Add store** button.

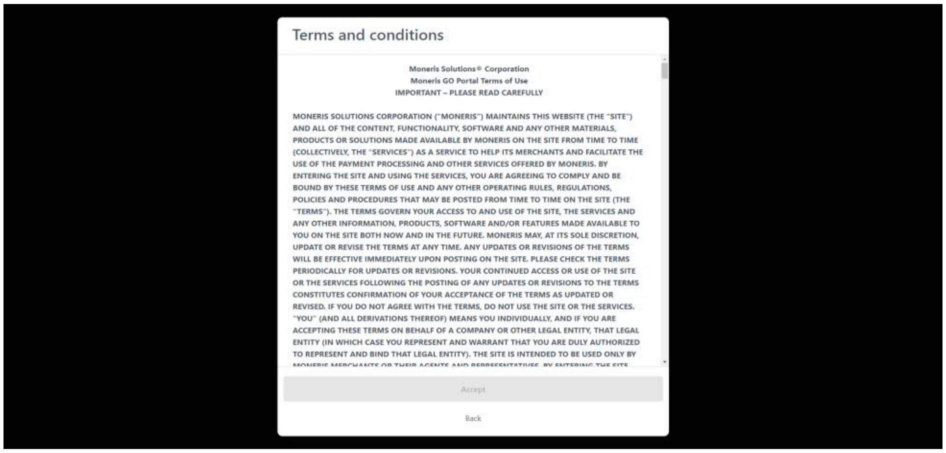
   Note: *For login instructions, see Logging into the Moneris Go portal (page 30).*



2. When the "Add store" window displays (shown below), fill in the fields with the required IDs, which you can find in your Moneris statement or Welcome email/letter:
   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.



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

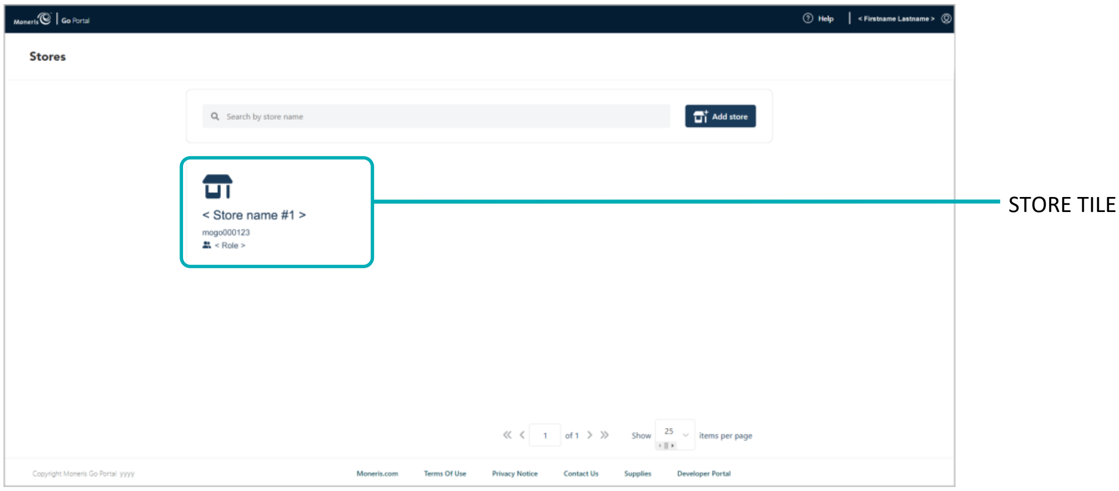


Terms and conditions

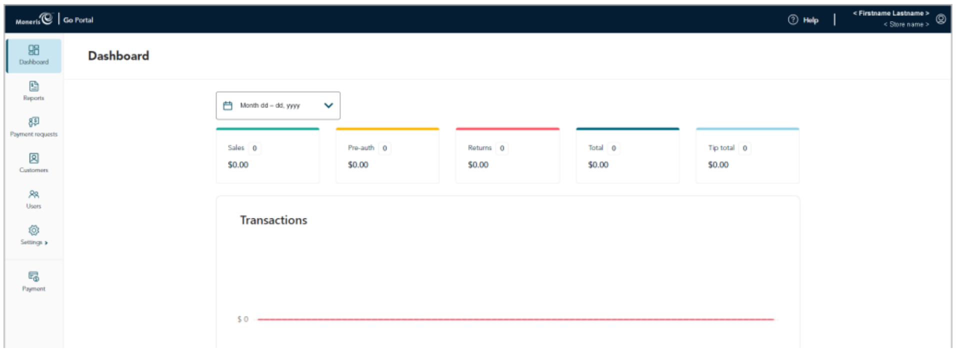
Moneris Solutions® Corporation
Moneris GO Portal Terms of Use
IMPORTANT – PLEASE READ CAREFULLY

MONERIS SOLUTIONS CORPORATION ("MONERIS") MAINTAINS THIS WEBSITE (THE "SITE") AND ALL OF THE CONTENT, FUNCTIONALITY, SOFTWARE AND ANY OTHER MATERIALS, PRODUCTS OR SOLUTIONS MADE AVAILABLE BY MONERIS ON THE SITE FROM TIME TO TIME (COLLECTIVELY, THE "SERVICES") AS A SERVICE TO HELP ITS MERCHANTS AND FACILITATE THE USE OF THE PAYMENT PROCESSING AND OTHER SERVICES OFFERED BY MONERIS. BY ENTERING THE SITE AND USING THE SERVICES, YOU ARE AGREEING TO COMPLY AND BE BOUND BY THESE TERMS OF USE AND ANY OTHER OPERATING RULES, REGULATIONS, POLICIES AND PROCEDURES THAT MAY BE POSTED FROM TIME TO TIME ON THE SITE (THE "TERMS"). THE TERMS GOVERN YOUR ACCESS TO AND USE OF THE SITE, THE SERVICES AND ANY OTHER INFORMATION, PRODUCTS, SOFTWARE AND/OR FEATURES MADE AVAILABLE TO YOU ON THE SITE BOTH NOW AND IN THE FUTURE. MONERIS MAY, AT ITS SOLE DISCRETION, UPDATE OR REVISE THE TERMS AT ANY TIME. ANY UPDATES OR REVISIONS OF THE TERMS WILL BE EFFECTIVE IMMEDIATELY UPON POSTING ON THE SITE. PLEASE CHECK THE TERMS PERIODICALLY FOR UPDATES OR REVISIONS. YOUR CONTINUED ACCESS OR USE OF THE SITE OR THE SERVICES FOLLOWING THE POSTING OF ANY UPDATES OR REVISIONS TO THE TERMS CONSTITUTES CONFIRMATION OF YOUR ACCEPTANCE OF THE TERMS AS UPDATED OR REVISED. IF YOU DO NOT AGREE WITH THE TERMS, DO NOT USE THE SITE OR THE SERVICES. "YOU" (AND ALL DERIVATIONS THEREOF) MEANS YOU INDIVIDUALLY, AND IF YOU ARE ACCEPTING THESE TERMS ON BEHALF OF A COMPANY OR OTHER LEGAL ENTITY, THAT LEGAL ENTITY (IN WHICH CASE YOU REPRESENT AND WARRANT THAT YOU ARE DULY AUTHORIZED TO REPRESENT AND BIND THAT LEGAL ENTITY). THE SITE IS INTENDED TO BE USED ONLY BY

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



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



6. 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 26).

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	Logging into the Moneris Go portal (page 30)
Log out	Logging out of the Moneris Go portal (page 43)
Reset login password	Forgot your login password? (page 34)
Move between stores	Using My Stores (page 39)
Add another store	Adding another store to the primary user account (page 41).

Language

Preference	See procedure:
Change default display language	Changing the default display language (page 38)

Financial transactions

Transaction type	Tender[1]	See procedure:
Purchase	credit	Purchase with credit card: manual entry (page 45)
Purchase	cash	Purchase with cash (page 47)
Preauthorization	credit	Preauthorization with credit card: manual entry (page 48)
Completion	credit	Completion with credit card: manual entry (page 50)
Void	credit	Void: manual entry (page 54)
Refund	credit/cash	Refund: manual entry (page 57)
Independent Refund	credit	Independent Refund with credit card: manual entry (page 60)

Reporting & receipts (financial transactions)

Action	See procedure:
View detailed transactions report	Financial transactions report (page 66)
View graphical summary	The dashboard (page 63)
Send/print transaction receipt	Sending/printing a transaction receipt (page 84)

---

[1] Some debit card brands may support manual entry for this transaction.

Payment requests

Action	See procedure:
Create payment request	Creating a payment request (page 91)
Cancel payment request	Cancelling a payment request (page 100)
Delete payment request	Deleting a payment request (page 98)
Resend payment request	Resending a payment request (page 95)
Save payment request draft	Saving a payment request as a draft (page 97)
View payment requests report	Payment requests report (page 101)

Vault customer profiles

Action	See procedure:
Create a profile	Creating a Vault customer profile (page 110)
Update a profile	Updating a Vault customer profile (page 113)
Delete a profile	Deleting a Vault customer profile (page 115)
View profiles report	Vault customer profiles report (page 116)
View transactions linked to a profile	Financial transactions associated with a Vault customer profile (page 121)
Export a report	Exporting a Vault customer profiles report (page 118)

My account preferences

Preference	See procedure:
Change personal name identification	Changing your name information (page 127)
Change portal login password	Changing your Moneris Go portal login password (page 128)
Change terminal login password	Changing your terminal login password (page 129)
Change terminal login username	Changing your terminal login username (page 130)

Store settings

Payment field	See procedure:
Billing address (address verification)	Billing address: store settings (page 133)
Postal code (address verification)	Postal code: store settings (page 135)
Customized field	Custom ID: store settings (page 137)

User accounts/roles management

Action	See procedure:
Add user account	Adding a new user account (page 140)
Modify user account	Modifying an active user account (page 143)
Deactivate user account	Deactivating a user account (page 147)
Reactivate a user account	Reactivating a user account (page 149)
Add a user role	Adding a new user role (page 152)
Delete a user role	Deleting a user role (page 157)
Modify a user role	Modifying a user role (page 154)

Terminal management

Feature	See procedure:
Automatic sign-out time	Terminal settings: general (page 163)
Display timeout	Terminal settings: general (page 163)
Sign out after transaction	Terminal settings: general (page 163)
Report reset time	Terminal settings: general (page 163)
Manual entry transactions	Terminal settings: transactions (page 166)
Pass terminal timer	Terminal settings: transactions (page 166)
Surcharge settings	Terminal settings: transactions (page 166)
Transaction identifier (custom)	Terminal settings: transactions (page 166)
Receipts	Terminal settings: receipts (page 169)
Print delay (receipt)	Terminal settings: receipts (page 169)
Print QR code (receipt)	Terminal settings: receipts (page 169)
Receipt format options	Terminal settings: receipts (page 169)
No. of Merchant copies (receipt)	Terminal settings: receipts (page 169)
Header/footer (Receipt)	Terminal settings: receipts (page 169)
Cashback settings	Terminal settings: cashback (page 176)
Tip settings	Terminal settings: tips (page 179)
Installments enabled by Visa	Terminal settings: Installments by Visa (page 183)

Developer tools

Integration type	See procedure:
Moneris Checkout	Moneris Checkout (page 189)
Hosted tokenization	Hosted tokenization (page 189)
API token (view/copy)	API token (page 190)

Logging in/ Logging out

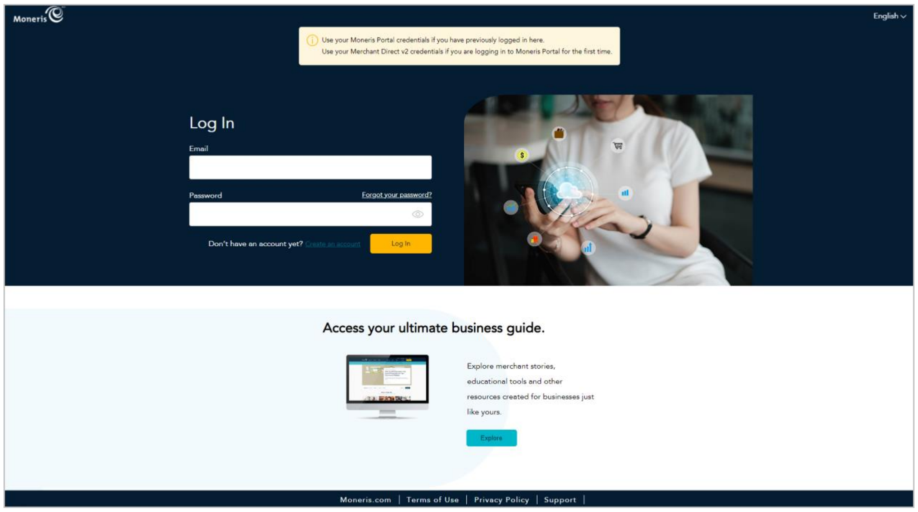
In this section, we go over everything you need to know to log into/log out of the Moneris Go portal.

Logging into the Moneris Go portal

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

Are you a Moneris Portal user?

1. Visit **https://login.moneris.com/en/login** to start on the Moneris Portal "Log In" page (shown below).



Use your Moneris Portal credentials if you have previously logged in here.
Use your Merchant Direct v2 credentials if you are logging in to Moneris Portal for the first time.

Access your ultimate business guide.

Explore merchant stories, educational tools and other resources created for businesses just like yours.

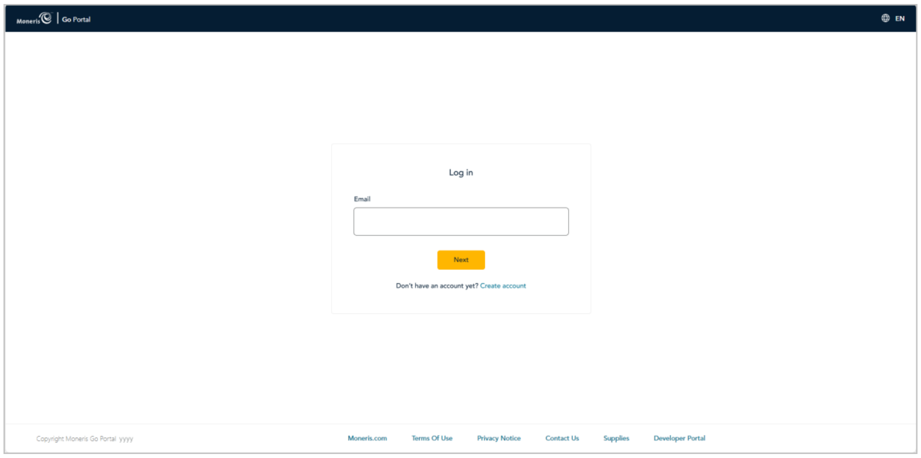
2. Log into Moneris Portal, and launch the **Moneris Go Portal** application to start your login session on the Moneris Go portal (continue in Accessing a store after logging into Moneris Go portal on page 32).

   Note: *For Moneris Portal documentation, visit **https://www.moneris.com/en/support/products/moneris-portal**.*

Are you an unmigrated user?

An unmigrated user is a Moneris Go portal user whose user account is not yet migrated to Moneris Portal.

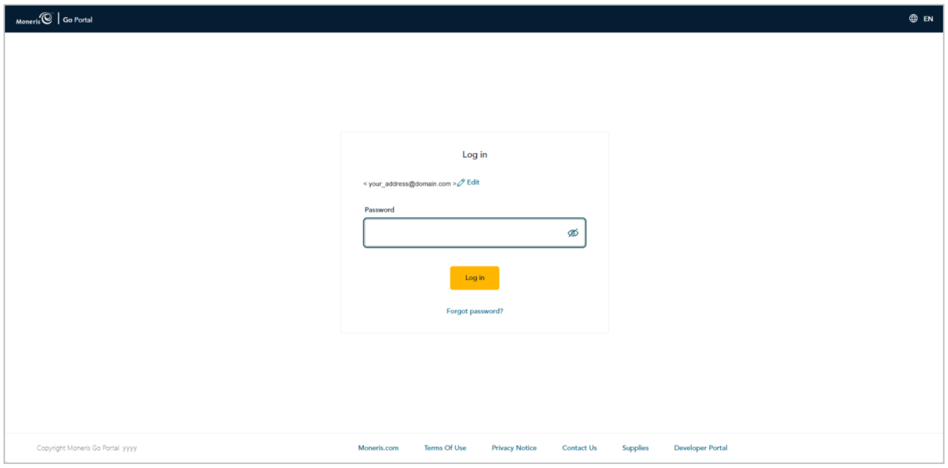
1. Visit **www.monerisgo.com** to start on the Moneris Go portal "Log in" page (shown below).



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.

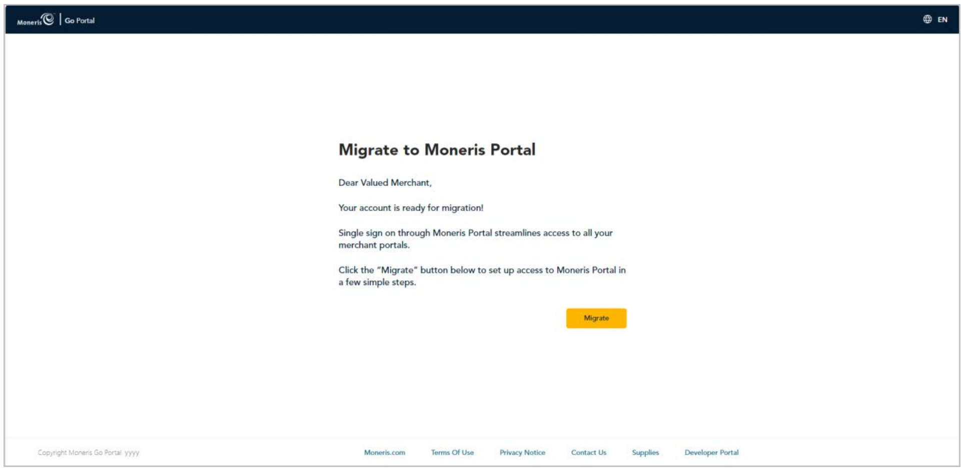
3. When the **Password** field displays (shown below), enter your Moneris Go portal login password.

   Note: *If you need to edit your login email first, click on **Edit** (go back to step 2). If you cannot remember your login password, see Forgot your login password? (page 34).*



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

5. When the "Migrate to Moneris Portal" page displays (shown partially below), continue in What to do if you are prompted to migrate to Moneris Portal (page 196).


Migrate to Moneris Portal

Dear Valued Merchant,

Your account is ready for migration!

Single sign on through Moneris Portal streamlines access to all your merchant portals.

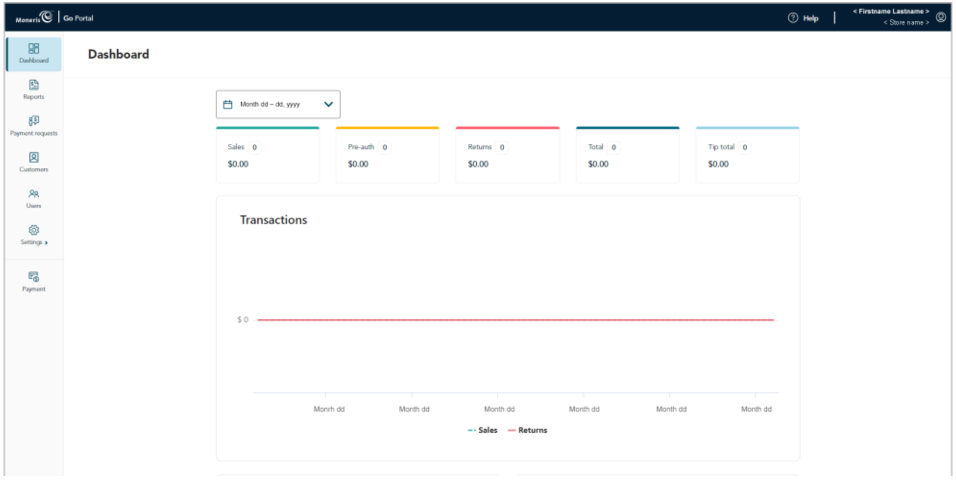
Click the "Migrate" button below to set up access to Moneris Portal in a few simple steps.

Accessing a store after logging into Moneris Go portal

After you have successfully logged into the Moneris Go portal (see Logging into the Moneris Go portal on page 30), you will see either the "Dashboard" page or a "Stores" page (empty or filled with one or more store tiles).

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

1. You have successfully accessed the store linked to your user account (see The dashboard on page 63).

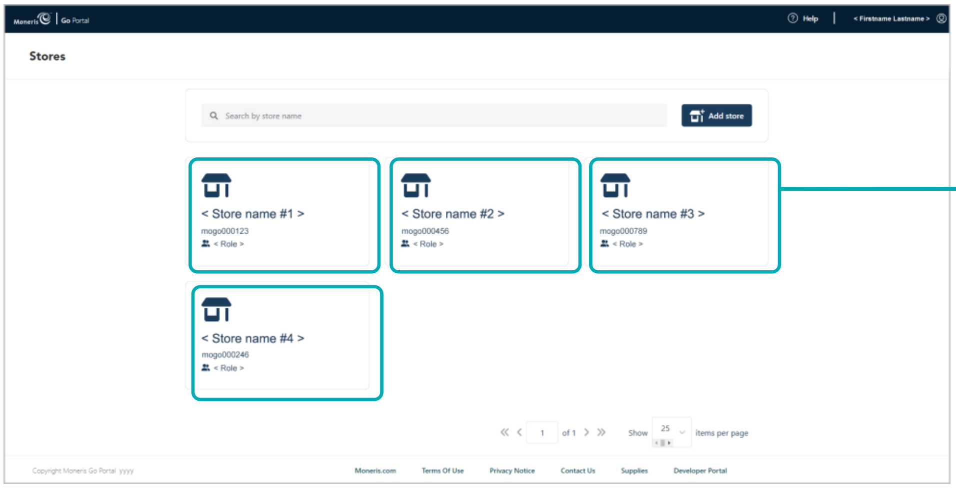


If the "Stores" page displays and one or more store tiles are shown (see example below):

1. 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 the 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.*

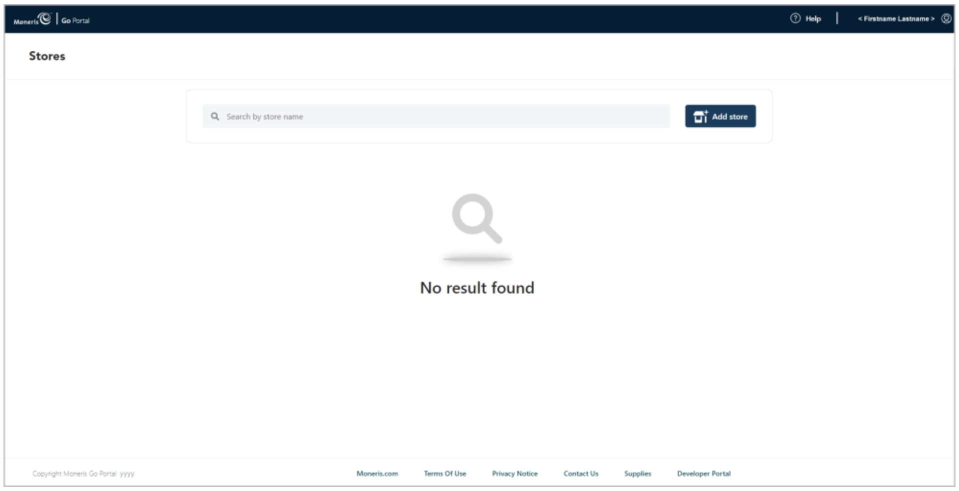


STORE TILES

2. When the "Dashboard" page displays (see The dashboard on page 63), it means you have successfully accessed the store.

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

   a. You (the primary user) must add/link a store to your user account (see Adding the first store to the primary user account on page 24).

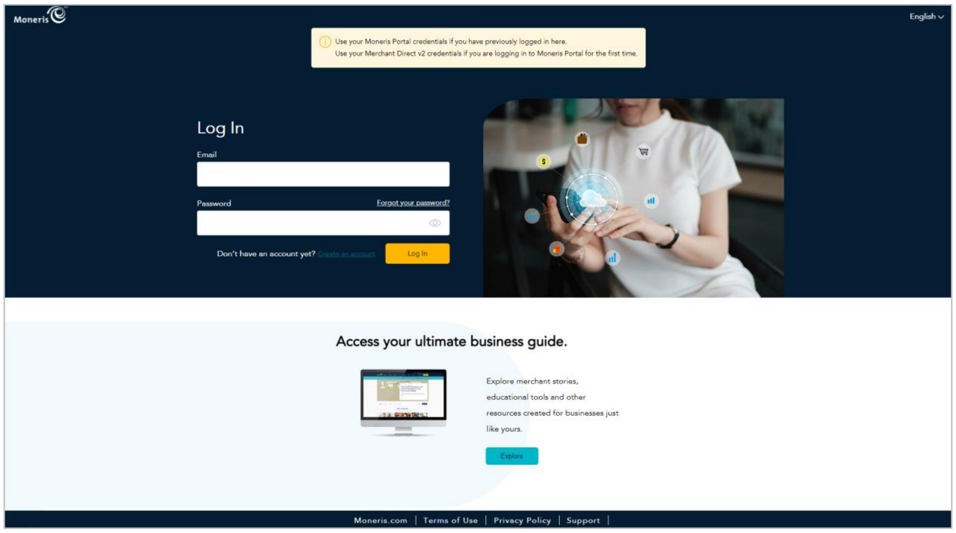


Forgot your login password?

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

Are you a Moneris Portal user?

1. Visit **https://login.moneris.com/en/login** to start on the Moneris Portal "Log In" page (shown below).



Use your Moneris Portal credentials if you have previously logged in here.
Use your Merchant Direct v2 credentials if you are logging in to Moneris Portal for the first time.

Access your ultimate business guide.

Explore merchant stories, educational tools and other resources created for businesses just like yours.

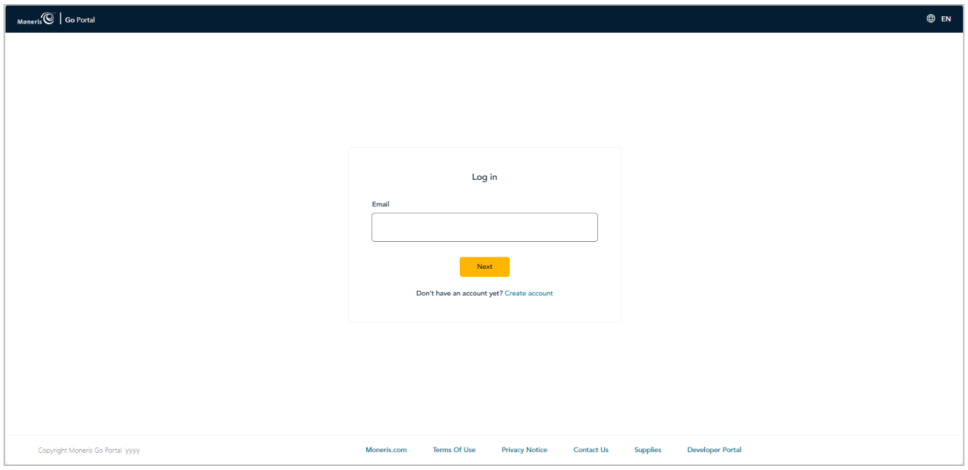
2. Click on **Forgot your password?**, and follow the prompts to reset your password.

   Note: *For Moneris Portal documentation, visit **https://www.moneris.com/en/support/products/moneris-portal**.*

Are you an unmigrated user?

An unmigrated user is a Moneris Go portal user whose user account is not yet migrated to Moneris Portal.

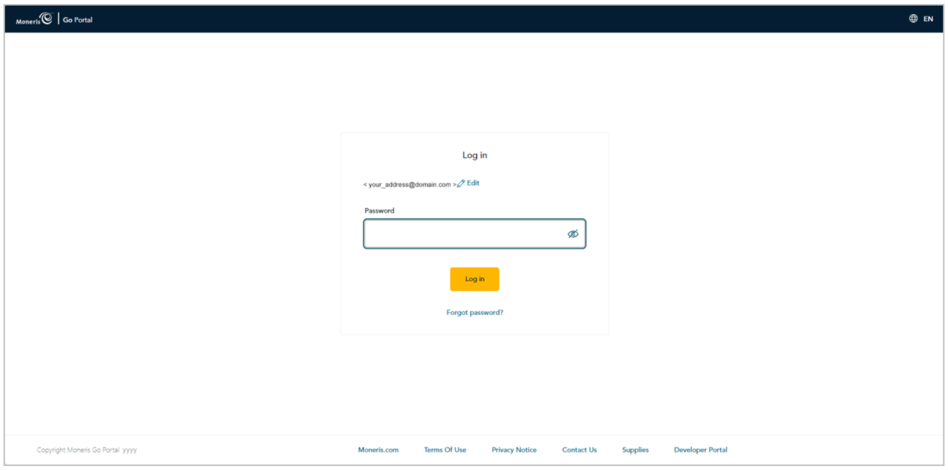
1. Visit **www.monerisgo.com** to start on the Moneris Go portal "Log in" page (shown below).



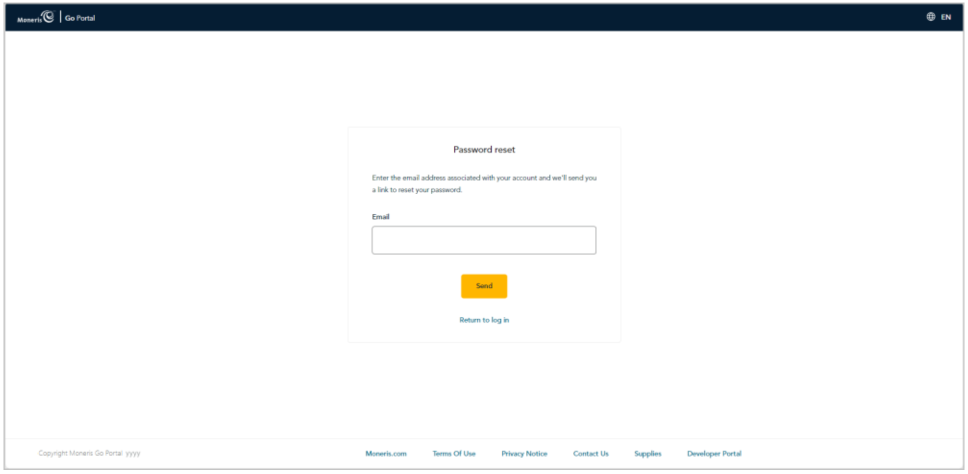
2. In the **Email** field, enter the email address that is registered to your Moneris Go portal user account, and then click on the **Next** button to continue.

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).*



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

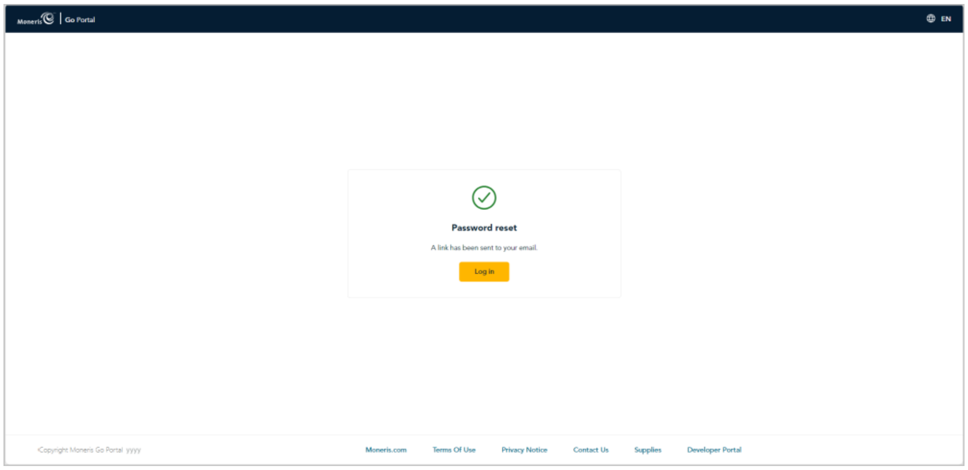


Enter the email address associated with your account and we'll send you a link to reset your password.

   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.

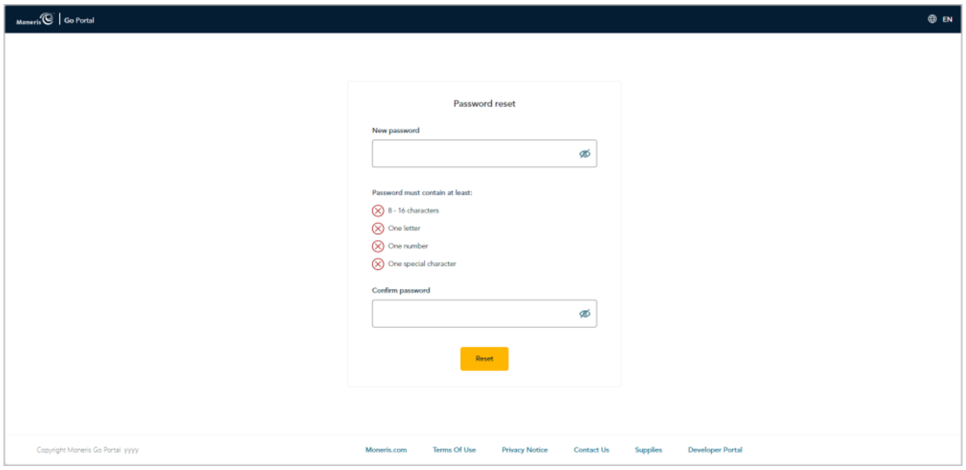


Password reset

A link has been sent to your email.

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:



Password reset

New password

Password must contain at least:

- ⊗ 8 - 16 characters
- ⊗ One letter
- ⊗ One number
- ⊗ One special character

Confirm password

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

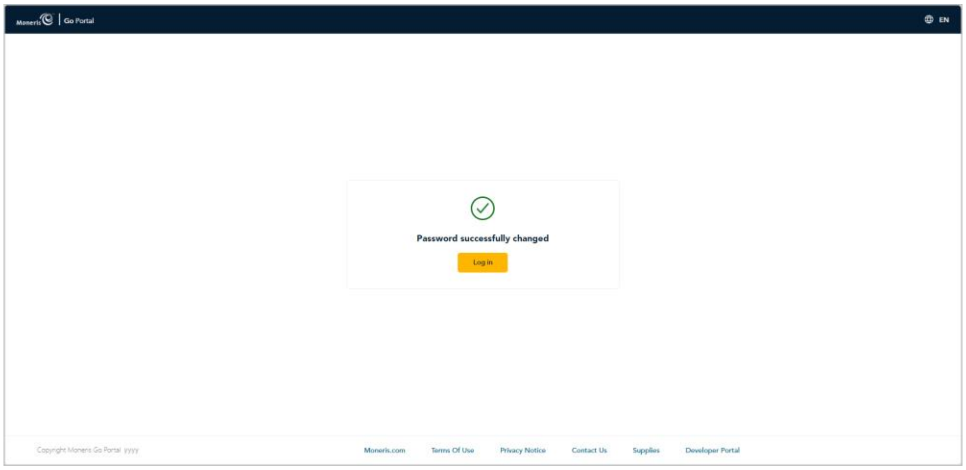
      Note: *Password fields are case sensitive. The password that you create must adhere to these requirements:*

      - *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.



Password successfully changed

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 30).*

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 30).

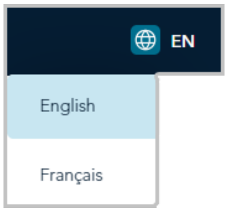
Starting on the Moneris Go portal "Log In" page?

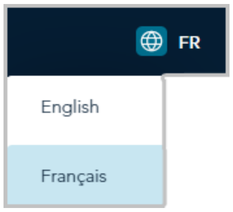
1. Click on the language tile in the Moneris Go portal page header (shown below).

LANGUAGE TILE

2. When the language drop-down displays (shown below), do one of the following:

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





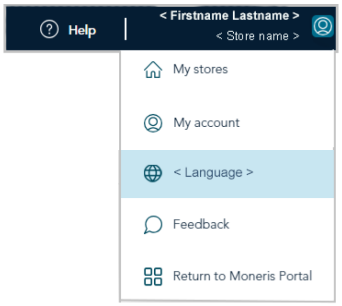
Already logged into the Moneris Go portal?

1. Click on your user account tile, which displays in the top right corner of the Moneris Go portal page header (shown below).

USER ACCOUNT TILE

2. When the user account menu displays (shown below), click on a default display language (**English**/**Français**).

   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.*



USER ACCOUNT MENU

Store navigation

Using My Stores

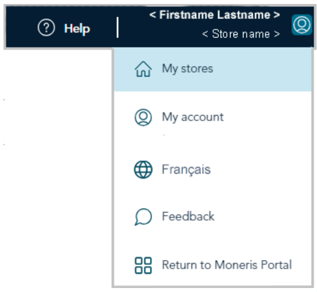
If you are logged into the Moneris Go portal and are already within (accessing) a store, follow the steps below to use the "My Stores" function to access any other store that is linked to your user account.

Note: *For instructions on how to log in and access a store, see Logging into the Moneris Go portal (page 30).*

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).

USER ACCOUNT TILE

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

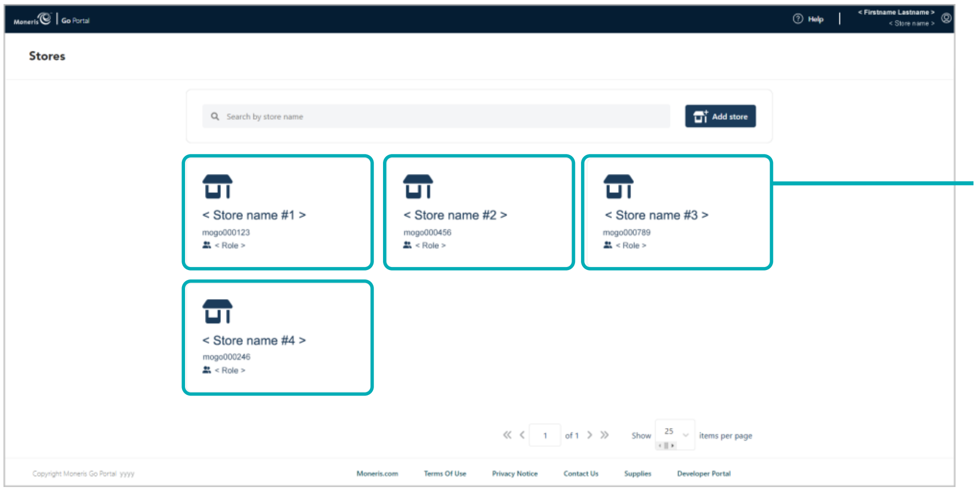


USER ACCOUNT MENU

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.

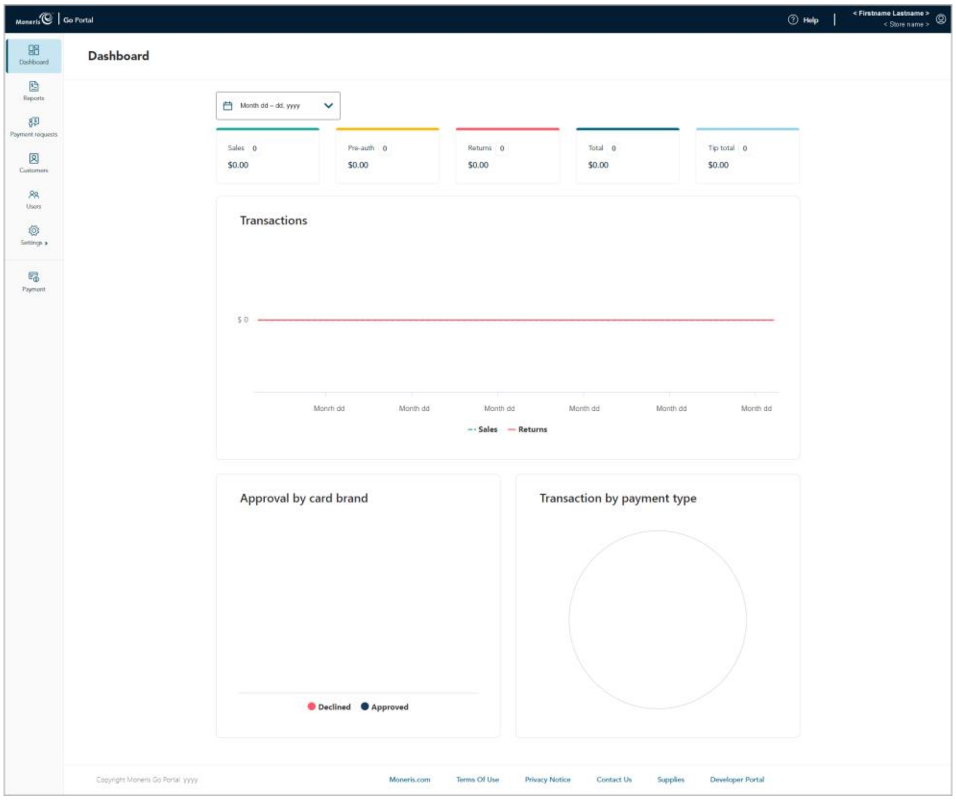
   Note: *To search for a specific store, enter the full/partial store name in the* ***Search by store name*** *field.*

   *To change the number of hits listed on the 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.*



STORE TILES

4. When the "Dashboard" page displays (shown below), it means you have successfully accessed your store (see The dashboard on page 63).



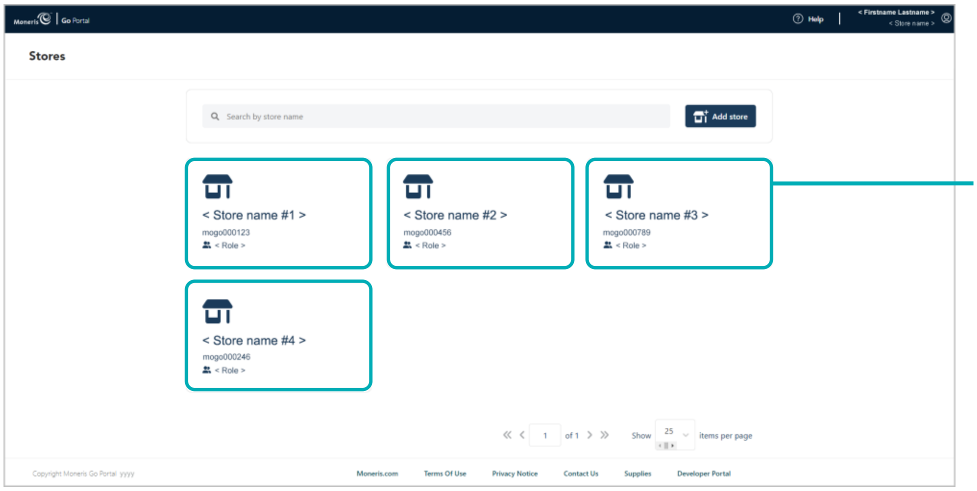
Adding another store to the primary user account

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.

1. Log into the Moneris Go portal (see Logging into the Moneris Go portal on page 30).

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.*



4x STORES

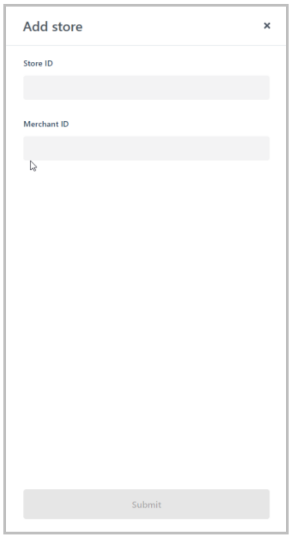
3. On the "Stores" page, click on the **Add store** button.

4. When the "Add store" window displays (shown here), fill in the fields with the required IDs as provided by Moneris:

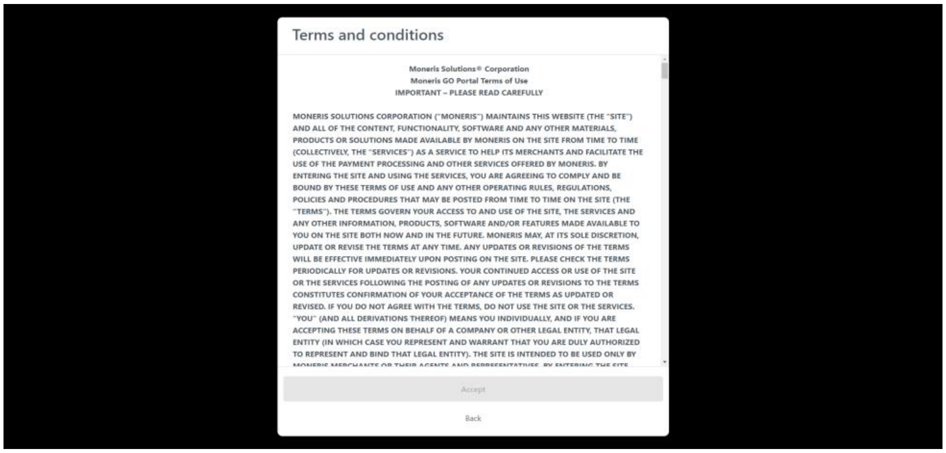
   a. In the **Store ID** field, enter the store ID of the store that you want to add.

   b. In the **Merchant ID** field, enter your 13-digit merchant ID.

   c. Click on the **Submit** button.



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

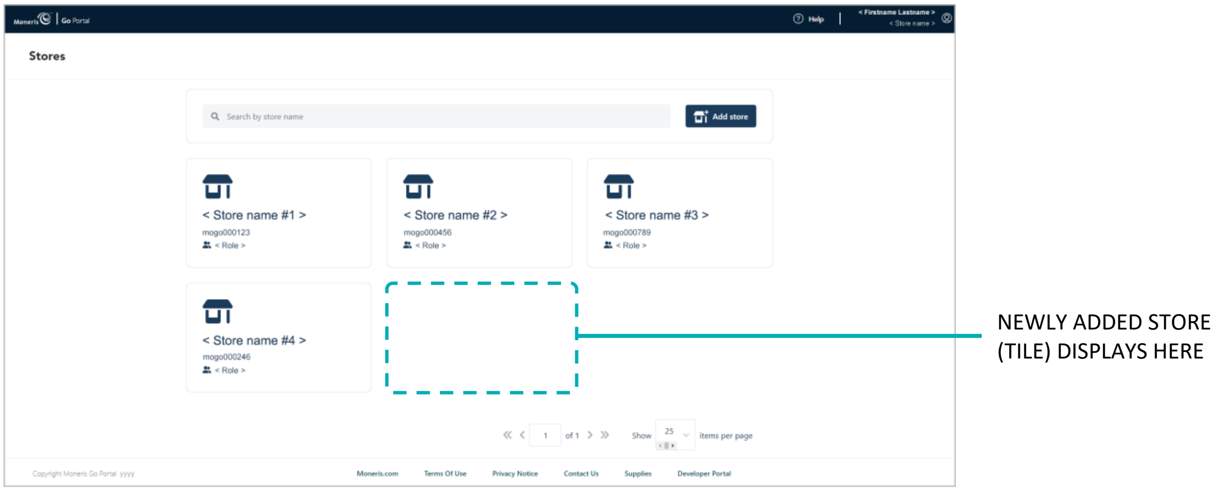


Terms and conditions

Moneris Solutions® Corporation
Moneris GO Portal Terms of Use
IMPORTANT – PLEASE READ CAREFULLY

MONERIS SOLUTIONS CORPORATION ("MONERIS") MAINTAINS THIS WEBSITE (THE "SITE") AND ALL OF THE CONTENT, FUNCTIONALITY, SOFTWARE AND ANY OTHER MATERIALS, PRODUCTS OR SOLUTIONS MADE AVAILABLE BY MONERIS ON THE SITE FROM TIME TO TIME (COLLECTIVELY, THE "SERVICES") AS A SERVICE TO HELP ITS MERCHANTS AND FACILITATE THE USE OF THE PAYMENT PROCESSING AND OTHER SERVICES OFFERED BY MONERIS. BY ENTERING THE SITE AND USING THE SERVICES, YOU ARE AGREEING TO COMPLY AND BE BOUND BY THESE TERMS OF USE AND ANY OTHER OPERATING RULES, REGULATIONS, POLICIES AND PROCEDURES THAT MAY BE POSTED FROM TIME TO TIME ON THE SITE (THE "TERMS"). THE TERMS GOVERN YOUR ACCESS TO AND USE OF THE SITE, THE SERVICES AND ANY OTHER INFORMATION, PRODUCTS, SOFTWARE AND/OR FEATURES MADE AVAILABLE TO YOU ON THE SITE BOTH NOW AND IN THE FUTURE. MONERIS MAY, AT ITS SOLE DISCRETION, UPDATE OR REVISE THE TERMS AT ANY TIME. ANY UPDATES OR REVISIONS OF THE TERMS WILL BE EFFECTIVE IMMEDIATELY UPON POSTING ON THE SITE. PLEASE CHECK THE TERMS PERIODICALLY FOR UPDATES OR REVISIONS. YOUR CONTINUED ACCESS OR USE OF THE SITE OR THE SERVICES FOLLOWING THE POSTING OF ANY UPDATES OR REVISIONS TO THE TERMS CONSTITUTES CONFIRMATION OF YOUR ACCEPTANCE OF THE TERMS AS UPDATED OR REVISED. IF YOU DO NOT AGREE WITH THE TERMS, DO NOT USE THE SITE OR THE SERVICES. "YOU" (AND ALL DERIVATIONS THEREOF) MEANS YOU INDIVIDUALLY, AND IF YOU ARE ACCEPTING THESE TERMS ON BEHALF OF A COMPANY OR OTHER LEGAL ENTITY, THAT LEGAL ENTITY (IN WHICH CASE YOU REPRESENT AND WARRANT THAT YOU ARE DULY AUTHORIZED TO REPRESENT AND BIND THAT LEGAL ENTITY). THE SITE IS INTENDED TO BE USED ONLY BY

6. 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

7. 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 140). You may duplicate the login credentials of an existing user account in each new store.*

Logging out of the Moneris Go portal

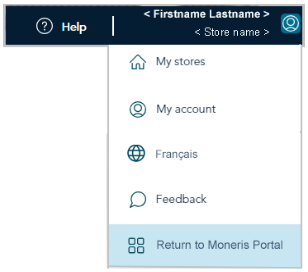
The steps below describe how to end your current session and log out of the Moneris Go portal.

1. Click on your user account tile, which displays in the top right corner of the Moneris Go portal page header (shown below).

USER ACCOUNT TILE

2. When the user account menu displays (shown below), click on **Return to Moneris Portal**.

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.*



USER ACCOUNT MENU

Financial Transactions

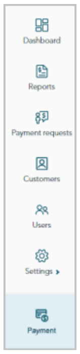
In this section, we go over everything you need to know to perform financial transactions through your Moneris Go portal store's virtual terminal.

Purchase with credit card: manual entry

The steps below describe how to perform a credit card[2] 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.

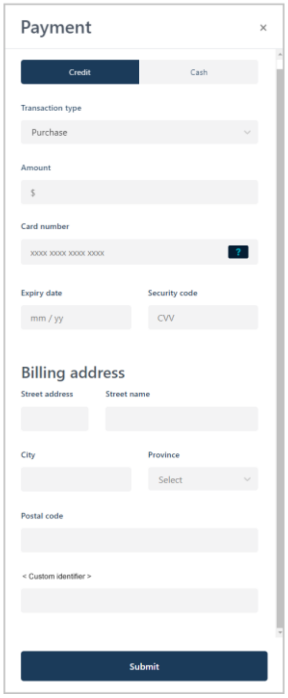
1. Log into the Moneris Go portal, and access the store through which you want to perform the transaction (see Logging into the Moneris Go portal on page 30).[3]

   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 39).*



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:
   1. Click on the **Credit** button.
   2. In the "Transaction type" drop-down, select **Purchase**.
   3. In the **Amount** field, enter the purchase dollar amount ($0.00).
4. Enter the credit card data:
   1. In the **Credit Card Number** field, enter the credit card's 16-digit PAN (personal account number).
   2. In the **Expiry date** field, enter the credit card's expiry date (mm/yy).
   3. 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 132).*

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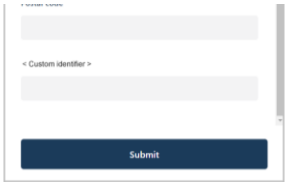
[2] Some card brands support debit card manual entry for this transaction.

[3] 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 38).

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 137).*

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



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

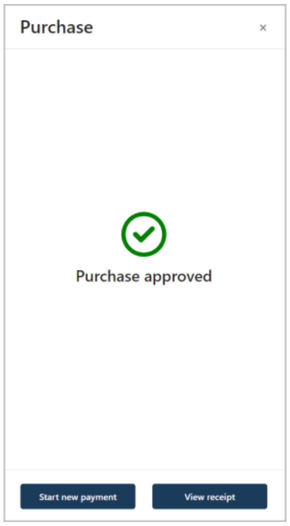
   To view, print, or send (email/text) the transaction receipt:

   a. Click on the **View receipt** button.

   b. Continue in Sending/printing a transaction receipt (page 84).

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

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



Purchase with cash

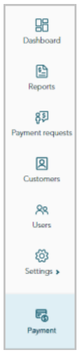
The steps below describe how to perform a cash sale of goods and services.

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 30).[4]

   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 39).*

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 137).*

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

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

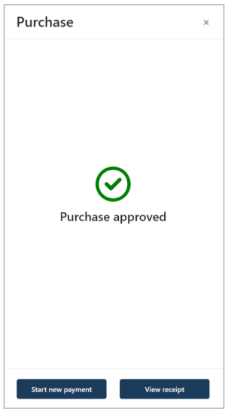
   To view, print, or send (email/text) the transaction receipt:

   a. Click on the **View receipt** button.

   b. Continue in Sending/printing a transaction receipt (page 84).

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

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



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[4] 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 38).

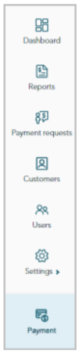
Preauthorization with credit card: manual entry

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.[5] 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 50).

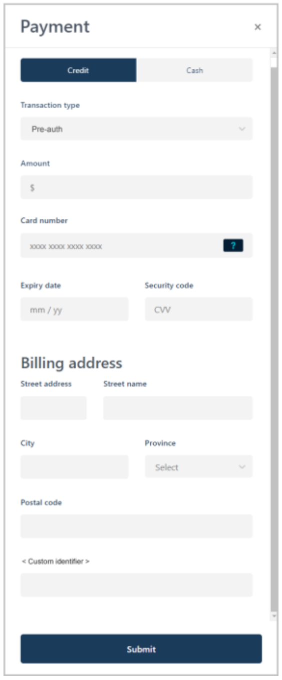
1. Log into the Moneris Go portal, and access the store through which you want to perform the transaction (see Logging into the Moneris Go portal on page 30).[6]

   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 39).*



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.

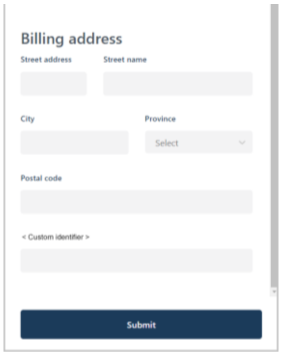
---

[5] Some card brands support debit card manual entry for this transaction.

[6] 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 38).

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 132).*

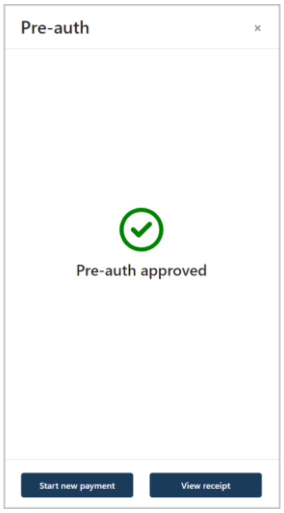


6. If the custom transaction identifier field displays, enter the requested data.

   Note: *To configure a custom transaction identifier, see Custom ID: store settings (page 137).*

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

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



Pre-auth approved

   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 84).

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

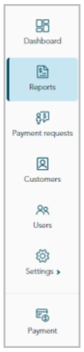
   a. Click on the **Start New Payment** button.

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 30). [7]

   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 83). 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 39.)*

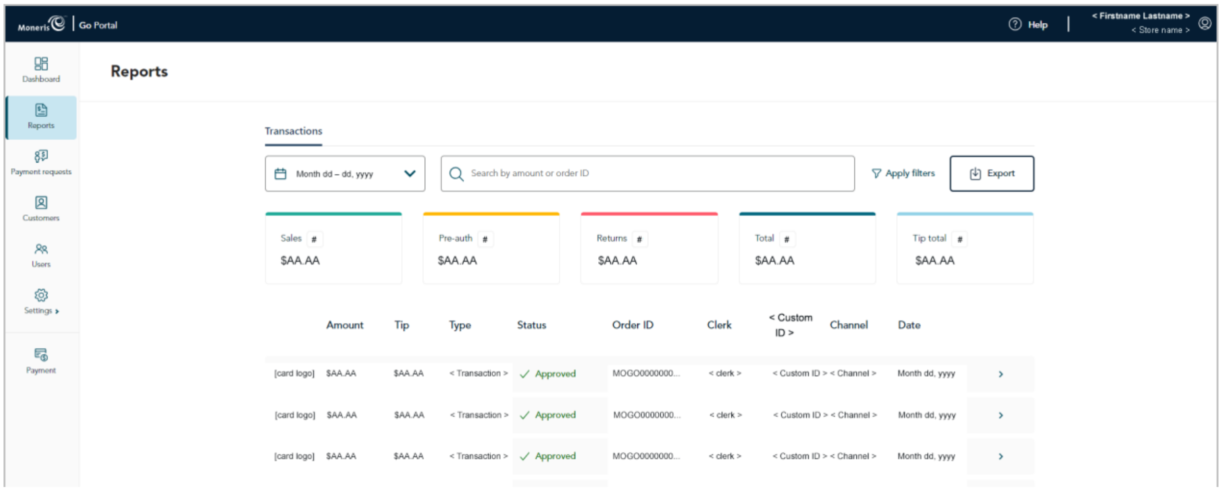


2. On the sidebar menu (shown here), click on **Reports**.

   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 66).*



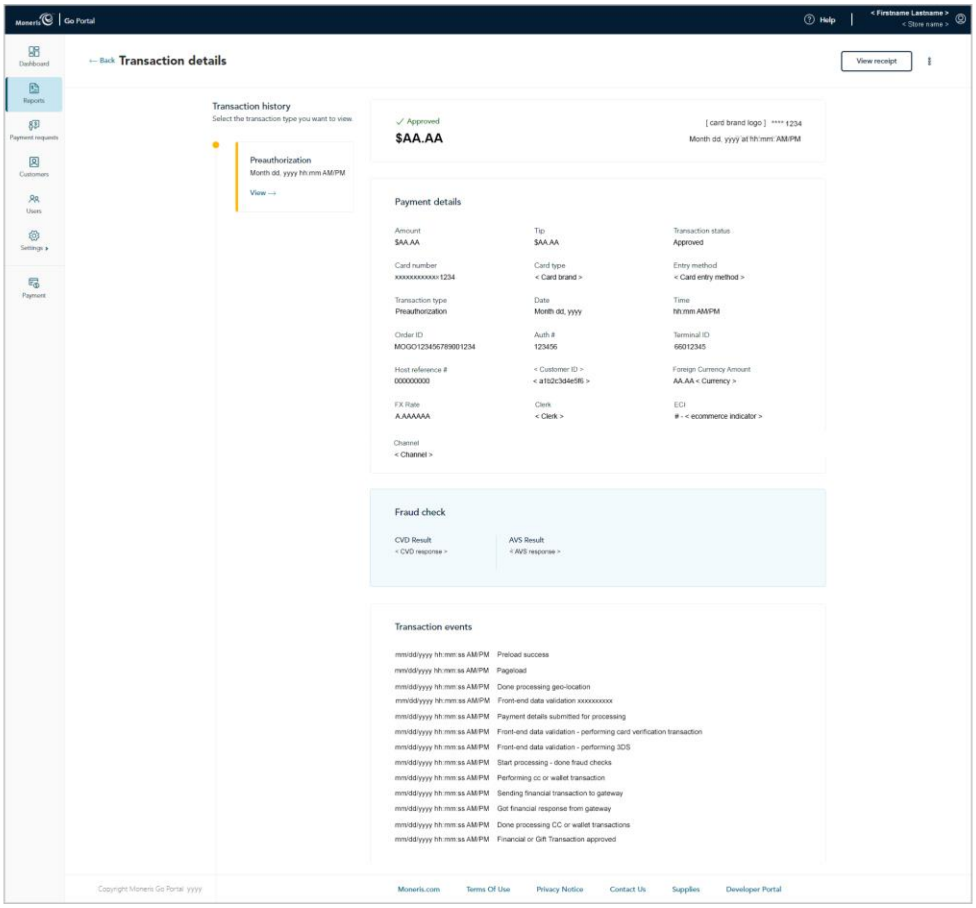
	Amount	Tip	Type	Status	Order ID	Clerk	< Custom ID >	Channel	Date	
[card logo]	$AA.AA	$AA.AA	< Transaction >	✓ Approved	MOGO0000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy	›
[card logo]	$AA.AA	$AA.AA	< Transaction >	✓ Approved	MOGO0000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy	›
[card logo]	$AA.AA	$AA.AA	< Transaction >	✓ Approved	MOGO0000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy	›

---

[7] 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 38).

4. 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 68).*



Transaction details

Transaction history

Select the transaction type you want to view.

Preauthorization

Month dd, yyyy hh:mm AM/PM

✓ Approved

$AA.AA

[card brand logo] **** 1234

Month dd, yyyy at hh:mm AM/PM

Payment details

Amount $AA.AA	Tip $AA.AA	Transaction status Approved
Card number xxxxxxxxxxxx1234	Card type < Card brand >	Entry method < Card entry method >
Transaction type Preauthorization	Date Month dd, yyyy	Time hh:mm AM/PM
Order ID MOGO123456789001234	Auth # 123456	Terminal ID 66012345
Host reference # 000000000	< Customer ID > < a1b2c3d4e5f6 >	Foreign Currency Amount AA.AA < Currency >
FX Rate A.AAAAAA	Clerk < Clerk >	ECI # - < ecommerce indicator >
Channel < Channel >		

Fraud check

CVD Result < CVD response >	AVS Result < AVS response >

Transaction events

mm/dd/yyyy hh:mm:ss AM/PM	Preload success
mm/dd/yyyy hh:mm:ss AM/PM	Pageload
mm/dd/yyyy hh:mm:ss AM/PM	Done processing geo-location
mm/dd/yyyy hh:mm:ss AM/PM	Front-end data validation xxxxxxxxxx
mm/dd/yyyy hh:mm:ss AM/PM	Payment details submitted for processing
mm/dd/yyyy hh:mm:ss AM/PM	Front-end data validation - performing card verification transaction
mm/dd/yyyy hh:mm:ss AM/PM	Front-end data validation - performing 3DS
mm/dd/yyyy hh:mm:ss AM/PM	Start processing - done fraud checks
mm/dd/yyyy hh:mm:ss AM/PM	Performing cc or wallet transaction
mm/dd/yyyy hh:mm:ss AM/PM	Sending financial transaction to gateway
mm/dd/yyyy hh:mm:ss AM/PM	Got financial response from gateway
mm/dd/yyyy hh:mm:ss AM/PM	Done processing CC or wallet transactions
mm/dd/yyyy hh:mm:ss AM/PM	Financial or Gift Transaction approved

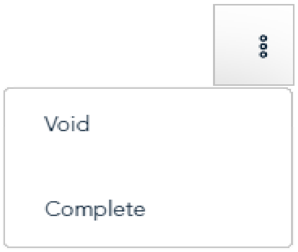
Copyright Moneris Go Portal yyyy

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

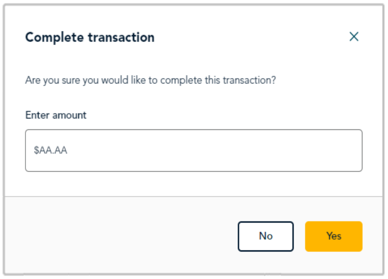
   ### To complete the Preauthorization for a full or partial amount:

   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 **Complete**.



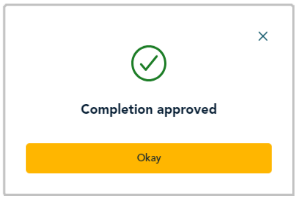
c. When the "Complete transaction" dialog displays (shown below), enter a new dollar value in the **Enter amount** field if you want to change the completion amount. Otherwise, leave the displayed amount unchanged to complete the transaction for the originally authorized amount.



Are you sure you would like to complete this transaction?

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 on its **Okay** button to close the dialog.

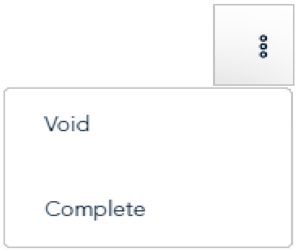


f. Print or send (email/text) a transaction receipt (see Sending/printing a transaction receipt on page 84).

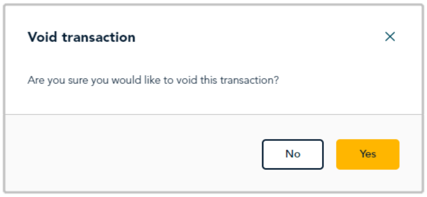
To cancel the Preauthorization and release the authorized funds:

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**.



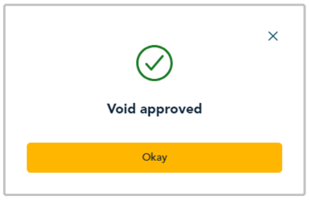
c. When the "Void transaction" dialog displays (shown below), click on its **Yes** button.



Are you sure you would like to void this transaction?

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 84).

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.

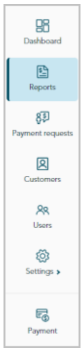
Note: *Transactions originally processed with an Interac card cannot be voided from the Moneris Go portal.*

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 30).[8]

   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 83). 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 39.)*

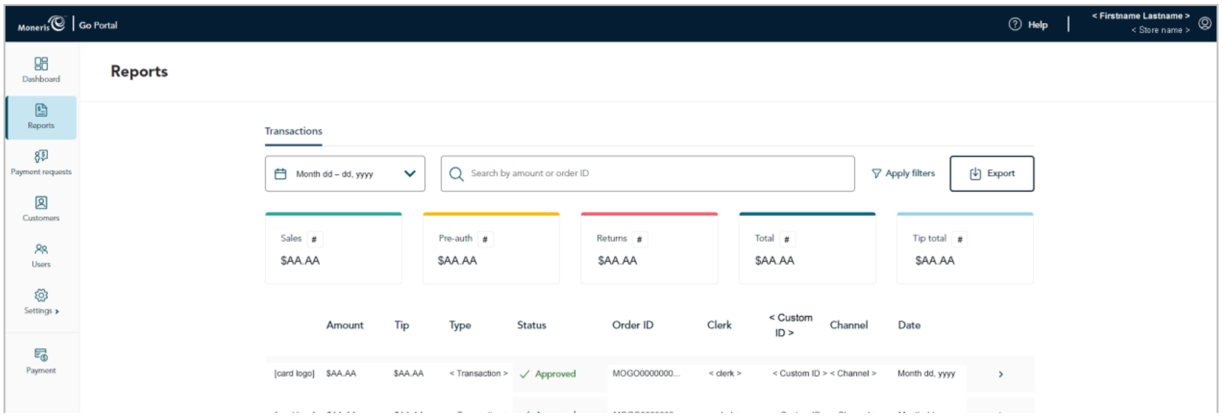
2. On the sidebar menu (shown here), click on **Reports**.

   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 66).*



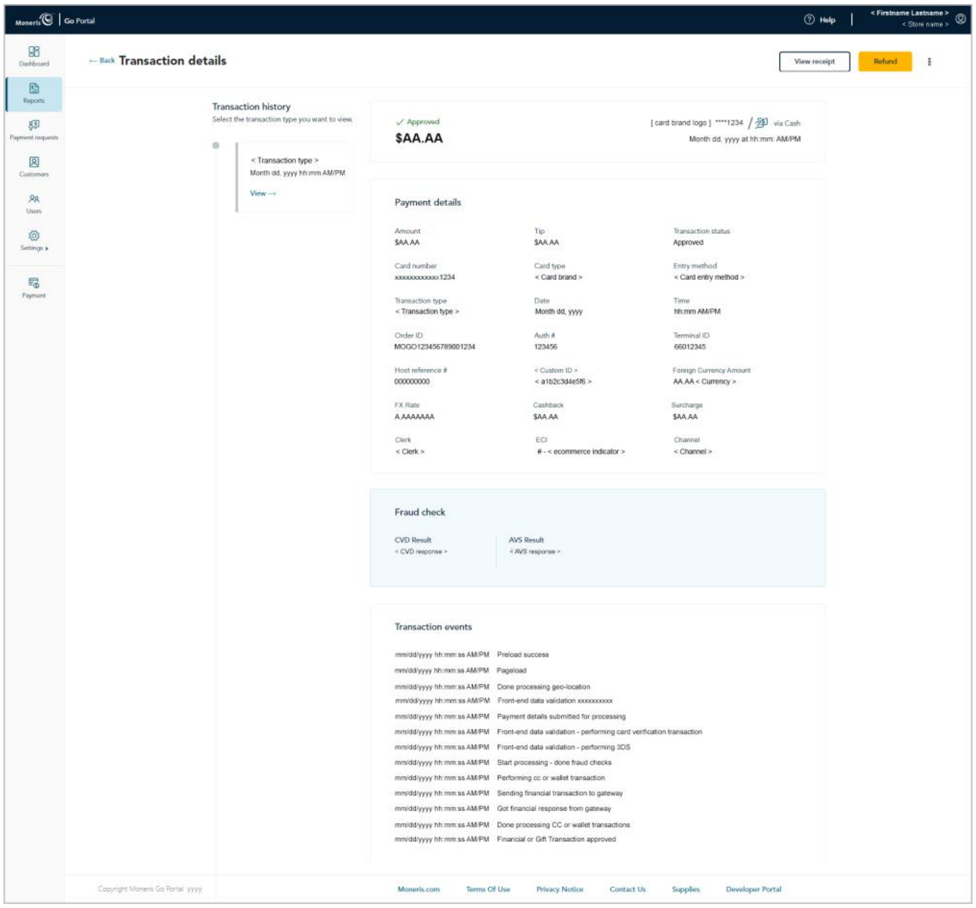
	Amount	Tip	Type	Status	Order ID	Clerk	< Custom ID >	Channel	Date	
[card logo]	$AA.AA	$AA.AA	< Transaction >	✓ Approved	MOGO0000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy	›

---

[8] 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 38).

4. 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 68).*



Transaction details

Transaction history

Select the transaction type you want to view.

< Transaction type >
Month dd, yyyy hh:mm AM/PM

✓ Approved

$AA.AA

[card brand logo] ****1234 / via Cash
Month dd, yyyy at hh:mm: AM/PM

Payment details

Amount $AA.AA	Tip $AA.AA	Transaction status Approved
Card number xxxxxxxxxxxx1234	Card type < Card brand >	Entry method < Card entry method >
Transaction type < Transaction type >	Date Month dd, yyyy	Time hh:mm AM/PM
Order ID MOGO123456789001234	Auth # 123456	Terminal ID 66012345
Host reference # 000000000	< Custom ID > < a1b2c3d4e5f6 >	Foreign Currency Amount AA.AA < Currency >
FX Rate A.AAAAAAA	Cashback $AA.AA	Surcharge $AA.AA
Clerk < Clerk >	ECI # - < ecommerce indicator >	Channel < Channel >

Fraud check

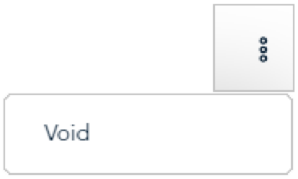
CVD Result < CVD response >	AVS Result < AVS response >

Transaction events

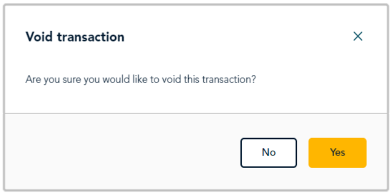
```
mm/dd/yyyy hh:mm:ss AM/PM   Preload success
mm/dd/yyyy hh:mm:ss AM/PM   Pageload
mm/dd/yyyy hh:mm:ss AM/PM   Done processing geo-location
mm/dd/yyyy hh:mm:ss AM/PM   Front-end data validation xxxxxxxxxx
mm/dd/yyyy hh:mm:ss AM/PM   Payment details submitted for processing
mm/dd/yyyy hh:mm:ss AM/PM   Front-end data validation - performing card verification transaction
mm/dd/yyyy hh:mm:ss AM/PM   Front-end data validation - performing 3DS
mm/dd/yyyy hh:mm:ss AM/PM   Start processing - done fraud checks
mm/dd/yyyy hh:mm:ss AM/PM   Performing cc or wallet transaction
mm/dd/yyyy hh:mm:ss AM/PM   Sending financial transaction to gateway
mm/dd/yyyy hh:mm:ss AM/PM   Got financial response from gateway
mm/dd/yyyy hh:mm:ss AM/PM   Done processing CC or wallet transactions
mm/dd/yyyy hh:mm:ss AM/PM   Financial or Gift Transaction approved
```

5. In the upper right corner on the "Transaction details" page, click on the (more options) ellipsis ⋮.

6. When the "Void" drop-down displays (shown below), click on **Void**.



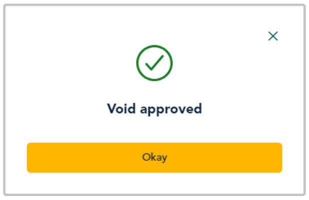
7. When the "Void transaction" dialog displays (shown below), click on its **Yes** button.



Are you sure you would like to void this transaction?

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 84).

Refund: manual entry

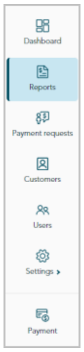
The steps below describe how to reverse (refund) a Moneris Go portal-referenced Purchase or Completion transaction for a full or partial amount. The funds of the original Purchase or Completion transaction are fully/partially restored to the cardholder's card.[9]

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 30).[10]

   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 83). 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 39.)*

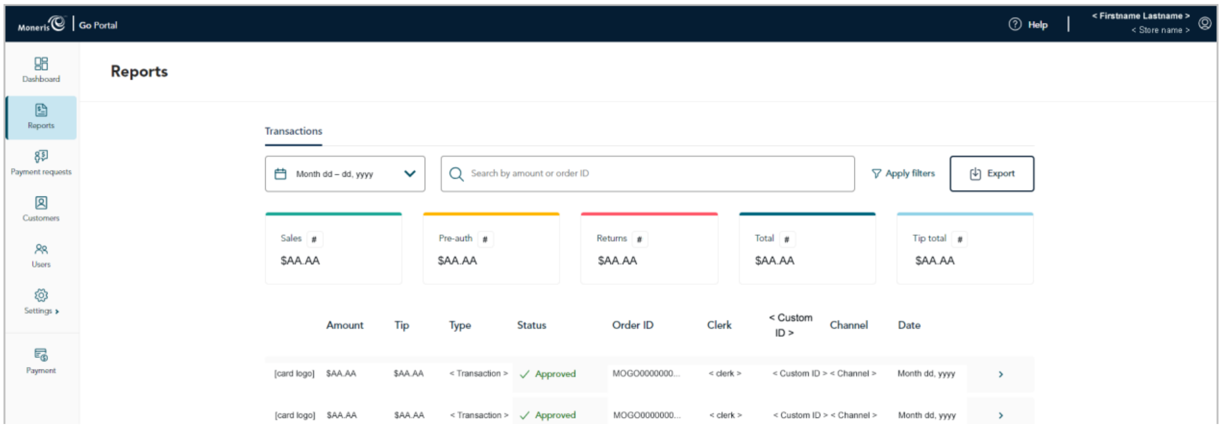
2. On the sidebar menu (shown here), click on **Reports**.

   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 66).*



	Amount	Tip	Type	Status	Order ID	Clerk	< Custom ID >	Channel	Date	
[card logo]	$AA.AA	$AA.AA	< Transaction >	✓ Approved	MOGO0000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy	›
[card logo]	$AA.AA	$AA.AA	< Transaction >	✓ Approved	MOGO0000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy	›

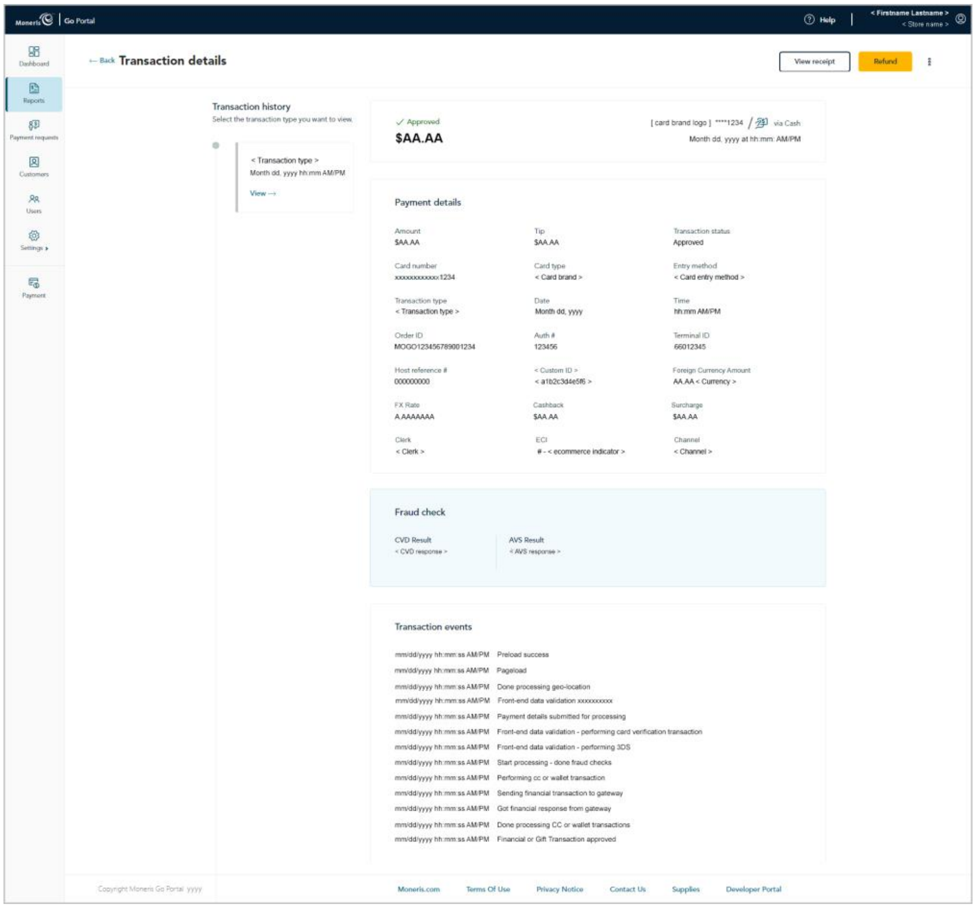
---

[9] Transactions originally processed with an *Interac card* cannot be refunded from the Moneris Go portal.

[10] 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 38).

4. 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* *<u>Transaction details</u>* *(page 68).*



Transaction details

Transaction history
Select the transaction type you want to view.

< Transaction type >
Month dd, yyyy hh:mm AM/PM

✓ Approved
$AA.AA
[card brand logo] ****1234 / via Cash
Month dd, yyyy at hh:mm: AM/PM

Payment details

Amount $AA.AA	Tip $AA.AA	Transaction status Approved
Card number xxxxxxxxxxxx1234	Card type < Card brand >	Entry method < Card entry method >
Transaction type < Transaction type >	Date Month dd, yyyy	Time hh:mm AM/PM
Order ID MOGO123456789001234	Auth # 123456	Terminal ID 66012345
Host reference # 000000000	< Custom ID > < a1b2c3d4e5f6 >	Foreign Currency Amount AA.AA < Currency >
FX Rate A.AAAAAAA	Cashback $AA.AA	Surcharge $AA.AA
Clerk < Clerk >	ECI # - < ecommerce indicator >	Channel < Channel >

Fraud check

CVD Result < CVD response >	AVS Result < AVS response >

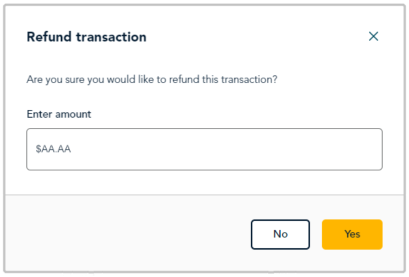
Transaction events

mm/dd/yyyy hh:mm:ss AM/PM	Preload success
mm/dd/yyyy hh:mm:ss AM/PM	Pageload
mm/dd/yyyy hh:mm:ss AM/PM	Done processing geo-location
mm/dd/yyyy hh:mm:ss AM/PM	Front-end data validation xxxxxxxxxx
mm/dd/yyyy hh:mm:ss AM/PM	Payment details submitted for processing
mm/dd/yyyy hh:mm:ss AM/PM	Front-end data validation - performing card verification transaction
mm/dd/yyyy hh:mm:ss AM/PM	Front-end data validation - performing 3DS
mm/dd/yyyy hh:mm:ss AM/PM	Start processing - done fraud checks
mm/dd/yyyy hh:mm:ss AM/PM	Performing cc or wallet transaction
mm/dd/yyyy hh:mm:ss AM/PM	Sending financial transaction to gateway
mm/dd/yyyy hh:mm:ss AM/PM	Got financial response from gateway
mm/dd/yyyy hh:mm:ss AM/PM	Done processing CC or wallet transactions
mm/dd/yyyy hh:mm:ss AM/PM	Financial or Gift Transaction approved

Copyright Moneris Go Portal yyyy

5. In the upper right corner on the "Transaction details" page, click on the **Refund** button.

6. When the "Refund transaction" 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.



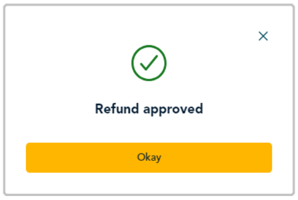
Refund transaction

Are you sure you would like to refund this transaction?

Enter amount
$AA.AA

7. Wait while the transaction is processed.

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



9. Print or send (email/text) a transaction receipt (see Sending/printing a transaction receipt on page 84).

Independent Refund with credit card: manual entry

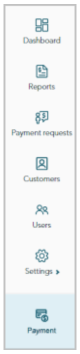
The steps below describe how to do an independent Refund of goods and services by entering card data in Moneris Go portal payment fields. The independent Refund fully or partially reverses (refunds) an unreferenced credit card[11] sale and restores funds to a cardholder's credit card.

Note: *The independent Refund is disabled by default but can be enabled (temporarily or for a longer period) for your store upon request provided that the store is not set up to support Tap to Pay (Moneris Go app).*

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 30).[12]

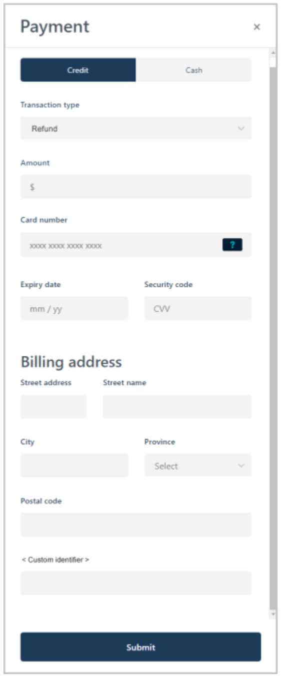
   Note: *If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*

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:

   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 132).*

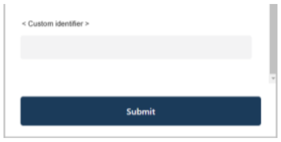
---

[11] Some card brands support debit card manual entry for this transaction.

[12] 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 38).

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 137).*



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:

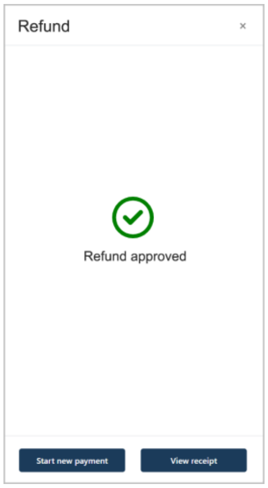
   To view, print, or send (email/text) the transaction receipt:

   a. Click on the **View receipt** button.

   b. Continue in Sending/printing a transaction receipt (page 84).

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

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



Refund approved

Reporting & Receipts

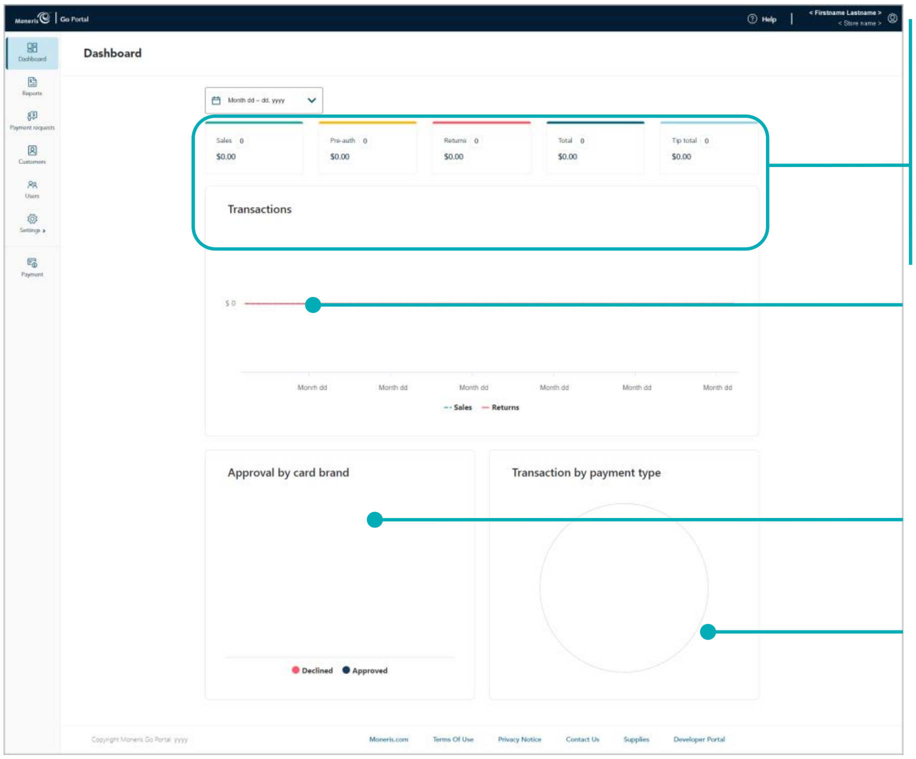
In this section, we go over everything you need to know to generate financial transaction reports and access receipts from your Moneris Go portal store, including reporting and receipt data from any point-of-sale device or application that is synchronized to your store.

The dashboard

The "Dashboard" page (shown below) provides an at-a-glance graphical and numeric summary of your store's financial transactions (up to the last 13 months), including net totals for the date range that you specify in the calendar. The default date range is "Current week". (For dashboard data older than 13 months, please access Merchant Direct.)

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 26).*

- To change the dashboard reporting period, see Changing your dashboard's report period (page 64).



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.

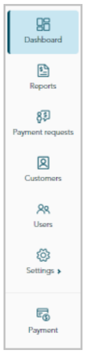
Returning to your store's dashboard

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 39).*

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.*

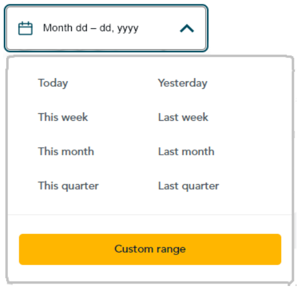


Changing your dashboard's report period

Follow the steps below to select a new date range (up to the last 13 months) for your Moneris Go portal store's dashboard report.

Note: *To retrieve transaction data older than 13 months, please access Merchant Direct.*

1. Go to your store's "Dashboard" page (see The dashboard on page 63).
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**).

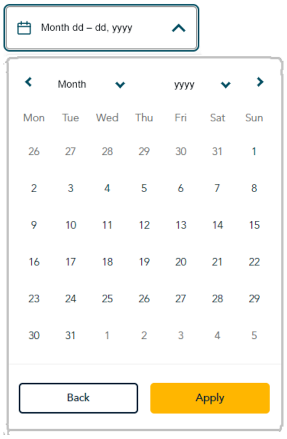
b. Wait while the dashboard request is processed.

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* **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 dashboard request is processed.

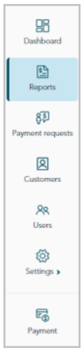
Financial transactions report

The steps below describe how to generate a detailed report about financial transactions performed in the last 13 months through your Moneris Go portal store, including transactions performed on any POS device/app 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.

Note: *If you want to retrieve transactions older than 13 months, please access Merchant Direct.*

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 30).

   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 39).*

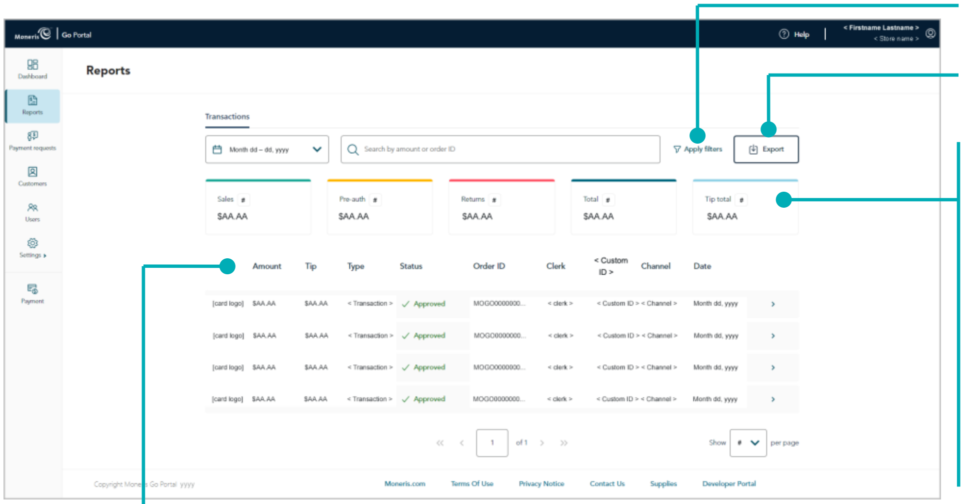


2. On the sidebar menu (shown here), click on **Reports**.

   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 numerical summary of totals by transaction type and list any transaction processed within the default search period (i.e., the 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 the search filters for your financial transactions report on page 73).*



	Amount	Tip	Type	Status	Order ID	Clerk	< Custom ID >	Channel	Date	
[card logo]	$AA.AA	$AA.AA	< Transaction >	✓ Approved	MOGO0000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy	›
[card logo]	$AA.AA	$AA.AA	< Transaction >	✓ Approved	MOGO0000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy	›
[card logo]	$AA.AA	$AA.AA	< Transaction >	✓ Approved	MOGO0000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy	›
[card logo]	$AA.AA	$AA.AA	< Transaction >	✓ Approved	MOGO0000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy	›

# of active search filters indicated.

Export the report (see Exporting a financial transactions report on page 81).

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.

Report headers include "Amount", "Tip", "Type", "Status", "Order ID", "Clerk", "Custom ID", "Channel", and "Date" (Month dd, yyyy). For more information about each header, see Payment details descriptions (page 70).

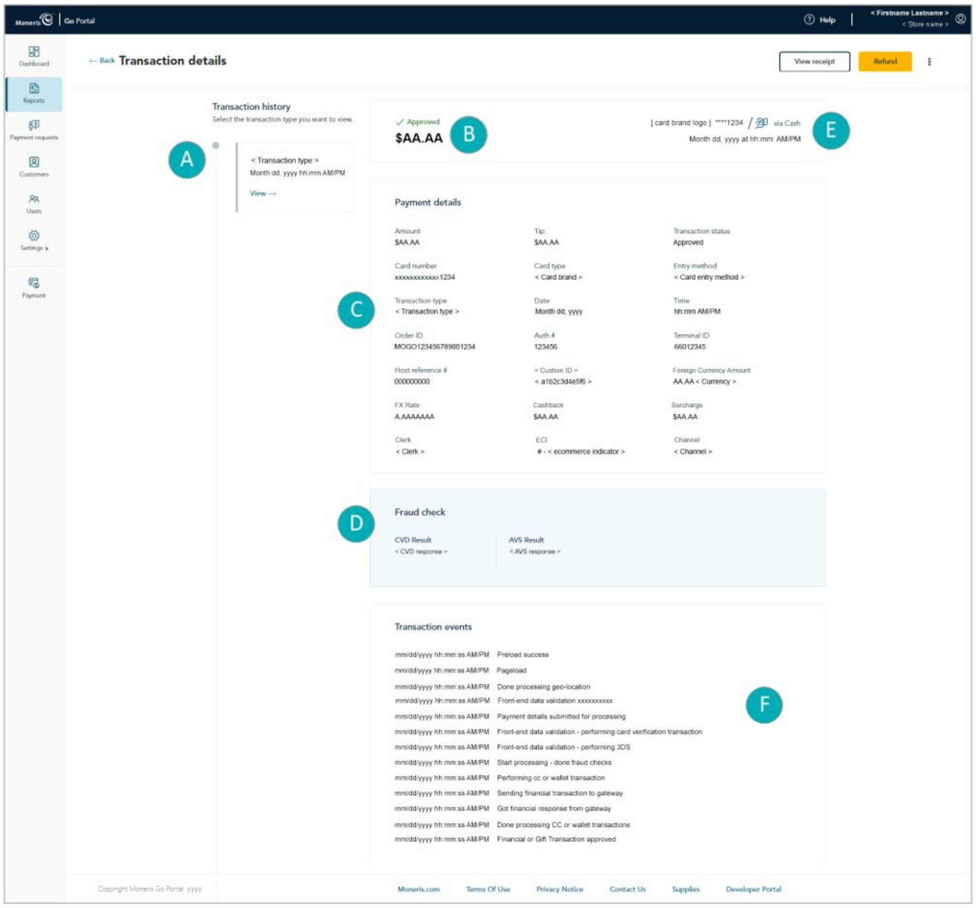
Merchant Direct note: *Any data populating under Moneris Go portal's custom ID field/header in a Go portal receipt or report will always be listed under the header "Customer ID" in Merchant Direct's financial transactions reports regardless of the field/header label that is configured in Moneris Go portal.*

- 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 68).
- To change the number of hits listed on the 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 steps below describe how to view the "Transaction details" page for an approved/declined financial transaction. 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.

1. Initiate a financial transactions report to retrieve the desired transaction (see Financial transactions report on page 66), and then click on the transaction to open its "Transaction details" page (shown below).



Transaction details

Transaction history

Select the transaction type you want to view.

< Transaction type >
Month dd, yyyy hh:mm AM/PM
View →

✓ Approved
$AA.AA

[card brand logo] ****1234 / via Cash
Month dd, yyyy at hh:mm: AM/PM

Payment details

Amount $AA.AA	Tip $AA.AA	Transaction status Approved
Card number xxxxxxxxxxxx1234	Card type < Card brand >	Entry method < Card entry method >
Transaction type < Transaction type >	Date Month dd, yyyy	Time hh:mm AM/PM
Order ID MOGO123456789001234	Auth # 123456	Terminal ID 66012345
Host reference # 000000000	< Custom ID > < a1b2c3d4e5f6 >	Foreign Currency Amount AA.AA < Currency >
FX Rate A.AAAAAAA	Cashback $AA.AA	Surcharge $AA.AA
Clerk < Clerk >	ECI # - < ecommerce indicator >	Channel < Channel >

Fraud check

CVD Result
< CVD response >

AVS Result
< AVS response >

Transaction events

```
mm/dd/yyyy hh:mm:ss AM/PM   Preload success
mm/dd/yyyy hh:mm:ss AM/PM   Pageload
mm/dd/yyyy hh:mm:ss AM/PM   Done processing geo-location
mm/dd/yyyy hh:mm:ss AM/PM   Front-end data validation xxxxxxxxxx
mm/dd/yyyy hh:mm:ss AM/PM   Payment details submitted for processing
mm/dd/yyyy hh:mm:ss AM/PM   Front-end data validation - performing card verification transaction
mm/dd/yyyy hh:mm:ss AM/PM   Front-end data validation - performing 3DS
mm/dd/yyyy hh:mm:ss AM/PM   Start processing - done fraud checks
mm/dd/yyyy hh:mm:ss AM/PM   Performing cc or wallet transaction
mm/dd/yyyy hh:mm:ss AM/PM   Sending financial transaction to gateway
mm/dd/yyyy hh:mm:ss AM/PM   Got financial response from gateway
mm/dd/yyyy hh:mm:ss AM/PM   Done processing CC or wallet transactions
mm/dd/yyyy hh:mm:ss AM/PM   Financial or Gift Transaction approved
```

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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 total transaction amount (CAD) and the transaction status. ***Note:*** *Funds are settled in CAD according to this dollar amount.*
C	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 >", "Foreign currency amount", "FX rate", "Clerk", "ECI", and "Channel". For line-item descriptions of payment details, see Payment details descriptions (page 70).

Label	Descriptions
D	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 Fraud check result descriptions (page 72).
E	▪ For a debit/credit/gift transaction: Displays the logo of the card brand used in the transaction and the last four digits of the masked card number. ▪ For a cash transaction: Displays the cash indicator logo "via Cash".
F	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 84).

Initiate a follow-on transaction:

- To do a Void, continue at step 4 in Void: manual entry (page 55).
- To do a Refund, continue at step 4 in Refund: manual entry (page 58).
- To do a Completion, continue at step 4 in Completion with credit card: manual entry (page 51).

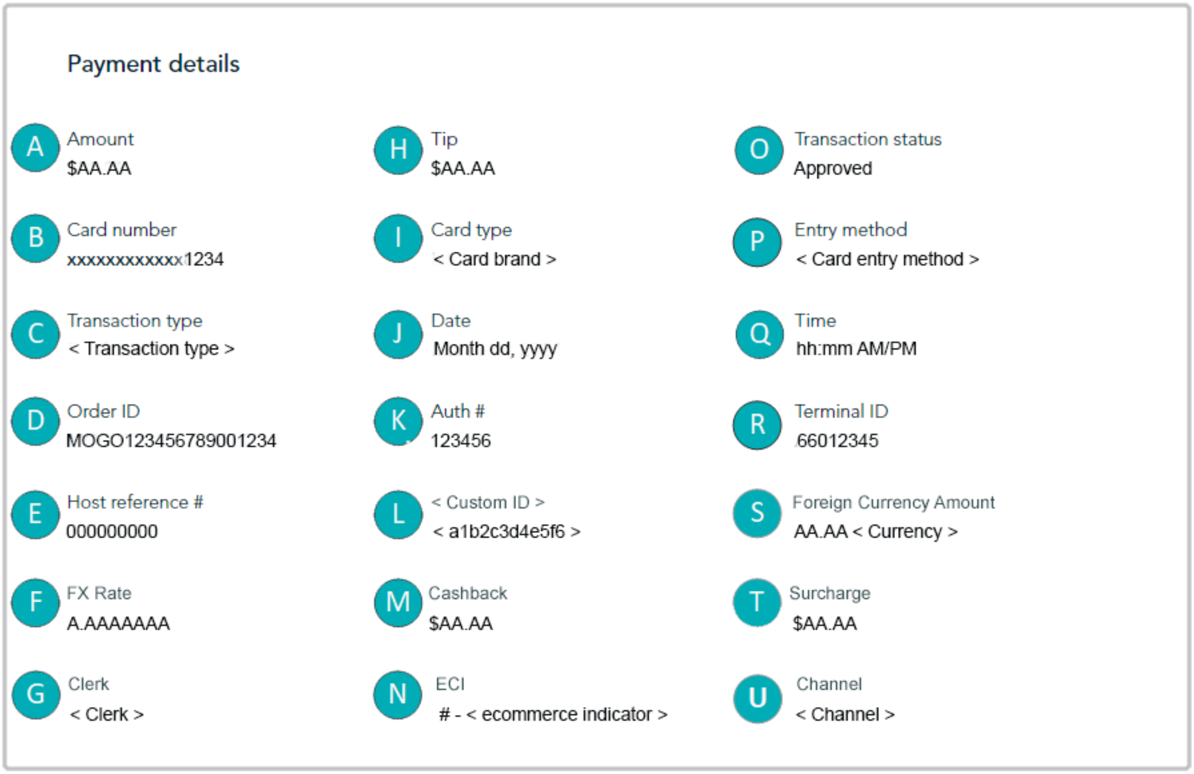
Return to your financial transactions report:

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 68). 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 66). These line items are also identified in the table below.*



Payment details

A Amount
$AA.AA

B Card number
xxxxxxxxxxxx1234

C Transaction type
< Transaction type >

D Order ID
MOGO123456789001234

E Host reference #
000000000

F FX Rate
A.AAAAAAA

G Clerk
< Clerk >

H Tip
$AA.AA

I Card type
< Card brand >

J Date
Month dd, yyyy

K Auth #
123456

L < Custom ID >
< a1b2c3d4e5f6 >

M Cashback
$AA.AA

N ECI
- < ecommerce indicator >

O Transaction status
Approved

P Entry method
< Card entry method >

Q Time
hh:mm AM/PM

R Terminal ID
66012345

S Foreign Currency Amount
AA.AA < Currency >

T Surcharge
$AA.AA

U Channel
< Channel >

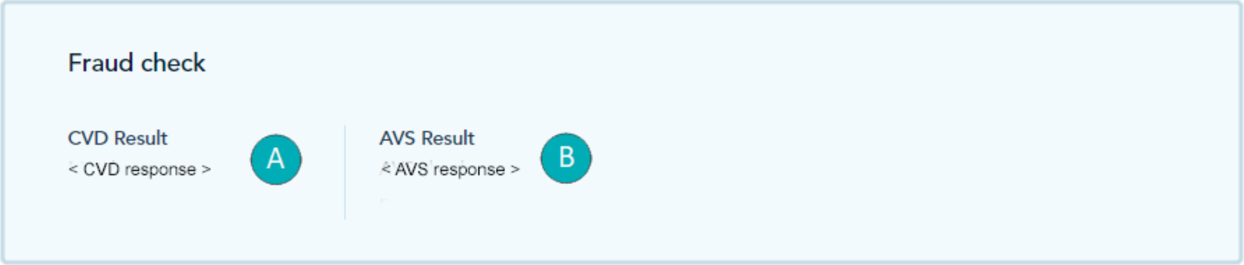
The table below describes the labelled line items in the "Payment details" module image shown above. The circle (●) in the "Header" column indicates the line item is also featured as a standard header in the financial transactions report.

Label	Line item	Report header	Description
A	Amount	●	Total transaction amount (CAD), including any tip, cashback, and/or surcharge. ***Note:*** *Funds are settled in CAD according to this dollar amount.*
B	Card number		Masked card number of the card used for the transaction.
C	Transaction type	●	Transaction type (e.g., Purchase, Preauthorization, Refund, Void, Completion, or Verification).
D	Order ID	●	Unique transaction identifier (also referred to as "Order #").
E	Host reference #		Host reference number.
F	FX rate		Exchange rate at the time the transaction was processed in the foreign currency (see "Foreign Currency Amount" line item in row "S").

Label	Line item	Report header	Description
G	Clerk	●	Login ID (email) of the user who initiated the transaction. If the transaction was initiated through an ecommerce integration (e.g., Moneris Checkout), the integration type is indicated in place of the login ID.
H	Tip	●	Tip amount (see Terminal settings: tips on page 179).
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 >	●	Custom transaction identifier (see Custom ID: store settings on page 137; and see Terminal settings: transactions on page 166). ***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.*
M	Cashback		Cashback amount (see Terminal settings: cashback on page 176).
N	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 Ecommerce indicator descriptions on page 216.)
O	Transaction status	●	Card issuer response (e.g., "Approved" or "Declined").
P	Entry method		Card entry method used for the transaction.
Q	Time		Time (hh:mm AM/PM) of the transaction.
R	Terminal ID		8-digit identifier associated with one or more card types and/or the point-of-sale device or application through which the transaction was initiated (see Terminal ID descriptions on page 217).
S	Foreign currency amount		The non-Canadian currency in which the transaction was processed (see "FX Rate" line item in row "F"). ***Note:*** *Multi-currency pricing (MCP)/dynamic currency conversion (DCC) must be enabled. Funds are settled in CAD (see "Amount" line item in row "A").*
T	Surcharge		Configurable surcharge amount (see Terminal settings: transactions on page 166).
U	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 Channel indicator descriptions on page 214.)

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 68). 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 the 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 66).
2. Select your report search filter(s) as desired (see filter list in the table below):

Search filter	See procedure:
Amount	Retrieving transactions by amount or order ID (page 74)
Card type	Manually selecting filter: ▪ Retrieving transactions by transaction type, card type, user, and/or channel: manual select (page 77) Selecting as part of pre-defined filter set: ▪ Retrieving transactions by using pre-defined filter set (page 79)
Channel	Manually selecting filter: ▪ Retrieving transactions by transaction type, card type, user, and/or channel: manual select (page 77) Selecting as part of pre-defined filter set: ▪ Retrieving transactions by using pre-defined filter set (page 79)
Date range (customized)	Retrieving transactions by custom date range (page 76)
Date range (pre-defined)	Retrieving transactions by pre-defined date range (page 75)
Order ID	Retrieving transactions by amount or order ID (page 74)
Transaction type	Manually selecting filter: ▪ Retrieving transactions by transaction type, card type, user, and/or channel: manual select (page 77) Selecting as part of pre-defined filter set: ▪ Retrieving transactions by using pre-defined filter set (page 79)
User	Manually selecting filter: ▪ Retrieving transactions by transaction type, card type, user, and/or channel: manual select (page 77) Selecting as part of pre-defined filter set: ▪ Retrieving transactions by using pre-defined filter set (page 79)

Retrieving transactions by amount or order ID

Follow the steps below to generate a financial transactions report (up to the last 13 months) for your Moneris Go portal store by entering a transaction amount or order ID as the search criterion.

Note: *If you want to retrieve transactions older than 13 months, please access Merchant Direct.*

1. Initiate a financial transactions report (see Financial transactions report on page 66).

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.

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 75).
    - For custom date, continue at step 2 in Retrieving transactions by custom date range (page 76).

4. Wait while the report request is processed.

    Note*:* *To use a different search filter, see Changing the search filters for your financial transactions report (page 73).*

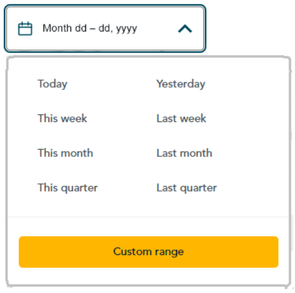
Retrieving transactions by pre-defined date range

Follow the steps below to generate a financial transactions report (up to the last 13 months) for your Moneris Go portal store by selecting a pre-defined report date range such as today, yesterday, week, or quarter.

Note: *If you want to retrieve transactions older than 13 months, please access Merchant Direct.*

1. Initiate a financial transactions report (see Financial transactions report on page 66).
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 a date range (**Today**, **Yesterday**, **This week**, **Last week**, **This month**, **Last month**, **This quarter**, or **Last quarter**).



4. Wait while the report request is processed.

   Note*:* *To use a different search filter, see Changing the search filters for your financial transactions report (page 73).*

Retrieving transactions by custom date range

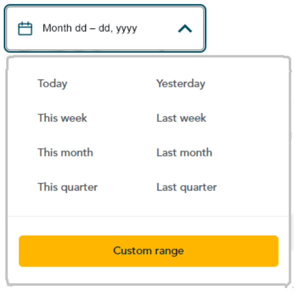
Follow the steps below to generate a financial transactions report (up to the last 13 months) for your Moneris Go portal store by selecting your own report date range.

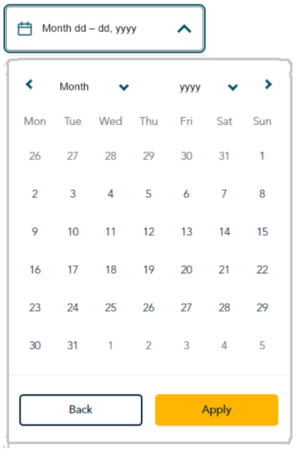
Note: *If you want to retrieve transactions older than 13 months, please access Merchant Direct.*

1. Initiate a financial transactions report (see Financial transactions report on page 66).

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* **v** *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* **v** *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.

   Note*:* *To use a different search filter, see Changing the search filters for your financial transactions report (page 73).*

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

Follow the steps below to generate a financial transactions report (up to the last 13 months) 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 79). If you want to retrieve transactions older than 13 months, please access Merchant Direct.*

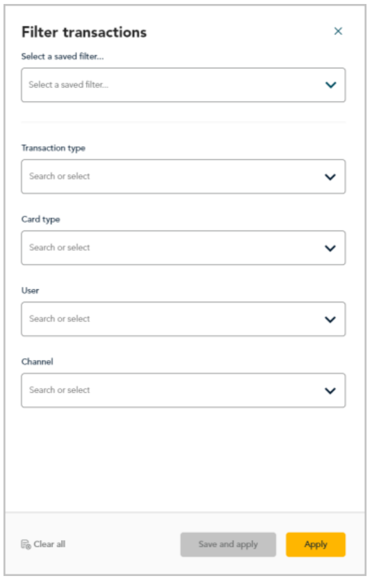
1. Initiate a financial transactions report (see Financial transactions report on page 66).

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), 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**, **Tap to Pay**, and **Go Retail POS**).

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

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).

OF ACTIVE FILTERS

Note*:* *To use a different search filter, see Changing the search filters for your financial transactions report (page 73).*

Retrieving transactions by using pre-defined filter set

Follow the steps below to generate a financial transactions report (up to the last 13 months) 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 80). If you want to retrieve transactions older than 13 months, please access Merchant Direct.*

1. Initiate a financial transactions report (see Financial transactions report on page 66).

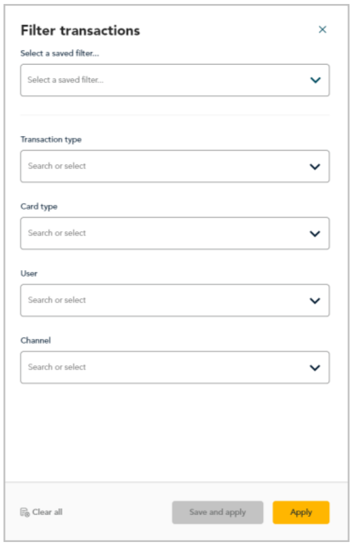
2. On the "Reports" page, click on **Apply filters** in the search bar (shown below).

   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).

   Note: *To use a different search filter, see Changing the search filters for your financial transactions report (page 73).*

Defining a new search filter set

Follow the steps below to generate a financial transactions report (up to the last 13 months) 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.

Note: *If you want to retrieve transactions older than 13 months, please access Merchant Direct.*

1. Initiate a financial transactions report (see Financial transactions report on page 66).

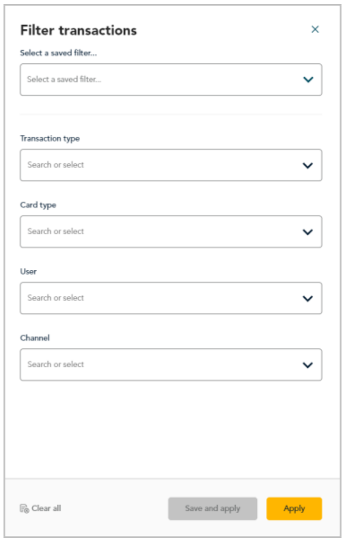
2. On the "Reports" page, click on **Apply filters** in the search bar (shown below).

   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**.*

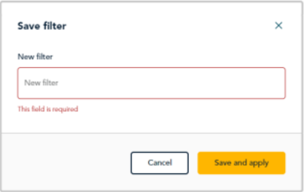
3. When the "Filter transactions" window displays (shown here), do the following:
   a. Click on the drop-down for the filter group containing the filter type(s) that you want to add, and then checkmark the box beside the desired filter type(s).

      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.



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.



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).

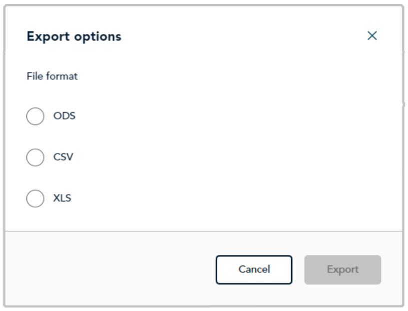

OF ACTIVE FILTERS

Exporting a financial transactions report

The steps below describe how 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 66).
2. On the "Reports" page, go to the search bar, and click on the **Export** button (shown below).

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.*

Other reports

Payment request reporting

- See Payment requests report (page 101).

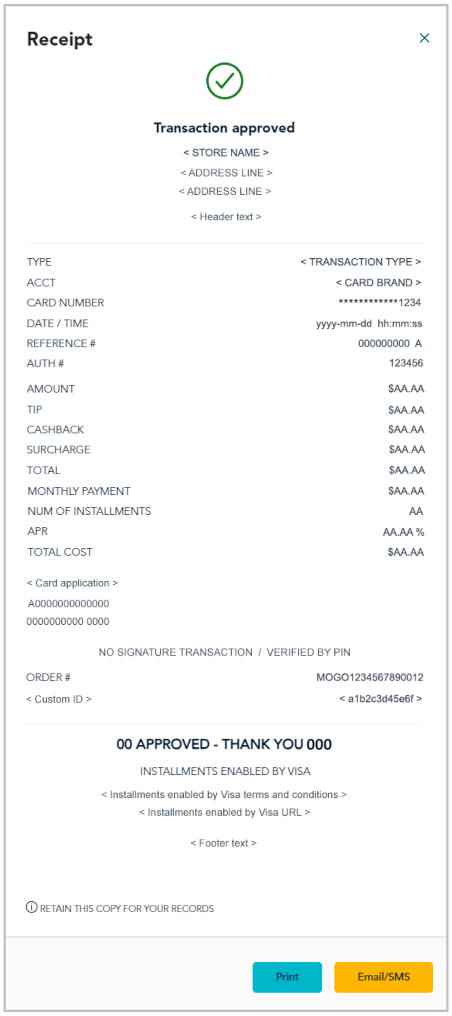
Vault customer profile reporting

- See Vault customer profiles report (page 116).
- See Financial transactions associated with a Vault customer profile (page 121).

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 point-of-sale device or application that is synched 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 84).*



Transaction approved

< STORE NAME >
< ADDRESS LINE >
< ADDRESS LINE >

< Header text >

TYPE	< TRANSACTION TYPE >
ACCT	< CARD BRAND >
CARD NUMBER	************1234
DATE / TIME	yyyy-mm-dd hh:mm:ss
REFERENCE #	000000000 A
AUTH #	123456
AMOUNT	$AA.AA
TIP	$AA.AA
CASHBACK	$AA.AA
SURCHARGE	$AA.AA
TOTAL	$AA.AA
MONTHLY PAYMENT	$AA.AA
NUM OF INSTALLMENTS	AA
APR	AA.AA %
TOTAL COST	$AA.AA

< Card application >
A0000000000000
0000000000 0000

NO SIGNATURE TRANSACTION / VERIFIED BY PIN

ORDER #	MOGO1234567890012
< Custom ID >	< a1b2c3d45e6f >

00 APPROVED - THANK YOU 000

INSTALLMENTS ENABLED BY VISA

< Installments enabled by Visa terms and conditions >
< Installments enabled by Visa URL >

< Footer text >

ⓘ RETAIN THIS COPY FOR YOUR RECORDS

Debit/credit receipt

- For receipt line-item descriptions, see Receipt example: debit/credit (page 85).

Gift receipt

- For receipt line-item descriptions, see Receipt example: gift (page 87).

Cash receipt

- For receipt line-item descriptions, see Receipt example: cash (page 89).

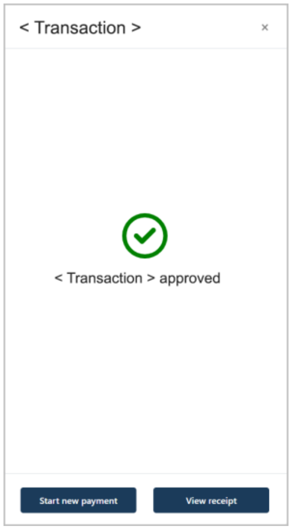
Sending/printing a transaction receipt

The steps below describe how to view, send, and/or print a financial transaction receipt (see Receipts on page 83) from the Moneris Go portal.

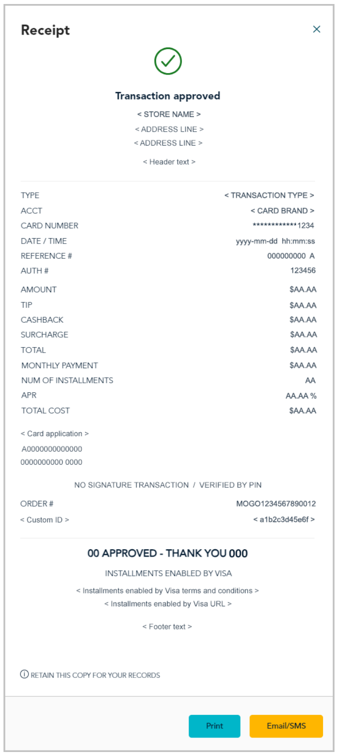
1. Access the "Transaction details" page of the desired transaction (see Transaction details on page 68), and then click on the **View receipt** button near the upper right corner on the page (shown below).

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:



Receipt

Transaction approved

< STORE NAME >
< ADDRESS LINE >
< ADDRESS LINE >

< Header text >

TYPE	< TRANSACTION TYPE >
ACCT	< CARD BRAND >
CARD NUMBER	************1234
DATE / TIME	yyyy-mm-dd hh:mm:ss
REFERENCE #	000000000 A
AUTH #	123456
AMOUNT	$AA.AA
TIP	$AA.AA
CASHBACK	$AA.AA
SURCHARGE	$AA.AA
TOTAL	$AA.AA
MONTHLY PAYMENT	$AA.AA
NUM OF INSTALLMENTS	AA
APR	AA.AA %
TOTAL COST	$AA.AA

< Card application >
A0000000000000
0000000000 0000

NO SIGNATURE TRANSACTION / VERIFIED BY PIN

ORDER #	MOGO1234567890012
< Custom ID >	< a1b2c3d45e6f >

00 APPROVED - THANK YOU 000

INSTALLMENTS ENABLED BY VISA
< Installments enabled by Visa terms and conditions >
< Installments enabled by Visa URL >

< Footer text >

ⓘ RETAIN THIS COPY FOR YOUR RECORDS

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.

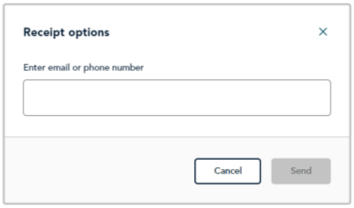
To email/text the transaction receipt:

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 84).*

Transaction approved

< STORE NAME >
< ADDRESS LINE >
< ADDRESS LINE >

< Header text >

TYPE	< TRANSACTION TYPE >
ACCT	< CARD BRAND >
CARD NUMBER	************1234
DATE / TIME	yyyy-mm-dd hh:mm:ss
REFERENCE #	000000000 A
AUTH #	123456
AMOUNT	$AA.AA
TIP	$AA.AA
CASHBACK	$AA.AA
SURCHARGE	$AA.AA
TOTAL	$AA.AA
MONTHLY PAYMENT	$AA.AA
NUM OF INSTALLMENTS	AA
APR	AA.AA %
TOTAL COST	$AA.AA

< Card application >
A0000000000000
0000000000 0000

NO SIGNATURE TRANSACTION / VERIFIED BY PIN

ORDER #	MOGO1234567890012
< Custom ID >	< a1b2c3d45e6f >

00 APPROVED - THANK YOU 000

INSTALLMENTS ENABLED BY VISA
< Installments enabled by Visa terms and conditions >
< Installments enabled by Visa URL >

< Footer text >

ⓘ RETAIN THIS COPY FOR YOUR RECORDS

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

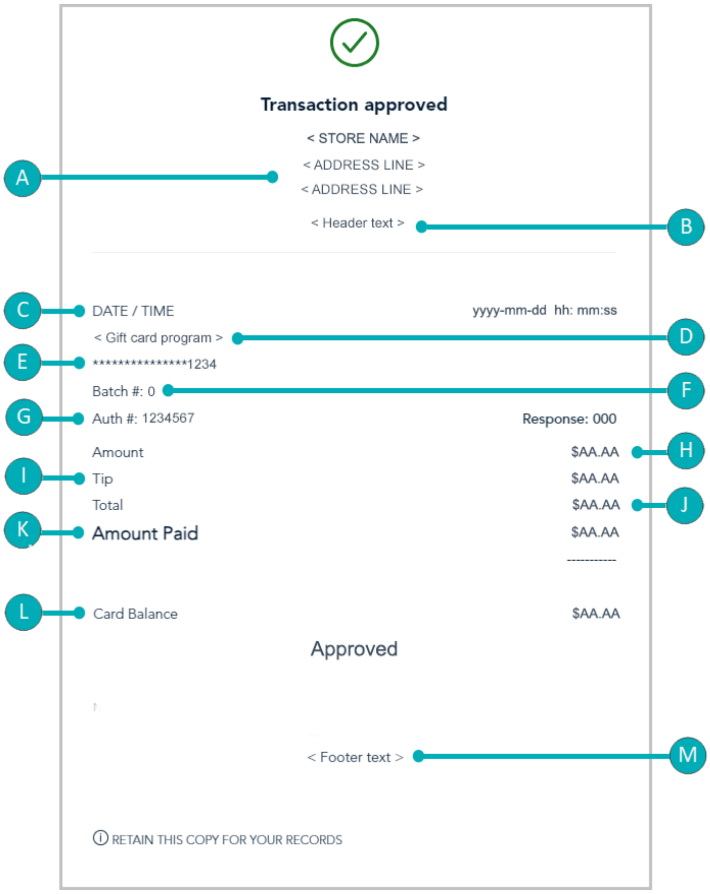
Label	Line item	Description
A	< Store name > < ADDRESS LINE # 1 > < ADDRESS LINE # 2 >	Store name (same as the store tile label on your "Stores" page) and address. ***Note:*** *The store name can be used to identify the Moneris Go portal store to which a point-of-sale device or application is synched.*
B	< Header text >	Customizable message in the header (see Terminal settings: receipts on page 169).
C	TYPE	Transaction type.

Label	Line item	Description
D	ACCT	Card brand (type) used for transaction.
E	CARD NUMBER	Masked debit/credit card number.
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	AMOUNT	Transaction amount (CAD), not including any tip, cashback, and surcharge.
J	TIP	Tip amount (see Terminal settings: tips on page 179).
K	CASHBACK	Cashback amount (see Terminal settings: cashback on page 176).
L	SURCHARGE	Surcharge amount (see Terminal settings: transactions on page 166).
M	TOTAL	Total transaction amount (CAD), including any tip, cashback, and surcharge.
N	MONTHLY PAYMENT	The fixed installment amount (CAD) to be billed to the cardholder by the card issuer for the duration of the installment plan as selected by the cardholder during the transaction (see Installments enabled by Visa on page 219). The installment amount is calculated by taking the total transaction amount (see "AMOUNT" line item if tip is not enabled or see "TOTAL" line item if tip is enabled) and dividing it into equal monthly payments.
	NUM OF INSTALLMENTS	The total number of installment payments to be billed to the cardholder per the installment plan they selected during the transaction (see Installments enabled by Visa on page 219).
	APR	Annual percentage rate: The interest rate, expressed as a percentage, which can include any additional fees charged per the installment plan the cardholder selected during the transaction (see Installments enabled by Visa on page 219).
	TOTAL COST	Total transaction amount (CAD) including any Installment enabled by Visa-related fees (see Installments enabled by Visa on page 219). ***Note:*** *If this is a consumer-funded installment plan, the "TOTAL COST" will be charged to the cardholder by the issuer over the number of installments in the installment plan.*
	INSTALLMENTS ENABLED BY VISA	Installments enabled by Visa terms and conditions (see Installments enabled by Visa on page 219).
O	< Card application >	Card application (contact or contactless transactions only).
P	NO SIGNATURE TRANSACTION / VERIFIED BY PIN	Statement ("NO SIGNATURE TRANSACTION" or "VERIFIED BY PIN") indicating the method of cardholder verification used during the transaction.
Q	ORDER #	Unique transaction identifier (also referred to as "Order ID").
R	< Custom ID >	Custom transaction identifier (see Custom ID: store settings on page 137; and see Terminal settings: transactions on page 166) ***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.*
S	< Footer text >	Customizable message in the footer (see Terminal settings: receipts on page 169).

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 84).*



Transaction approved

< STORE NAME >
< ADDRESS LINE >
< ADDRESS LINE >

< Header text >

DATE / TIME yyyy-mm-dd hh: mm:ss
< Gift card program >
***************1234
Batch #: 0
Auth #: 1234567 Response: 000
Amount $AA.AA
Tip $AA.AA
Total $AA.AA
Amount Paid $AA.AA

Card Balance $AA.AA

Approved

< Footer text >

RETAIN THIS COPY FOR YOUR RECORDS

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

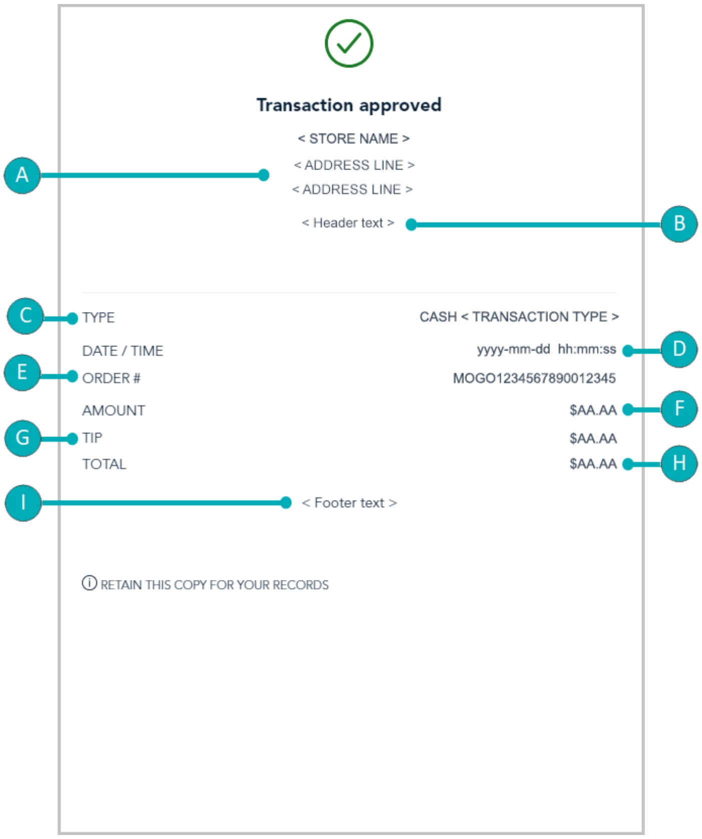
Label	Line item	Description
A	< Store name > < ADDRESS LINE # 1 > < ADDRESS LINE # 2 >	Store name (same as the store tile label on your "Stores" page) and address. ***Note:*** *The store name can be used to identify the Moneris Go portal store to which a point-of-sale device or application is synched.*
B	< Header text >	Customizable message in the header (see Terminal settings: receipts on page 169).
C	DATE/TIME	Date (yyyy-month-day)/time (hh:mm:ss) of the transaction.
D	< Gift card program >	Gift card program.
E	**********1234	Masked gift card number.
F	Batch #	Batch number (gift).
G	Auth #	Authorization number.
H	Amount	Transaction amount, not including any tip.
I	Tip	Tip amount (see Terminal settings: tips on page 179).

Label	Line item	Description
J	Total	Total transaction amount, including any tip.
K	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.
L	Card Balance	The dollar amount remaining on the gift card.
M	< Footer text >	Customizable message in the footer (see Terminal settings: receipts on page 169).

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 84).*



Transaction approved

< STORE NAME >
< ADDRESS LINE >
< ADDRESS LINE >

< Header text >

TYPE	CASH < TRANSACTION TYPE >
DATE / TIME	yyyy-mm-dd hh:mm:ss
ORDER #	MOGO1234567890012345
AMOUNT	$AA.AA
TIP	$AA.AA
TOTAL	$AA.AA

< Footer text >

ⓘ RETAIN THIS COPY FOR YOUR RECORDS

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. ***Note:*** *The store name can be used to identify the Moneris Go portal store to which a point-of-sale device or application is synched.*
B	< Header text >	Customizable message in the header (see Terminal settings: receipts on page 169).
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.
G	TIP	Tip amount (see Terminal settings: tips on page 179).
H	TOTAL	Total transaction amount, including any tip.
I	< Footer text >	Customizable message in the footer (see Terminal settings: receipts on page 169).

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

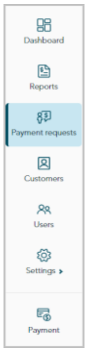
The steps below describe how to create a new credit card payment request through your Moneris Go portal store.

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 30).

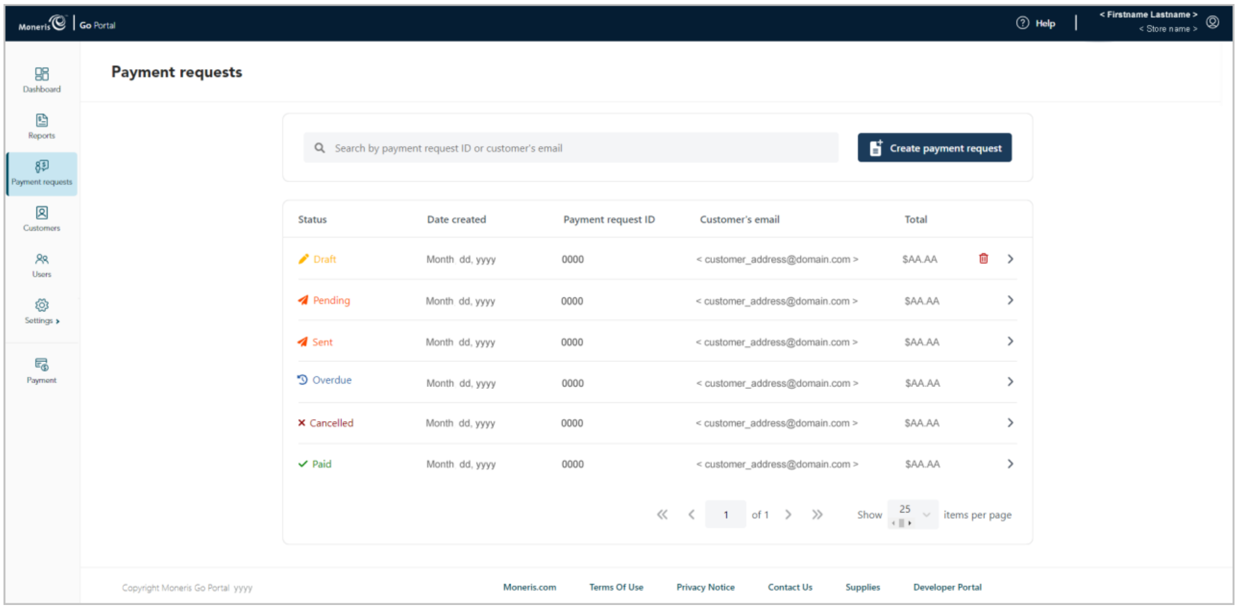
   Note: *If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*

2. On the sidebar menu (shown below), 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.*



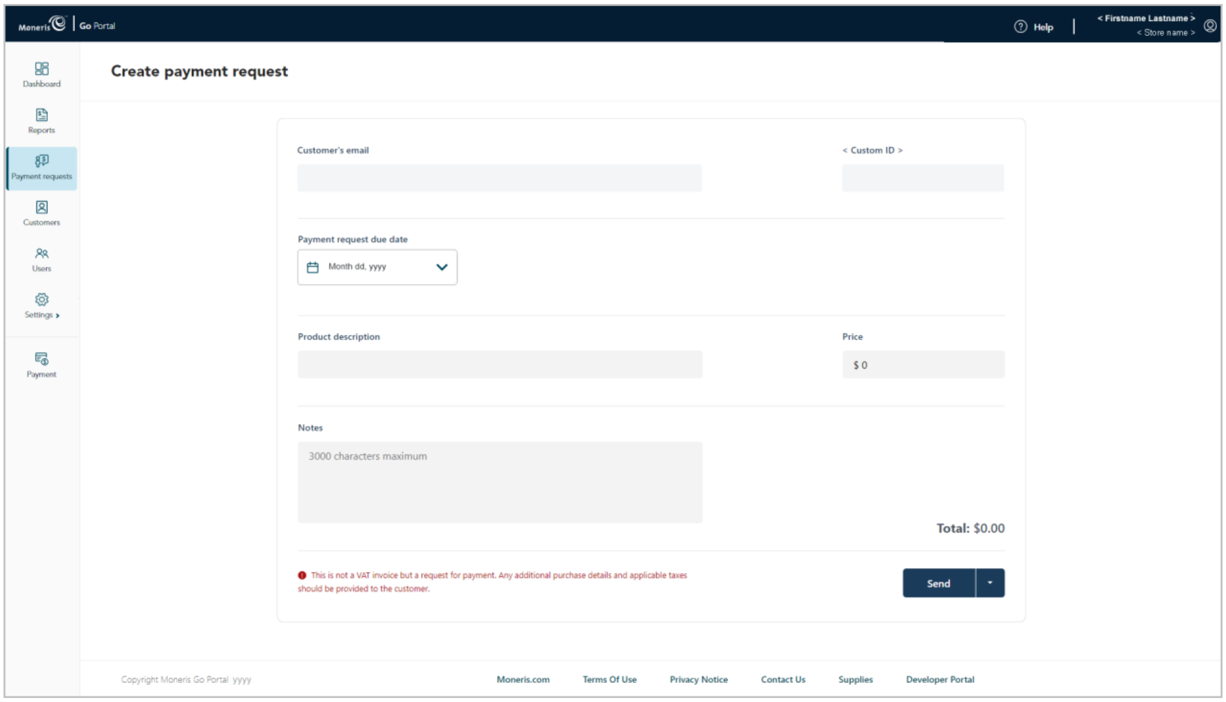
3. When the "Payment requests" page displays (shown below), click on the **Create payment request** button.



Payment requests

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.



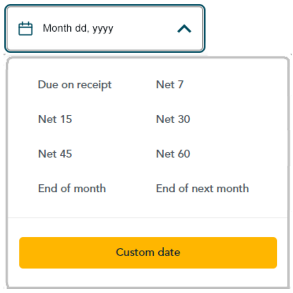
This is not a VAT invoice but a request for payment. Any additional purchase details and applicable taxes should be provided to the customer.

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**.



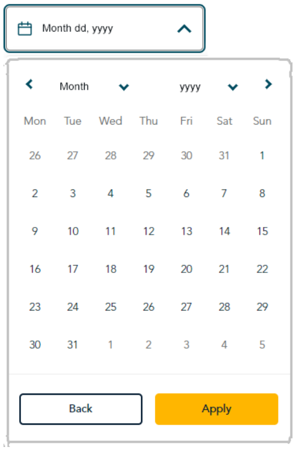
To select a custom due date:

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* ˅ *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:
    1. In the **Customer email** field, enter the customer's email address (the payment request will be sent to this address).
    2. In the **Product description** field, enter a description of the product/service for which you are sending the payment request.
    3. In the **Price** field, enter the payment request amount ($0.00).

7. Fill in the other payment fields as required:
    1. 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.*

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

        Note: *To configure the custom transaction identifier field, see Store settings: payments (page 132).*

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 94).

    To save the payment request as a draft without sending it:

    a. Continue in Saving a payment request as a draft (page 97).

    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

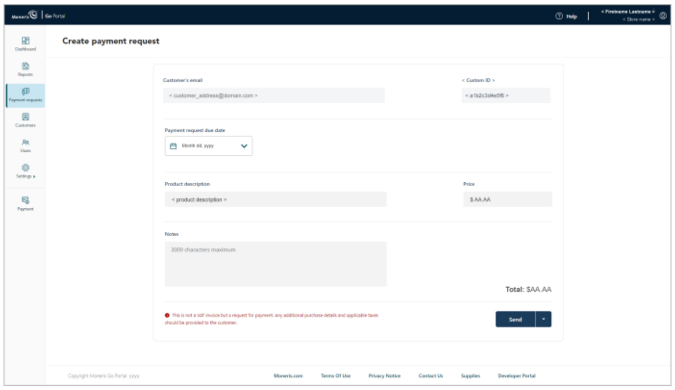
Sending a payment request

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.[13]

Note: *To start a new payment request, see Creating a payment request (page 91). To reopen a draft payment request, see Payment request details (page 103).*

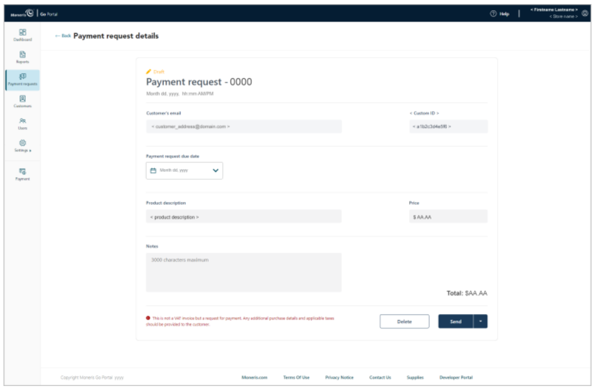
1. While the payment request is open on your screen (shown below), do the following:

NEW



This is not a VAT invoice but a request for payment. Any additional purchase details and applicable taxes should be provided to the customer.

DRAFT



This is not a VAT invoice but a request for payment. Any additional purchase details and applicable taxes should be provided to the customer.

   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 102.)*

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 106).

   Resend the payment request to the customer:

   a. See Resending a payment request (see page 95).

   Cancel the payment request:

   a. See Cancelling a payment request (page 100).

---

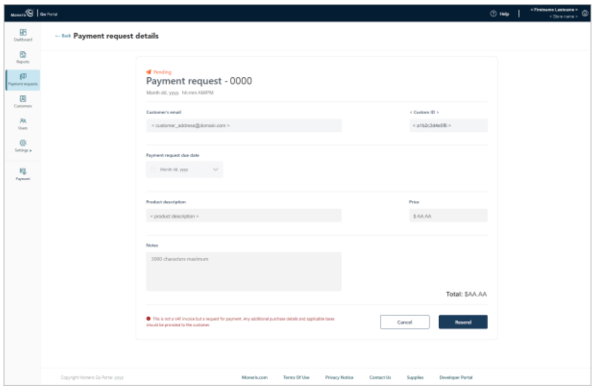
[13] Your user account's current default display language determines the language format of the payment request your customer receives. If you want to change your default display language before sending this payment request, see Changing the default display language (page 38).

Resending a payment request

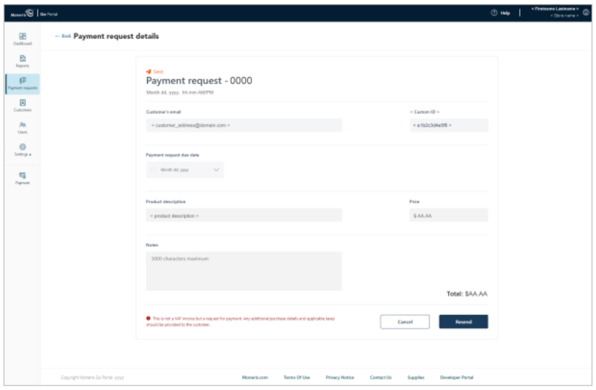
If you reopen a payment request that has the status "Pending", "Sent", or "Overdue", you can opt to resend the same payment request to the customer although you cannot alter any of payment request details. The steps below describe how to resend an overdue/sent/pending payment request.[14]

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 101).
2. Once you retrieve the desired record, click on it to view its "Payment request details" page (shown below):

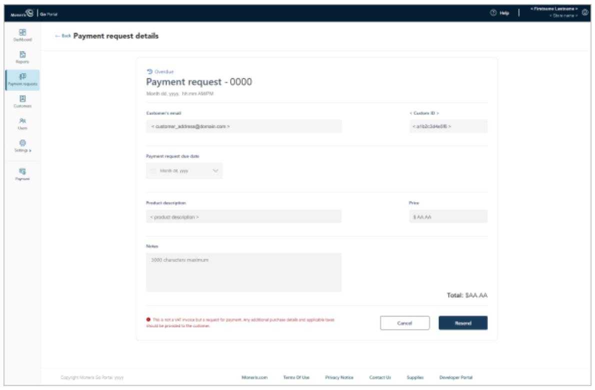
PENDING



SENT



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 102.)*

---

[14] 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 38).

3. You now 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 106).

   Resend the payment request to the customer:

   a. See Resending a payment request (see page 95).

   Cancel the payment request:

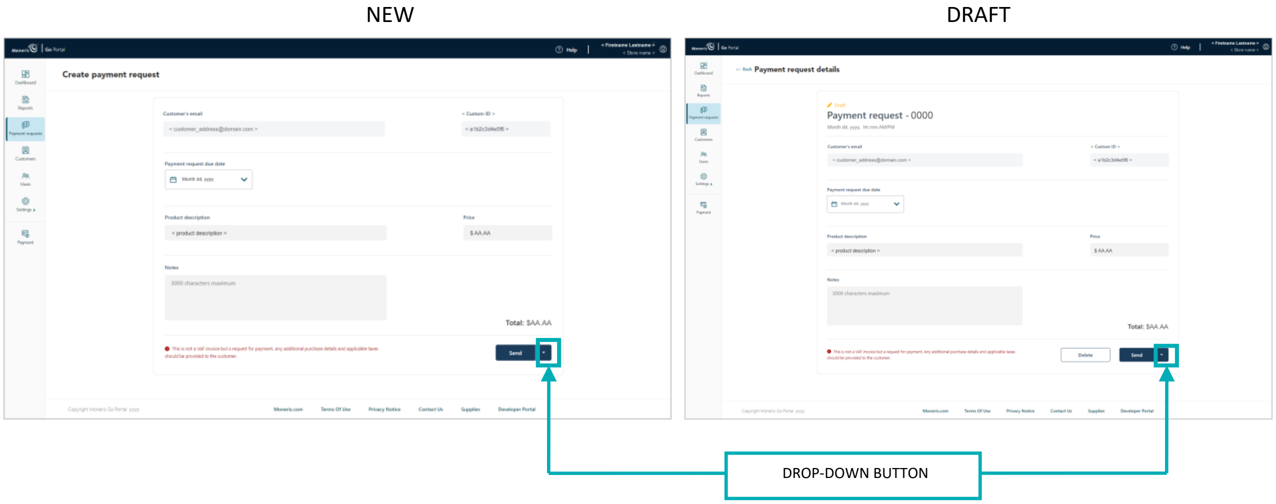
   a. See Cancelling a payment request (page 100).

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 91). The steps to reopen a draft payment request are described in Payment request details (page 103).*

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 101).*

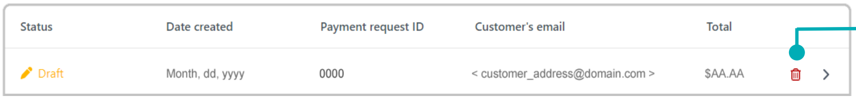
Deleting a payment request

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 100).*

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 101).

2. Once the desired payment request record is retrieved (shown below), you have two deletion options:



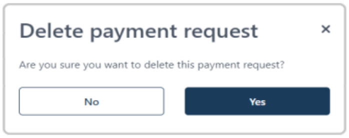
Status	Date created	Payment request ID	Customer's email	Total		
Draft	Month, dd, yyyy	0000	< customer_address@domain.com >	$AA.AA	🗑	>

"DELETE" ICON

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.



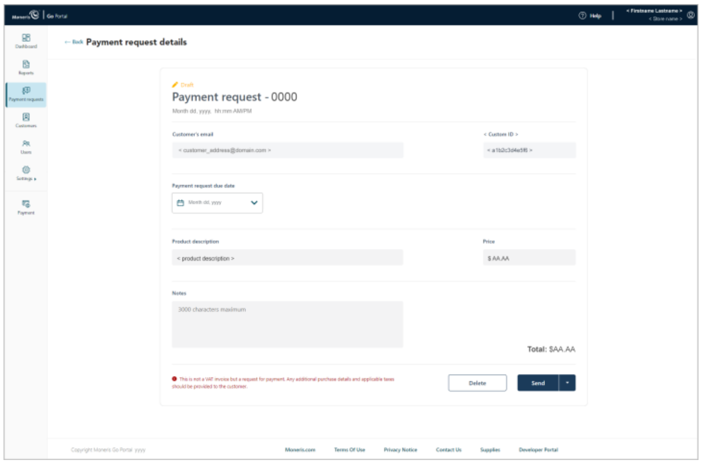
Delete payment request ×

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, 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

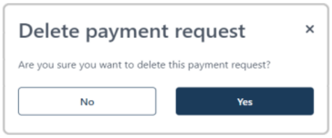
Notes: 3000 characters maximum

Total: $AA.AA

This is not a VAT invoice but a request for payment. Any additional purchase details and applicable taxes should be provided to the customer.

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

c. 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?

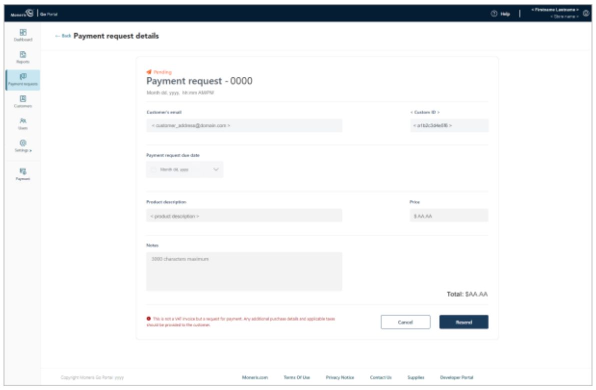
d. When the "Payment request successfully deleted" response displays, the operation is complete.

Cancelling a payment request

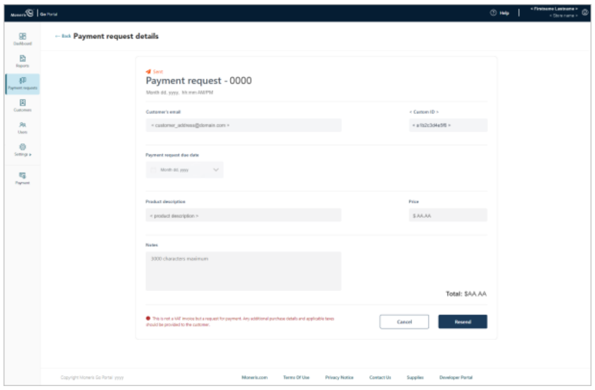
You can rescind (cancel) a payment request that has the status "Pending", "Sent" or "Overdue" (i.e., the customer has not yet made the payment). When you cancel a payment request, it permanently deactivates the payment request link that your customer received (or will receive) in their payment request 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 101).
2. Once you retrieve the desired record, click on it to view its "Payment request details" page (shown below).

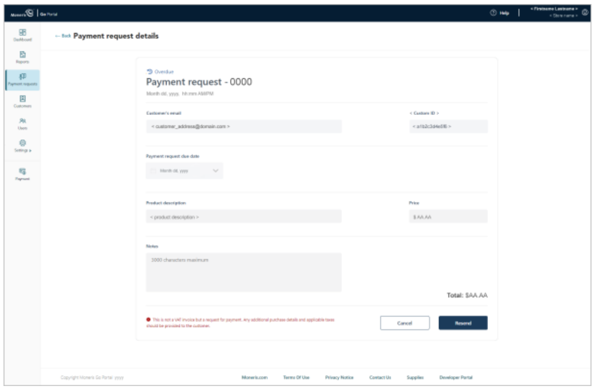
PENDING



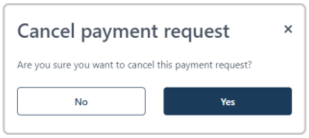
SENT



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.



Cancel payment request

Are you sure you want to cancel this payment request?

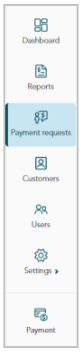
5. When the "Payment request successfully cancelled" response displays, the operation is complete.
   Note: *When your screen transitions to the "Payment requests" page, the status of this payment request will indicate "Cancelled".*

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 30).

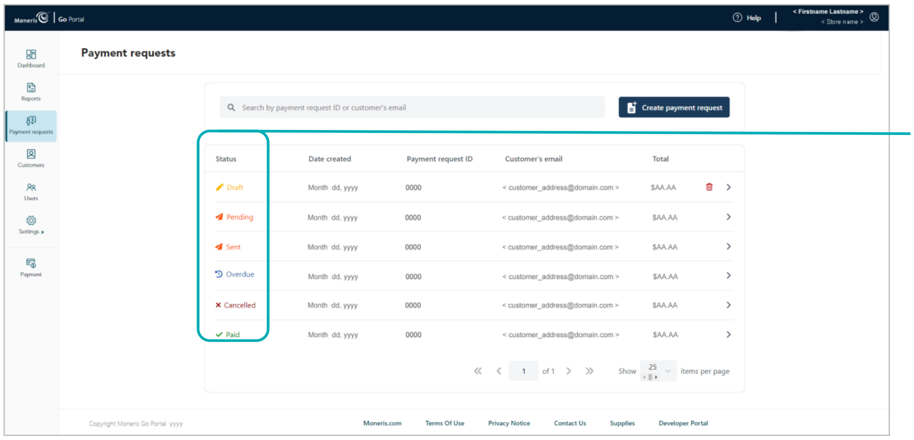
   Note: *If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*



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.



Payment requests

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

1 of 1

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

(For status definitions, see Payment request status indicators defined on page 102).

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 103).

   - To change the number of hits listed on the 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 92).

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 101) and displays on the "Payment request details" page of each payment request (see Payment request details on page 103).

The status indicators are described in the table below.

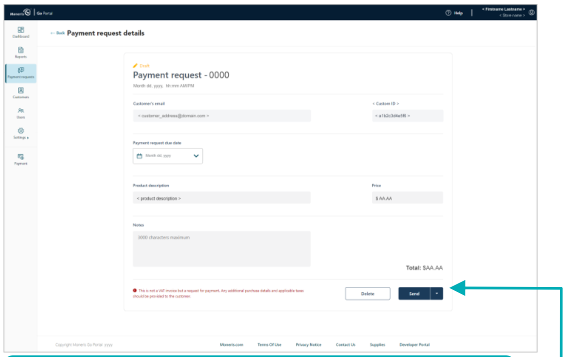
Status indicator	Description
Cancelled	The payment request was sent to the customer but subsequently cancelled prior to payment (see Cancelling a payment request on page 100).
Draft	The payment request is saved but has not yet been sent to a customer. The payment request can be reopened to be edited, saved/sent, or deleted (see Payment request details on page 103). ***Note:*** *A draft can be saved indefinitely until you opt to send it or delete it.*
Overdue	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 Paying a payment request on page 106) or you cancel the payment request first (see Cancelling a payment request on page 100). ***Note:*** *You can also resend an overdue payment request (see Resending a payment request on page 95).*
Pending	The payment request was sent but the Moneris Go portal server has not yet emailed the payment request to the customer. ***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 Resending a payment request on page 95).*
Paid	The customer made their payment (see Payment request details on page 103).
Sent	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. ***Note:*** *You can allow the customer to make their payment (see Paying a payment request on page 106), you can cancel the request to prevent the customer from making the payment (see Cancelling a payment request on page 100), or you can resend the payment request (see Resending a payment request on page 95).*

Payment request details

You can display the payment request details of any payment request that is logged in your Moneris Go portal store's payment requests report. Payment details include status ("Draft", "Sent", "Pending", "Overdue", "Paid", or "Cancelled") customer email, due date, product description, price/total, and a note if appended. You may also cancel, resend, or delete a payment request and view a payment receipt as described below.

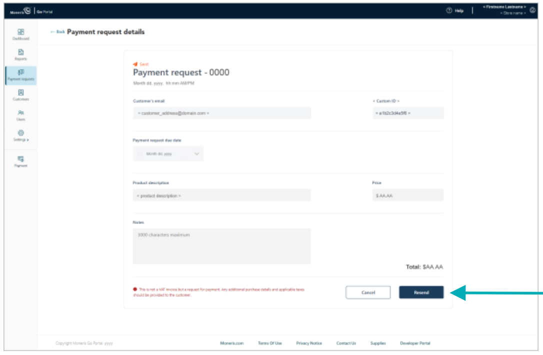
1. Initiate a payment requests report, and retrieve the desired payment request record (see Payment requests report on page 101).
2. When you retrieve the desired record, click on it to view its "Payment request details" page (shown below).

DRAFT



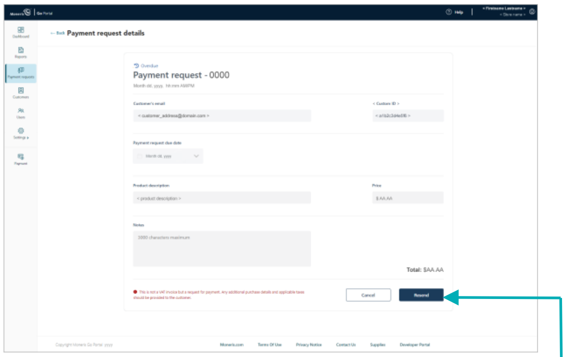
To send, see Sending a payment request (page 94).
To delete, see Deleting a payment request (page 98).

SENT (or PENDING)



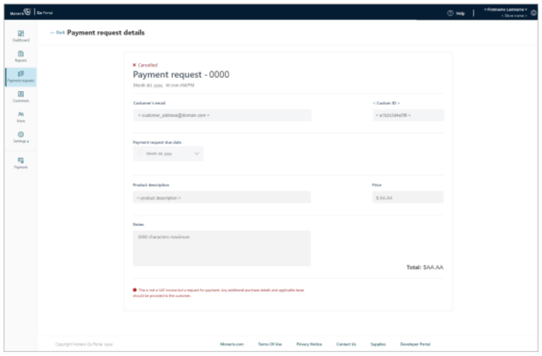
To resend, see Resending a payment request (page 95).
To cancel, see Cancelling a payment request (page 100).

OVERDUE

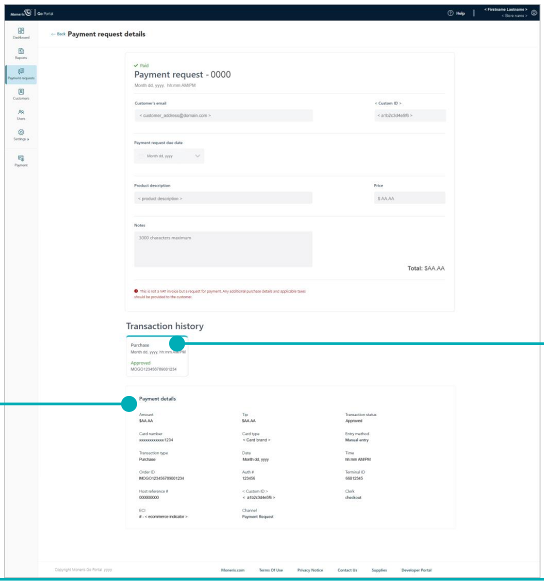


To resend, see Resending a payment request (page 95).
To cancel, see Cancelling a payment request (page 100).

CANCELLED



PAID



To view/send a receipt to the customer and/or perform a follow-on Refund or Void, see Cross-referencing a paid payment request with its Purchase record (page 105).

For line-item descriptions of the "Payment details" shown here, see Payment details: paid payment request (page 104).

Payment details: paid payment request

The "Payment details" module (shown below) displays on the "Payment request details" page (see Payment request details on page 103) of every paid payment request.

Payment details

Amount
$AA.AA

Card number
xxxxxxxxxxxx1234

Transaction type
Purchase

Order ID
MOGO123456789001234

Host reference #
000000000

ECI
- < ecommerce indicator >

Tip
$AA.AA

Card type
< Card brand >

Date
Month dd, yyyy

Auth #
123456

< Custom ID >
< a1b2c3d4e5f6 >

Channel
Payment Request

Transaction status
Approved

Entry method
Manual entry

Time
hh:mm AM/PM

Terminal ID
66012345

Clerk
checkout

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

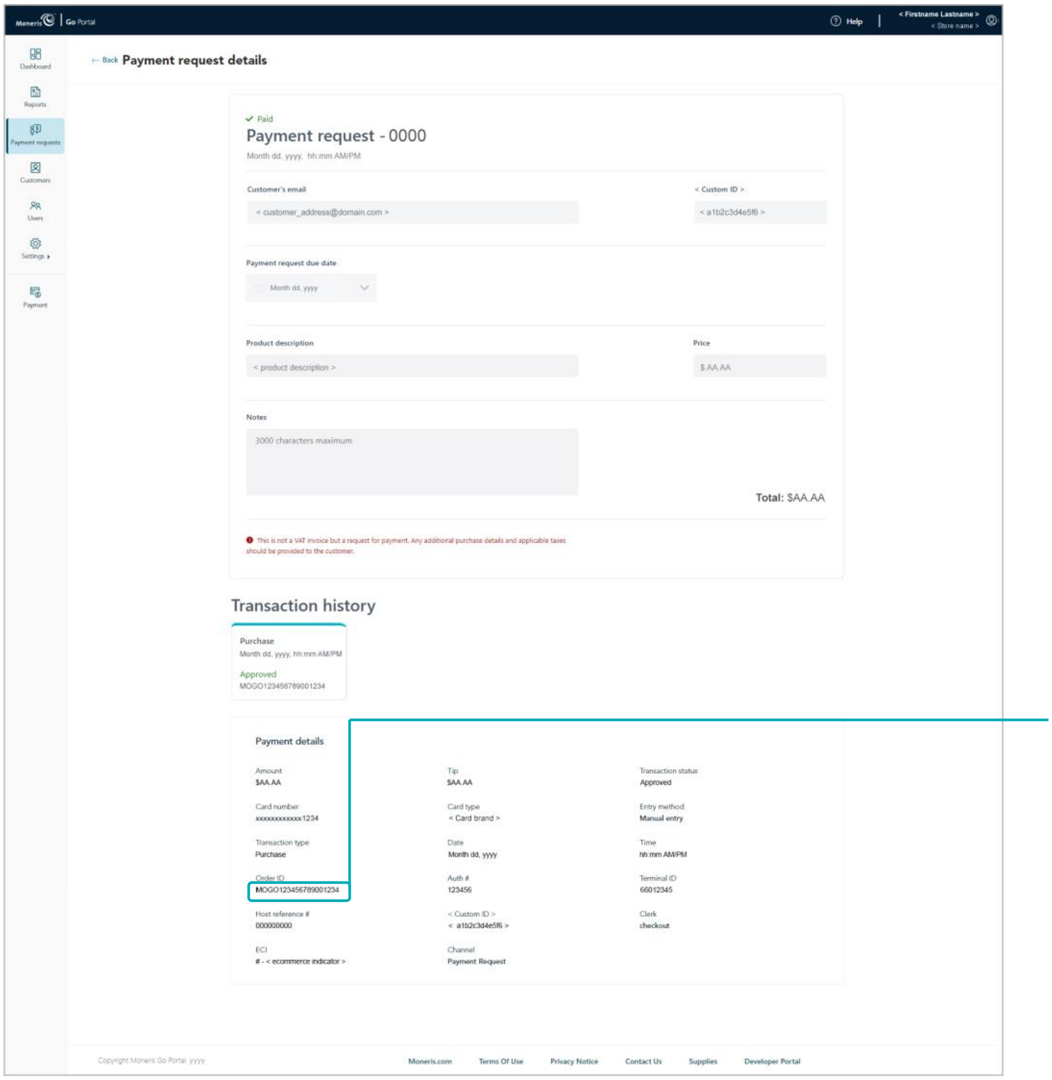
Label	Line item	Description
A	Amount	Total transaction amount.
B	Card number	Masked card number of the card used for the transaction.
C	Transaction type	Transaction type (i.e., "Purchase").
D	Order ID	Unique transaction identifier (also referred to as "Order #").
E	Host reference #	Host reference number.
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 Ecommerce indicator descriptions on page 216.)
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 Custom ID: store settings on page 137). ***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.*
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. 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 101), 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: $AA.AA

This is not a VAT invoice but a request for payment. Any additional purchase details and applicable taxes should be provided to the customer.

Transaction history

Purchase
Month dd, yyyy, hh:mm AM/PM
Approved
MOGO123456789001234

Payment details

Amount $AA.AA	Tip $AA.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 MOGO123456789001234	Auth # 123456	Terminal ID 66012345
Host reference # 000000000	< Custom ID > < a1b2c3d4e5f6 >	Clerk checkout
ECI # - < ecommerce 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.

   Note: *Payment details older than 13 months will not be displayed here. To access the payment details for a Purchase that is older than 13 months, please access Merchant Direct.*

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 66).

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 94), 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.

< Store name >

$ AA.AA

Complete your purchase

Date: < mm/dd/yy >
Payment request ID: 0000
Due date: < mm/dd/yy >

Order Summary

Item	Amount
< Product description >	$AA.AA

Subtotal: $ AA.AA

Thank you,
The Moneris Team

Continue to payment

Please contact us at 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.

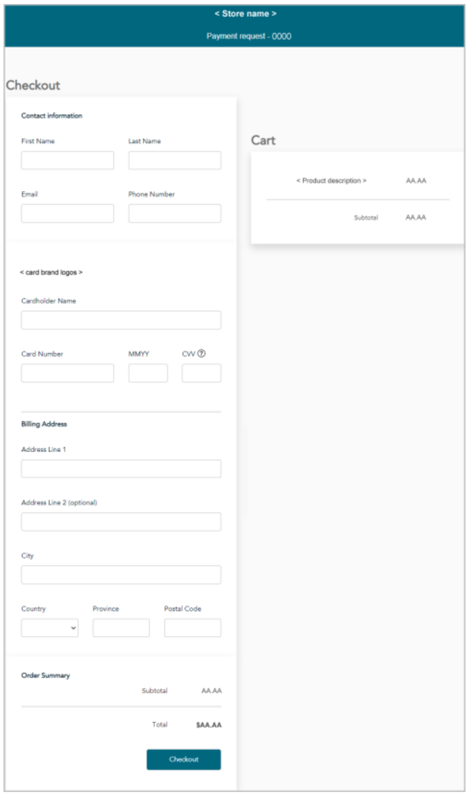
Card information:

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.



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 transcation 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 101).

   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 105).

   Unsubscribing from your mailing list:

   - The customer can opt to unsubscribe from your mailing list (see Unsubscribing from your mailing list on page 108).

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

Complete your purchase

Date: < mm/dd/yy >
Payment request ID: 0000
Due date: < mm/dd/yy >

Order Summary

Item	Amount
< Product description >	$AA.AA

Subtotal: $ AA.AA

Thank you,
The Moneris Team

Continue to payment

Please contact us at moneris@moneris.com or unsubscribe

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 106).

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.

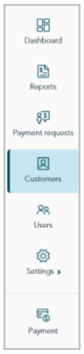
Note: *When you save the profile, your Moneris Go portal store simultaneously processes a zero-dollar Verification transaction, which sends captured payment details, including billing address details (if submitted) to the card issuer and an address verification service (AVS). You can subsequently view 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 30).

   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 39).*

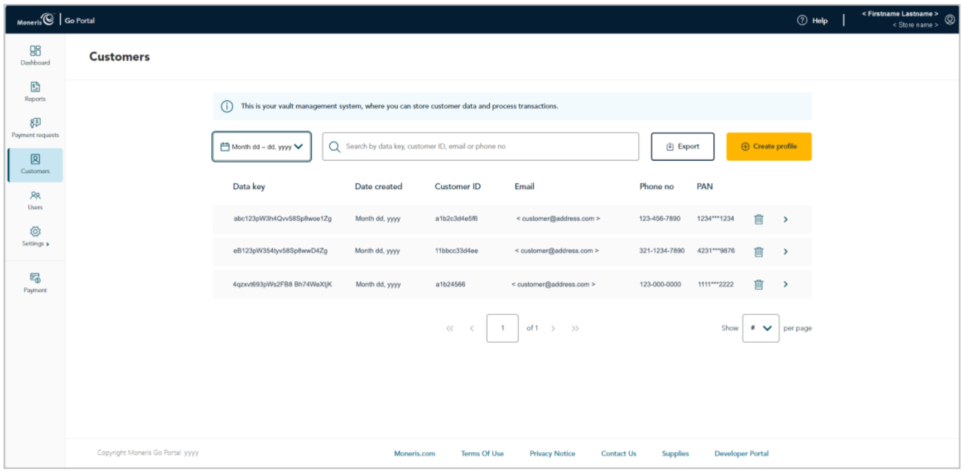
2. On the sidebar menu (shown here), click on **Customers**.

   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.

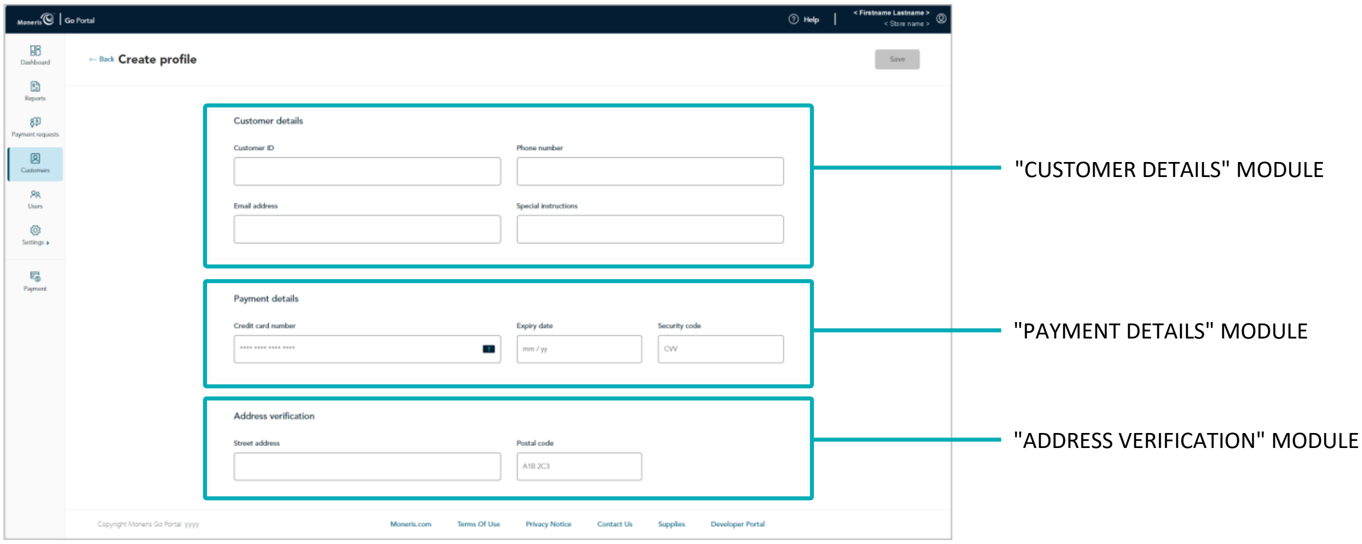
   Note: *Any profile that was created within the date range specified in the calendar will be listed in the report.*



This is your vault management system, where you can store customer data and process transactions.

Data key	Date created	Customer ID	Email	Phone no	PAN
abc123pW3h4Qvv58Sp8woe1Zg	Month dd, yyyy	a1b2c3d4e5f6	< customer@address.com >	123-456-7890	1234***1234
eB123pW354tyv58Sp8wwD4Zg	Month dd, yyyy	11bbcc33d4ee	< customer@address.com >	321-1234-7890	4231***9876
4qzxvt693pWs2FB8 Bh74WeXtjK	Month dd, yyyy	a1b24566	< customer@address.com >	123-000-0000	1111***2222

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



"CUSTOMER DETAILS" MODULE

"PAYMENT DETAILS" MODULE

"ADDRESS VERIFICATION" MODULE

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.

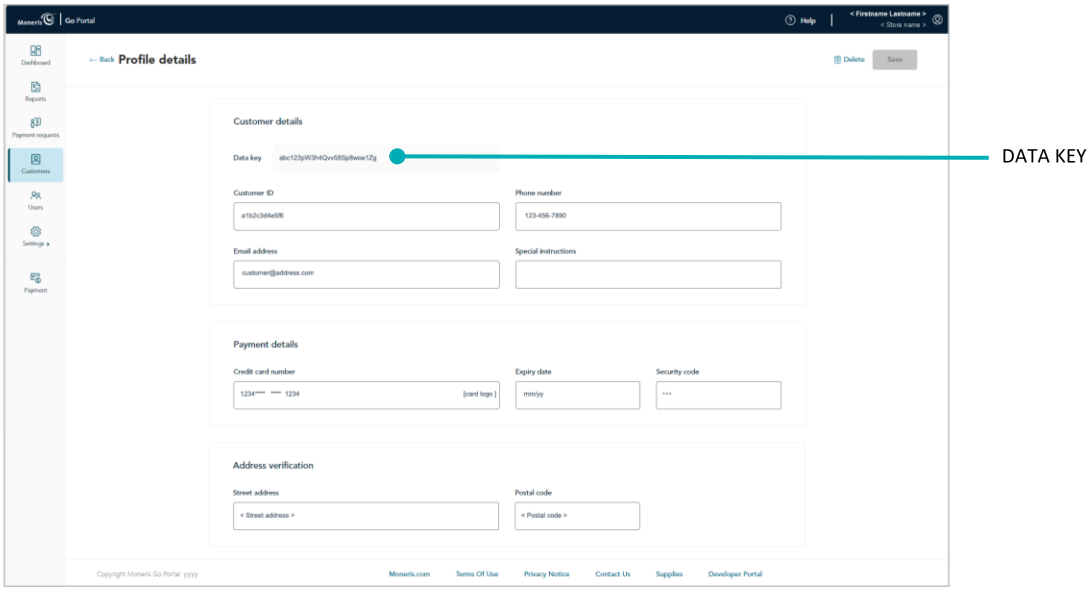
   b. In the **Postal code** field, enter the cardholder billing postal code.

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 123).*

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.



Profile details

Customer details

Data key: abc123pW3h4Qvv58Sp8woe1Zg

Customer ID: a1b2c3d4e5f6

Phone number: 123-456-7890

Email address: customer@address.com

Special instructions:

Payment details

Credit card number: 1234**** **** 1234

Expiry date: mm/yy

Security code: ***

Address verification

Street address: < Street address >

Postal code: < Postal code >

Updating a Vault customer profile

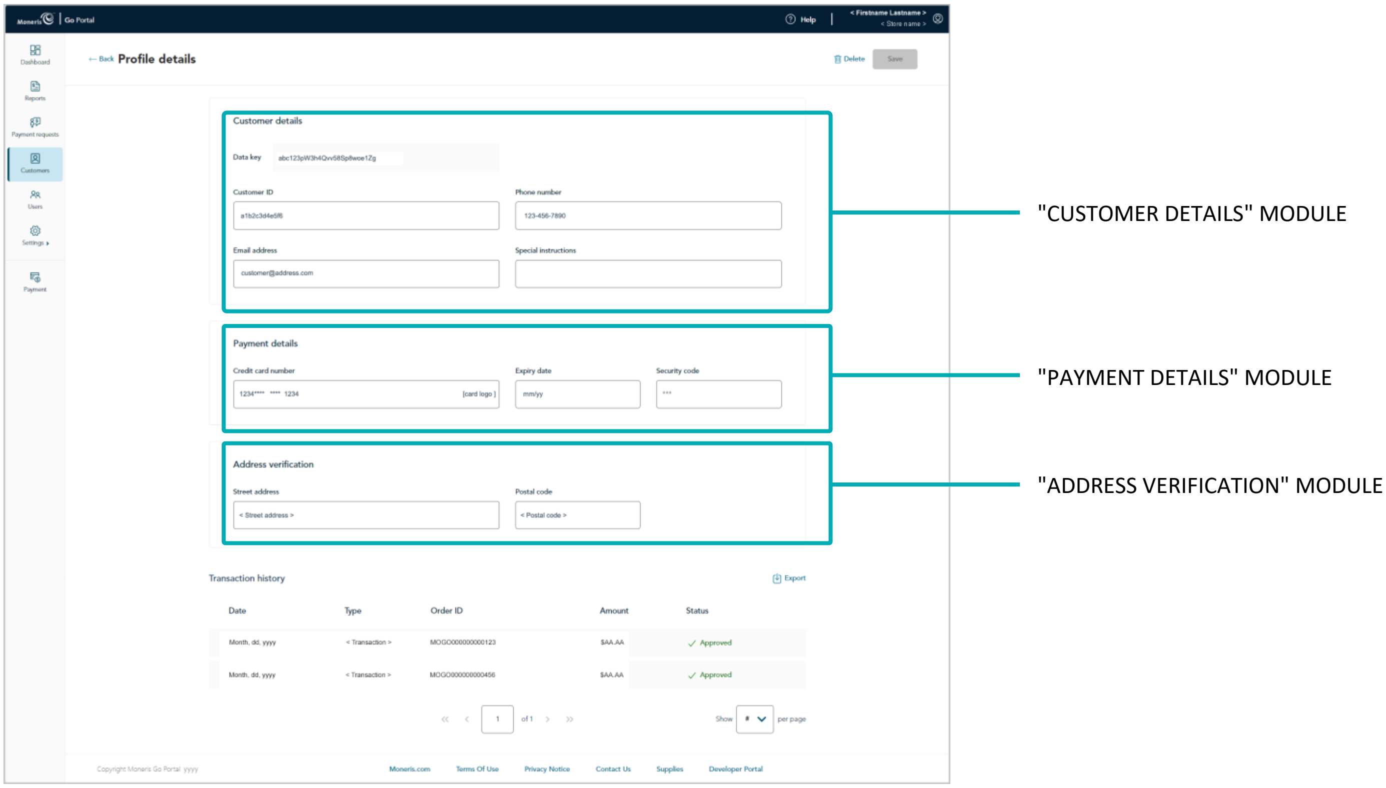
The steps below describe how to update the details (customer, payment, and/or address) of a saved Vault customer profile in your Moneris Go portal store.

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 116), 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:

   Note: *The "Transaction history" area displays only if one or more financial transactions have been processed using the data key from this Vault profile (see Financial transactions associated with a Vault customer profile on page 121).*



Profile details

Customer details

Data key: abc123pW3h4Qvv58Sp8woe1Zg

Customer ID: a1b2c3d4e5f6

Phone number: 123-456-7890

Email address: customer@address.com

Special instructions:

Payment details

Credit card number: 1234**** **** 1234 [card logo]

Expiry date: mm/yy

Security code: ***

Address verification

Street address: < Street address >

Postal code: < Postal code >

Transaction history

Date	Type	Order ID	Amount	Status
Month, dd, yyyy	< Transaction >	MOGO000000000123	$AA.AA	✓ Approved
Month, dd, yyyy	< Transaction >	MOGO000000000456	$AA.AA	✓ Approved

« ‹ 1 of 1 › » Show # per page

\

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 123).*

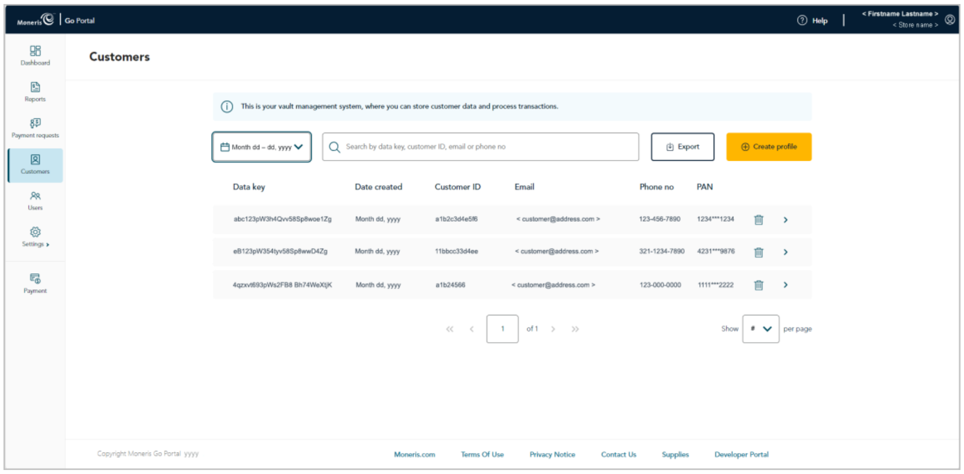
4. When the "Profile successfully updated" response displays, the operation is complete.

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 116).

2. When the desired profile is listed on the "Customers" page (shown below), do one of the following:



This is your vault management system, where you can store customer data and process transactions.

Data key	Date created	Customer ID	Email	Phone no	PAN
abc123pW3h4Qvv58Sp8woe1Zg	Month dd, yyyy	a1b2c3d4e5f6	< customer@address.com >	123-456-7890	1234***1234
eB123pW354tyv58Sp8wwD4Zg	Month dd, yyyy	11bbcc33d4ee	< customer@address.com >	321-1234-7890	4231***9876
4qzxvt693pWs2FB8 Bh74WeXtjK	Month dd, yyyy	a1b24566	< customer@address.com >	123-000-0000	1111***2222

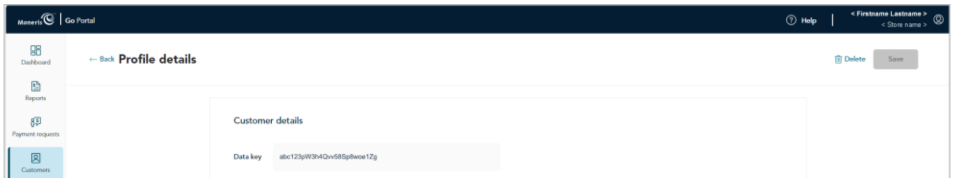
Delete the profile without opening it:

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:

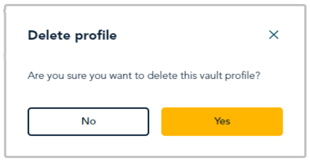
a. On the "Customers" page (shown above), click on the profile that you want to delete to open it.

b. When the "Profile details" page displays (shown partially below), click on **Delete**.



Data key abc123pW3h4Qvv58Sp8woe1Zg

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



Are you sure you want to delete this vault profile?

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

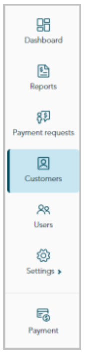
Note: *The deleted profile will no longer be listed on the "Customers" page.*

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 for a specified date. 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 30).

   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 39).*

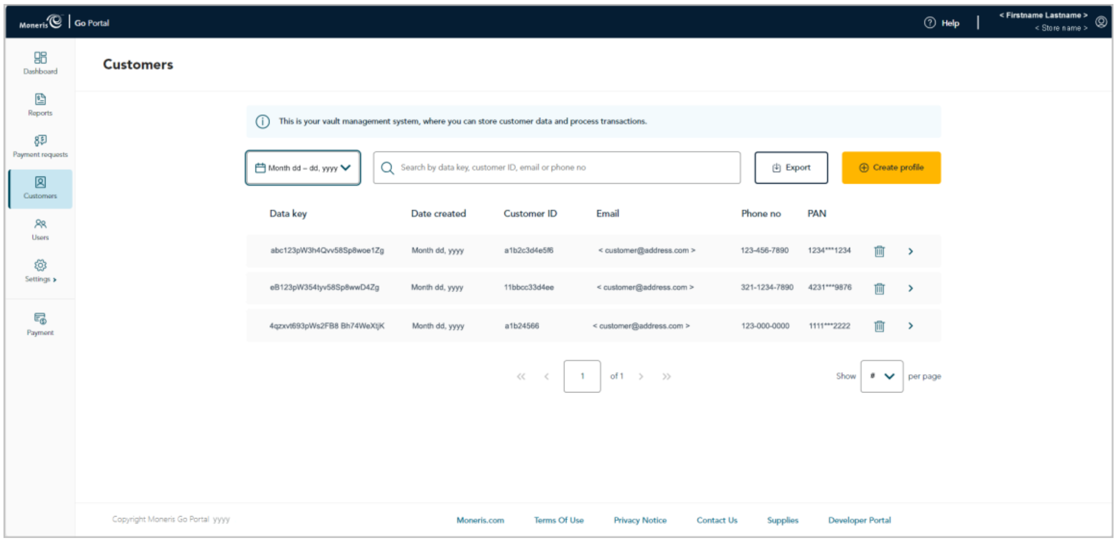


2. On the sidebar menu (shown here), click on **Customers**.

   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.*



This is your vault management system, where you can store customer data and process transactions.

Data key	Date created	Customer ID	Email	Phone no	PAN
abc123pW3h4Qvv58Sp8woe1Zg	Month dd, yyyy	a1b2c3d4e5f6	< customer@address.com >	123-456-7890	1234***1234
eB123pW354tyv58Sp8wwD4Zg	Month dd, yyyy	11bbcc33d4ee	< customer@address.com >	321-1234-7890	4231***9876
4qzxvt693pWs2FB8 Bh74WeXtjK	Month dd, yyyy	a1b24566	< customer@address.com >	123-000-0000	1111***2222

4. You can do any of the following:

   - To view the details of a listed profile, click on the desired profile to open it.
   - To export the report results, see Exporting a Vault customer profiles report (page 118).
   - To view/export a list of financial transactions associated with a profile, see Financial transactions associated with a Vault customer profile (page 121).
   - To update the details of a profile, see Updating a Vault customer profile (page 113).

- To delete a profile, see <u>Deleting a Vault customer profile</u> (page 115).
- 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 <u>Selecting a Vault customer profiles calendar date</u> on page 119).

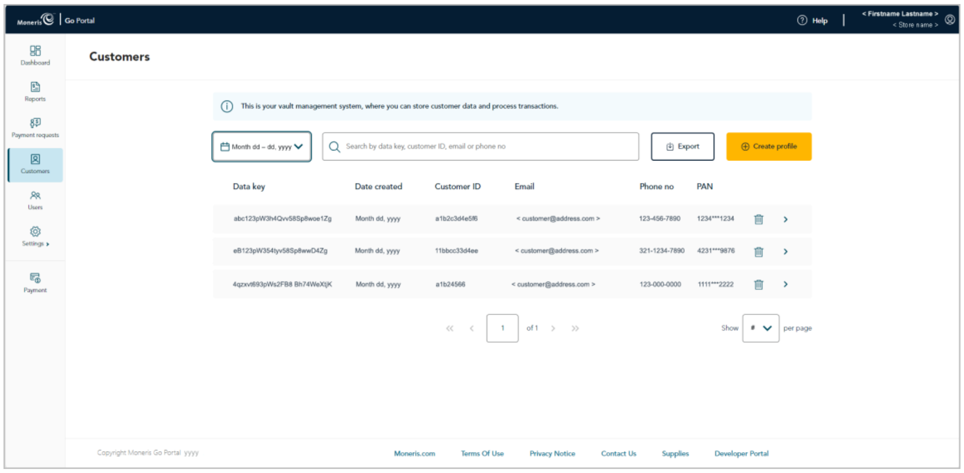
- To change the number of hits listed on the page, click on the "Show # per page" drop-down, and select a number (**10**, **25**, or **50**). To advance to the next page or last page, click on the **Next page >** icon or the **Last page >>** icon respectively. To go back to the previous page or the first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

1. Initiate a Vault customer profiles report (see Vault customer profiles report on page 116).

2. When the "Customers" page displays (shown below), click on the **Export** button.

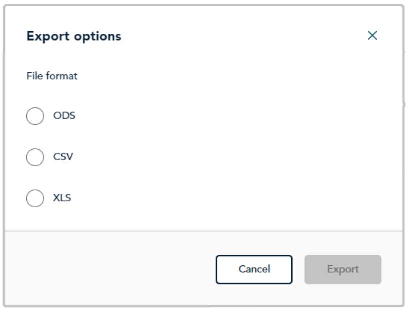


Customers

This is your vault management system, where you can store customer data and process transactions.

Data key	Date created	Customer ID	Email	Phone no	PAN
abc123pW3h4Qvv58Sp8woe1Zg	Month dd, yyyy	a1b2c3d4e5f6	< customer@address.com >	123-456-7890	1234***1234
eB123pW354tyv58Sp8wwD4Zg	Month dd, yyyy	11bbcc33d4ee	< customer@address.com >	321-1234-7890	4231***9876
4qzxvt693pWs2FB8 Bh74WeXtjK	Month dd, yyyy	a1b24566	< customer@address.com >	123-000-0000	1111***2222

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



File format

○ ODS

○ CSV

○ XLS

4. Click on the dialog's **Export** button.

5. When "File downloaded successfully" displays, the operation is complete.

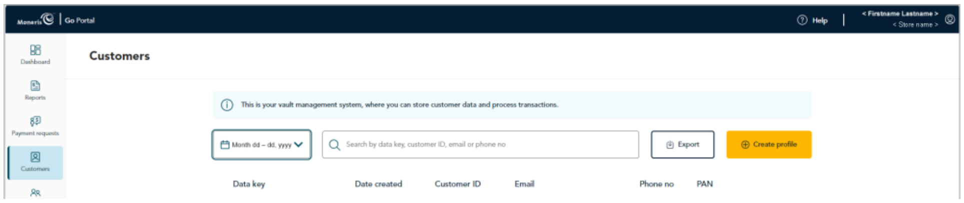
   Note: *When your device prompts you to save the downloaded file, save the file to the desired location.*

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 116).

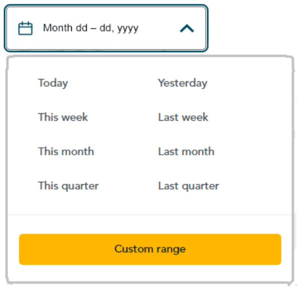
2. When the "Customers" page displays (shown partially below), click on the calendar 📅 icon to display the date-range drop-down. Do one of the following:



This is your vault management system, where you can store customer data and process transactions.

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:

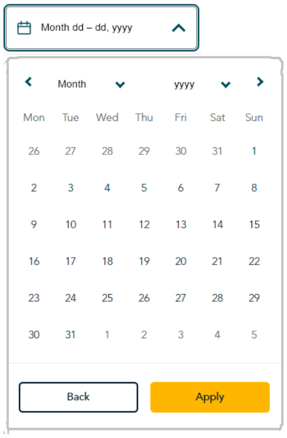
a. In the date range drop-down (shown above), click on **Custom range**.

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.*



Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

d. Click on the calendar's **Apply** button.

e. Wait while the request is processed.

Financial transactions associated with a Vault customer profile

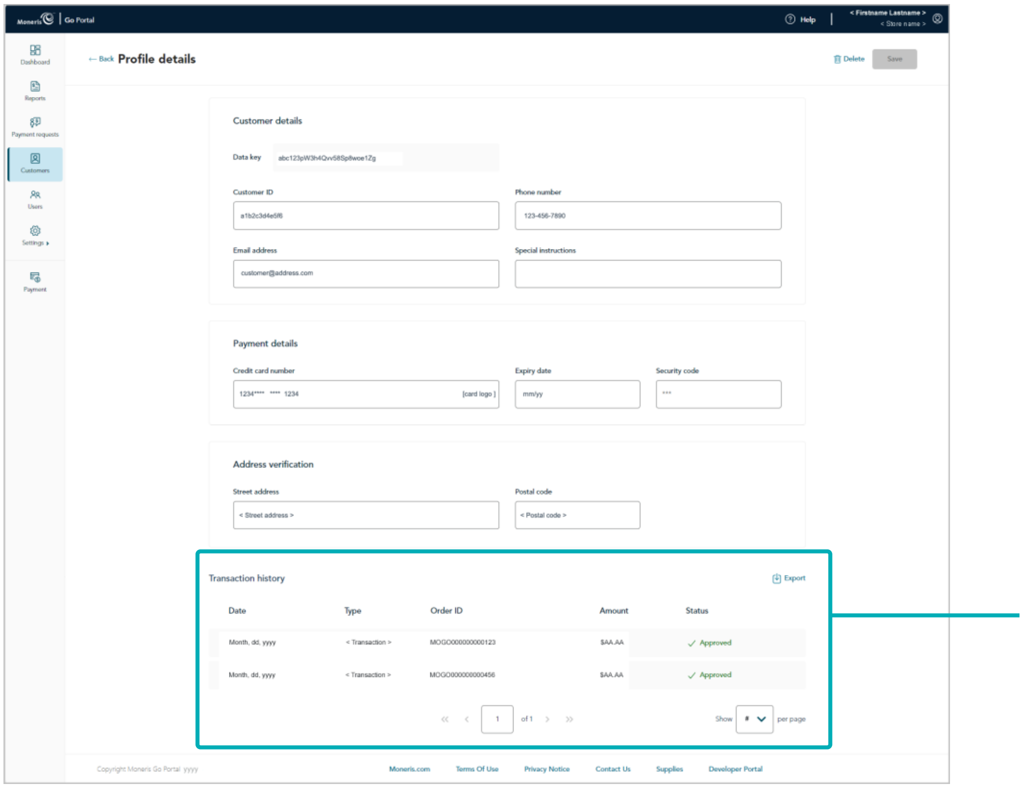
The steps below describe how to view and/or export a listing of approved/declined Purchases, Preauthorizations, and independent Refunds that were processed in the last 13 months using the data key (tokenized card data) from a saved Vault customer profile in your Moneris Go portal store.

Note: *If you want to retrieve transactions older than 13 months, please access Merchant Direct.*

1. Initiate a Vault customer profiles report to retrieve the profile for which you want to view the list of associated financial transactions (see Vault customer profiles report on page 116), and then click on the desired profile to open it.

2. When the "Profile details" page displays, scroll to the "Transaction history" area (shown below) to view the list of Purchases, Preauthorizations, and independent Refunds that were processed using the data key from this profile.

   Note: *Financial transactions are listed by "Date", "Type", "Order ID", "Amount", and "Status".*



Profile details

Customer details

Data key: abc123pW3h4Qvv58Sp8woe1Zg

Customer ID: a1b2c3d4e5f6

Phone number: 123-456-7890

Email address: customer@address.com

Special instructions:

Payment details

Credit card number: 1234**** **** 1234 [card logo]

Expiry date: mm/yy

Security code: ***

Address verification

Street address: < Street address >

Postal code: < Postal code >

Transaction history

Export

Date	Type	Order ID	Amount	Status
Month, dd, yyyy	< Transaction >	MOGO000000000123	$AA.AA	✓ Approved
Month, dd, yyyy	< Transaction >	MOGO000000000456	$AA.AA	✓ Approved

1 of 1

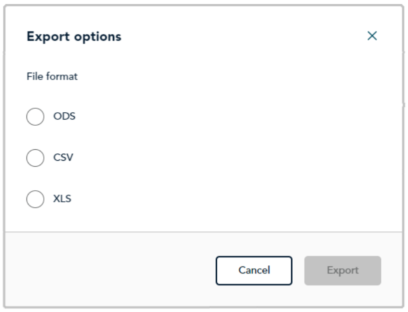
Show # per page

"TRANSACTION HISTORY" AREA

3. If you want to export the transactions to a spreadsheet file (Excel or open document format) or a text file (comma separated values format), do the following:

   a. Click on **Export** in the upper right corner of the "Transaction history" area.

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



c. Click on the dialog's **Export** button.

d. 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.*

Verification transaction: Vault customer profile

Whenever you execute a save action in a Vault customer profile, (see Creating a Vault customer profile on page 110; and see Updating a Vault customer profile on page 113), 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 66). 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 113), 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

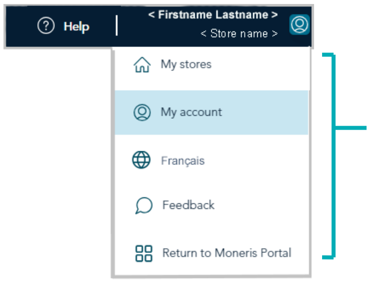
The steps below describe how to configure your Moneris Go portal/terminal user account settings, including name information and login credentials.

1. Log into the Moneris Go portal, and access any store (see Logging into the Moneris Go portal on page 30).

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).

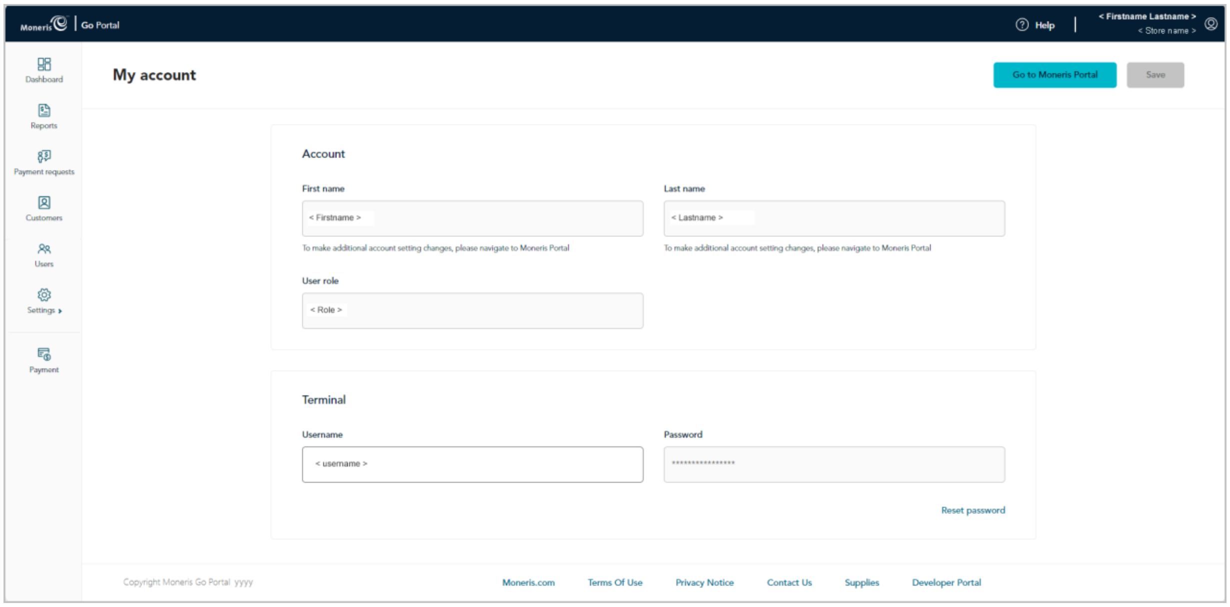
USER ACCOUNT TILE

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



USER ACCOUNT MENU

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



Account

First name: < Firstname >

To make additional account setting changes, please navigate to Moneris Portal

Last name: < Lastname >

To make additional account setting changes, please navigate to Moneris Portal

User role: < Role >

Terminal

Username: < username >

Password: ****************

Moneris Go portal

- To update your name information, see Changing your name information (page 127).
- To change your login password, see Changing your Moneris Go portal login password (page 128).

Terminal

- To change your login password, see Changing your terminal login password (page 129).
- To change your login username, see Changing your terminal login username (page 130).

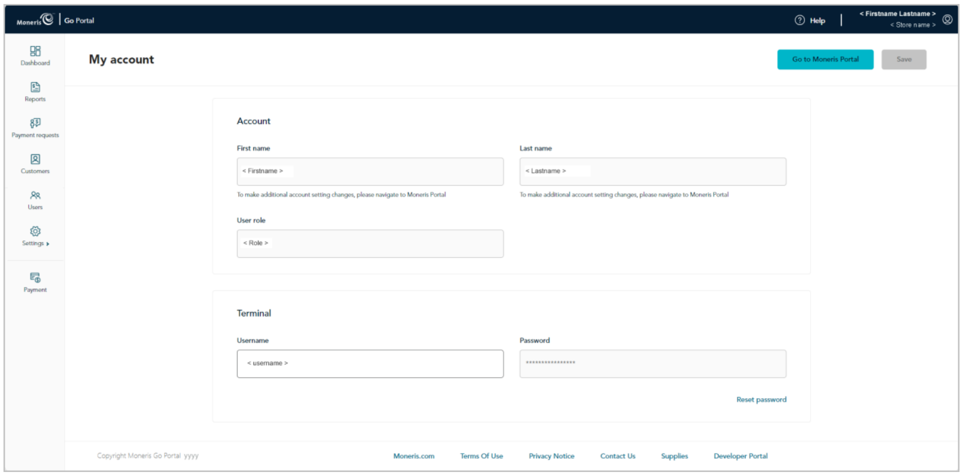
Changing your name information

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

1. Access your user account settings (see "My account" settings on page 125).

2. On the "My account" page (shown below), click on the **Go to Moneris Portal** button to return to Moneris Portal (you must edit your user account settings/name information from within Moneris Portal).

   Note: *The name change may not be applied in Moneris Go portal. For Moneris Portal documentation, visit **https://www.moneris.com/en/support/products/moneris-portal**.*



My account

Account

First name: < Firstname >

To make additional account setting changes, please navigate to Moneris Portal

Last name: < Lastname >

To make additional account setting changes, please navigate to Moneris Portal

User role: < Role >

Terminal

Username: < username >

Password: ****************

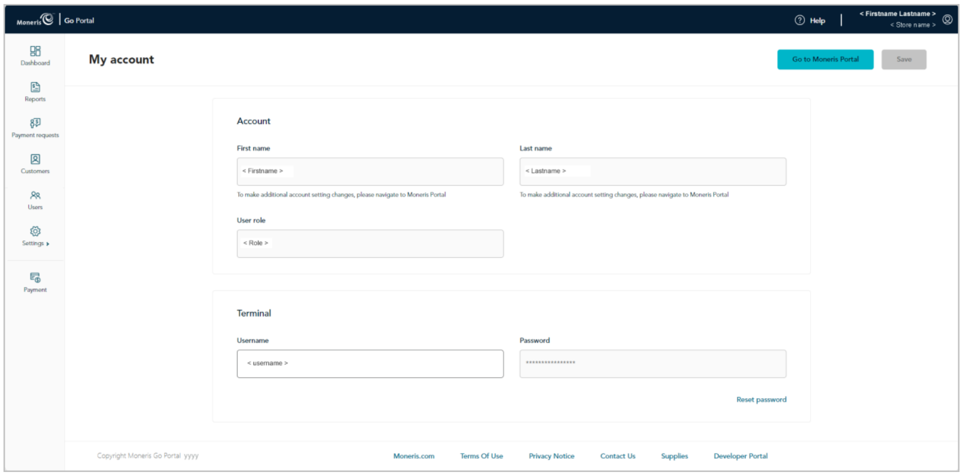
Changing your Moneris Go portal login password

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 125).

2. On the "My account" page (shown below), click on the **Go to Moneris Portal** button to return to Moneris Portal (you must edit your user account settings/login credentials from within Moneris Portal).

   Note: *For Moneris Portal documentation, visit **https://www.moneris.com/en/support/products/moneris-portal**.*



Account

First name: < Firstname >

To make additional account setting changes, please navigate to Moneris Portal

Last name: < Lastname >

To make additional account setting changes, please navigate to Moneris Portal

User role: < Role >

Terminal

Username: < username >

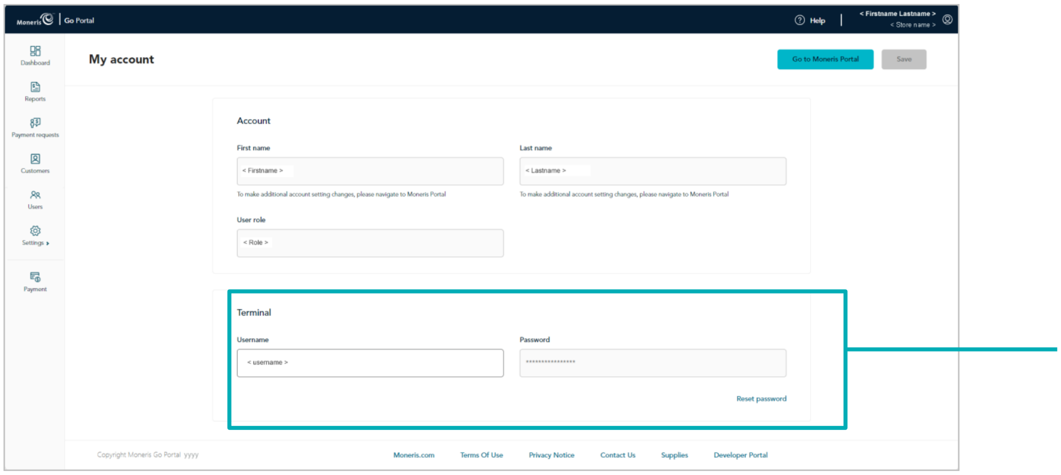
Password: ****************

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.[15])

1. Access your user account settings (see "My account" settings on page 125).

2. On the "My account" page, scroll to the "Terminal" module (shown below).



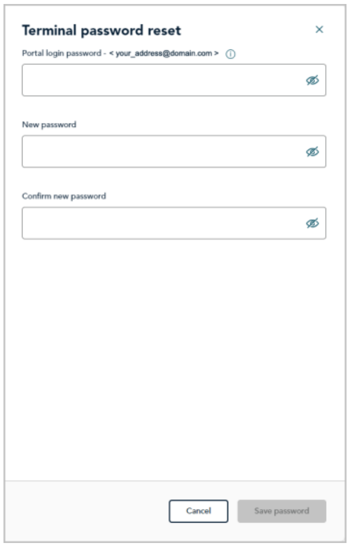
To make additional account setting changes, please navigate to Moneris Portal

To make additional account setting changes, please navigate to Moneris Portal

"TERMINAL" MODULE

3. In the "Terminal" module, click on **Reset password**.

4. When the "Terminal password reset" widow displays (shown here), do the following:



   a. In the **Portal login password** field, enter your current Moneris 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.

---

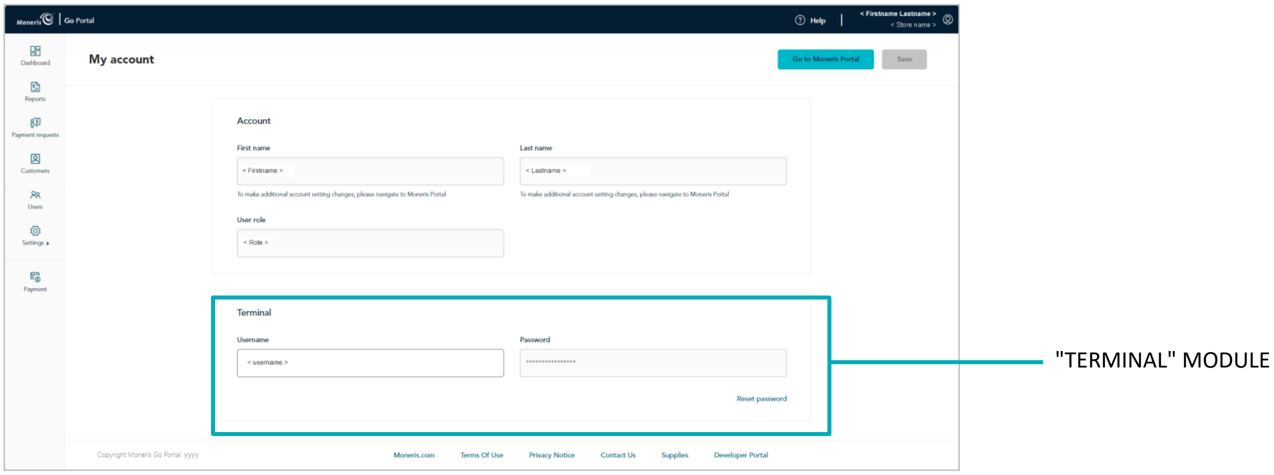
[15] If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).

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.[16])

1. Access your user account settings (see "My account" settings on page 125).

2. On the "My account" page, scroll to the "Terminal" module (shown below).



My account

Account

First name: < Firstname >

To make additional account setting changes, please navigate to Moneris Portal

Last name: < Lastname >

To make additional account setting changes, please navigate to Moneris Portal

User role: < Role >

Terminal

Username: < username >

Password: ****************

"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.

---

[16] 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 39).

Store Settings

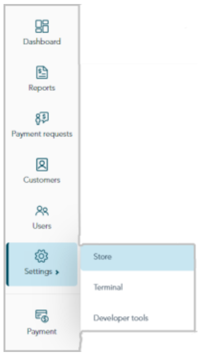
In this section, we go over everything you need to know to manage your Moneris Go portal store's optional payment fields.

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 30).

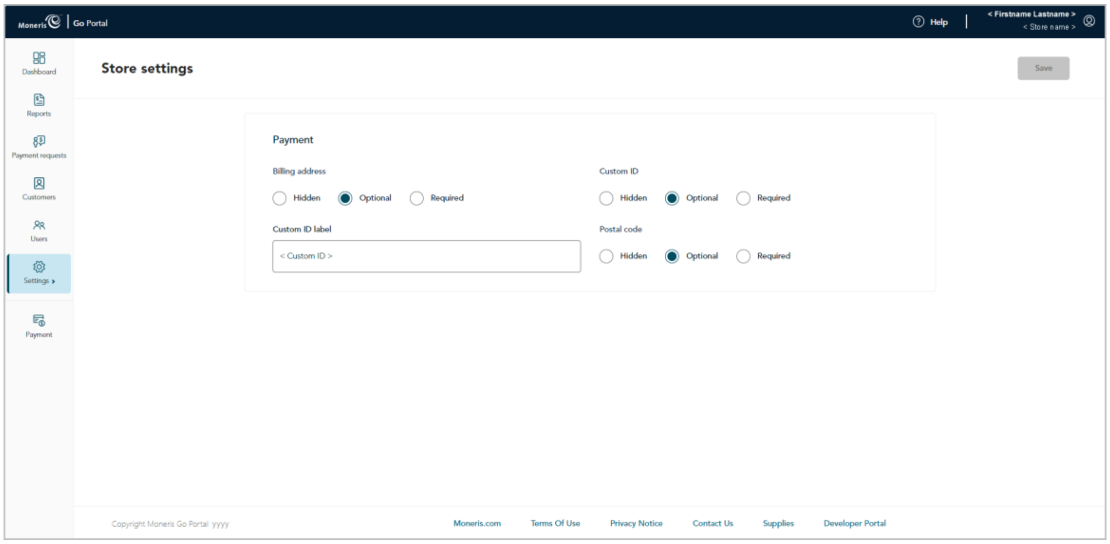
   Note: *If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*



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 settings as desired:



Store settings

Payment

Billing address: ○ Hidden ● Optional ○ Required

Custom ID: ○ Hidden ● Optional ○ Required

Custom ID label: < Custom ID >

Postal code: ○ Hidden ● Optional ○ Required

Billing address fields

- See Billing address: store settings (page 133).

Postal code field

- See Postal code: store settings (page 135).

Custom ID field

- See Custom ID: store settings (page 137).

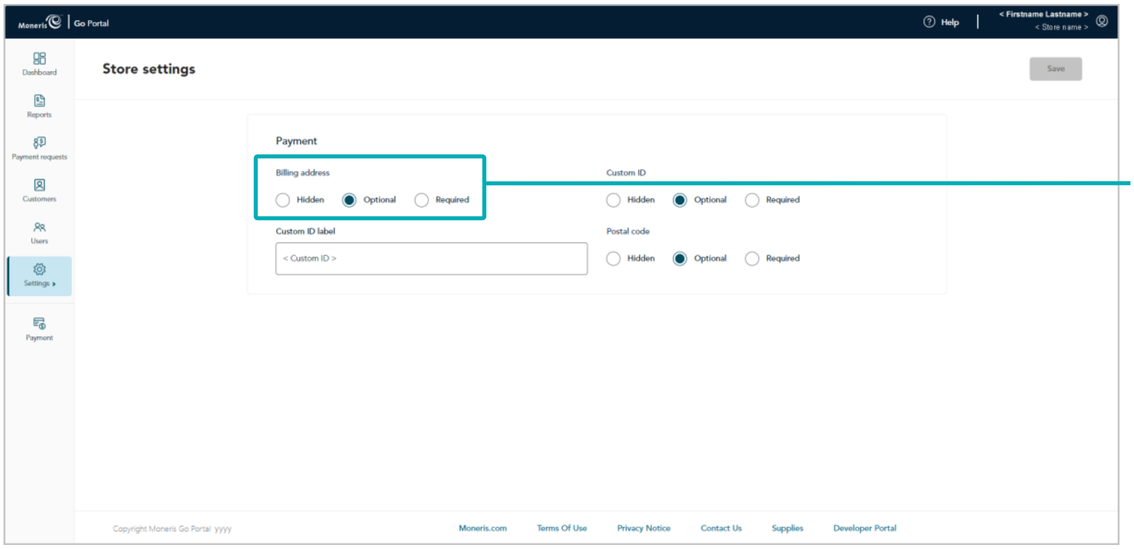
Billing address: store settings

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 45), Preauthorizations (see Preauthorization with credit card: manual entry on page 48), and independent Refunds (see Independent Refund with credit card: manual entry on page 60) in your Moneris Go portal store.

Billing address capture is used for address verification.[17]

1. Access your Moneris Go portal store's payment settings (see Store settings: payments on page 132).

2. On the "Store settings" page (shown below), click on a "Billing address" radio button:



Payment

Billing address
○ Hidden ● Optional ○ Required

Custom ID
○ Hidden ● Optional ○ Required

Custom ID label
< Custom ID >

Postal code
○ Hidden ● Optional ○ Required

"BILLING ADDRESS" RADIO BUTTONS

Radio button	Description
Hidden	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.
Optional	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.
Mandatory	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.

---

[17] 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.

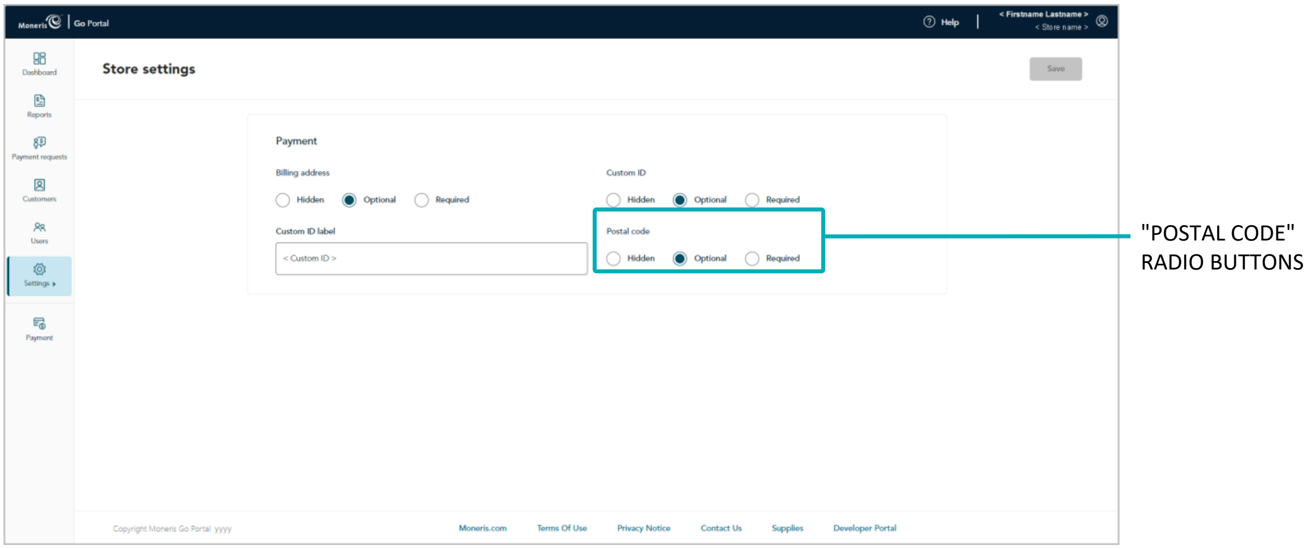
4. When the "Payment settings updated" response displays, the operation is complete.

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 45), Preauthorizations (see Preauthorization with credit card: manual entry on page 48), and independent Refunds (see Independent Refund with credit card: manual entry on page 60) in your Moneris Go portal store. Postal code capture is used for address verification.[18]

1. Access your Moneris Go portal store's payment settings (see Store settings: payments on page 132).

2. On the "Store settings" page (shown below), click on a "Postal code" radio button:



Payment

Billing address: ○ Hidden ● Optional ○ Required

Custom ID: ○ Hidden ● Optional ○ Required

Custom ID label: < Custom ID >

Postal code: ○ Hidden ● Optional ○ Required

"POSTAL CODE"
RADIO BUTTONS

Radio button	Description
Hidden	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.
Optional	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.
Mandatory	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.

---

[18] 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.

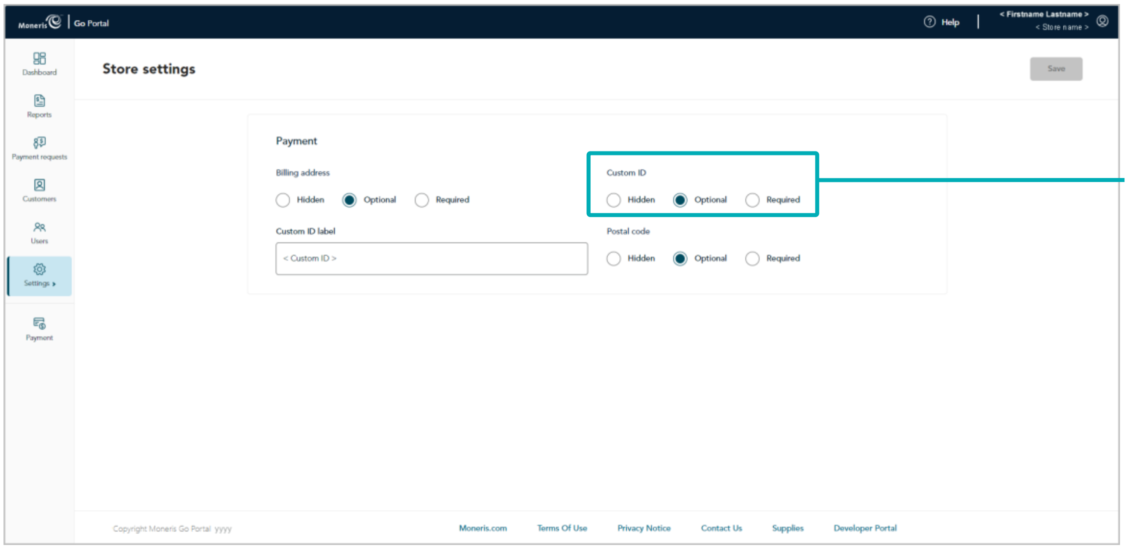
Custom ID: store settings

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[19] 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 218).*

1. Access your Moneris Go portal store's payment settings (see Store settings: payments on page 132).

2. On the "Store settings" page (shown below), click on a "Custom ID" radio button:



Store settings

Payment

Billing address: ○ Hidden ● Optional ○ Required

Custom ID: ○ Hidden ● Optional ○ Required

Custom ID label: < Custom ID >

Postal code: ○ Hidden ● Optional ○ Required

"CUSTOM ID"
RADIO BUTTONS

Radio button	Description
Hidden	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. ***Note:*** *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.*
Optional	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. ***Note:*** *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.*

---

[19] 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 123).

Radio button	Description
Mandatory	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. ***Note:*** *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.*

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 Terminal settings: transactions on page 166).*

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 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 point-of-sale device or application that is synched to the store.

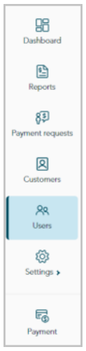
Important! Each user account must be assigned with a user role. Ensure that you configure your store's user roles appropriately (i.e., enable/disable portal and terminal permissions as desired) before you attempt to assign them to user accounts. For instructions on how to add, modify, or delete user roles, see the User roles section (pages 152 to 160).

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 30).

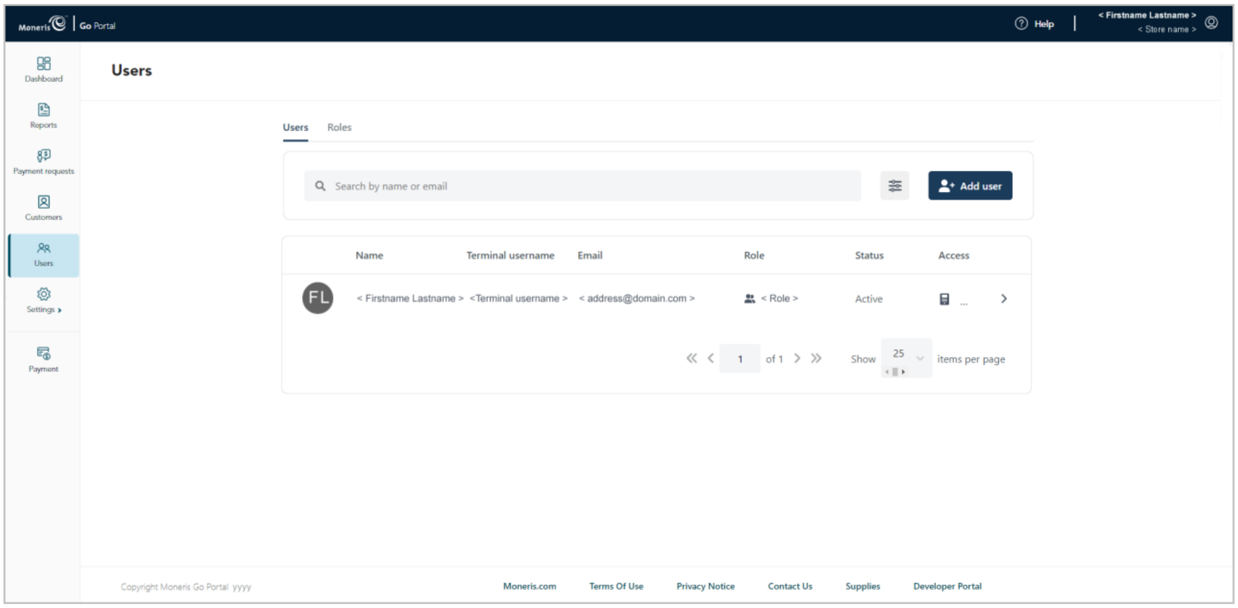
   Note: *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*

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.*

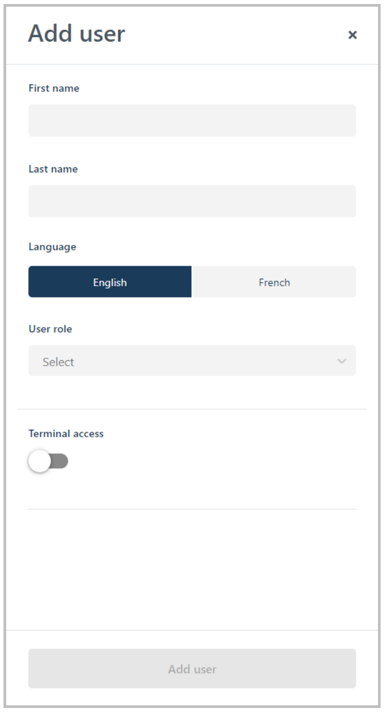


3. When the "Users" page displays (shown below), click on the **Add user** button.



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

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:

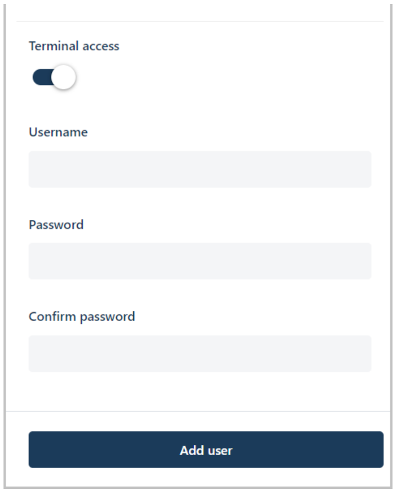
      Note: *Default user roles and descriptions are listed in the table below. To view/modify the parameters of a user role (e.g., change role name or define new permissions for a role) or add/delete a user role, see the* *User roles* *section (pages 152 to 160).*

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

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.

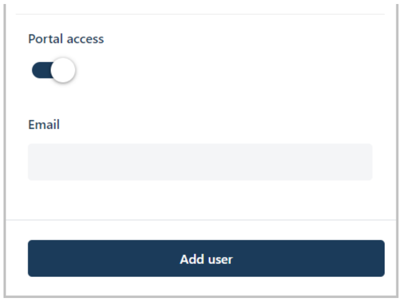


   a. In the **Username** field, enter the user name credential this user needs to enter to log into any terminal that is synched to this store.
   b. In the **Password** field, enter the user password credential this user needs to enter to log into any terminal that is synched to this store.
   c. In the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

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.*

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 Moneris Go portal user account via activation email (page 16).

     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).

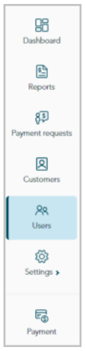
Modifying an active user account

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.

Note: *If you want to modify your own account, please refer to "My account" settings (page 125).*

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 30).

   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 39).*



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

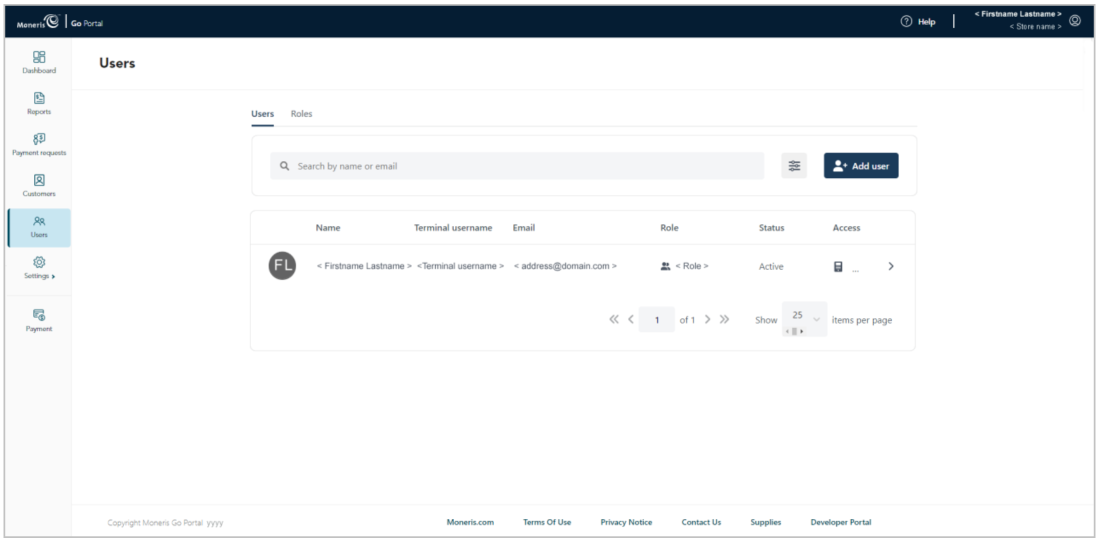
   Note: *If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the*

   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.

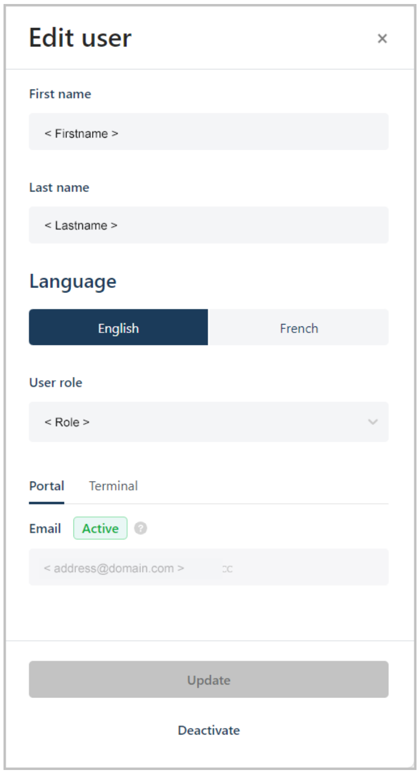
   Note: *To do a general search for an account, enter a full/partial name or a full email address in the **Search by name or email** field. To use filters to refine the search, see Using filters to search for users (page 151).*

   *To change the number of hits listed on the 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.*



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

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



To change username information:

Note: *This option is not supported if the user is already migrated to Moneris Portal.*

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 152 to 160).*

User role	Portal access	Terminal access	Description
Admin	Yes	Yes	Access to all functionality in the application.
High	No	Yes	Access to all transactions types and reports but limited access to settings.
Low	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.

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.

Note: *If you are a Moneris Portal user, enter your current Moneris Portal password.*

d. In the **Username** field, enter the user's new terminal login username.

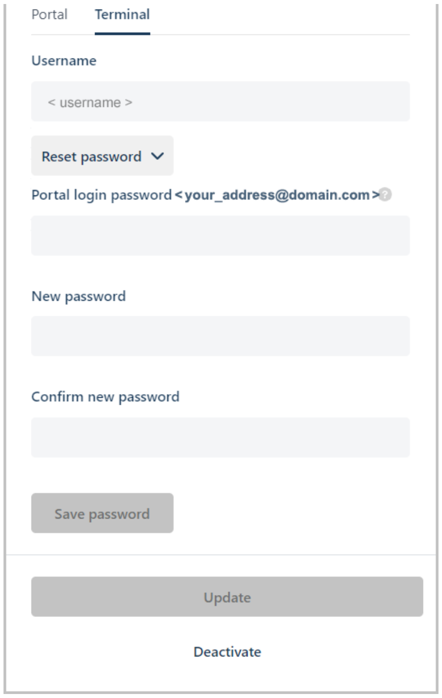
e. In the **Password** field, enter the user's new terminal login password.

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.*



To enable terminal access:

a. Click on the **Terminal** tab (shown here).

b. In the **Username** field, enter the user's terminal login username.

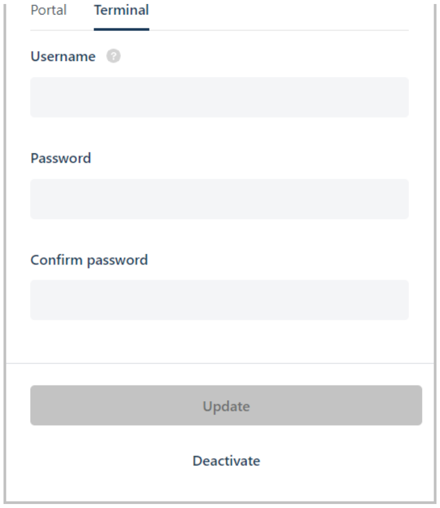
c. In the **Password** field, enter the user's terminal login password.

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.*



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 144).*

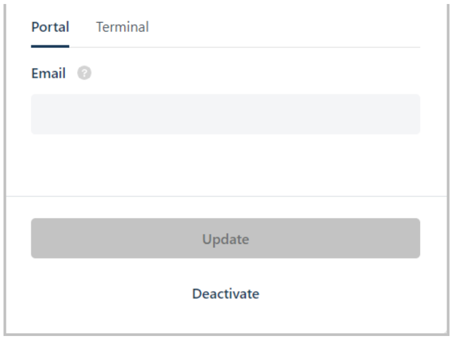
a. Click on the **Portal** tab (shown here).

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

c. Click on the **Update** button.

d. When the "User updated successfully" response displays, the operation is complete.

   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

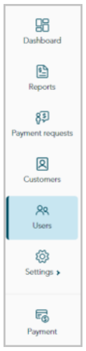
The steps below describe how to deactivate a Moneris Go portal user account. Once the account is deactivated, the user associated with it will be unable to use their login credentials to start a session on the Moneris Go portal nor any point-of-sale device or application that is synched to your Moneris 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 30).

   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 39).*

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

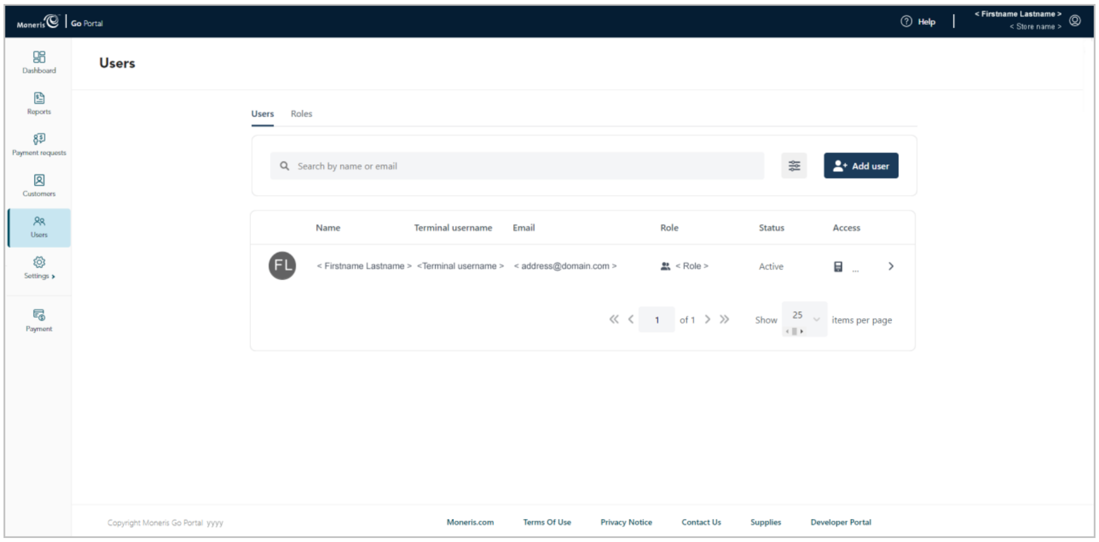
   Note: *If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*



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

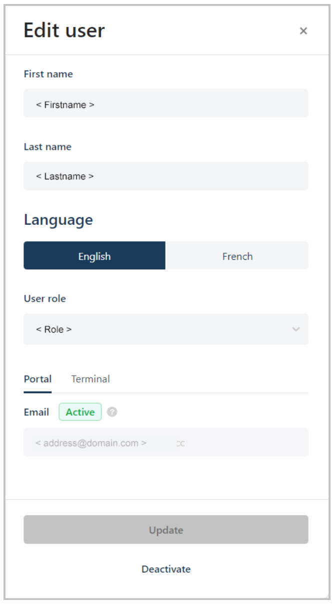
   Note: *To do a general search for an account, enter a full/partial name or a full email address in the **Search by name or email** field. To use filters to refine the search, see Using filters to search for users (page 151).*

   *To change the number of hits listed on the 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.*



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

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



First name: < Firstname >

Last name: < Lastname >

User role: < Role >

Email: Active

< address@domain.com >

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.


Are you sure you want to deactivate this user?

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 149).
   - 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 point-of-sale device or application that is synched to the store.

Reactivating a user account

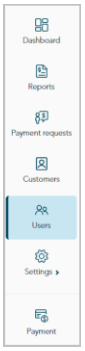
The steps below describe how to reactivate an existing Moneris Go portal user account. Once the user account is reactivated, the user reacquires their previous access to the Moneris Go portal store and/or point-of-sale device or application functionality.

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 30).

   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 39).*

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

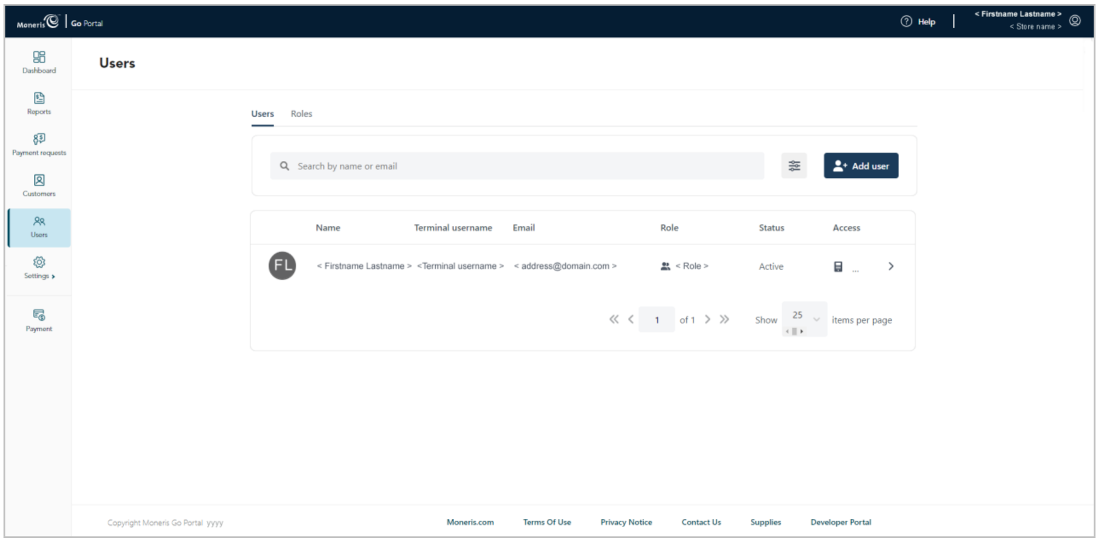
   Note: *If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*



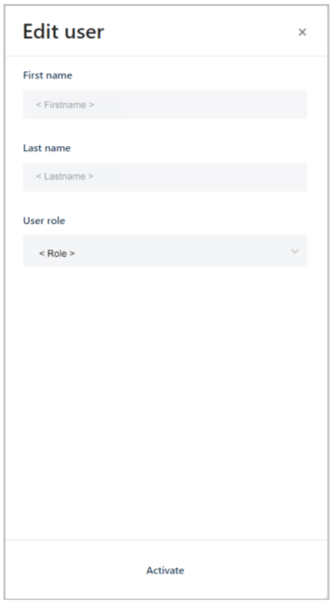
3. When the "Users" page displays (shown below), locate the user account that you want to reactivate, and click on it.

   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 151).*

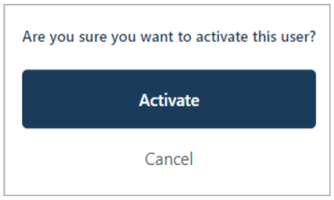
   *To change the number of hits listed on the page, click on the "Show # items per page" drop-down, and select a number (**10**, **25**, or **50**). To advance to the next page or last page, click on the **Next page >** icon or the **Last page >>** icon respectively. To go back to the previous page or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



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.



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 point-of-sale device or application that is synched to the store.

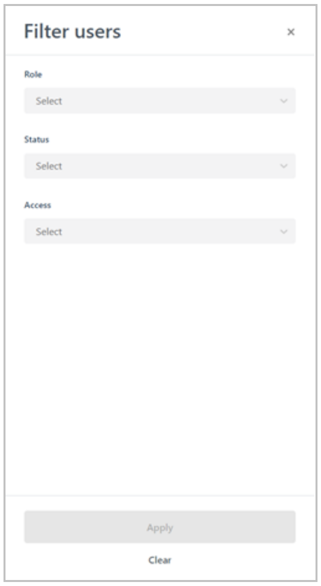
Using filters to search for users

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 143).
    - See Deactivating a user account (page 147).
    - See Reactivating a user account (page 149).

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

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**).



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 143 (Modifying an active user account).
    - If you are deactivating an active user account, continue at 3 on page 147 (Deactivating a user account)
    - If you are reactivating an inactive user account, continue at step 3 on page 149 (Reactivating a user account).

User roles

Adding a new user role

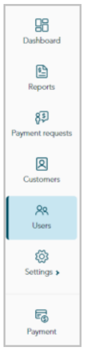
The steps below describe how to add a new user role. Each Moneris Go portal user account must be assigned with a user role. The user role defines which features and functions a user can utilize during their login session in a specific Moneris Go portal store and/or any point-of-sale device or application 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 30).

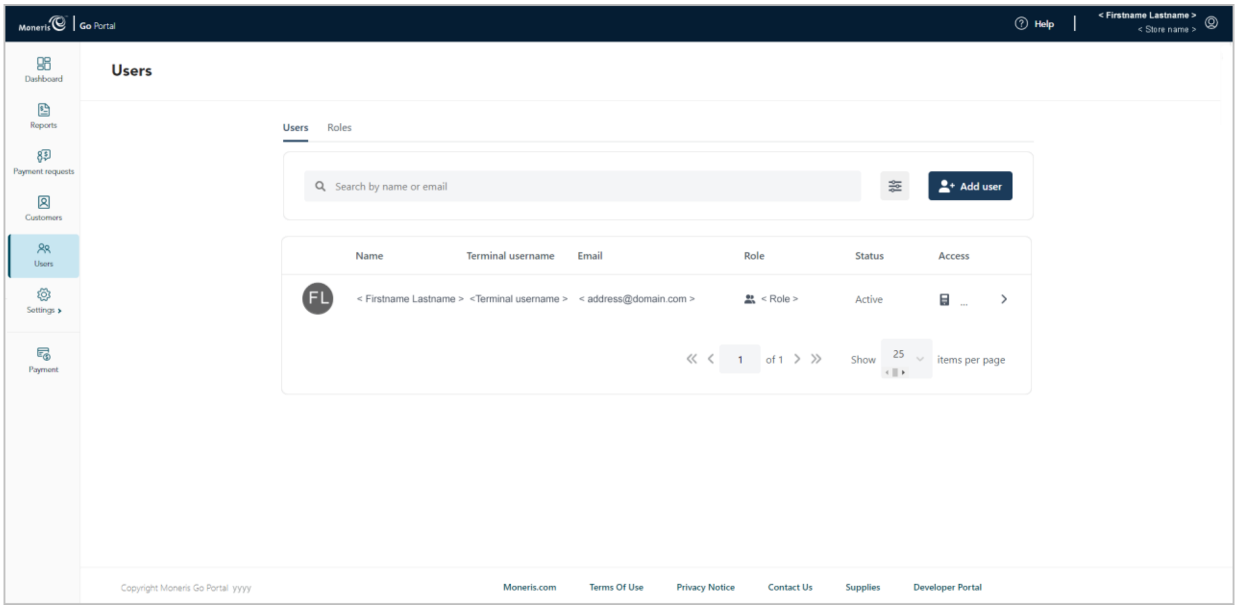
   Note: *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*

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.

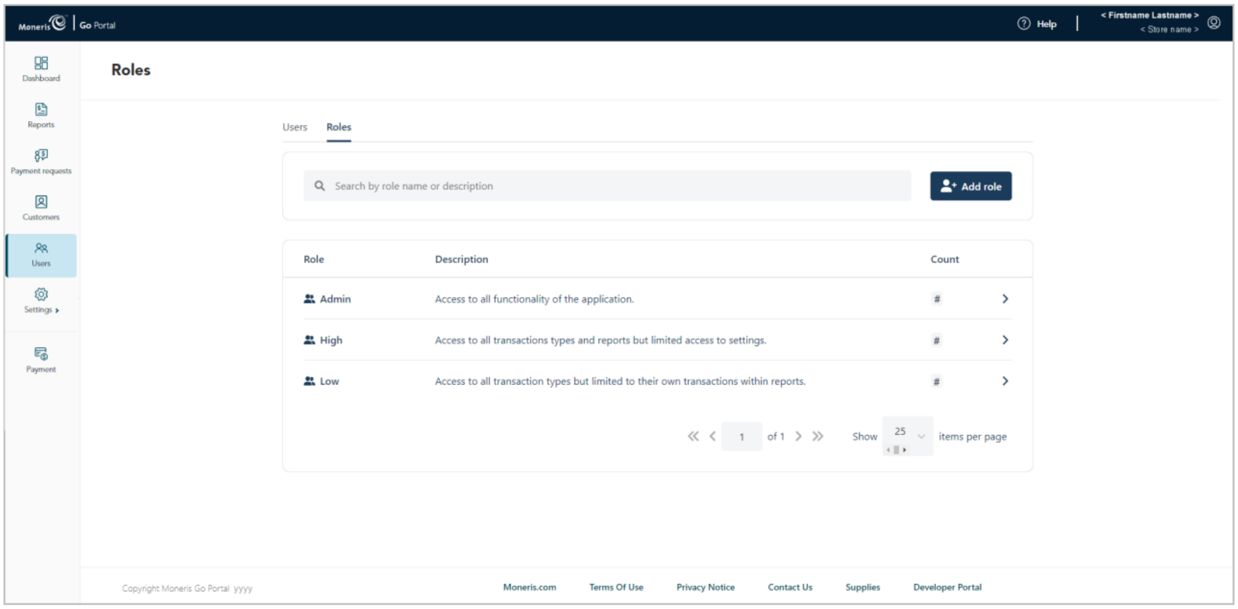


	Name	Terminal username	Email	Role	Status	Access
FL	< Firstname Lastname >	<Terminal username >	< address@domain.com >	< Role >	Active	

1 of 1 · Show 25 items per page

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

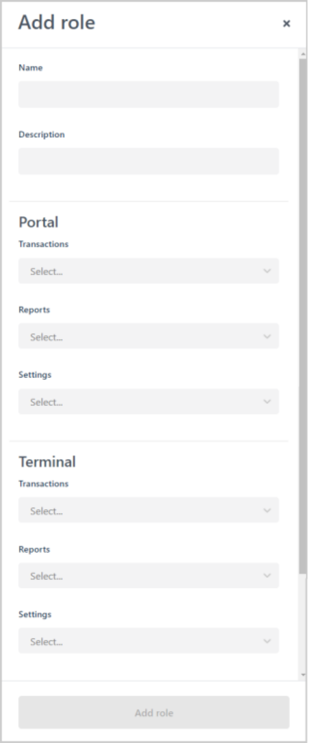
   Note: *The default user roles are "Admin", "High", and "Low".*



Roles

Role	Description	Count
Admin	Access to all functionality of the application.	#
High	Access to all transactions types and reports but limited access to settings.	#
Low	Access to all transaction types but limited to their own transactions within reports.	#

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



   a. In the **Name** field, enter the user role name.

   b. In the **Description** field, enter the user role description.

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

   a. 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: *"Portal" permissions are also applicable to the Moneris Go app. For a list of supported permissions, see List of user role permissions on page 160.*

To enable/disable user role permissions for the terminal:

   a. 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 160.*

6. Click on the **Add role** button.

7. When the "User role added successfully" response displays, the operation is complete.

Modifying a user role

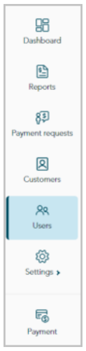
The steps below describe how to modify a user role's parameters, including name, description, and user permissions.

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 30).

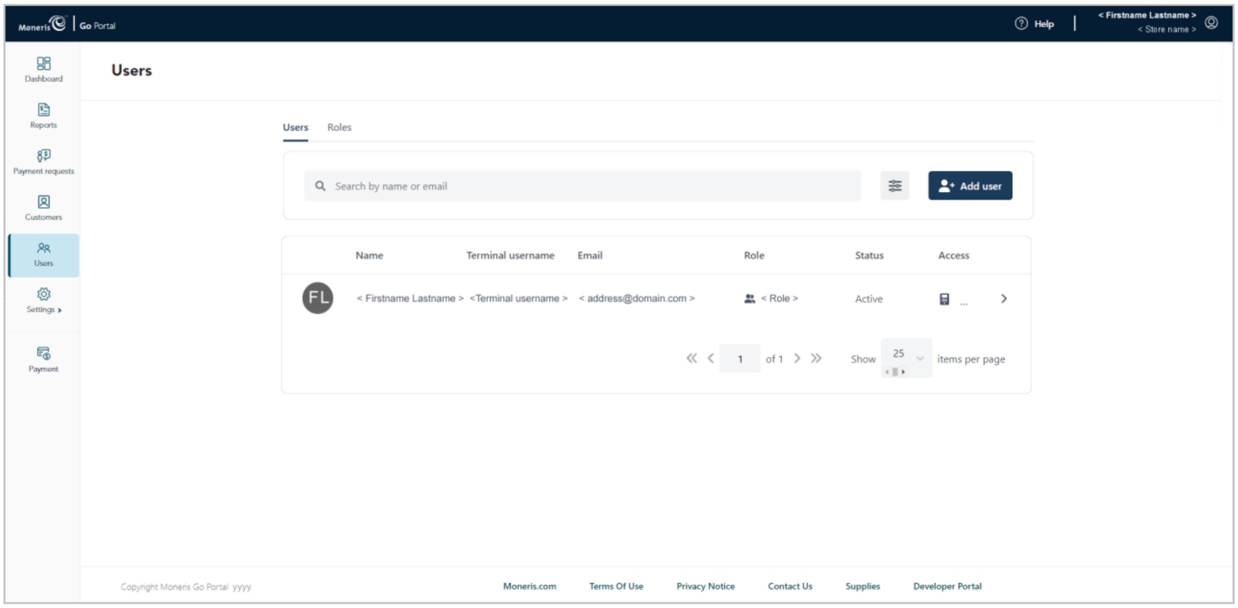
   Note: *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*

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.

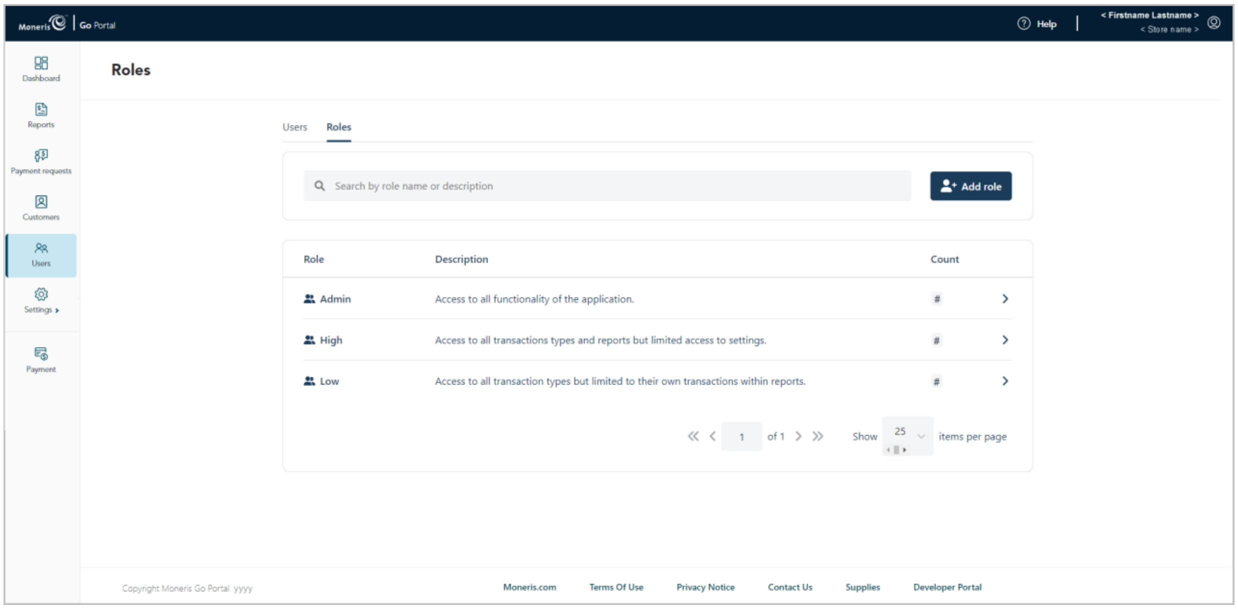


	Name	Terminal username	Email	Role	Status	Access
FL	< Firstname Lastname >	<Terminal username >	< address@domain.com >	< Role >	Active	...

4. 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.*

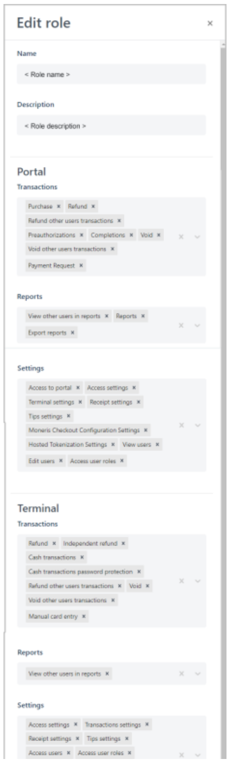
   *To change the number of hits listed on the page, click on the "Show # items per page" drop-down, and select a number (**10**, **25**, or **50**). To advance to the next page or last page, click on the **Next page >** icon or the **Last page >>** icon respectively. To go back to the previous page or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



Roles

Role	Description	Count
Admin	Access to all functionality of the application.	#
High	Access to all transactions types and reports but limited access to settings.	#
Low	Access to all transaction types but limited to their own transactions within reports.	#

1 of 1 Show 25 items per page



Edit role

Name: < Role name >

Description: < Role description >

Portal

Transactions: Purchase, Refund, Refund other users transactions, Preauthorizations, Completions, Void, Void other users transactions, Payment Request

Reports: View other users in reports, Reports, Export reports

Settings: Access to portal, Access settings, Terminal settings, Receipt settings, Tips settings, Moneris Checkout Configuration Settings, Hosted Tokenization Settings, View users, Edit users, Access user roles

Terminal

Transactions: Refund, Independent refund, Cash transactions, Cash transactions password protection, Refund other users transactions, Void, Void other users transactions, Manual card entry

Reports: View other users in reports

Settings: Access settings, Transactions settings, Receipt settings, Tips settings, Access users, Access user roles

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

   To edit the user role name/description:

   a. In the **Name** field, enter the new name of the user role.

   b. In the **Description** field, enter the new description for the user role.

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

   a. 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.

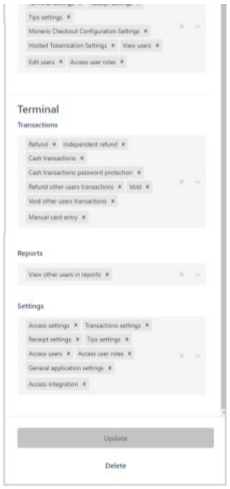
      Note: *If no permission is currently enabled, select one or more from the "Transactions", "Settings", and/or "Reports" drop-down as desired. "Portal" permissions are also applicable to the Moneris Go app. (For a list of supported permissions, see List of user role permissions on page 160.)*

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 160.)*

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



Tips settings ×
Moneris Checkout Configuration Settings ×
Hosted Tokenization Settings × View users ×
Edit users × Access user roles ×

Terminal
Transactions
Refund × Independent refund ×
Cash transactions ×
Cash transactions password protection ×
Refund other users transactions × Void ×
Void other users transactions ×
Manual card entry ×

Reports
View other users in reports ×

Settings
Access settings × Transactions settings ×
Receipt settings × Tips settings ×
Access users × Access user roles ×
General application settings ×
Access integration ×

Deleting a user role

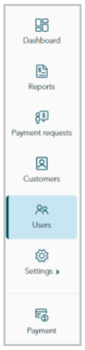
The steps below describe how to delete a user role so that it cannot be assigned to a Moneris Go portal user account.

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 30).

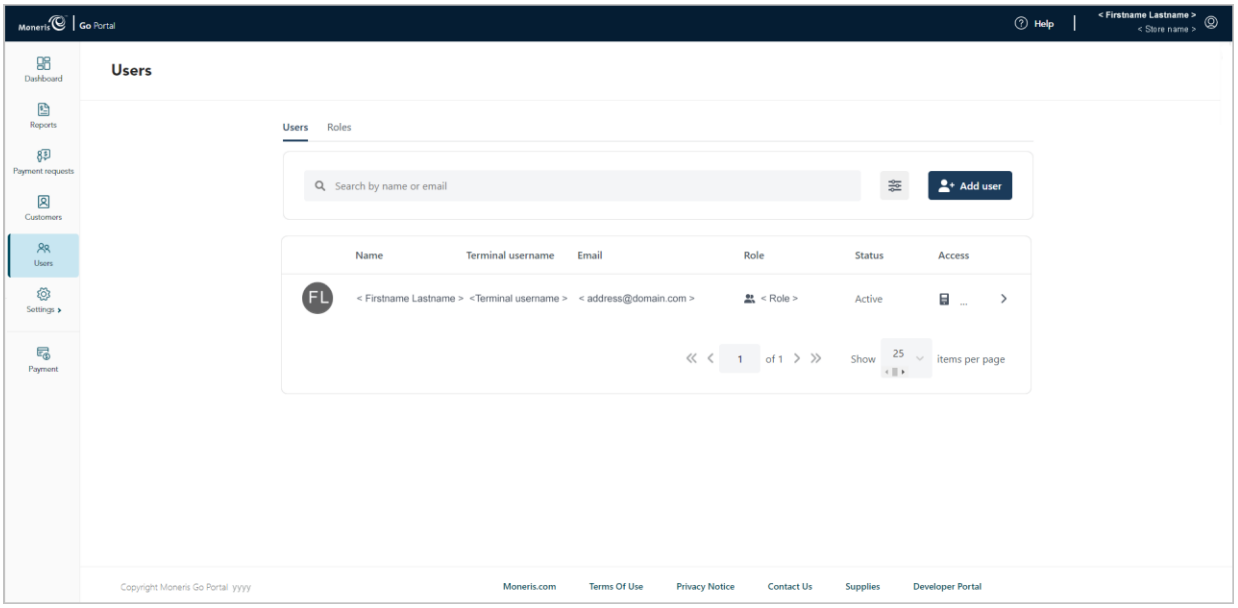
   Note: *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*

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.

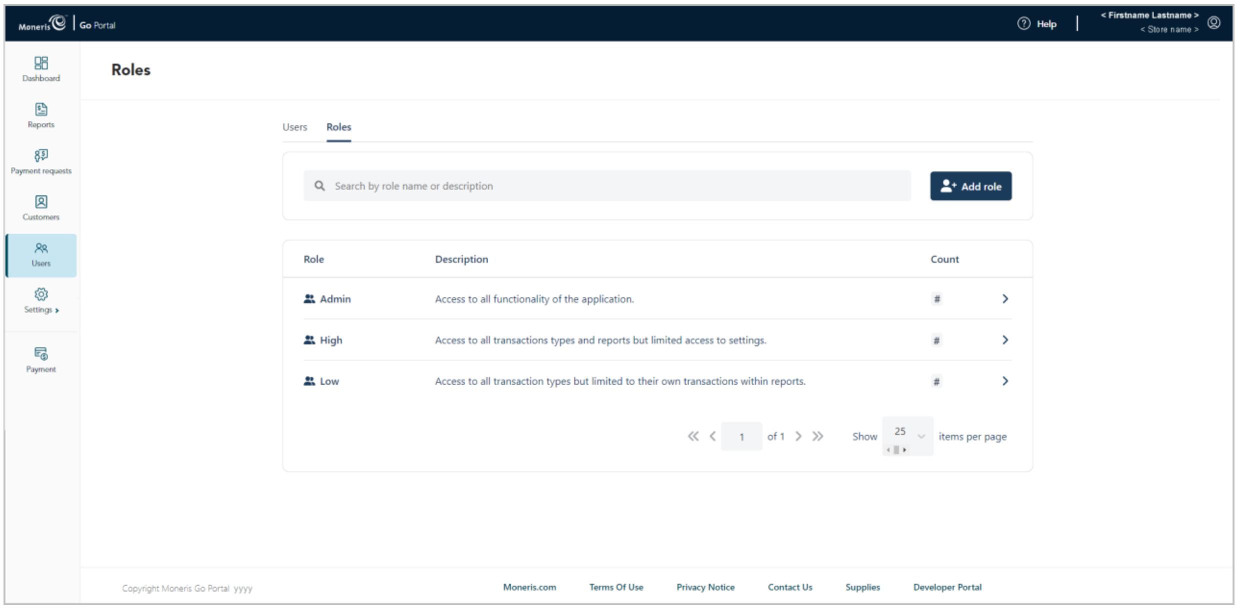


	Name	Terminal username	Email	Role	Status	Access	
FL	< Firstname Lastname >	<Terminal username >	< address@domain.com >	< Role >	Active	...	›

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

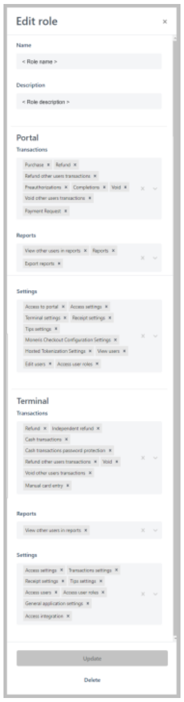
   Note: *To search for a user role, enter a full/partial role name or a full role description in the **Search by role name or description** field.*

   *To change the number of hits listed on the 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.*



Role	Description	Count
Admin	Access to all functionality of the application.	#
High	Access to all transactions types and reports but limited access to settings.	#
Low	Access to all transaction types but limited to their own transactions within reports.	#

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



Name: < Role name >

Description: < Role description >

Portal

Transactions: Purchase, Refund, Refund other users transactions, Preauthorizations, Completions, Void, Void other users transactions, Payment Request

Reports: View other users in reports, Reports, Export reports

Settings: Access to portal, Access settings, Terminal settings, Receipt settings, Tips settings, Moneris Checkout Configuration Settings, Hosted Tokenization Settings, View users, Edit users, Access user roles

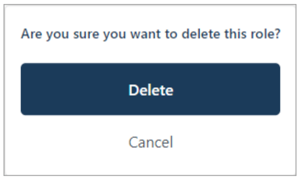
Terminal

Transactions: Refund, Independent refund, Cash transactions, Cash transactions password protection, Refund other users transactions, Void, Void other users transactions, Manual card entry

Reports: View other users in reports

Settings: Access settings, Transactions settings, Receipt settings, Tips settings, Access users, Access user roles, General application settings, Access integration

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



Are you sure you want to delete this role?

7. 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.

Note: *"Portal" permissions are applicable to the Moneris Go app.*

- For instructions on how to add a new user role, see Adding a new user role (page 152).
- For instructions on how to modify an existing user role, see Modifying a user role (page 154).

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

Terminal

Group	Permission
Transactions	**Cash transactions**
	Cash transactions password protection
	Independent refund
	Manual card entry
	Preauthorizations
	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

Group	Permission
	Receipt settings

Portal (continued...)

Group	Permission
Settings	**Terminal settings**
	Tips settings
	View users

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/Go Plus terminals. For information and resources on how to use your terminal to process transactions, visit:

- [Moneris Go] https://www.moneris.com/en/support/moneris-go/monerisgo
- [Moneris Go Plus] https://www.moneris.com/en/support/moneris-go/moneris-go-plus

Terminal settings: general

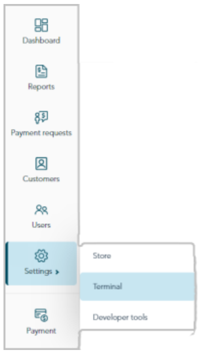
The steps below describe how to access the general settings for all terminals that are synched to your Moneris Go portal store. General settings include automatic sign-out time, automatic sign-out after transaction, report reset time, and display timeout.

1. Log into the Moneris Go portal, and access the store that is synched to the terminal(s) that you want to modify (see Logging into the Moneris Go portal on page 30).

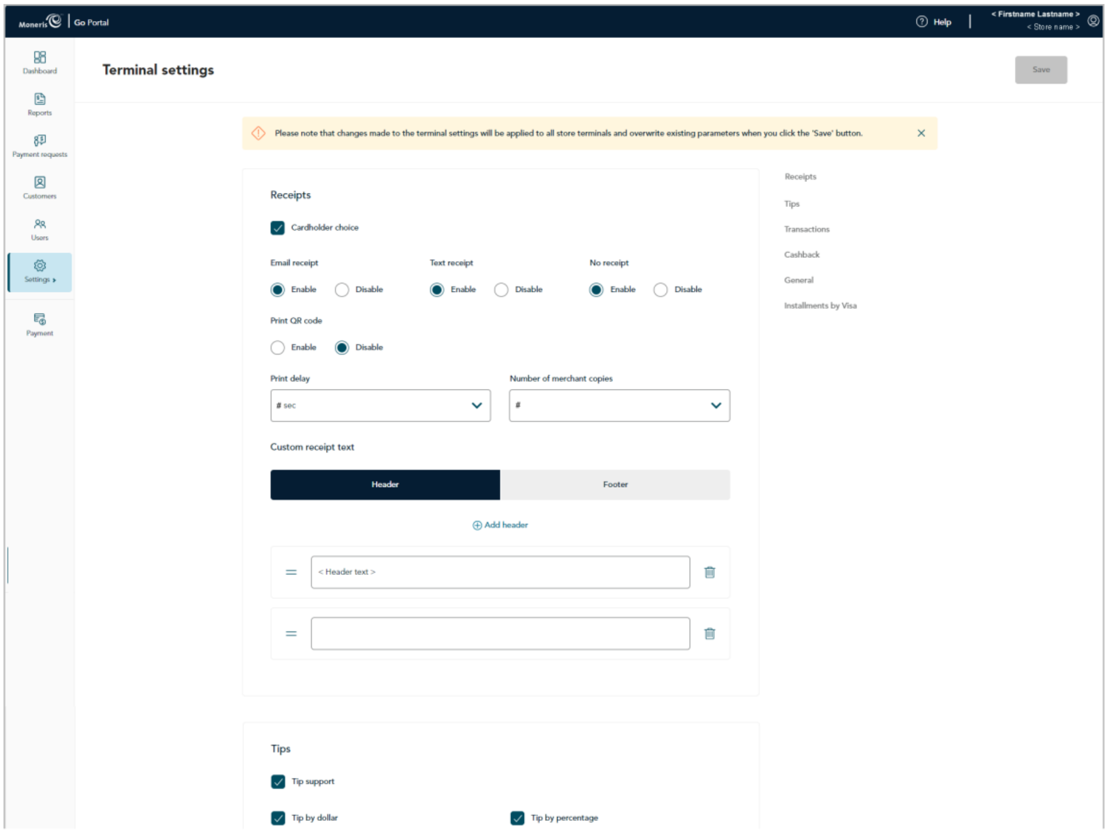
   Note: *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*

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), continue to the next step.



Terminal settings

Please note that changes made to the terminal settings will be applied to all store terminals and overwrite existing parameters when you click the 'Save' button.

Receipts

☑ Cardholder choice

Email receipt: ● Enable ○ Disable

Text receipt: ● Enable ○ Disable

No receipt: ● Enable ○ Disable

Print QR code: ○ Enable ● Disable

Print delay: # sec

Number of merchant copies: #

Custom receipt text

< Header text >

Tips

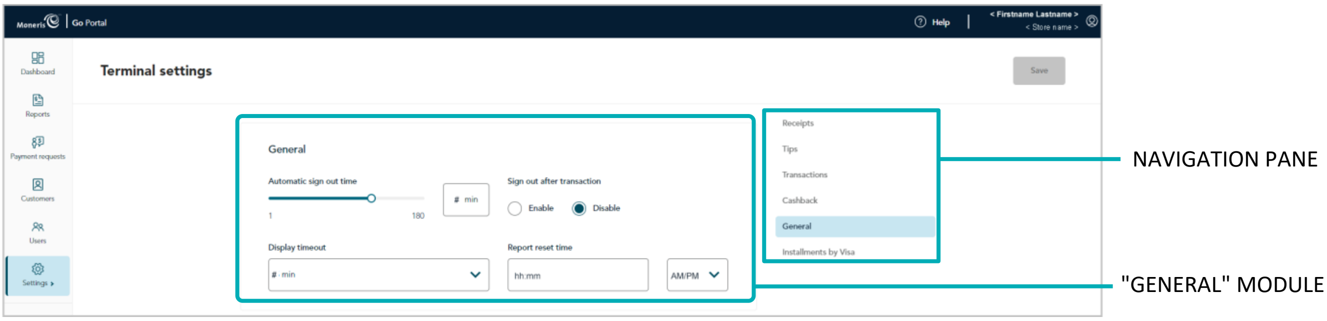
☑ Tip support

☑ Tip by dollar

☑ Tip by percentage

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).*



Sign out after transaction ○ Enable ● Disable

Automatic sign-out time

Configure when the terminal automatically logs off a user after X seconds of inactivity.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

a. Move the **Automatic sign-out time** slider to the desired value (1 sec to 180 sec).

b. Click on the **Save** button.

c. When the "Changes saved" 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 terminal enters into sleep mode to conserve battery power.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

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 "Changes saved" 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 terminal transaction.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

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 "Changes saved" 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 terminal reports reset to $0.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

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 "Changes saved" response displays, the operation is complete.

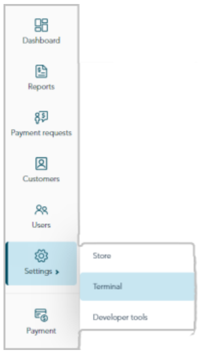
  Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

Terminal settings: transactions

The steps below describe how to access the transaction settings for all 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 terminal(s) that you want to modify (see Logging into the Moneris Go portal on page 30).

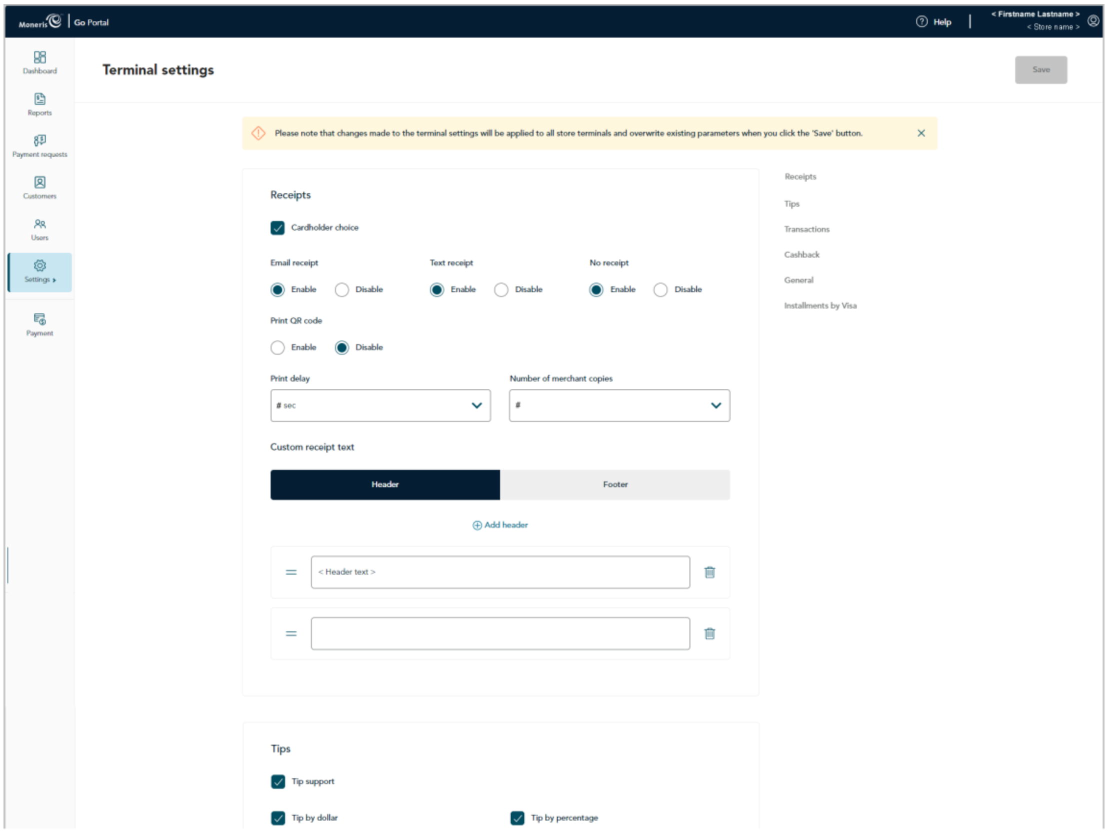
   Note: *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*



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), continue to the next step.



Terminal settings

Please note that changes made to the terminal settings will be applied to all store terminals and overwrite existing parameters when you click the 'Save' button.

Receipts

☑ Cardholder choice

Email receipt: ● Enable ○ Disable

Text receipt: ● Enable ○ Disable

No receipt: ● Enable ○ Disable

Print QR code: ○ Enable ● Disable

Print delay: # sec

Number of merchant copies: #

Custom receipt text

< Header text >

Tips

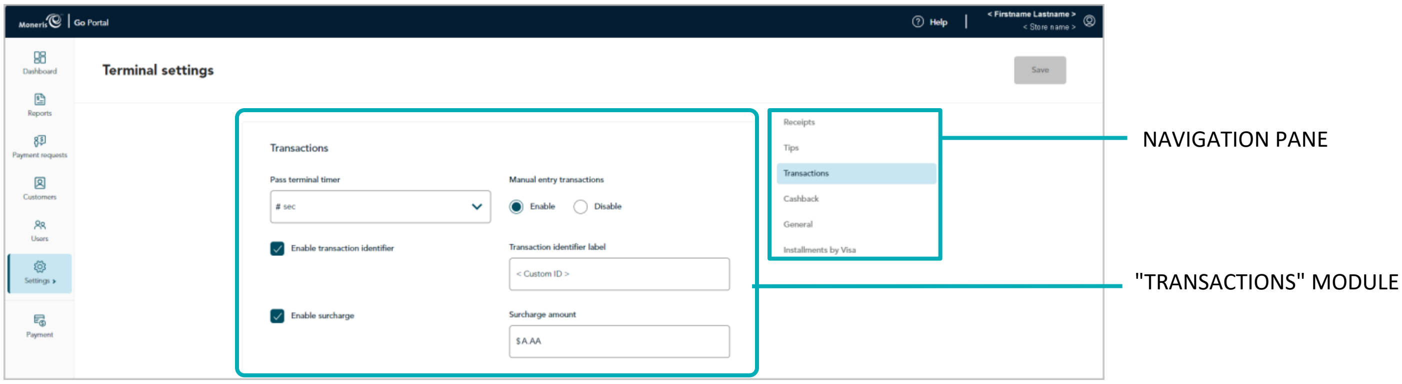
☑ Tip support

☑ Tip by dollar

☑ Tip by percentage

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).*



Transactions

Pass terminal timer: # sec

Manual entry transactions: ● Enable ○ Disable

☑ Enable transaction identifier

Transaction identifier label: < Custom ID >

☑ Enable surcharge

Surcharge amount: $A.AA

Manual entry transactions

Enable/disable keying in transactions on the terminal.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

a. 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.

b. Click on the **Save** button.

c. When the "Changes saved" 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 terminal displays the "Please pass the terminal to your customer" prompt (e.g., this prompt would display when tip prompting is enabled).

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

a. Click on the **Pass terminal timer** drop-down, and select a value (0 sec to 10 sec).

b. Click on the **Save** button.

c. When the "Changes saved" 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

Enable/disable the addition of a fixed dollar amount (surcharge) to Interac debit Purchase transactions performed on the terminal. The surcharge amount cannot exceed $0.25.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

a. Do one of the following:

- To enable, checkmark the **Enable surcharge** box, and enter the surcharge amount (not exceeding $0.25) in the **Surcharge amount** field.
- To disable, unmark the **Enable surcharge** box.

b. Click on the **Save** button.

c. When the "Changes saved" 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 terminal. If enabled, the custom transaction identifier field will appear as a line item in reports and receipts.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

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.

  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 137).*

- To disable, unmark the **Enable transaction identifier** box.

b. Click on the **Save** button.

c. When the "Changes saved" 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.*

Terminal settings: receipts

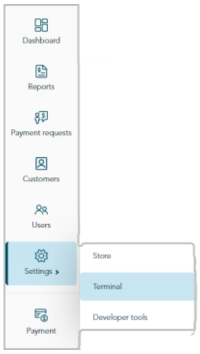
The steps below describe how to access the settings for receipts issued from all terminals that are synched to your Moneris Go portal store. Receipt settings include transaction receipt format choice, print QR code, print delay, and customizable greeting headers and footers.

1. Log into the Moneris Go portal, and access the store that is synched to the terminal(s) that you want to modify (see Logging into the Moneris Go portal on page 30).

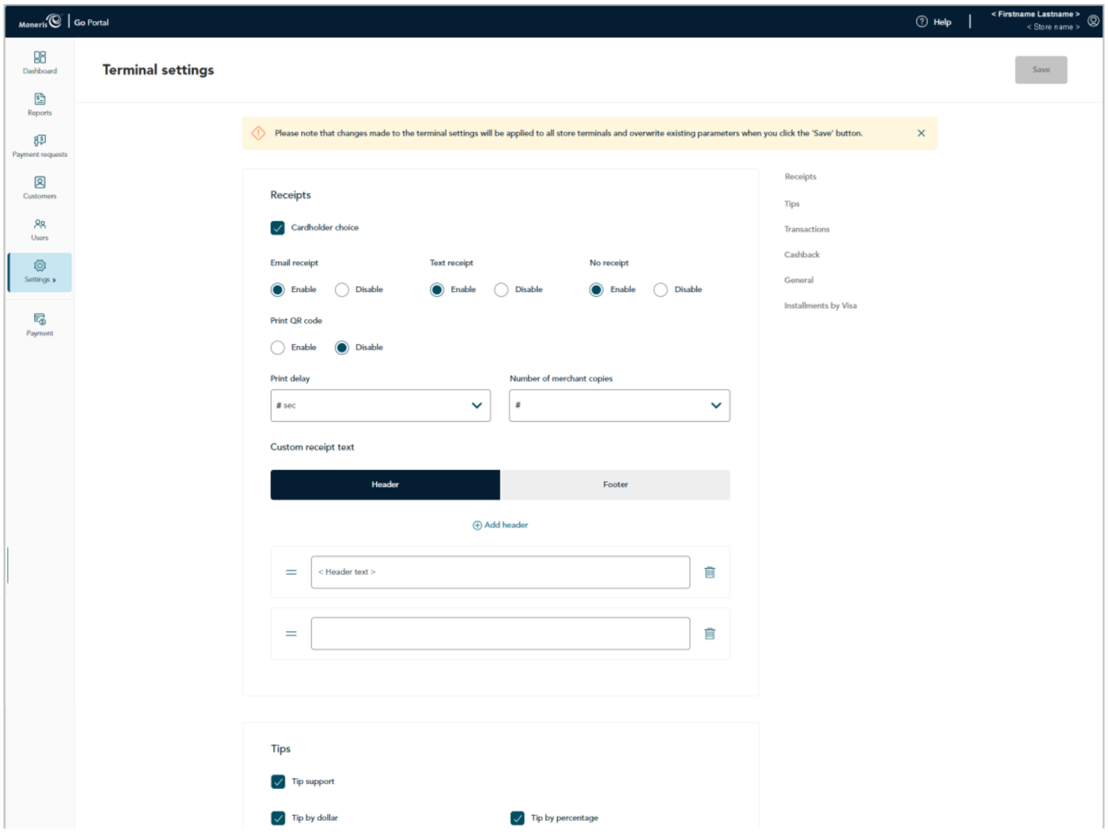
   Note: *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*

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), continue to the next step.



Terminal settings

Please note that changes made to the terminal settings will be applied to all store terminals and overwrite existing parameters when you click the 'Save' button.

Receipts

☑ Cardholder choice

Email receipt: ● Enable ○ Disable

Text receipt: ● Enable ○ Disable

No receipt: ● Enable ○ Disable

Print QR code: ○ Enable ● Disable

Print delay: # sec

Number of merchant copies: #

Custom receipt text: Header | Footer

< Header text >

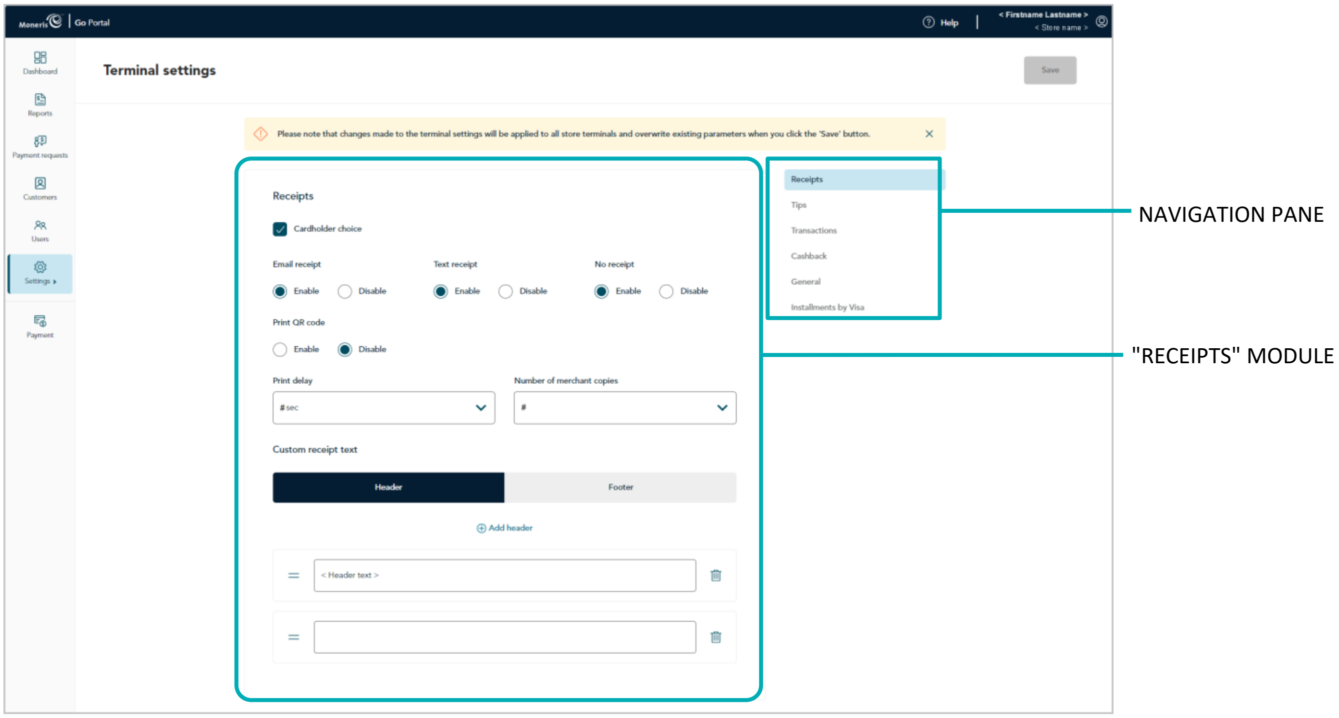
Tips

☑ Tip support

☑ Tip by dollar ☑ Tip by percentage

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

Enable/disable receipt format prompting on the terminal.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

a. Do one of the following:

   - To enable, checkmark the **Cardholder choice** box.
   - To disable, unmark the **Cardholder choice** box.

b. Click on the **Save** button.

c. When the "Changes saved" 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[20]

Enable/disable the "Email receipt" option on the terminal.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

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 "Changes saved" 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[21]

Enable/disable the "Text receipt" option on the terminal.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

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 "Changes saved" 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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[20] This option is supported only if "Cardholder choice" is enabled (see Cardholder choice on page 170).

[21] This option is supported only if "Cardholder choice" is enabled (see Cardholder choice on page 170).

No receipt[22]

Enable/disable the "No receipt" option on the terminal.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

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 "Changes saved" 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 that is connected to an ECR, the change is effected when the terminal reboots or receives a manual Sync command.*

Number of merchant copies

Set the number of merchant copy receipts that the terminal prints for each transaction.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

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 "Changes saved" 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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[22] This option is supported only if "Cardholder choice" is enabled (see Cardholder choice on page 170).

Print QR code

Enable/disable the appearance of a QR code on 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.)

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

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 "Changes saved" 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 terminal prints the cardholder copy receipt and when it prints the merchant copy receipt.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

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 "Changes saved" 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 terminal transaction receipts.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

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 "Changes saved" 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:

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step d.*

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 "Changes saved" 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.*

Footer

Configure a customized greeting message in the footer line(s) on terminal transaction receipts.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

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 "Changes saved" 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:

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step d.*

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 "Changes saved" 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.*

Terminal settings: cashback

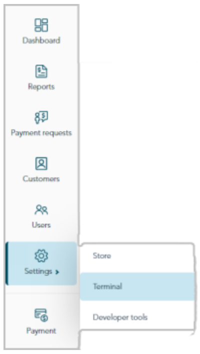
The steps below describe how to access the settings for cashback prompting on all terminals that are synched to your Moneris Go portal store. When enabled, cashback prompting displays during contact-based debit Purchase transactions performed on the terminal.

1. Log into the Moneris Go portal, and access the store that is synched to the terminal(s) that you want to modify (see Logging into the Moneris Go portal on page 30).

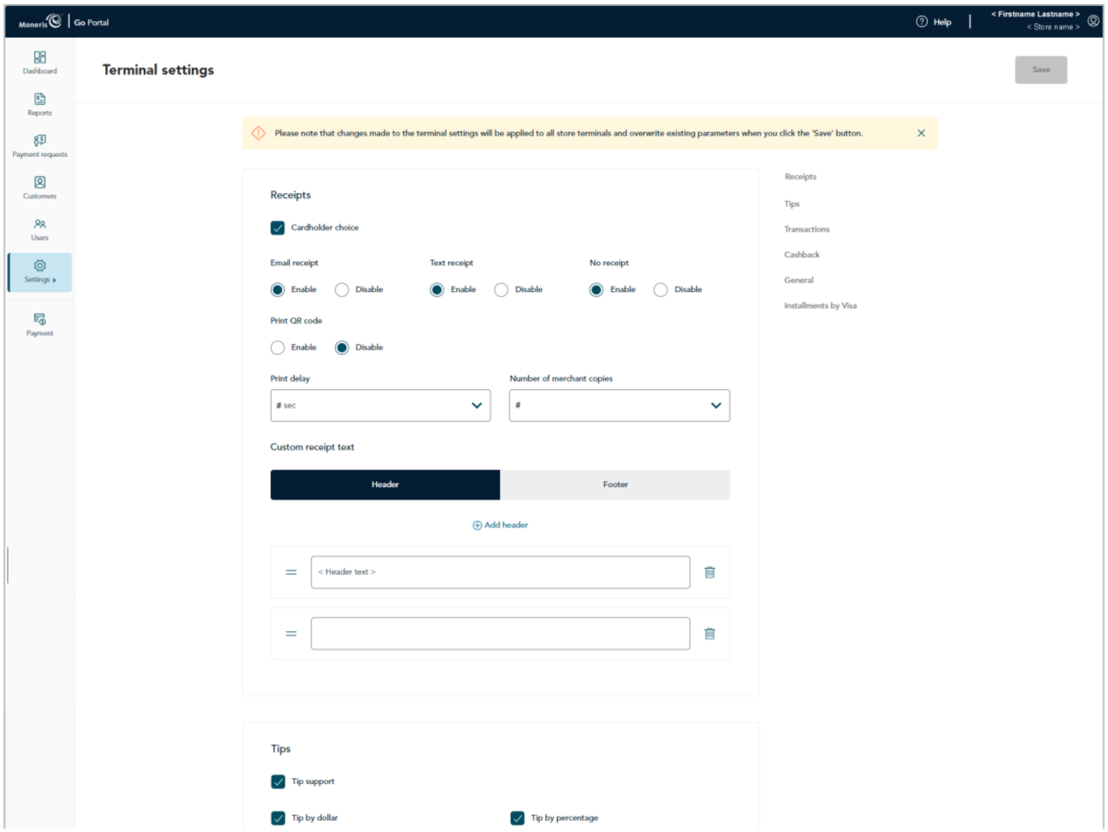
   Note: *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*

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), continue to the next step.



Please note that changes made to the terminal settings will be applied to all store terminals and overwrite existing parameters when you click the 'Save' button.

Receipts

☑ Cardholder choice

Email receipt: ● Enable ○ Disable

Text receipt: ● Enable ○ Disable

No receipt: ● Enable ○ Disable

Print QR code: ○ Enable ● Disable

Print delay: # sec

Number of merchant copies: #

Custom receipt text

Header | Footer

Add header

< Header text >

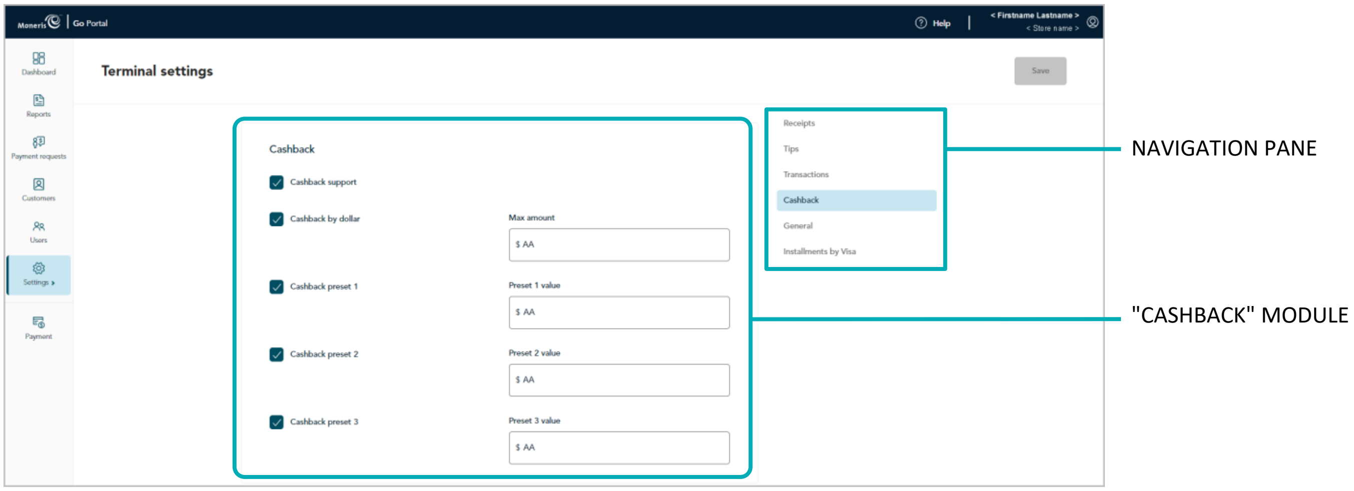
Tips

☑ Tip support

☑ Tip by dollar ☑ Tip by percentage

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).*



Terminal settings

Cashback

☑ Cashback support

☑ Cashback by dollar — Max amount: $ AA

☑ Cashback preset 1 — Preset 1 value: $ AA

☑ Cashback preset 2 — Preset 2 value: $ AA

☑ Cashback preset 3 — Preset 3 value: $ AA

NAVIGATION PANE

"CASHBACK" MODULE

Cashback support

Enable/disable cashback prompting on the terminal.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

a. Do one of the following:

   - To enable, checkmark the **Cashback support** box.
   - To disable, unmark the **Cashback support** box.

b. Click on the **Save** button.

c. When the "Changes saved" 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[23]

Enable/disable the option for cardholders to enter a cashback amount on the terminal to a maximum dollar amount that you define.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

a. Do one of the following:

   - 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 "Changes saved" 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 preset[24]

Enable/disable the option for cardholders to select a pre-defined cashback dollar amount on the terminal. (There are three pre-defined dollar amount settings; each can be configured/enabled independently.)

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

a. Do one of the following:

   - 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 "Changes saved" 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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[23] This option is supported only if "Cashback support" is enabled (see Cashback support on page 177).

[24] This option is supported only if "Cashback support" is enabled (see Cashback support on page 177).

Terminal settings: tips

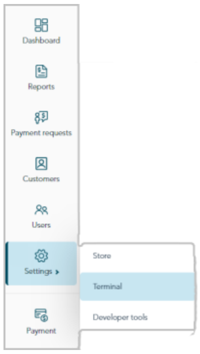
The steps below describe how to access the settings for tip prompting on all terminals that are synched to your Moneris Go portal store. When enabled, tip prompting displays during Purchase and Preauthorization transactions.

1. Log into the Moneris Go portal, and access the store that is synched to the terminal(s) that you want to modify (see Logging into the Moneris Go portal on page 30).

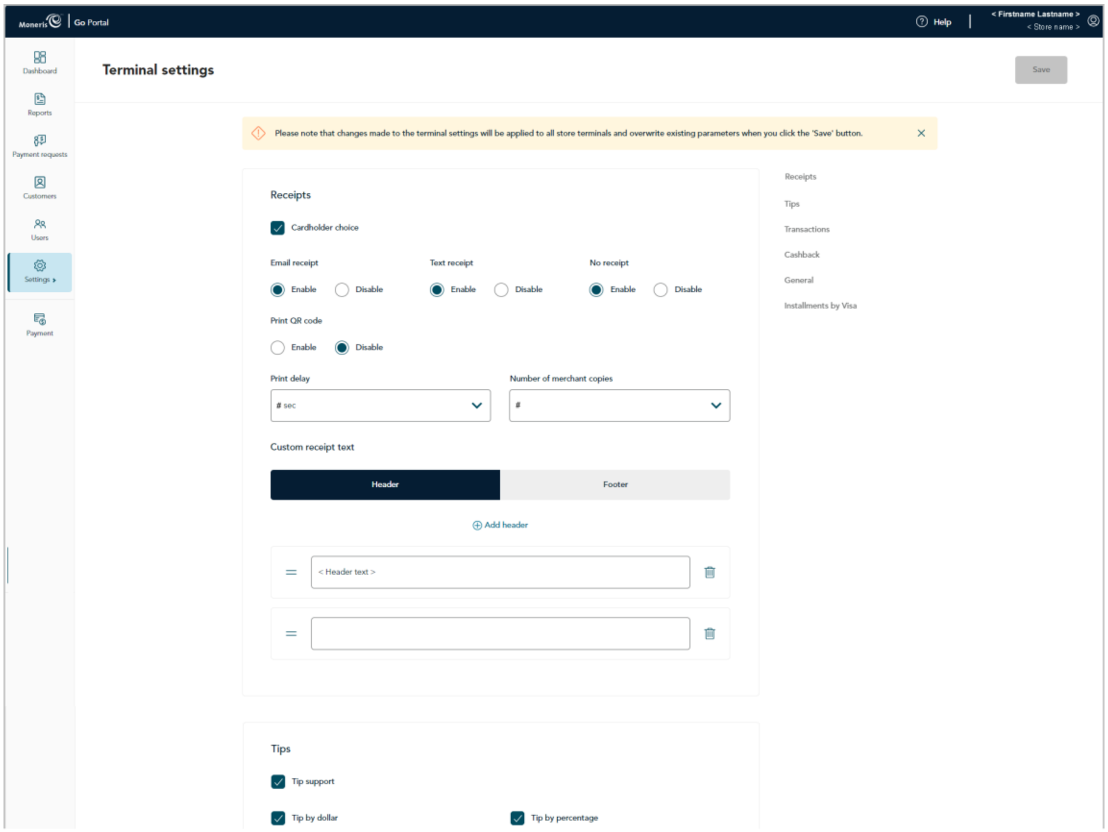
   Note: *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*

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), continue to the next step.



Terminal settings

Please note that changes made to the terminal settings will be applied to all store terminals and overwrite existing parameters when you click the 'Save' button.

Receipts

☑ Cardholder choice

Email receipt: ● Enable ○ Disable

Text receipt: ● Enable ○ Disable

No receipt: ● Enable ○ Disable

Print QR code: ○ Enable ● Disable

Print delay: # sec

Number of merchant copies: #

Custom receipt text

< Header text >

Tips

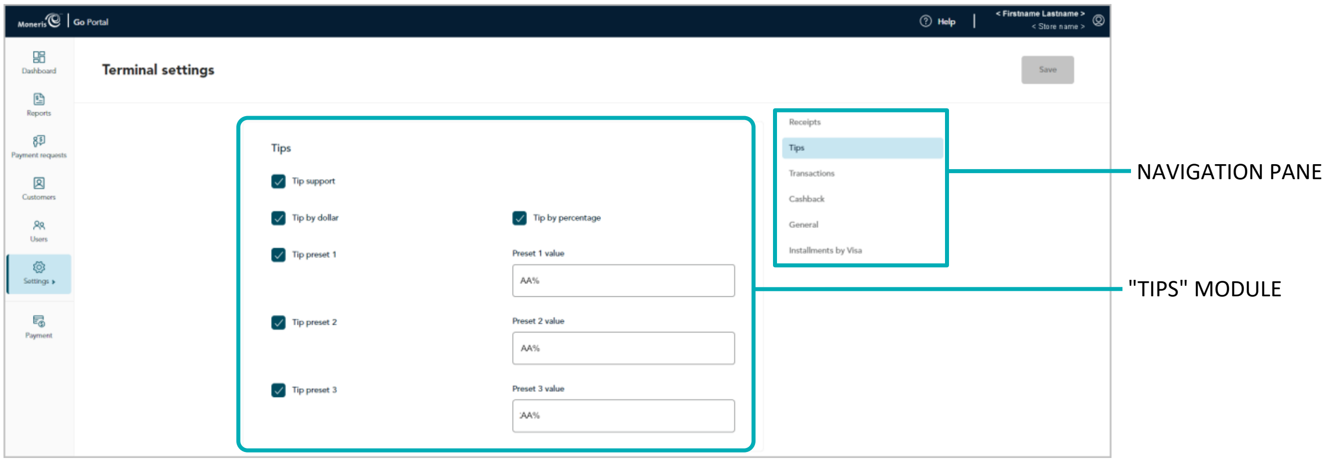
☑ Tip support

☑ Tip by dollar

☑ Tip by percentage

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).*



Tips

☑ Tip support

☑ Tip by dollar ☑ Tip by percentage

☑ Tip preset 1 Preset 1 value AA%

☑ Tip preset 2 Preset 2 value AA%

☑ Tip preset 3 Preset 3 value AA%

NAVIGATION PANE

"TIPS" MODULE

Tip support

Enable/disable tip prompting on the terminal.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

a. Do one of the following:

   - To enable, checkmark the **Tip support** box.
   - To disable, unmark the **Tip support** box.

b. Click on the **Save** button.

c. When the "Changes saved" 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[25]

Enable/disable the option for customers to enter a tip as a dollar amount on the terminal:

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

a. Do one of the following:

- To enable, checkmark the **Tip by dollar** box.
- To disable, unmark the **Tip by dollar** box.

b. Click on the **Save** button.

c. When the "Changes saved" 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 percent[26]

Enable/disable the option for customers to enter a tip as a percentage on the terminal:

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

a. Do one of the following:

- 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 "Changes saved" 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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[25] This option is supported only if "Tip support" is enabled (see Tip support on page 180).

[26] This option is supported only if "Tip support" is enabled (see Tip support on page 180).

Tip by preset percentage[27]

Enable/disable the option for customers to select a pre-defined tip percentage on the terminal. There are three pre-defined tip percentage settings; each can be configured/enabled independently.

Note: *If you save a new configuration for this setting, it will be overwrite the corresponding setting on every terminal that is synched to this store. The overwrite will be effected on each terminal as described below in the note at step c.*

a. Do one of the following:

  - 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 "Changes saved" 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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[27] This option is supported only if "Tip by percent" is enabled (see Tip by percent on page 181).

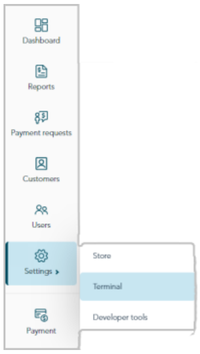
Terminal settings: Installments by Visa

The steps below describe how to access the settings for enabling/disabling Installments enabled by Visa ("Visa installments") on all terminals that are synched to your Moneris Go portal store. If you enable one or more installment plans (to a maximum of three), your synched terminals will display the option for cardholders to pay for a qualifying Purchase or Preauthorization over a defined time period in fixed, equal installment payments

Note: *For more information on the Visa installments solution, see Installments enabled by Visa on page (219).*

1. Log into the Moneris Go portal, and access the store that is synched to the terminal(s) that you want to modify (see Logging into the Moneris Go portal on page 30).

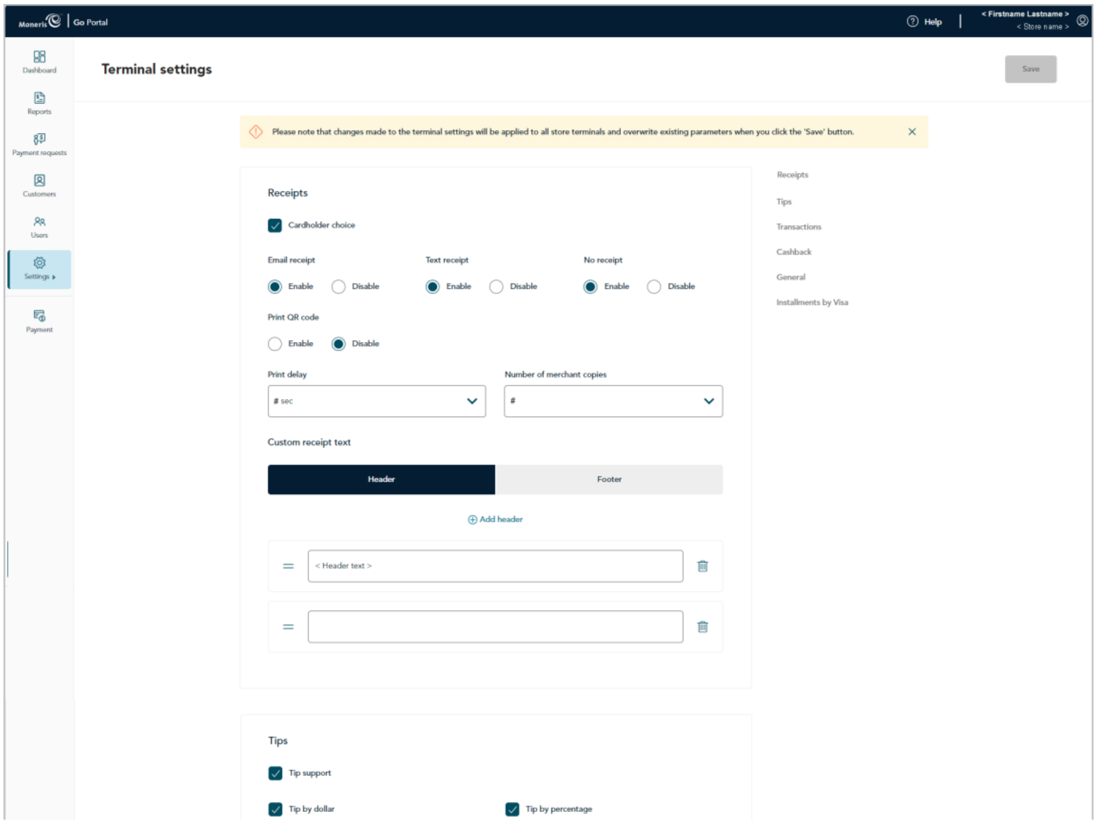
   Note: *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 39).*



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), continue to the next step.



Please note that changes made to the terminal settings will be applied to all store terminals and overwrite existing parameters when you click the 'Save' button.

Receipts

☑ Cardholder choice

Email receipt: ● Enable ○ Disable

Text receipt: ● Enable ○ Disable

No receipt: ● Enable ○ Disable

Print QR code: ○ Enable ● Disable

Print delay: # sec

Number of merchant copies: #

Custom receipt text: Header | Footer

Add header

< Header text >

Tips

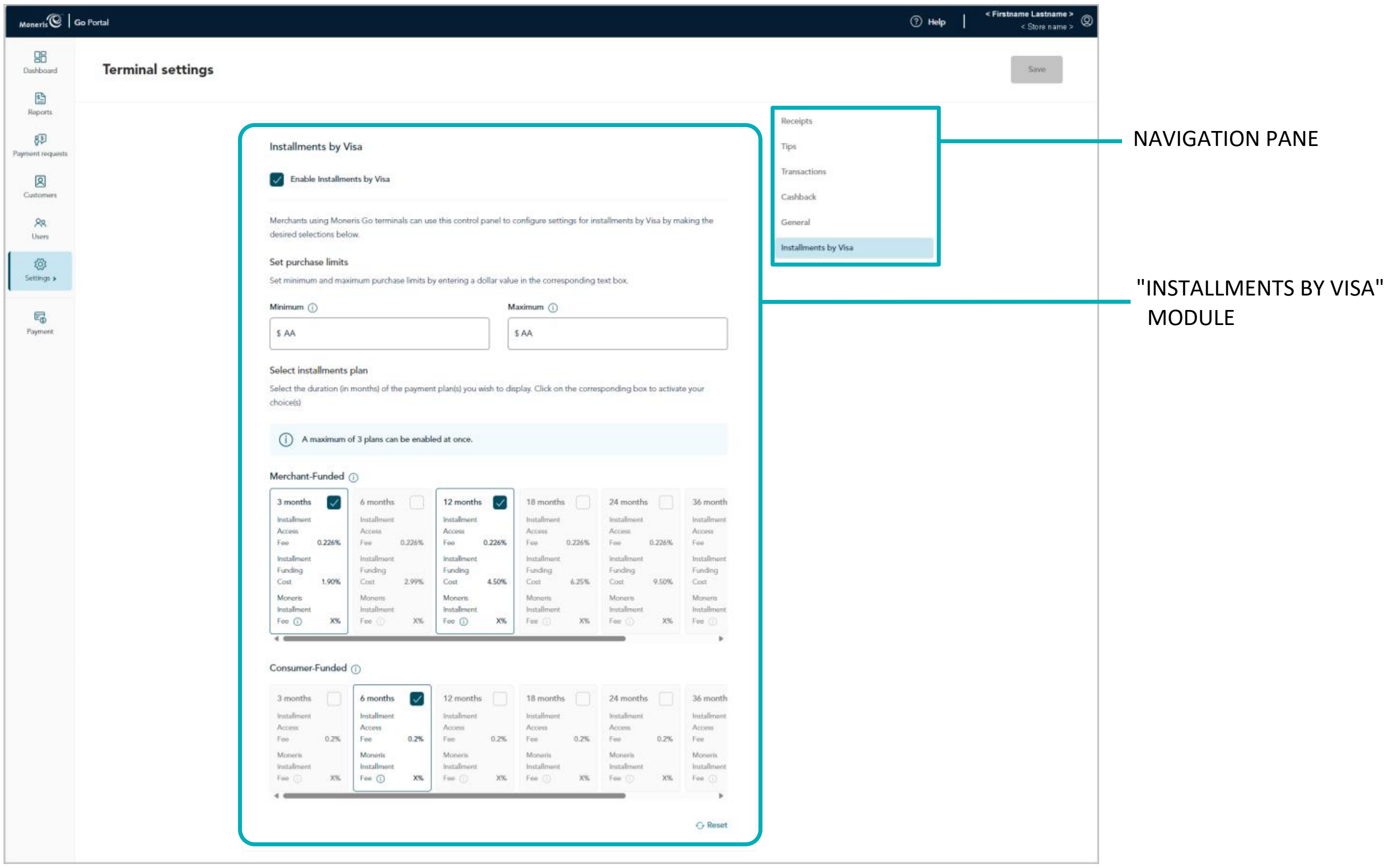
☑ Tip support

☑ Tip by dollar

☑ Tip by percentage

4. Scroll to the "Installments by Visa" module (shown below), and configure the installment settings as desired:

   Note: *To jump directly to the "Installments by Visa" module, click on* ***Installments by Visa*** *in the navigation pane (shown below).*



Terminal settings

Installments by Visa

☑ Enable Installments by Visa

Merchants using Moneris Go terminals can use this control panel to configure settings for installments by Visa by making the desired selections below.

Set purchase limits

Set minimum and maximum purchase limits by entering a dollar value in the corresponding text box.

Minimum: $ AA

Maximum: $ AA

Select installments plan

Select the duration (in months) of the payment plan(s) you wish to display. Click on the corresponding box to activate your choice(s)

A maximum of 3 plans can be enabled at once.

Merchant-Funded

	3 months ☑	6 months ☐	12 months ☑	18 months ☐	24 months ☐	36 month
Installment Access Fee	0.226%	0.226%	0.226%	0.226%	0.226%	
Installment Funding Cost	1.90%	2.99%	4.50%	6.25%	9.50%	
Moneris Installment Fee	X%	X%	X%	X%	X%	

Consumer-Funded

	3 months ☐	6 months ☑	12 months ☐	18 months ☐	24 months ☐	36 month
Installment Access Fee	0.2%	0.2%	0.2%	0.2%	0.2%	
Moneris Installment Fee	X%	X%	X%	X%	X%	

Reset

To enable Visa installments prompting on all terminals that are synched to this store:

a. Checkmark the **Enable Installments by Visa** box.

b. In the "Set purchase limits" area, optionally set a minimum and maximum qualifying Purchase amount:

   - To set the minimum, enter a dollar value in the **Minimum** field (the default is set to $100.00).
   - To set the maximum, enter a dollar value in the **Maximum** field (the default is set to $9,999,999).[28]

c. Select (enable) up to three installment plans:

   Note: *An installment plan is implemented in monthly durations (3x, 6x, 12x, 18x, 24x, 36x, or 48x months). You may enable any combination of merchant-funded plans and/or consumer-funded plans.*[29]

   - To enable an installment plan, checkmark the box in the desired plan.
   - To disable an installment plan, unmark the box in the undesired plan.

---

[28] If you leave this field blank, the maximum qualifying Purchase amount is automatically set to the cardholder's available credit limit.

[29] In a "Merchant-funded plan", you (the merchant) are responsible for paying the installment funding fees to the issuer. In a "Consumer-funded plan", the cardholder is responsible for paying the installment funding fees to the issuer.

d. If you want to reset the default plan settings, click on **Reset**. Otherwise, proceed directly to step e.

e. Click on the **Save** button.

f. When the "Changes saved" 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 disable Visa installments prompting on all terminals that are synched to this store:

a. Unmark the **Enable Installments by Visa** box.

b. Click on the **Save** button.

c. When the "Changes saved" 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.*

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[30] 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 Moneris Portal to access Merchant Direct (visit **https://login.moneris.com/en/login**).

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 137).*

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.

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[30] Includes all transactions performed on point-of-sale devices or applications that are synched to your store.

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**

API token

The steps below describe how to view and copy your Moneris Go portal store's API token.

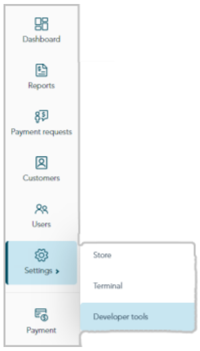
Note: *The API token is a unique alphanumeric value that is assigned to every Moneris Go portal store. The API token is used to authenticate a store and facilitate ecommerce transactions through that store. For information on how to use the API token in your ecommerce integration, visit the Moneris Developer Portal (**https://developer.moneris.com**), and refer to the ecommerce integration guide for your integration type.*

1. Log into the Moneris Go portal, and access the store containing the API token that you want to view or copy (see Logging into the Moneris Go portal on page 30).

   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 39).*

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

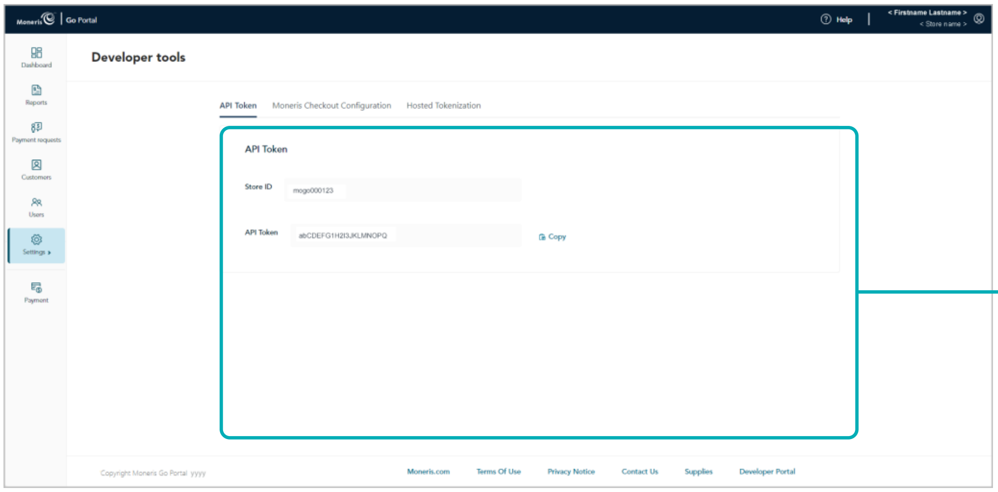
   Note: *If the sidebar menu is not displayed on your screen, click on the "menu" ☰ icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*



3. When the "Developer tools" page displays, you should see the "API Token" module (shown below), which lists your store's API token and store ID.

   Note: *If the "API Token" module is not displayed, click on the **API token** tab to display the module.*

   Important! To prevent your API token from being compromised, do not share it over email, text message, etc.



Developer tools

API Token

Store ID mogo000123

API Token abCDEFG1H2I3JKLMNOPQ

"API TOKEN" MODULE

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 194).

Issue	Solution
You changed one or more terminal settings in Moneris Go portal, but the new configuration has not been pushed to your synchronized terminal.	1. If you are using a standalone terminal, do any of the following: ▪ Perform a manual Sync on the terminal. OR ▪ End your login session on the terminal, and then log in again. OR ▪ Reboot the terminal. ***Note:*** *If you are using a synched integrated terminal, the configuration change is effected on the terminal when it reboots or receives a manual Sync command from the ECR to which the terminal is connected.*
You did not receive your Moneris Go portal activation email.	1. Confirm that your email spam filter is not blocking the activation email. 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. ***Note:*** *To verify your account setup, your administrator can click on* ***Users*** *in the sidebar menu, locate your user account listing, and review the email registered to your account.* 3. If your administrator registered the incorrect email address, have them add a new account for you with the correct email address. ***Note:*** *To add the new user account, the administrator must follow the Adding a new user account procedure (page 140).*
You added a new user account through your Moneris Go portal store, but the user account status indicates "Pending".	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. 2. Once the user account is activated, its status as shown on the "Users" page will indicate the account is "Active". ***Note:*** *To verify the account status, click on* ***Users*** *in the sidebar menu, locate the user account listing, and review its "STATUS" indicator.*
You forgot your Moneris Go portal login password.	1. Reset your password (see Forgot your login password? on page 34).

Sending feedback/requesting assistance while logged in

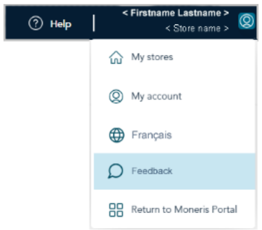
If you are logged into the Moneris Go portal and are already within (accessing) a store, [31] follow the steps below to use the Moneris Go portal feedback form to send us your feedback and/or request assistance.

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 193).*

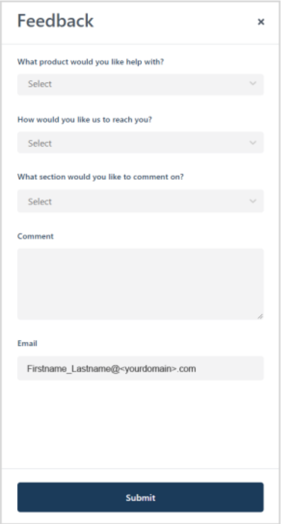
1. From any page in your store, click on your user account tile, which displays in the top right corner of the page header (shown below).

USER ACCOUNT TILE

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



USER ACCOUNT MENU



What product would you like help with?
Select

How would you like us to reach you?
Select

What section would you like to comment on?
Select

Comment

Email
Firstname_Lastname@<yourdomain>.com

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.
4. Click on the **Submit** button to send us the completed form.

---

[31] For instructions on how to log in and access a store, see Logging into the Moneris Go portal (page 30).

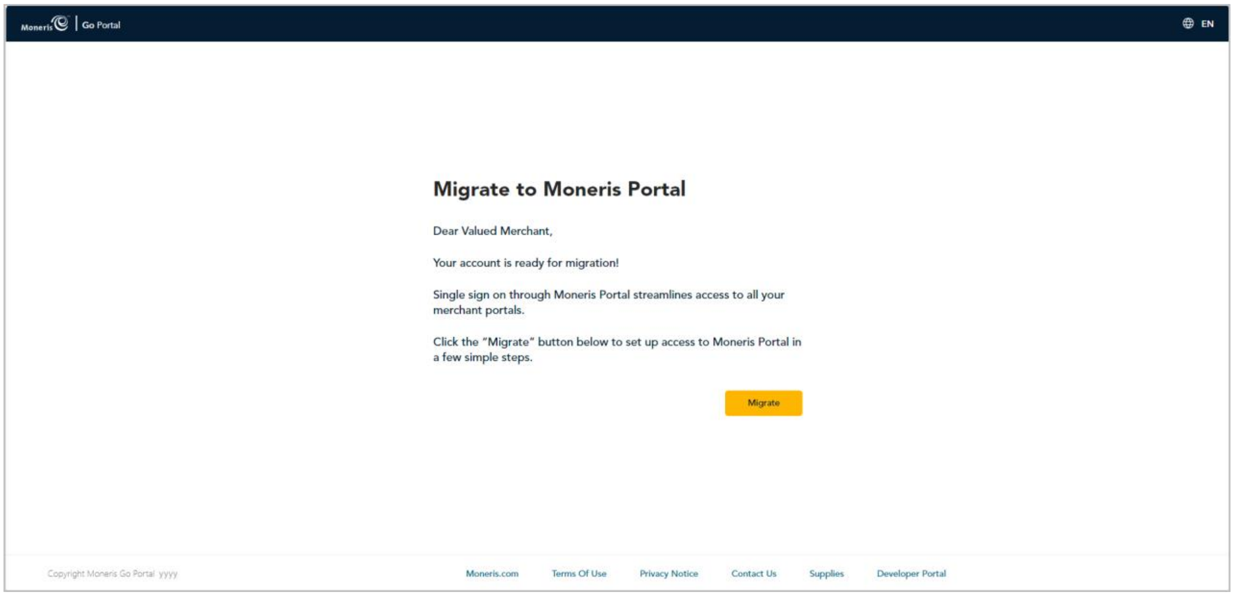
Migrating to Moneris Portal

In this section, we go over everything you need to know to migrate your user account(s) to Moneris Portal.

What to do if you are prompted to migrate to Moneris Portal

If you log into the Moneris Go portal (see Logging into the Moneris Go portal on page 30) and the "Migrate to Moneris Portal" page displays (shown below), it means you must migrate your Moneris Go portal user account to Moneris Portal, our new single sign-on merchant platform.

Note: *Once you migrate your account to Moneris Portal, you will thereafter access your Moneris Go portal store(s) by logging into Moneris Portal. Through Moneris Portal you will also have access to a variety of other resources.*



Migrate to Moneris Portal

Dear Valued Merchant,

Your account is ready for migration!

Single sign on through Moneris Portal streamlines access to all your merchant portals.

Click the "Migrate" button below to set up access to Moneris Portal in a few simple steps.

1. Determine which migration path applies to you:

   If you have a Merchant Direct user account that is registred to the same email address as your Moneris Go portal user account (i.e., you have dual accounts):

   - Continue in Migrating your Go portal and Merchant Direct user accounts to Moneris Portal (page 206).

   If you do not have a Merchant Direct user account:

   - Continue in Migrating your Go portal user account to Moneris Portal (page 197).

Migrating your Go portal user account to Moneris Portal

This section provides step-by-step instructions for what you need to do to successfully migrate your Moneris Go portal user account to Moneris Portal.

1. Review the information in What to do if you are prompted to migrate to Moneris Portal (page 196) to determine if this migration procedure is applicable to you.

2. Review the information below to ensure that you have prepared for your migration:
   a. Ensure your mobile device/PC meets the minimum requirements:
      - Up-to-date supported browser installed (Google Chrome, Microsoft Edge, and Apple Safari)
      - Cookies enabled
      - Pop-up blocker disabled
      - Internet access

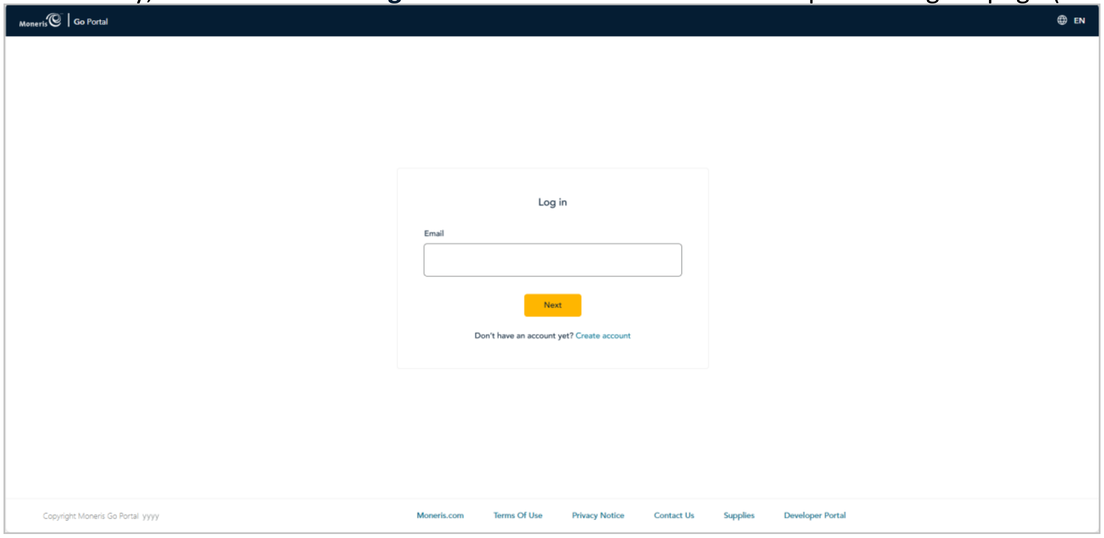
   b. Be prepared to enter or confirm the account details listed below. During the migration process, you will be prompted to:
      - Confirm your first name and last name information.
      - Create a login password.
      - Select three pre-defined security questions and enter a customized answer to each question.

        Note: *You must complete this step within 10: 00 minutes of being prompted to do so.*
      - Enter a 6-digit verification code.

        Note: *We will send this 6-digit code to the inbox for your Moneris Go portal login email address. (You will be prompted to enter this code when logging into Moneris Portal for the first time.)*

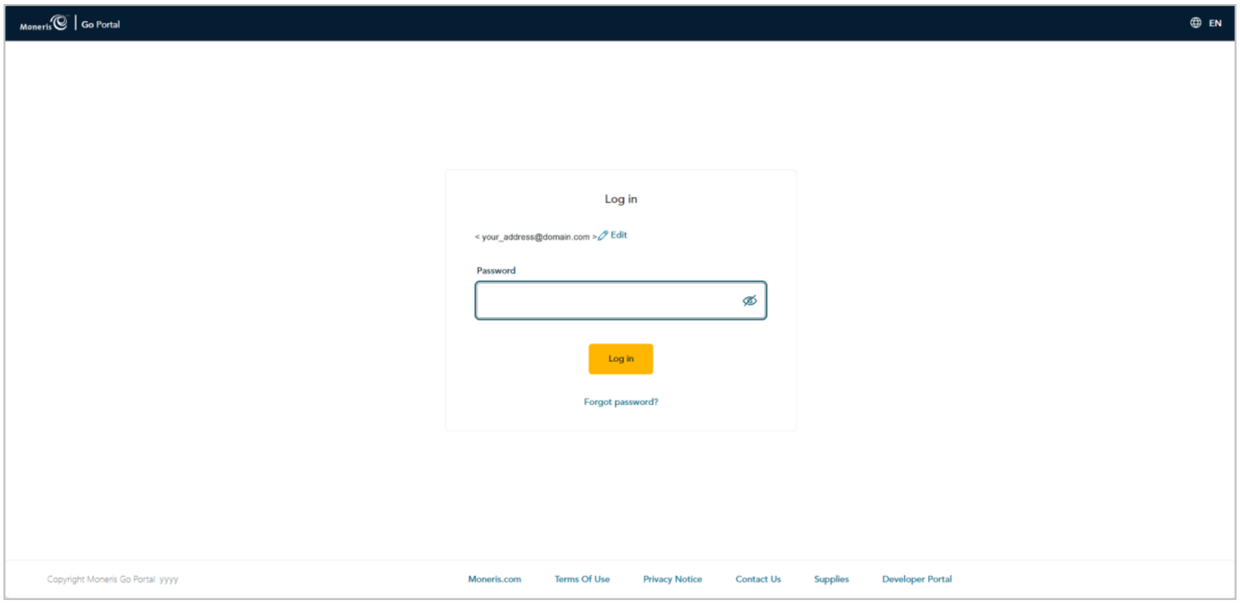
3. If you are currently logged into Moneris Go portal, please log out now.

4. When ready, visit **www.monerisgo.com** to start on the Moneris Go portal "Log in" page (shown below).

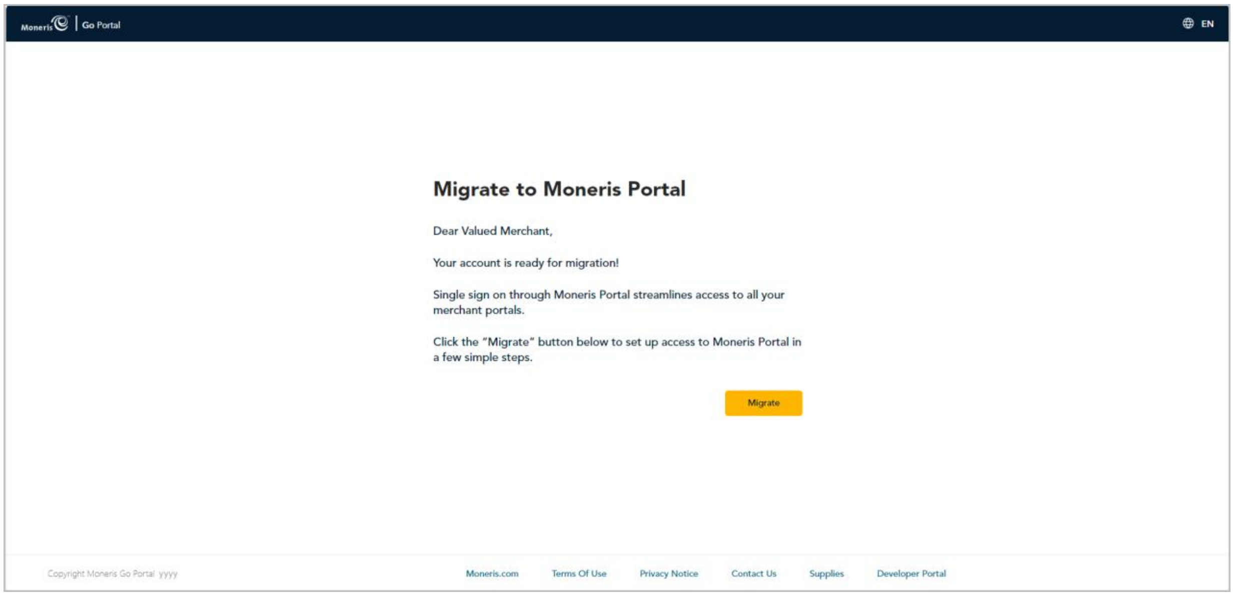


5. In the **Email** field (shown above), enter the email address that was registered to your Moneris Go portal user account when you activated it, and click on the **Next** button.

6. When the **Password** field displays (shown below), enter your Moneris Go portal login password, and click on the **Log in** button.



7. When "Migrate to Moneris Portal" page displays (shown below), click on the **Migrate** button.



Migrate to Moneris Portal

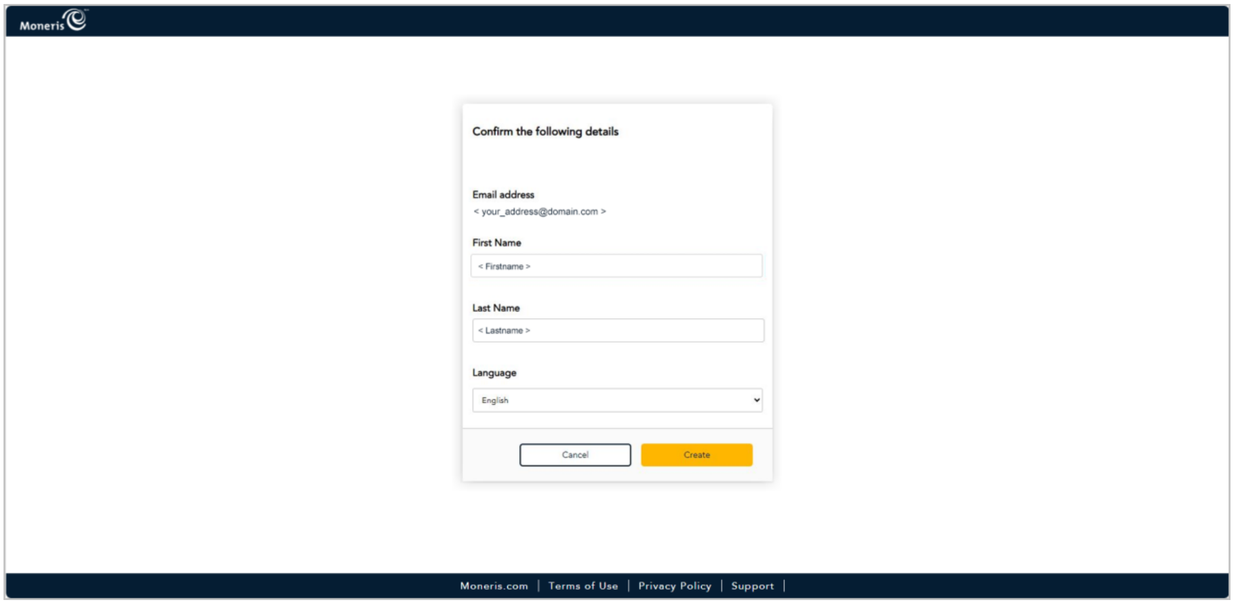
Dear Valued Merchant,

Your account is ready for migration!

Single sign on through Moneris Portal streamlines access to all your merchant portals.

Click the "Migrate" button below to set up access to Moneris Portal in a few simple steps.

8. When the "Confirm the following details" dialog displays (shown below), do the following:



Confirm the following details

Email address
< your_address@domain.com >

First Name
< Firstname >

Last Name
< Lastname >

Language
English

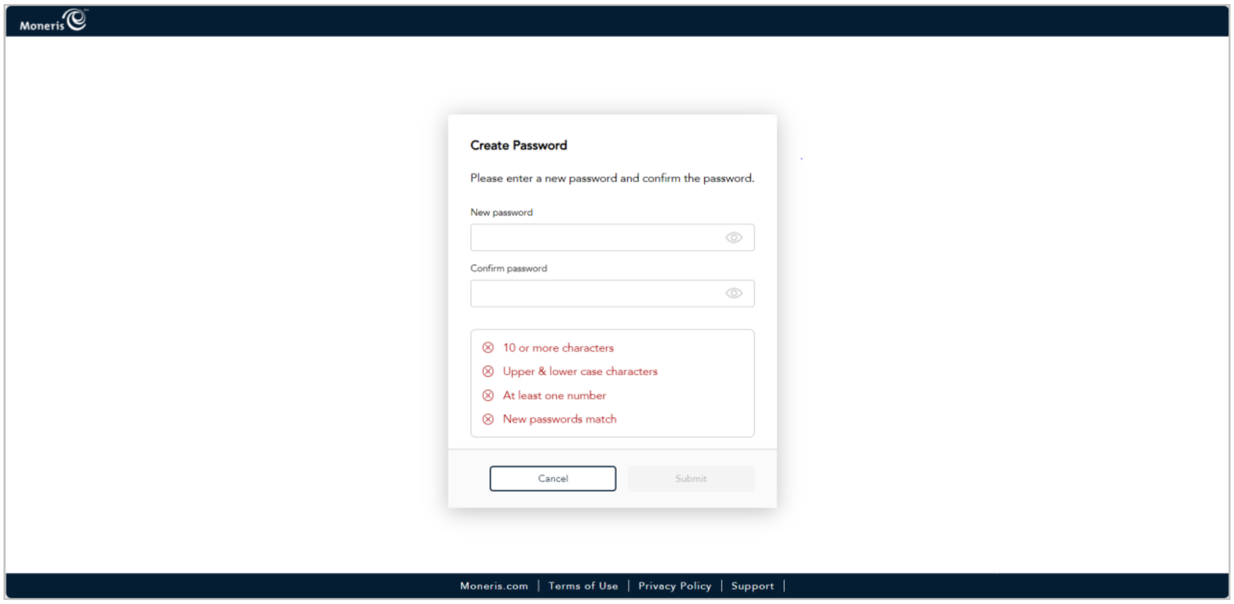
   a. Confirm that the information pre-filling the **First Name** field and the **Last Name** field is correct.

      Note: *If desired, you can edit the information in any of these data fields.*

   b. In the "Language" drop-down, select the default display language (**English** or **French**) in which to continue the migration.

   c. Click on the **Create** button, and wait for a response.

9. When the "Create Password" dialog displays (shown below), do the following:



Create Password

Please enter a new password and confirm the password.

   a. In the **New password** field, enter the password that you will use to log into Moneris Portal.

      Note: *You may enter the same password as that which you use to log into Moneris Go portal, or you may opt to create a new password. (You can always change the password once you successfully migrate your account.) Regardless, the password must adhere to these requirements:*

      - *10 or more characters in length*
      - *Include uppercase and lowercase characters*
      - *Include at least one number*

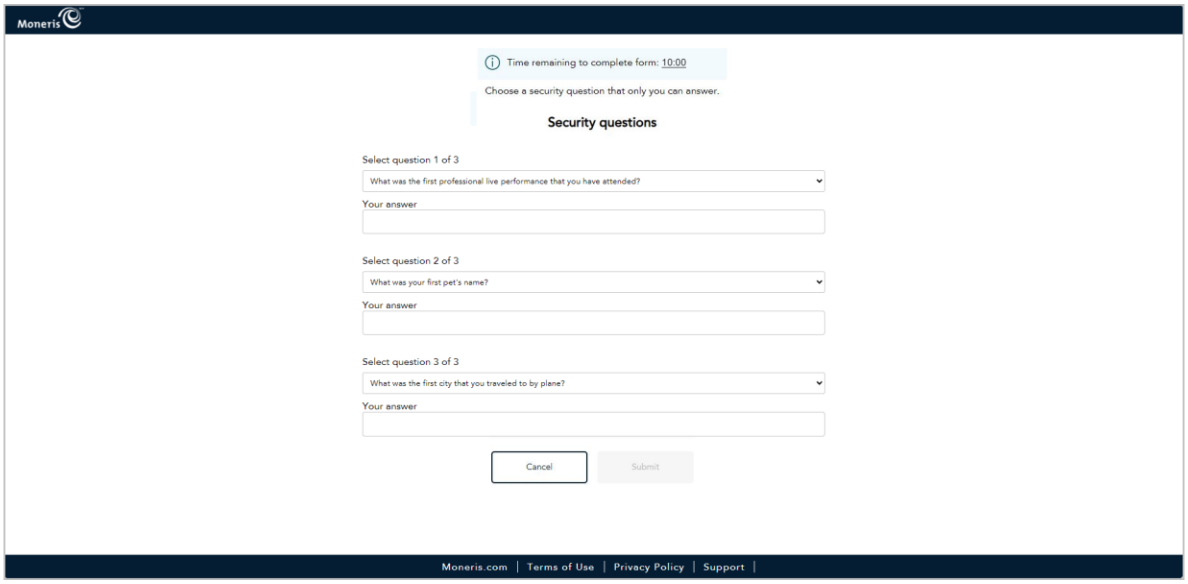
   b. In the **Confirm new password** field, re-enter the password.

      Note: *The data in the "Confirm new password" field must match the data in the "New password" field.*

   c. Click on the **Submit** button, and wait for a response.

10. When the "Security questions" page displays (shown below), configure your security questions and answers:

    Note: *You have up to 10:00 minutes to configure your security questions answers. If you cannot configure your security questions before the time elapses, you will be directed to restart the migration process again.*

    Time remaining to complete form: 10:00

    Choose a security question that only you can answer.

    Security questions

    Select question 1 of 3: What was the first professional live performance that you have attended?

    Your answer

    Select question 2 of 3: What was your first pet's name?

    Your answer

    Select question 3 of 3: What was the first city that you traveled to by plane?

    Your answer

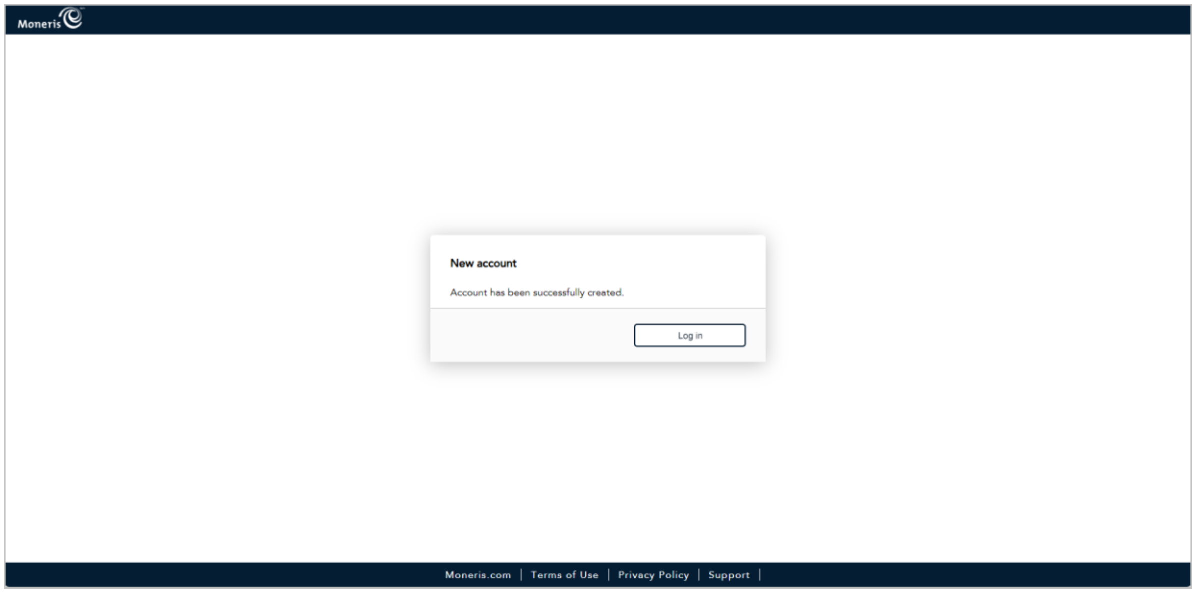
    a. Click on each of the **Security question # of #** drop-downs, and select a security question.

    b. In each **Your answer** field, enter an answer to the corresponding security question you selected.

       Note: *If you should ever need to reset your Moneris Portal password after your account is migrated, Moneris Portal will prompt you to answer one of these security questions as a means of authenticating your identity.*

    c. Click on the **Submit** button, and wait for a response.

11. When the "Account has been successfully created" dialog displays (shown below), click on its **Log in** button.

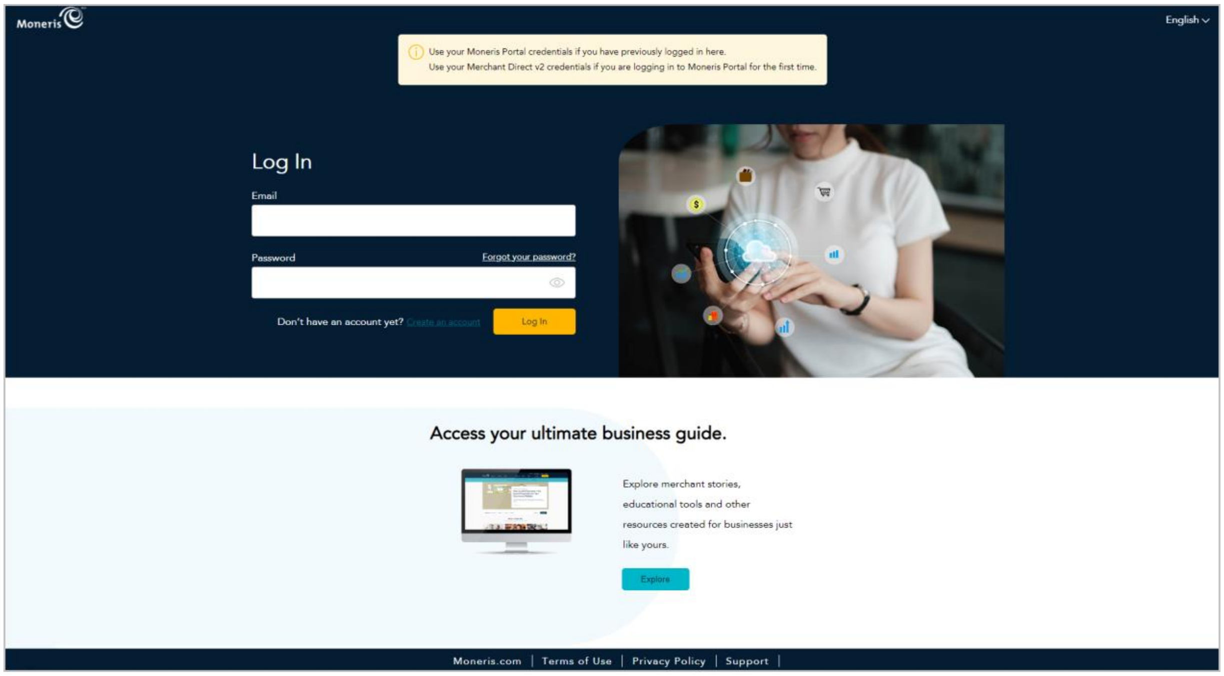
    

    New account

    Account has been successfully created.

12. When the Moneris Portal "Log In" page displays (shown below), enter your login credentials:

    Note: *Now that you completed the migration steps, please follow the steps below to confirm that you can successfully log into Moneris Portal (**https://login.moneris.com/en/login**) and access your Moneris Go portal store(s).*



Use your Moneris Portal credentials if you have previously logged in here.
Use your Merchant Direct v2 credentials if you are logging in to Moneris Portal for the first time.

Don't have an account yet?

Access your ultimate business guide.

Explore merchant stories, educational tools and other resources created for businesses just like yours.

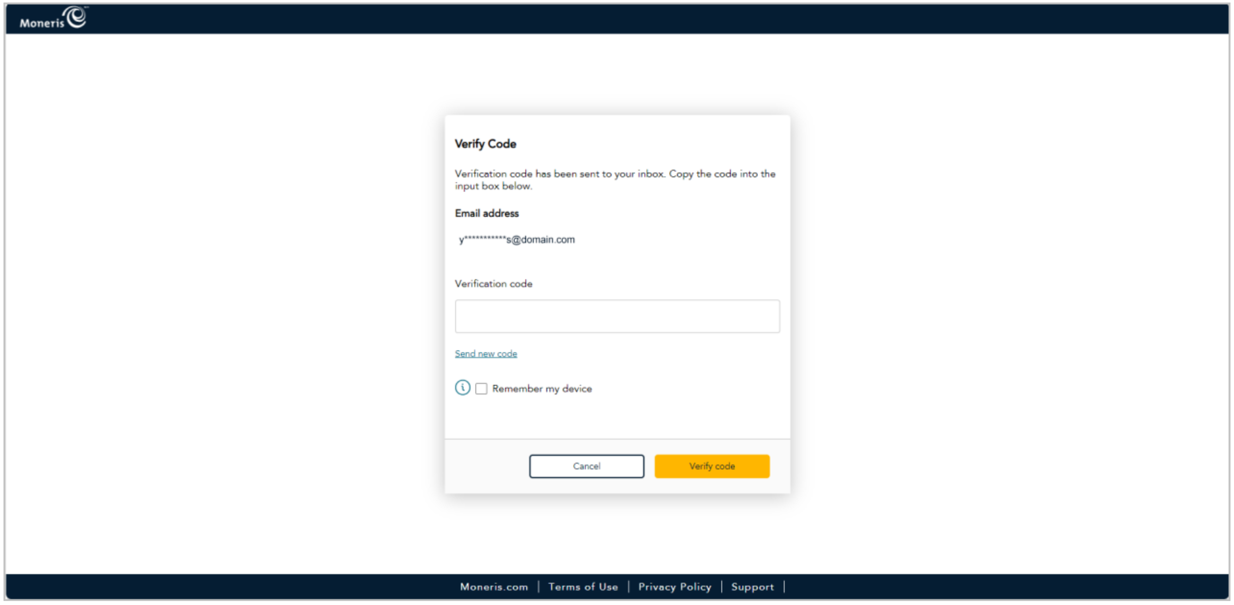
a. In the **Email** field, enter the email address that you registered when you activated your Moneris Go portal account (i.e., this is the same email address that you used previously when logging into Moneris Go portal).

b. In the **Password** field, enter the password that you registered when you performed the migration steps (described in the previous section).

c. Click on the **Log In** button, and wait for a response.

13. When the "Verify Code" dialog displays (shown below), it means we have sent a 6-digit authentication code to the inbox for your Moneris Portal login email address. Do the following:

    Note: *If you want us to send a new code, click on* ***Send new code****.*



Verify Code

Verification code has been sent to your inbox. Copy the code into the input box below.

Email address

y***********s@domain.com

Verification code

a. Open the "Moneris verification code" message in your inbox, and copy the 6-digit code (shown below) to your device's clipboard.

English version *** La version française suit ***

Secure your account

Your Moneris Portal verification code is:

123456

If you did not request the account setup, please contact Moneris at 1-866-319-7450.

This is automated message. Please do not reply.

Have questions?

We're here to help

Get online support

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This email was sent by: Moneris Solutions Corporation
3300 Bloor Street, 10th Floor, Toronto,ON, M8X 2X2, Canada
ems.replies@moneris.com moneris.com

Update you email preferences here.

Version française *** The English version precedes ***

Sécurisez votre compte

Votre code de vérification Moneris:

123456

Si vous n'avez pas demandé la création d'un compte, veuillez contacter Moneris à 1-866-319-7450.

Ceci est un message automatique. Veuillez ne pas y répondre.

Vous avez des questions?

Nous sommes là pour vous aider.

Obtenir de l'aide en ligne

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ems.replies@moneris.com | moneris.com | 1 844 447-0446

Cliquez ici pour mettre à jour vos préférences en matière de courriel.

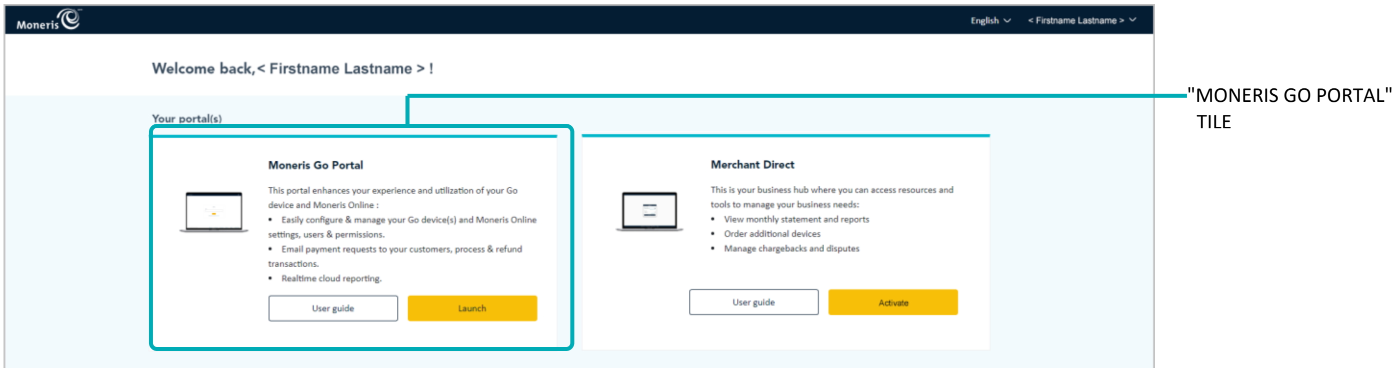
b. Paste the code in the "Verify Code" dialog's **Verification code** field.

    - If you do not want to be prompted to enter a verification code each time you log in from the same device and browser, checkmark the **Remember my device** box in the dialog.

      Note: *If enabled (checkmarked), this setting is effective up to 30 days so long as you log in from the same device and browser. After 30 days has elapsed, Moneris Portal will again prompt you for 2-factor authentication. When this happens, you may opt to re-enable the "Remember my device" setting.*

c. Click on the **Verify code** button in the "Verify Code" dialog, and wait for a response.

14. When the "Your portal(s)" page displays (shown partially below), it means you have successfully migrated your user account to Moneris Portal.



Welcome back,< Firstname Lastname > !

This portal enhances your experience and utilization of your Go device and Moneris Online :

- Easily configure & manage your Go device(s) and Moneris Online settings, users & permissions.
- Email payment requests to your customers, process & refund transactions.
- Realtime cloud reporting.

This is your business hub where you can access resources and tools to manage your business needs:

- View monthly statement and reports
- Order additional devices
- Manage chargebacks and disputes

15. Click on the "Moneris Go portal" tile's **Launch** button (shown above) to start a login session in the Moneris Go portal application.

    Note: *Once you start a session in Moneris Go portal, you can access your Moneris Go portal store(s) as you normally would following a successful login (see Accessing a store after logging into Moneris Go portal on page 32).*

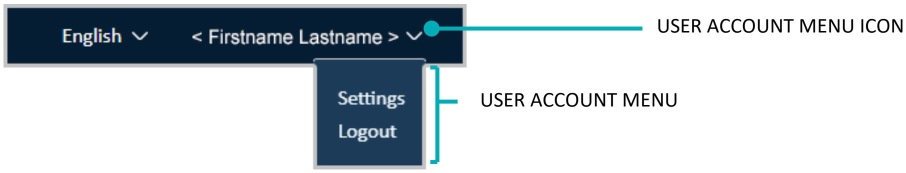
16. Please review Things to note now that your account is migrated (page 205).

Things to note now that your account is migrated

Now that you have successfully migrated your account to Moneris Portal and confirmed access to your Moneris Go portal store(s), please review the following bulleted points:

Using Moneris Portal:

- To end your login session on Moneris Portal, click on user account menu ∨ icon to the right of your name as displayed in the Moneris Portal header (shown below), and then click on **Logout** in the user account menu.



- If you forget your login password, use Moneris Portal's "Forgot password?" function. (You access this function on the Moneris Portal "Log In" page at **https://login.moneris.com/en/login**.)

- If you need to change your user account preferences (e.g., Moneris Portal login password, etc.), use Moneris Portal.

  Note: *If you have one or more POS terminals and want to change your terminal login username/password, access the terminal username/password settings on your Moneris Go portal store's "My account" page (see "My account" settings on page 125).*

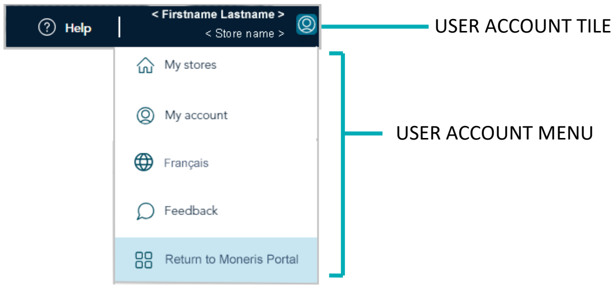
Using the Moneris Go portal:

- Whenever you want to access your Moneris Go portal store(s), log into Moneris Portal (visit **https://login.moneris.com/en/login**). From there, launch the "Moneris Go Portal" application.

  Note: *If you attempt to submit your login credentials from the Moneris Go portal "Log in" page (**www.monerisgo.com**), you will be redirected to the Moneris Portal "Log In" page.*

- If you create/add a new user in Moneris Go portal, that user will be migrated to Moneris Portal when they activate their account.

- If you are logged into your Moneris Go portal store and you want to end your login session on the Moneris Go portal, click on the user account 👤 tile in the Moneris Go portal header (shown below), and then click on **Return to Moneris Portal** in the menu.



Migrating your Go portal and Merchant Direct user accounts to Moneris Portal

This section provides step-by-step instructions for what you need to do to successfully migrate your Moneris Go portal user account and your Merchant Direct user account to Moneris Portal.

1. Review the information in What to do if you are prompted to migrate to Moneris Portal (page 196) to determine if this migration procedure is applicable to you.

2. Review the information below to ensure that you have prepared for your migration:

    a. Ensure your mobile device/PC meets the minimum requirements:

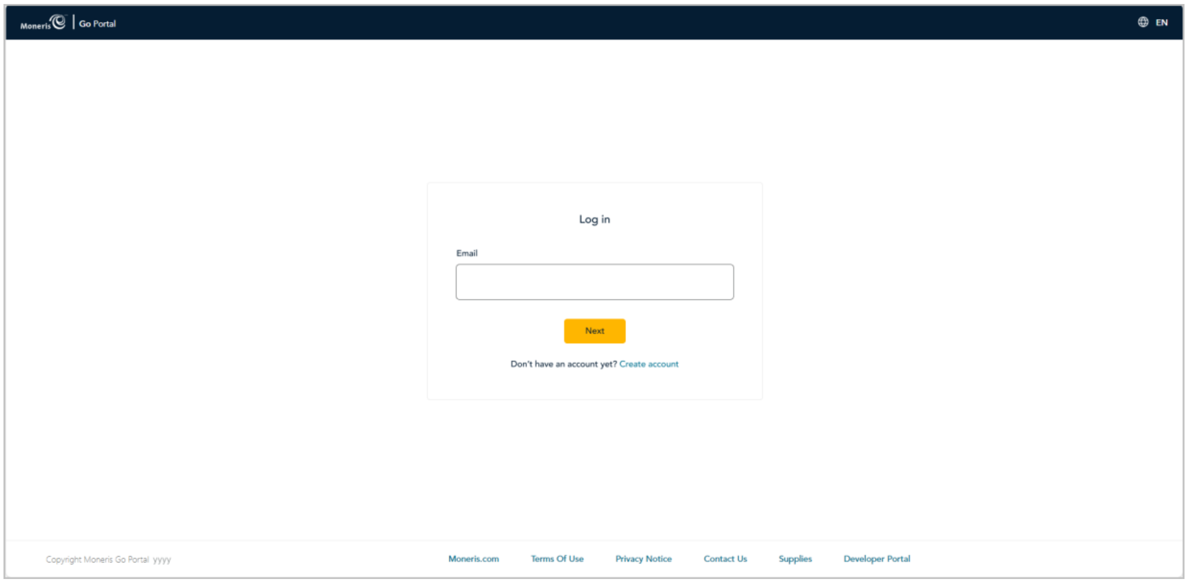
    - Up-to-date supported browser installed (Google Chrome, Microsoft Edge, and Apple Safari)
    - Cookies enabled
    - Pop-up blocker disabled
    - Internet access

    b. Ensure you can access the inbox for the email address that you use to log into/sign into Moneris Go portal and Merchant Direct:

    - We will send a 6-digit verification code to this inbox during your migration. You will be prompted to enter this code to continue.

3. If you are currently logged into Moneris Go portal and/or Merchant Direct on any device, please log out of these two applications now.

4. When ready, visit **www.monerisgo.com** to start on the Moneris Go portal "Log in" page (shown below).

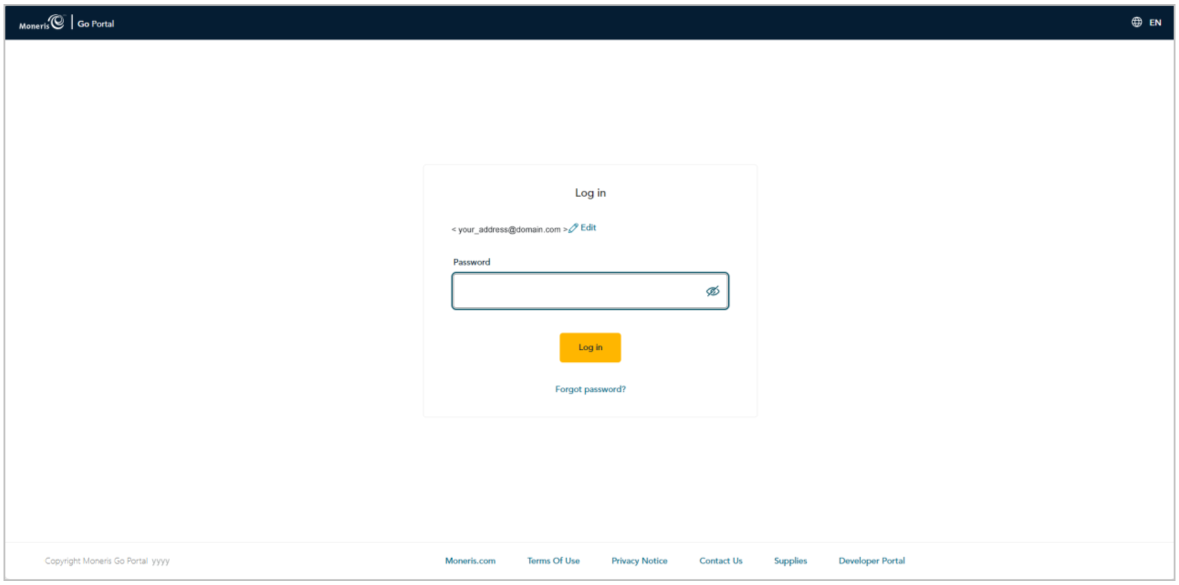


Don't have an account yet? Create account

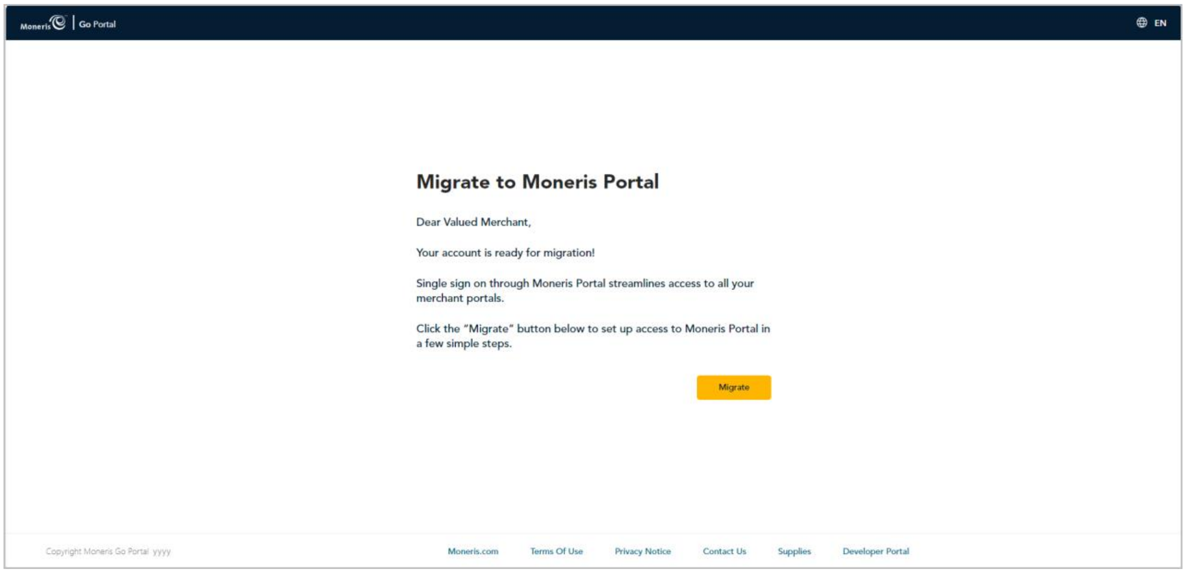
Copyright Moneris Go Portal yyyy

5. In the **Email** field (shown above), enter the email address that was registered to your Moneris Go portal user account when you activated it, and click on the **Next** button.

6. When the **Password** field displays (shown below), enter your Moneris Go portal login password, and click on the **Log in** button.



7. When "Migrate to Moneris Portal" page displays (shown below), click on the **Migrate** button.



Migrate to Moneris Portal

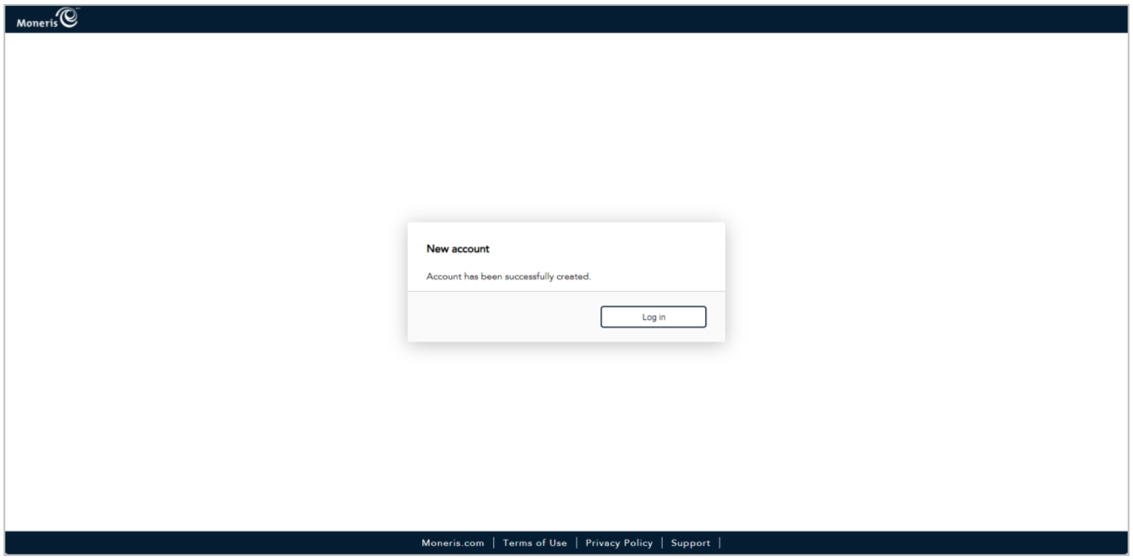
Dear Valued Merchant,

Your account is ready for migration!

Single sign on through Moneris Portal streamlines access to all your merchant portals.

Click the "Migrate" button below to set up access to Moneris Portal in a few simple steps.

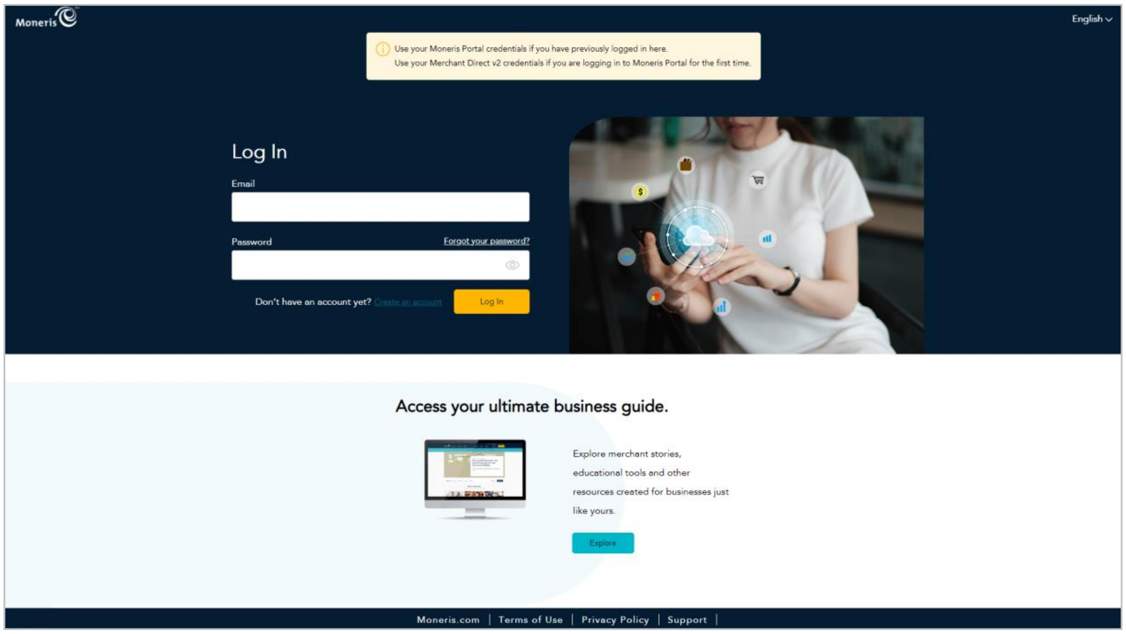
8. When the "New account: Account has been successfully created" dialog displays (shown below), click on the **Log in** button.



Account has been successfully created.

9. When the Moneris Portal "Log In" page displays (shown below), do the following:

   Note: *You can also access the login page by visiting* ***https://login.moneris.com/en/login****.*



Use your Moneris Portal credentials if you have previously logged in here.
Use your Merchant Direct v2 credentials if you are logging in to Moneris Portal for the first time.

Explore merchant stories, educational tools and other resources created for businesses just like yours.

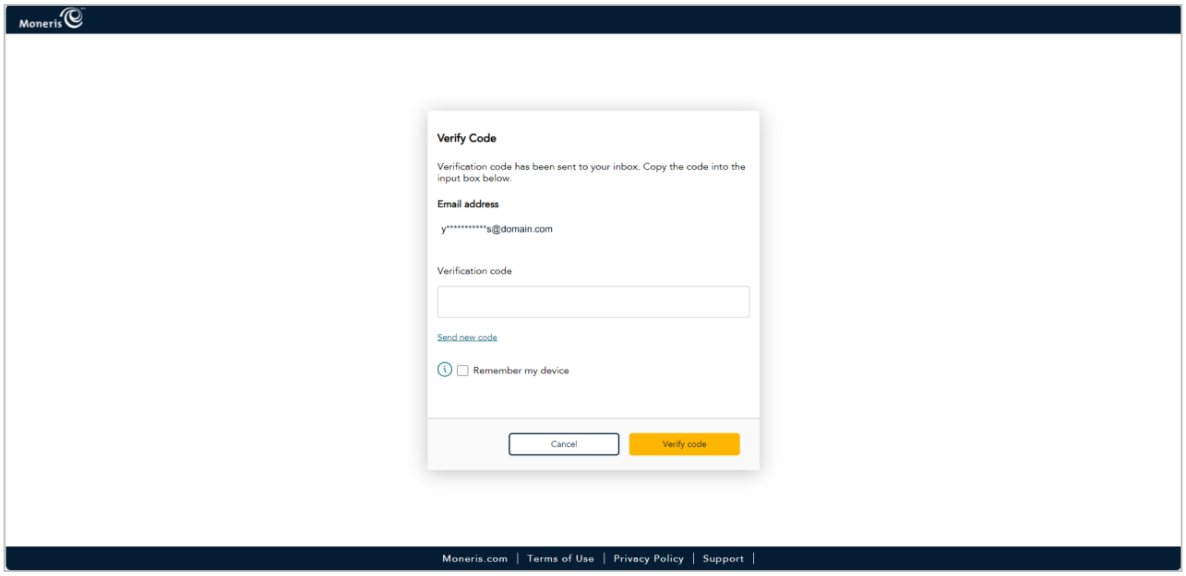
   a. In the **Email** field, enter the email address that you registered when you activated your Merchant Direct account (i.e., this is the same address that you use to sign into Merchant Direct).

   b. In the **Password** field, enter the password that you use to sign into Merchant Direct.

   c. Click on the **Log In** button, and wait for a response.

10. When the "Verify Code" dialog displays (shown below), it means we have sent a 6-digit authentication code to your inbox. Do the following:

    Note: *If you want a new code, click on* ***Send new code****.*



Verify Code

Verification code has been sent to your inbox. Copy the code into the input box below.

Email address

y***********s@domain.com

Verification code

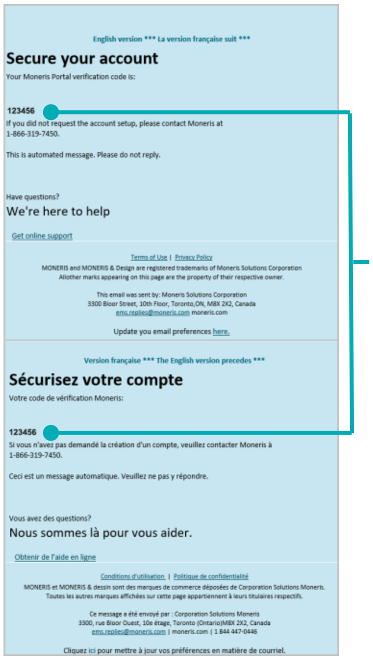
a. Open the "Moneris verification code" message in your inbox, and copy the 6-digit code (shown below) to your device's clipboard.

b. Paste the code in the "Verify Code" dialog's **Verification code** field.

    - If you do not want to be prompted to enter a verification code each time you log in from the same device and browser, checkmark the **Remember my device** box.

      Note: *If enabled (checkmarked), this setting is effective up to 30 days so long as you log in from the same device and browser. After 30 days has elapsed, Moneris Portal will again prompt you for 2-factor authentication. When this happens, you may opt to re-enable the "Remember my device" setting.*

c. Click on the **Verify code** button, and wait for a response.



English version *** La version française suit ***

Secure your account

Your Moneris Portal verification code is:

123456

If you did not request the account setup, please contact Moneris at 1-866-319-7450.

This is automated message. Please do not reply.

Have questions?

We're here to help

Get online support

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This email was sent by: Moneris Solutions Corporation
3300 Bloor Street, 10th Floor, Toronto,ON, M8X 2X2, Canada
ems.replies@moneris.com moneris.com

Update you email preferences here.

Version française *** The English version precedes ***

Sécurisez votre compte

Votre code de vérification Moneris:

123456

Si vous n'avez pas demandé la création d'un compte, veuillez contacter Moneris à 1-866-319-7450.

Ceci est un message automatique. Veuillez ne pas y répondre.

Vous avez des questions?

Nous sommes là pour vous aider.

Obtenir de l'aide en ligne

Conditions d'utilisation | Politique de confidentialité

MONERIS et MONERIS & dessin sont des marques de commerce déposées de Corporation Solutions Moneris.
Toutes les autres marques affichées sur cette page appartiennent à leurs titulaires respectifs.

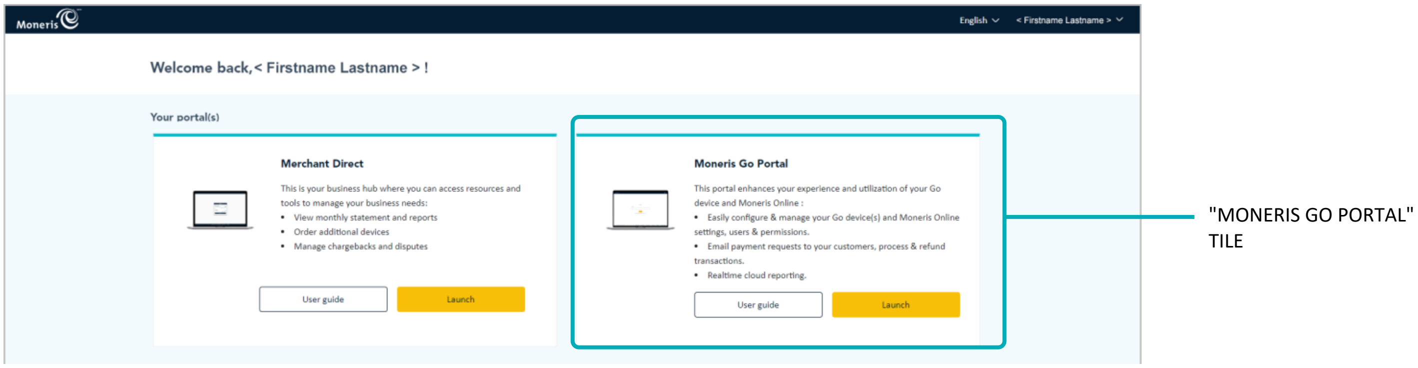
Ce message a été envoyé par : Corporation Solutions Moneris
3300, rue Bloor Ouest, 10e étage, Toronto (Ontario)M8X 2X2, Canada
ems.replies@moneris.com | moneris.com | 1 844 447-0446

Cliquez ici pour mettre à jour vos préférences en matière de courriel.

11. When the "Your portal(s)" page displays (shown partially below), click on the "Moneris Go Portal" tile's **Launch** button to start a login session in the Moneris Go portal application.

    Note: *Once you start a session in Moneris Go portal, you can access your Moneris Go portal store(s) as you normally would following a successful login (see Accessing a store after logging into Moneris Go portal on page 32).*

    Important! You must perform this step to complete the migration of your two accounts.



Welcome back,< Firstname Lastname > !

Your portal(s)

Merchant Direct

This is your business hub where you can access resources and tools to manage your business needs:

- View monthly statement and reports
- Order additional devices
- Manage chargebacks and disputes

Moneris Go Portal

This portal enhances your experience and utilization of your Go device and Moneris Online :

- Easily configure & manage your Go device(s) and Moneris Online settings, users & permissions.
- Email payment requests to your customers, process & refund transactions.
- Realtime cloud reporting.

"MONERIS GO PORTAL" TILE

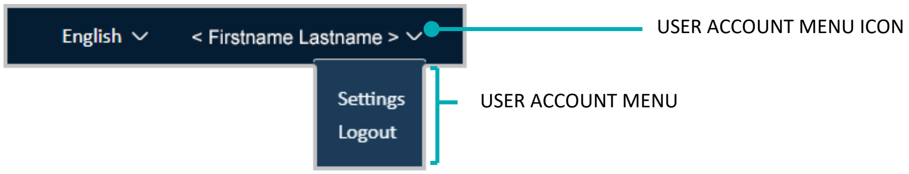
12. Please review Things to note now that your accounts are migrated (page 211).

Things to note now that your accounts are migrated

Now that you have successfully migrated your Moneris Go portal account and your Merchant Direct account to Moneris Portal, please review the following bulleted points:

Moneris Portal:

- To end your login session on Moneris Portal, click on user account menu ∨ icon to the right of your name as displayed in the Moneris Portal header (shown below), and then click on **Logout** in the menu.



- If you forget your login password, use Moneris Portal's "Forgot password?" function. (You access this function on the Moneris Portal "Log In" page at **https://login.moneris.com/en/login**.)

Moneris Go portal:

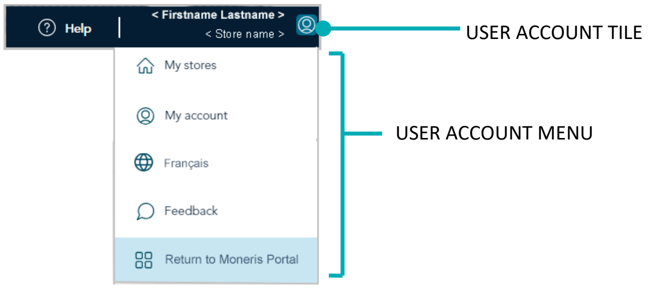
- Whenever you want to access your Moneris Go portal store(s), log into Moneris Portal (visit **https://login.moneris.com/en/login**). From there, launch the "Moneris Go Portal" application.

  Note: *If you attempt to submit your login credentials from the Moneris Go portal "Log in" page (**www.monerisgo.com**), you will be redirected to the Moneris Portal "Log In" page.*

- If you create/add a new user in Moneris Go portal, that user will be migrated to Moneris Portal when they activate their account.

- If you have one or more POS terminals and want to change your terminal login username/password, access your terminal username/password settings from your Moneris Go portal store's "My account" page (see "My account" settings on page 125).

- If you are logged into Moneris Go portal and want to end your login session there, click on the user account tile in the Moneris Go portal header (shown below), and then click on **Return to Moneris Portal** in the user account menu.



Merchant Direct:

- Whenever you want to access your Merchant Direct reports, log into Moneris Portal (visit **https://login.moneris.com/en/login**). From there, launch the "Merchant Direct" application.

  Note: *You may continue to sign in directly from the Merchant Direct "Sign in" page (**moneris.com/mymerchantdirect**); however, we will permanently disable this option in the near future.*

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 66) and as line item on the "Transaction details" page of any transaction (see Transaction details on page 68) and on the "Payment request details" page of a paid payment request (see Payment request details on page 103).

Channel	Description
Cash	The approved/declined cash transaction (Purchase or Refund) was originally initiated via your Moneris Go portal store's virtual terminal (see Purchase with cash on page 47; and see Refund: manual entry on page 57), or the cash transaction was initiated via a POS device or application that is synchronized to your store.
E-commerce (Moneris Checkout)	The approved/declined transaction (debit, credit, or gift) was initiated via a Moneris Checkout integration with your Moneris Go portal store (see Moneris Checkout on page 189).
E-commerce API	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.
Go Retail POS	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.
Payment request	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 Paying a payment request on page 106).
Tap to Pay	The approved/declined transaction (debit/credit) was initiated via the Moneris Go app on a mobile device, and the Moneris Go app is synchronized to your Moneris Go portal store. Any associated follow-on transaction will also show the "Tap to Pay" channel indicator.
Terminal	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.
Vault	The approved/declined transaction was initiated using Moneris-tokenized card data that is stored (or in the process of being stored) in a Vault customer profile within your Moneris Go portal store: ▪ see Financial transactions associated with a Vault customer profile (page 121) ▪ see Verification transaction: Vault customer profile (page 123)

Channel	Description
Virtual terminal	The approved/declined transaction (credit) was originally initiated from your Moneris Go portal store's virtual terminal: ▪ see Purchase with credit card: manual entry (page 45) ▪ see Preauthorization with credit card: manual entry (page 48) ▪ see Completion with credit card: manual entry (page 50) ▪ see Void: manual entry (page 54) ▪ see Refund: manual entry (page 57) ▪ see Independent Refund with credit card: manual entry (page 60)
WIX payment	The approved/declined transaction was originally initiated via a WIX ecommerce integration with your Moneris Go portal store.

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 ecommerce 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 68) and on the "Payment request details" page of a paid payment request (see Payment request details on page 103).

ECI	Description
M - Manually Keyed Card Present	-
0 - Not an electronic commerce transaction	-
1 - Mail/Telephone Order - Single	Cardholder provides credit card details via phone or on paper. Authorizes the use of the card for one payment.
2 - Mail/Telephone Order - Recurring	Cardholder provides credit card details via phone or on paper. Authorizes the use of the card for multiple payments processed at predetermined intervals.
3 - Mail/Telephone Order - Instalment	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.
4 - Mail/Telephone Order	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.
5 - Fully Authenticated - 3D Secure	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.
6 - Authentication Attempted - 3D Secure	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.
7 - SSL Transaction (Not Authenticated)	Applicable to ecommerce transactions whereby the cardholder provides their card data over the Internet on a secure site.

Terminal ID descriptions

The terminal ID is an 8-digit identifier associated with one or more card types and/or the point-of-sale device or application through which a financial transaction was initiated. The terminal ID displays as a line item on the "Transaction details" page of every approved/declined transaction except for cash transactions (see Transaction details on page 68).

A debit/credit terminal ID can be assigned to only one device/application at a time. Therefore, this ID can also denote the point-of-sale device or application through which the transaction was initiated as described in the table below. Conversely, a gift terminal ID is variable and may be assigned to multiple point-of sale devices/applications.

Note: *The "Transaction details" page includes additional information about a transaction that can help you to identify the point-of-sale device or application through which the transaction was initiated.*

Prefix	Card type	Description
66	Debit/credit	If the prefix starts with "66" (e.g., **66**012345), it indicates the debit/credit transaction was initiated via your store's virtual terminal, a payment request, an ecommerce integration (e.g., Moneris Checkout), or an API.
A1	Debit/credit	If the prefix starts with "A1" (e.g., **A1**012345), it indicates the debit/credit transaction was initiated via a Moneris Go terminal that is synchronized to your store.
A2	Debit/credit	If the prefix starts with "A2" (e.g., **A2**012345), it indicates the debit/credit transaction was initiated via a Moneris Go Plus terminal that is synchronized to your store.
AP	Debit/credit	If the prefix starts with "AP" (e.g., **AP**012345), it indicates the debit/credit transaction was initiated via the Moneris Go app (installed on a mobile device) that is synchronized to your store.
-	Gift	A gift terminal ID is variable and has no defined prefix.

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 137). 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 45; see Purchase with cash on page 47).
- Preauthorization (see Preauthorization with credit card: manual entry on page 48).
- Independent Refund (see Independent Refund with credit card: manual entry on page 60).

Follow-on transactions (listed below) inherit the custom ID from their predecessor transaction:

- Void (see Void: manual entry on page 54).
- Refund (see Refund: manual entry on page 57).
- Completion (see Completion with credit card: manual entry on page 50).

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 94).

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 66).
- "Transaction details" page (see Transaction details on page 68).
- Debit/credit receipt (see Receipt example: debit/credit on page 85).

Installments enabled by Visa

Installments enabled by Visa allows eligible cardholders to pay for a qualifying Purchase or Preauthorization in fixed, equal installments made over a defined period of time without an additional line of credit, credit check, or a new account. Installments enabled by Visa is offered by participating banks and facilitated by Visa’s payment technology for Visa and non-Visa cards.

How it works during a transaction

The cardholder shops in-store or on your Website and initiates checkout as usual. At the checkout (terminal or ecommerce integration), the cardholder enters their card information. If their card is eligible for Installments enabled by Visa, and if the Purchase or Preauthorization qualifies, the available Installments enabled by Visa plans will display at the checkout. The cardholder then chooses a plan and reviews the plan terms (set by their issuing bank). Once the cardholder accepts the terms, they can complete their order.

The cardholder's card-issuing bank will bill them in fixed equal installment payments over a defined period of time per the terms of the plan they selected and per their cardholder agreement (see Installment enabled by Visa line items in Receipt example: debit/credit on page 85).

If the cardholder's card or Purchase/Preauthorization is not eligible for an Installments enabled by Visa plan, then no Installments enabled by Visa plan will be displayed at the checkout.

Note: *If the cardholder wants more information, they must contact their card-issuing bank or review their cardholder agreement. Depending on the installment plan(s) that you configure, installment plan funding fees will be paid to the card issuer by the cardholder (consumer-funded installment plan) or by you (merchant-funded installment plan).*

Enabling/disabling Installments enabled by Visa plans on your synched terminals

- To enable/disable one or more Installments enabled by Visa plans on all terminals that are synched to your store, see Terminal settings: Installments by Visa (page 183).

Enabling/disabling Installments enabled by Visa plans in your Moneris Checkout integration

- To enable/disable Installments enabled by Visa plans in your Moneris Checkout integration, refer to the "Configuring the checkout's "Visa installments" settings" procedure in the ***Moneris Checkout: Using the MCO configurator in Moneris Go portal Reference Guide*** (available at **https://www.moneris.com/en/support/moneris-go/moneris-go-portal**).

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** to purchase point-of-sale supplies and receipt paper.
- Visit **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?

- 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**.

Your credit and/or debit card processing is governed by the terms and conditions of your agreement(s) for merchant credit/debit card processing services with Moneris Solutions Corporation. It is your responsibility to ensure that proper card processing procedures are followed at all times. Please refer to the ***Moneris Merchant Operating Manual*** (available at: (available at: **moneris.com/en/Legal/Terms-And-Conditions**) and the terms and conditions of your applicable agreement(s) for credit/debit processing or other services with Moneris Solutions Corporation for details.

(11/2024)