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Merchant Web Portal

Minimum Requirements

**Internet Browser 6.0 or higher**
Microsoft Internet Explorer 6.0 and higher is required to run the Web Portal.
1. If you do not have Microsoft Internet Explorer go to microsoft.com and search for Internet Explorer. Follow Microsoft’s instructions on how to download and install Internet Explorer.
2. Ensure that your zoom setting is at 100% at all times.

**JavaScript-enabled**
JavaScript must be enabled in Microsoft Internet Explorer. To enable JavaScript in Microsoft Internet Explorer 6.0 or higher:
1. From the Tools menu, click Internet Options.
2. Click on the Security Tab. Make sure that the ‘Internet’ icon is highlighted and then click Custom Level.
3. Scroll down to Active Scripting and click Enable.
4. Click OK.
5. Click OK.
6. Re-start your Internet Explorer.

**Pop-ups-enabled**
Pop-ups must be enabled for Web Portal website. To enable pop-ups in Microsoft Internet Explorer:
1. Click the Tools menu and point to Pop-up Blocker.
2. Click Turn Off Pop-up Blocker.

This section provides the instructions on how to use the Merchant Web Portal.

**Merchant Registration, Login and Profile Management**

**Web Portal Registration**
To register for an account on the Merchant Web Portal:
1. Go to moneris.com/loyaltycard/merchant.
2. Click on Create Online Account.
3. Enter your Registration Token (use your 13 digit Moneris Merchant ID) in “Registration Token” field.
4. Enter your Validation Code (use the last four digits of your Business phone number that you provided to Moneris Solutions during program sign-up) in “Validation Code” field.
5. Enter the Numeric Code shown in the picture on the screen, in the “Numeric Code” field.
6. Click Continue.

**Login to Your Merchant Web Portal**
To login to the Merchant Web Portal and access your information after you have registered for an account (see “Web Portal Registration” section above):
1. Go to moneris.com/loyaltycard/merchant.
   *Note: We strongly recommend you bookmark this page for easy access, by adding this to your Internet Explorer Favorites.*
2. Enter your Login ID (use your e-mail address) in the “Login ID” field.
3. Enter your Password in the “Password” field.
4. Click Log In.
Reset Your Online Password
If you forgot your password:
1. From the Merchant Login screen, select the Reset Online Password link.
2. Enter your Login ID in the “Enter your login ID” field.
3. Click Continue.
4. Fill in the answers to the security questions displayed.
5. Enter a New Password in the “Choose new password” field.
6. Enter your New Password again in the “Re-enter new password” field.
7. Click Submit.
Note: You will be locked out of the system after three incorrect attempts to reset your online password. If you do not remember answers to your security questions, call Merchant Customer Service at 1-866-319-7450 for support.

Update Your Web Portal Profile
To update your personal profile including first name, last name and language preference:
1. Select the My Profile section from the top menu.
2. Select Update Profile from the left menu.
3. Enter your First Name in the “First Name” field.
4. Enter your Last Name in the “Last Name” field.
5. Select preferred Portal Language (English or French) from the “Language” drop down menu.
6. Click Update.

Change Your Password
To change your Merchant Web Portal Login password:
1. Select the My Profile section from the top menu.
2. Select Update Password from the left menu.
3. Enter Old Password in the “Old password” field.
4. Enter New Password in the “New password” field.
5. Enter your New Password again in the “Re-enter new password” field.
6. Click Update.
Note: The new password must be at least 6 alpha-numeric characters long.

Change Your Merchant Security Questions
To update your security questions and answers:
1. Select the My Profile section from the top menu.
2. Select Update Security Information from the left menu.
3. Enter your Password in the “Password” field.
4. Select Security question #1 from the drop down menu.
5. Enter your Answer in the “Enter Your Answer” field for Security question #1.
6. Select Security question #2 from the drop down menu.
7. Enter your Answer in the “Enter Your Answer” field for Security question #2.
8. Click Update.

Update Merchant Login ID
To update your Merchant Web Portal Login ID:
1. Select the My Profile section from the top menu.
2. Select Update Login ID (e-mail).
3. Enter your Password in the “Password” field.
4. Enter your New Login ID in the “New Login ID” field. Your Login ID should be a valid e-mail address.
5. Click Update.

Log Out and System Time-Out
1. To log-off at any time while using the Web Portal, click on the Log Out button on the top right-hand corner.
Note: For security reasons, the Web Portal automatically signs you out after 30 minutes of inactivity. To continue using the Web Portal, you will need to login again.
Cardholder Management

Cardholder Lookup
To search for a specific Loyalty cardholder and access their card information:
1. Select the Cardholders section from the top menu.
2. Key the Card Number in the “Card Number” field.
   OR
   Enter full First Name in the “First Name” field.
   OR
   Enter cardholder’s full Last Name in the “Last Name” field.
   OR
   Enter full Phone Number in the “Phone” field.
   OR
3. Click Search.
4. Click on the View link to access the information for a selected card.

Note: If the cardholder search result contains only one cardholder, the cardholder information will automatically be displayed in the Web Portal.

Cardholder Information
After you perform a Cardholder Lookup, you will see this as the default section for the selected card. In this section, you will be able to:
• View card information, card transaction history and cardholder profile
• Update cardholder profile and Web Portal account
• Adjust points on a card
• Deactivate a card

View Card Information
To view card status, expired date, last transaction date, last transaction points amount and current points balance:
1. Select Display Card Information from the left menu.

View Card Transaction History
1. Select Display Transaction History from the left menu.
2. Select a Transaction Period: Last 30 days, Last 60 days, Last 90 days or All from the dropdown menu.
3. Click Go.
4. Click on Details to view transaction details.

Update Cardholder Profile
To view or manage cardholder profile:
1. Select Display/Update Account Information from the left menu.
2. Update profile details as required.
3. Click Update.

Deactivate Card
To deactivate a card from the Merchant Web Portal:
1. Select Deactivate Card from the left menu.
2. To assign the transaction to a Location for tracking purposes, select the Enterprise, then Business and Location using the drop down menus.
3. Click Deactivate.

Note: Once a card has been deactivated, it is permanently disabled. Members will have to re-enroll to use the program again. A card can also be deactivated via your Moneris terminal(s). See your Using Your Terminal for Loyalty Guide for more information.

Adjust Points Balance
To adjust points on a Loyalty card:
1. Select Adjust Points Balance from the left menu.
2. Enter the Number of points to be adjusted.
3. Select Enterprise, Business and Location to assign the transaction to a Location for tracking purposes.
4. Click on Add Points or Remove Points to complete the adjustment.
**Update Cardholder’s Login**

In order to manage a cardholder’s online Web Portal account, the cardholder must first create his or her online account.

To view or manage a cardholder’s Web Portal account:
1. Select **Update Cardholder Log In** from the left menu.

**Update Cardholder’s Web Portal Password**

To update a cardholder’s Web Portal password:
1. Select **Update Password** from the left menu.
2. Enter cardholder’s **New Password** in the “New Password” field.
3. Enter cardholder’s **New Password** again in the “Re-enter New Password” field.
4. Click **Update**.

**Disable Cardholder’s Web Portal Account**

To disable a cardholder’s Web Portal account:
1. Select **Update Account Status** from the left menu.
2. Click **Disable**.

**Enable Cardholder’s Web Portal Account**

To enable a previously disabled cardholder’s Web Portal account:
1. Select **Update Account Status** from the left menu.
2. Click **Enable**.

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**Reports and Extracts**

Your Web Portal has powerful reports that will give you more insight into your customers and help you run your business better, such as:

- **Transaction Activity Reports** – Gives you summary and detailed information about Loyalty transactions which occurred in your program. You can group the data by different dimensions such as location, date, card number, clerk ID and transaction type.
- **Points Liability Reports** – Gives you an overview of all outstanding points that you are liable for in your Loyalty program.
- **Cardholder Contact Lists** – Cardholder contact information lists for all cardholders or for cardholders based on your chosen criteria (e.g. top cardholders by spend).
- **Exception Reports** (Enhanced Loyalty only) – Provides transaction information for cards that meet your exception criteria (e.g. number of redemptions).

**View Reports List**

To view a list of available reports:
1. Select the **Reports** section from the top menu.
2. Select a **Program** folder from the left menu bar.

**View Report**

To view a report:
1. Select the **Reports** section from the top menu.
2. Select a **Report** from a reports folder in the left menu bar.
3. Input or select the **Start Date** and **End Date** by clicking.
4. Click **Submit**.

**View Report Details**

To access the next level of details for any available reports:
1. Select a **Value** in the report that is blue and underlined.
2. To return to the parent report, click on the top menu bar.

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Generate Extracts
This section describes how to access extracts. Extracts are generated only upon user request and a notification is sent to the user’s registered email address when the file is ready for download from the Web Portal. Extracts are identified with “Extract” in the title of the extract.

To generate a new extract:
1. Select the Reports section from the top menu.
2. Select an Extract from a reports folder in the left menu bar.
3. Select an Export Format (CSV or Excel) using the drop down list.
4. Click Generate.

Download Extracts
To download an existing extract:
1. Select the Reports section from the top menu.
2. Select an Extract from a reports folder in the left menu bar.
3. Select Version from the list on the right menu and click Download.
4. You will receive an e-mail when an extract is available for download.

View Help for a Report or Extract
To view additional help information for a specific report or extract:
1. Select the Reports section from the top menu.
2. Select a report from a reports folder in the left menu bar.
3. Click on the HERE link (underlined in blue) in the text to view help information on the report or extract.
Cardholder Web Portal

Instructions are provided below for how to use the Cardholder Web Portal in case you need to guide a customer through this process. Basic instructions are found on the back of each Loyalty card as well.

Cardholder Registration and Login

Cardholder Web Portal Registration

To register for a Cardholder Web Portal account:

1. Go to moneris.com/loyaltycard/cardholder (the web address is provided on the back of the Loyalty cards).
2. Click on the Create Online Password link.
3. Enter the Card Number printed on the back of the Loyalty card in the “Card Number” field.
4. Enter the Password printed underneath the scratch-off foil on the Loyalty card in the “Card Password” field.
5. Enter a New Password in the “New Password” field.
6. Enter a New Password again in the “Re-enter new password” field.
7. Select Security question #1 from the drop down menu.
8. Enter an Answer in the “Enter your answer” field for Security question #1.
9. Select Security question #2 from the drop down menu.
10. Enter an Answer in the “Enter your answer” field for Security question #2.
11. Click Register to use the Portal.

Cardholder Web Portal Login

To login to the Cardholder Web Portal and access account information after the cardholder has registered for an account (see “Cardholder Web Portal Registration” section above):

1. Go to moneris.com/loyaltycard/cardholder (the web address provided on the back of the Loyalty cards).
2. Enter the Login ID (use the card number as shown on the card) in the “Login” field.
3. Enter the Password in the “Password” field.
4. Click Log In.
Reset Cardholder Web Portal Login Online Password
If the cardholder forgot their password:
1. From the cardholder Login screen select the “Reset Online Password” link.
2. Enter the Card Number in the “Please enter a card number” field.
3. Click Continue.
4. Fill in the answers to the security questions displayed.
5. Enter a New Password in the “Choose new password” field.
6. Enter the same New Password again in the “Re-enter new password” field.
7. Click Submit.
Note: The cardholder will be locked out of the system after three incorrect attempts to reset their online password. If they do not remember answers to their security questions, then they may call you to reset their password (see “Cardholder Management” in the “Merchant Web Portal” section starting on p. 6).

Log Out and System Time-Out
1. To log-off at any time while using the Web Portal, click on the Log out button on the top right-hand corner.
Note: For security reasons, the Web Portal automatically signs a user out after 30 minutes of inactivity. To continue using the Web Portal, the cardholder will need to login again.

View Card Information and Transaction History (My Card)
This section enables cardholders to view their card status, balance and transaction history.

View Card Information
To view card status, last transaction date, last transaction points amount and current points balance:
1. Select the My Card section from the top menu.
2. Select Display Card Information from the left menu.

View Card Transaction History
To view card transaction history:
1. Select the My Card section from the top menu.
2. Select Display Card History from the left menu.
3. Select a Transaction Period: Last 30 days, Last 60 days, Last 90 days or All from the dropdown menu.
4. Click Go!
5. Click on Details to view transaction details.
Cardholder Profile and Login Management (My Profile)

This section enables cardholders to see and modify their user profile, including password and security questions.

Update Profile

To view or manage cardholder profile:
1. Select the My Profile section from the top menu.
2. Select Display/Update Account Information from the left menu.
3. Update profile details as required.
4. Click Update.

Update Cardholder Login Password

To change Cardholder Web Portal Login password:
1. Select the My Profile section from the top menu.
2. Select Update Password from the left menu.
3. Enter the Old Password in the “Old password” field.
4. Enter a New Password in the “New password” field.
5. Enter the New Password again in the “Re-enter new password” field.
6. Click Update.

Note: The new password must be at least 6 alpha-numeric characters long.

Update Cardholder Security Questions

To update security questions and answers:
1. Select the My Profile section from the top menu.
2. Select Update Security Information from the left menu.
3. Enter the Password in the “Password” field.
4. Select a Security question #1 from the drop down menu.
5. Enter an Answer in the “Enter your answer” field for Security question #1.
6. Select a Security question #2 from the drop down menu.
7. Enter an Answer in the “Enter your answer” field for Security question #2.
8. Click Update.
How to contact us
Our Merchant Customer Service support line is available 24 hours a day, seven days a week to answer any questions you may have regarding your merchant account. Please visit us online at moneris.com or call us at 1-866-319-7450.
If you would like to speak to our Sales department, please call us at 1-866-666-3747.

How to order stationery/promotional materials
You can order a number of supplies for your business from Moneris. Please visit us online at shopmoneris.com or call us at 1-866-319-7450.

Get an updated manual
Moneris may, from time to time, update this operating manual. You are responsible for ensuring you obtain and are using the most up to date copy of the Loyalty Program Web Portal Operating Manual. To obtain an updated copy, please go to moneris.com and search Downloads.