Enhanced Gift and Loyalty Program

Web Portal Operating Manual
For Merchant’s Head Office
Welcome to the Moneris Gift and Loyalty Web Portals
PAGE 2
• Web Portal Minimum Requirements

Merchant Web Portal
PAGES 3 – 21
• Merchant Registration, Login and Profile Management
• Merchant Web Portal User Management
• Cardholder Management
• Reports and Extracts

Cardholder Web Portal
PAGES 22 – 25
• Cardholder Registration and Login
• View Card Information and Transaction History (My Card)
• Cardholder Profile and Login Management (My Profile)
Welcome to the Merchant Web Portal

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

Merchant Registration, Login and Profile Management

Web Portal Registration

Head Office/Enterprise Users
If you are a Head Office/Enterprise user, please follow the steps in “Login to Your Merchant Web Portal” to access the Merchant Web Portal. Your portal Login ID is the email address you gave Moneris during program launch. You will receive your portal password from Moneris by email. You will be prompted to change your password during initial login.

Location User – Automatic Registration Token method
If you are a Location user, you can register for an account on the Merchant Web Portal using your Location-specific registration token and validation codes. Location users will initially be set up with report viewing capabilities only. To register as a Location user:

1. Go to moneris.com/giftloyaltycard/merchant.
2. Click on Create Online Account.
3. Enter your Registration Token (use your 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.
   You will be prompted to create a Login ID, password and answers to your selected security questions.

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/giftloyaltycard/merchant.
2. Click on Create Online Account.
3. Enter your Login ID (use your email address) in the “Login ID” field.
4. Enter your Password in the “Password” field.
5. Click Log In.
   Note: If you are logging in for the first time, you will be prompted to change your password and create answers to security questions.

Welcome to the Merchant Web Portal

In this Web Portal Operating Manual, you will find instructions on how your organization and cardholders can effectively use the Moneris Web Ports.

The Merchant Web Portal is a secure, web-based application that allows you, the merchant, to view your Gift and Loyalty program performance, manage cardholder accounts, update cardholder profile information, adjust balance, batch activate Gift cards, deactivate cards, and generate reports.

The Cardholder Web Portal allows your cardholders to view their current card balance, card transaction history and update their contact information.

Web Portal Minimum Requirements

Internet Explorer 6.0 or higher
Microsoft Internet Explorer 6.0 or 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.
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: The new password must be at least 7 alpha-numeric characters long. 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 7 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.
Merchant Web Portal User Management

Create a New Merchant Web Portal User

To create a new Merchant Web Portal user within your organization:

1. Select the User Management section from the top menu.
2. Select Create a New User from the left menu.
3. Select the authority level of access for this user from the drop down menus. By default, the authority access level is set to Enterprise. Your choices include:
   - **Enterprise** level – user will be able to access all data for your program.
   - **Business** level – user will only be able to access data for a specific business, sub-brand or banner. (Please note that the Business level may not be applicable for all programs.)
   - **Location** level – user will only be able to access data for a specific location.

For more information on user authority access levels, please refer to Table 1A.

4. Click Continue.
5. Choose the Merchant Web Portal functionalities available for this user to use by selecting the desired Role(s) in the “Available Roles” field. Click
   - to add a single role,
   - to add all roles (this will give the user full access)
   You can de-select a role by highlighting it in the “Selected Roles” field and click
   - to remove a single highlighted role
   - to remove all selected roles

For more information on the associated functionalities for each role, please refer to Table 1B.

6. Enter First Name in the “First Name” field.
7. Enter Last Name in the “Last Name” field.
8. Enter Email in the “Email” field. This will be your new user’s Login ID.
9. Enter the same Email again in the “Re-enter Email” field.
10. Enter a temporary Password in the “Password” field.
11. Enter the same temporary Password again in the “Re-enter Password” field.
12. Click Add.

**Note:** The password you assign to the new portal user will be temporary. The user will be prompted to change their password and create answers to security questions during initial login.

<table>
<thead>
<tr>
<th>User Authority Level</th>
<th>Description</th>
<th>Available Functionalities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise User</td>
<td>Executive level or at the corporate head office</td>
<td>• View and manage Enterprise, Business, Location and Cardholder level users • View and generate Enterprise, Business and Location level reports and extracts</td>
</tr>
<tr>
<td>Business User</td>
<td>Management level or at a sub-brand, banner or business</td>
<td>• View and manage Business, Location and Cardholder level users • View and generate Business and Location level reports and extracts</td>
</tr>
<tr>
<td>Location User</td>
<td>Location manager or a location operator</td>
<td>• View and manage Location and Cardholder level users • View and generate Location level reports and extracts</td>
</tr>
</tbody>
</table>

**Note:** If you have a head office Location, your head office will appear as a Location under the Location drop down. If you wish to configure a user with Enterprise functionalities, please configure them with Enterprise level authority by selecting the appropriate program name in the Enterprise drop down menu. Do not select the head office Location in the Location drop down. Users configured for the head office Location will be given Location User rights and can view transactional data generated at the head office only.
### Table 1B: Merchant Web Portal Role Description and User Groups

A role defines the actions a user in your organization is allowed to perform through the Merchant Web Portal. A user can have multiple roles. You can restrict a user from performing an action on the Web Portal by not assigning a role to them, or add the capability for a user or at any point by adding a new role for them.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Available Functionalities</th>
</tr>
</thead>
</table>
| **Card Support**      | User that can make updates to a single card at a time.                       | • Update complete profile for a cardholder by making changes to the cardholder’s personal and preference information including First and Last Name.  
|                       |                                                                             | • View transaction details for the card.                                                   
|                       |                                                                             | • Adjust the balance on a card by increasing or decreasing cash or points.                 |
| **Cardholder Manager** | User with access to view the complete profiles for cardholders, including personal and preferences information. User will be able to update all information except cardholder’s First Name, Last Name and Birthday. | • View cardholders’ complete profiles  
|                       |                                                                             | • Update cardholders’ profiles                                                             |
| **Cardholder Search** | User that can search for cardholders using their card number and view a limited profile for cardholders. First Name and Last Name are shown, but not contact or preference information. **Note:** To enable Cardholder Search for a user, you must also configure the Cardholder User Admin role for the same user. | • Search for cardholders                                                                 |
| **Cardholder User Admin** | User with Cardholder Web Portal administration functionalities.                | • View transaction details for the card.                                                   |
| **Cardholder Viewer** | User with access to view card information only.                              | • View card status and balance information  
|                       |                                                                             | • View card transaction information                                                        |
| **Ernex Client**      | User that can deactivate a single card at a time through the Merchant Web Portal. | • Email Moneris/Ernex Support                                                              |
| **POS Manager**       | User other than an admin user that can see which users have been enabled with access to your Merchant Web Portal. | • Deactivate cards                                                                         |
| **Program Config**    | User that can create and update an email group that will receive notification for Gift card batch activation events. | Create and update an e-mail group that will receive a notification for the following events:  
|                       |                                                                             | • New batch activation request is submitted  
|                       |                                                                             | • Status of an existing batch activation request is changed.  
|                       |                                                                             | • Batch activation request is cancelled.                                                   |
| **Program Manager**   | User with Gift card batch activation rights.                                 | Conduct and cancel batch Gift card activations of up to 500 cards in real-time on the Web Portal  
|                       |                                                                             | • Request batch Gift card activations for more than 500 cards                            |
|                       |                                                                             | • View Gift card batch activation history                                                   |
| **Report Viewer**     | User that can generate and view reports and extracts.                       | • View a list of available reports  
|                       |                                                                             | • Generate reports                                                                         
|                       |                                                                             | • View and print reports                                                                    |
| **User Admin**        | User with Merchant Web Portal administration functionalities.                | • Create new users for the Merchant Web Portal  
|                       |                                                                             | • Modify users’ Merchant Web Portal authority levels and roles                           
|                       |                                                                             | • Enable or Disable users’ Web Portal accounts                                             
|                       |                                                                             | • View users’ Web Portal accounts                                                          
|                       |                                                                             | • Set users’ Web Portal passwords                                                          |
| **User Search**       | User other than an admin user that can see which users have been enabled with access to your Merchant Web Portal. **Note:** To enable User Search for a user, you must also configure the User Admin role for the same user. | • Search users by role, authority level, or user ID                                        |
Enable Previously Disabled User’s Account
To enable a previously disabled Merchant Web Portal account:
1. Select Update Account from the left menu.
2. Click Enable.

Update User’s Role/Access Level
To update user’s Merchant Web Portal role:
1. Select Update User Role from the left menu.
2. Select a Role in the “Available Roles” field and click >> to add a single role.
   OR
   Click >>> to add all roles.
   Click on a Role in the “Selected Roles” field and click << to remove a single role.
   OR
   Click on <<< to remove all roles and start again.
3. Click Update.
For more information on the associated functionalities for each role, please refer to Table 1B.

Update User’s Authority Level
Authority level defines level of control through the Merchant Web Portal. To update user’s authority level:
1. Select Update User Authority Level from the left menu.
To give a new user Enterprise level of authority, proceed to step 2 since your Enterprise will be selected by default.
   OR
To give a user Business or Location level of authority, select the applicable Business and/or Location from the Business and/or Location drop down menus.
   OR
To give a user a higher level of authority (e.g. moving a Location user to Business level authority, or a Business user to Enterprise level authority), remove the Business and/or Location from the Business and/or Location drop down menus.
2. Click Update.
For more information on user authority access levels, please refer to Table 1A.

Manage Existing Users
This option allows you to manage existing Merchant Web Portal user accounts within your organization. This is only available to users with User Admin Role (Refer to Table 1B for more information about user roles).
To search for a specific user and access their Merchant Web Portal account:
1. Select the User Management section from the top menu.
2. Select Manage Existing Users from the left menu.
3. You can search by:
   a. User Name – by entering a full or partial Login ID (e-mail) in the “User Name” field
   b. Role – by selecting a role type from the Role drop down menu
   c. Authority Level – by selecting an authority level from the drop down menu.
   Enterprise level is selected by default. You can alternatively select a Business level and/or Location level from this menu.
4. Click Search.
5. Click on the View Details link for a specific account to access the account information for a selected Web Portal user.

View User Profile
To view Merchant Web Portal user profile, user’s first name, last name, email, roles for that user, authority level, language preference and account status:
1. Select View User Profile from the left menu.

Change User’s Password
To update user’s Merchant Web Portal password:
1. Select Update Password from the left menu.
2. Enter user’s temporary New Password in the “New Password” field.
3. Enter user’s temporary New Password again in the “Re-enter New Password” field.
4. Click Update.
Note: The password you assign to the new portal user will be temporary. The user will be prompted to change their password and create answers to security questions during initial login.

Disable User’s Account
To disable a Merchant Web Portal account:
1. Select Update Account from the left menu.
2. Click Disable.
Cardholder Management

Cardholder Lookup
To search for a specific 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 cash or points on a card
• Deactivate a card

View Card Information
To view card status, expired date, last transaction date, last transaction amount and current 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 Terminal Quick Reference Guide or Using Your Terminal Guide for more information.

Adjust Cash Balance (Gift Only)
To adjust balance on a Gift card:
1. Select Adjust Cash Balance from the left menu.
2. Enter Amount to be adjusted in the “Amount to Adjust” field.
3. Select Reason for adjustment from the “Reason for Adjustment” drop down menu.
4. Select Enterprise, Business and Location to assign the transaction to a Location for tracking purposes.
5. Click on Add to Card Balance or Remove from Card Balance to complete the adjustment.
Batch Activation (Gift Only)

Initiate Batch Activation
To complete bulk card activations for your Gift program:
1. Select the Card Management section from the top menu.
2. Select Batch Activation from the left menu.
3. If not already selected by default, select Enterprise, Business and Location from the drop down menus.
4. Click Continue.
5. If not already selected by default, select Program from the drop down menu.
6. Enter number of cards you want to activate in the “Number of Cards” field.
   Note: This service will activate in real-time a maximum of 500 cards per request per program; requests to activate more than 500 cards will be processed offline within 48 Business hours from request date. Alternatively, you can split the total number of cards to be activated in smaller batches, each with a maximum of 500 cards.
7. Enter the first card number of the range of cards you want to activate in the “Card Range Start Number” field.
8. Enter the last card number of the range of cards you want to activate in the “Card Range End Number” field.
   Note: The range between the Start and End Numbers must be continuous.
9. Enter an activation dollar value (e.g. enter 25.00 for $25) in the “Activation Value” field.
10. Click Continue to submit the batch activation request.
   OR
   Back to select a different Enterprise, Business or Location.
   OR
   Cancel to go back to the Card Management page.
11. If you have selected to Continue, the application will display a confirmation page.
12. If the number of cards to activate is less than 500, click Continue to complete the Batch Activation request.
   OR
   Cancel to go back to the Card Management page.

Adjust Points Balance (Loyalty Only)

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.
13. If the number of cards to activate is higher than 500, click Modify to change the request parameters. OR Continue to submit the batch activation request. OR Cancel to go back to the Card Management page.

14. When the request is complete, you will receive an email notification at the address provided in your user profile.

Cancel Batch Activation
This option allows the user to request a cancellation of a batch activation. You can only submit these requests until 2 pm EST. If the original activations are part of a closed terminal batch, you will not be able to submit a cancellation request to void these activations.

1. Select the Card Management section from the top menu.
2. Select Cancel Request from the left menu.
3. Review the list of requests and click the Cancel link to the right of the request you want to cancel.
4. Select Confirm to submit the cancellation request.
5. Select Cancel to return to the list of requests.

View Batch Activation History
To view a history of all batch activation requests:

1. Select the Card Management section from the top menu.
2. Select View Request History from the left menu.
3. Select the History period from the select period drop down menu.
4. If not already selected by default, select Program from the drop down menu.
5. Click Search.
6. The list displays batch activation requests in descending order by request date. Click on any underlined column name to change the sorting criteria.
7. The list will display the following request types:
   - Real Time – request to activate less than 500 cards
   - Deferred – request to activate more than 500 cards
   - Cancel – request to cancel a batch activation

8. Click on the Details link to view additional details regarding a request. When viewing the details of a cancelled request, you can click on View Original Request to access the details of the original batch activation request. OR

9. The application highlights any requests completed with errors and places the number of errors in the errors column. You can click on the Errors link to view error details. The details page will list the card number, error code and reason for each card number that failed to activate. Click on Return to Request Details to return to the previous page.

10. Click Return to Request List to go return to the list of batch activation requests.

Configure Email Notification Group for Batch Activation
To set up an email group that will receive all notifications when batch activations are initiated or cancelled:

1. Select the Card Management section from the top menu.
2. Select Configure Batch Activation from the left menu.
3. If you want other users to receive email notification associated with your batch activation requests, then select the checkbox to the right of the setup group for email notifications.
4. Enter the email address and click Add. You can add up to five email addresses to this email group.
5. After you have added all email addresses, click Submit to complete the update.
6. To leave this menu, press Cancel to return to the Card Management page.
7. To change an email address, click the edit link to its right and then click Submit to complete the update.
8. To delete an email address, click the Delete link to it.
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. Reports include transaction activity, liability, contact lists, exception reports and more. For more information about each report, you can view report-specific descriptions and generation instructions on the right-hand panel of the report generation screen that appears when you click the report’s name. A user’s authority level will determine the reports and level of data the user can access. For example, an Enterprise level user will be able to access all Enterprise, Business and Location reports whereas a Location level user can only access reports for their specific Location.

View Reports List

By default, all folders and report lists are displayed when you first login to portal. To view a list of available reports:
1. Select the Reports section from the top menu.
2. Select a Program Type (Gift or Loyalty) folder from the left menu bar.
3. For Loyalty, select a Program folder to view reports for a specific program.
   OR
   For Gift, data for all your Gift programs will be located within one report and separated by report page. Therefore, there are no separate steps to open additional folders when you want to generate reports for different Gift programs.

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 appropriate report generation criteria, such as the number of transactions and/or Start Date and End Date by clicking .
4. Click Submit.

Note: Report-specific generation instructions and criteria are detailed on the right-hand panel of the report generation screen that appears when you click the report’s name.

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.

Download Report

To download a report:
1. Access available reports (see “View Report” section).
2. Select a Format (PDF, CSV or Excel) from the drop down list on the report’s top menu.
3. Click Export.

Scroll through Report

To scroll through a report:
1. Access available reports (see “View Report” section).
2. To scroll up and down the current page of the report, use scrollbars on the left or on the bottom.
   OR
   To scroll between pages, use the arrow icons found at the top of each report.
   • Click on ➤ to scroll to the next page
   • Click on ◄ to scroll to the previous page
   • Click on ◄ ► to scroll down to the last page
   • Click on ◄ ◄ to scroll up to the first page

Note: For Gift reports, program data are organized by page and therefore you must scroll through the report by page to view data for each Gift program.

Sort Data in Report

To re-sort data by a particular column in a report (e.g. sort by date):
1. Access available reports (see “View Report” section).
2. Click on ▲, located adjacent to the column title, to re-sort data in ascending order.
   OR
   Click on ▼, located adjacent to the column title, to re-sort data in descending order.

Print Report

To print a report:
1. Access available reports (see “View Report” section).
2. Click on , located on the top menu of the report.

Note: For the first execution of the print command function, the application may ask you to install an ActiveX control in order to print the report. Alternatively, you can download and print a PDF version of the report. View the “Download Report” section on how to generate a PDF version of the report.
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.
5. You will receive an e-mail when the extract is available for download.

Note: For extracts with large amounts of data, there could be a significant time delay between when you requested the extract to be generated and when you can download the extract. Please refrain from requesting the same extract to be generated multiple times since multiple extracts will be produced as a result.

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. Extracts are identified with “Extract” in the title of the extract.
3. Select Version from the list on the right menu and click Download.
4. Only the last generated version of the extract will appear.
   OR
   Select the My Download section from the top menu.
5. Select Download Extract from the left menu bar.
6. Select Version from the list on the right menu and click Download. Only the last generated version of the extract will appear on this list.

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.

Cardholder Registration and Login

Cardholder Web Portal Registration
To register for a Cardholder Web Portal account:
1. For Gift cardholders, go to moneris.com/giftcard/cardholder.
   For Loyalty cardholders, go to moneris.com/loyaltycard/cardholder.
2. Click on the Create Online Password link.
3. Enter the Card Number printed on the back of the card in the “Card Number” field.
4. Enter the Card Validation Code or Password printed underneath the scratch-off foil on the card in the “Card Password” field. These numbers are usually printed underneath a scratch-off foil on the back of a card.
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. For Gift cardholders, go to moneris.com/giftcard/cardholder.
   For Loyalty cardholders, go to moneris.com/loyaltycard/cardholder.
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, the cardholder can follow the instructions below to reset 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 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. 12).

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 amount and current balance as a cardholder:
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 as a cardholder:
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 as a cardholder:
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 as a cardholder:
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 as a cardholder:
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.

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 Gift and Loyalty Program Web Portal Operating Manual. To obtain an updated copy, please go to moneris.com and search Downloads.