Need help?

Web: moneris.com/support
Toll-free: 1-866-319-7450

Record your Moneris® merchant ID here:
# Contents

**Welcome to the Moneris Gift & Loyalty Web Portals** ......................................................... 3  
Before you begin ......................................................................................................................... 4  

**Merchant Web Portal** .......................................................................................................... 5  

**Merchant Registration, Login, and Profile Management** .................................................. 6  
Basic Loyalty, Pro Loyalty, and Tracking Locations ................................................................. 6  
Web Portal Registration (Enhanced, Pro, and Tracking Program) ........................................ 6  
Head Office/Enterprise Users ..................................................................................................... 6  
Location User – Login ID and Password method ..................................................................... 6  
Location User – Automatic Registration Token method .......................................................... 6  
Login to your Merchant Web Portal .......................................................................................... 7  
Reset your Online Password .................................................................................................... 7  
Update your Web Portal Profile ............................................................................................... 7  
Change your Password ............................................................................................................. 8  
Change your Merchant Security Questions .......................................................................... 8  
Update Merchant Login ID ....................................................................................................... 8  
Log Out and System Time-Out ................................................................................................. 9  

**Merchant Web Portal User Management (for Enhanced, Pro, and Tracking Programs Only)** .................. 10  
Create a New Merchant Web Portal User ............................................................................... 10  
Table 1A: Merchant Web Portal User Authority Levels ....................................................... 11  
Table 1B: Merchant Web Portal Role Description and User Groups .................................... 12  
Manage Existing Users .......................................................................................................... 14  
View User Profile ................................................................................................................... 14  
Change User’s Password ......................................................................................................... 14  
Disable User’s Account .......................................................................................................... 15  
Enable Previously Disabled User’s Account ......................................................................... 15  
Update User’s Role/Access Level ......................................................................................... 15  
Update User’s Authority Level .............................................................................................. 15  

**Cardholder Management** .................................................................................................. 17  
Cardholder Lookup ............................................................................................................... 17  
Cardholder Information ........................................................................................................... 17  
View Card Information ........................................................................................................... 17  
View Card Transaction History ............................................................................................... 17  
Update Cardholder Profile ..................................................................................................... 18  
Deactivate Card ....................................................................................................................... 18  
Adjust Cash Balance (Gift Card Solutions Only) ................................................................. 18  
Adjust Points Balance (Loyalty Program Only) .................................................................... 18  
Update Cardholder’s Login ..................................................................................................... 18  
Update Cardholder’s Web Portal Password ......................................................................... 19  
Disable Cardholder’s Web Portal Account .......................................................................... 19  
Enable Cardholder’s Web Portal Account .......................................................................... 19  
Replace Card (Gift Rewards Cards Only) ........................................................................... 19  
Batch Activation (Gift Card Solutions Only) ....................................................................... 20  
Initiate Batch Activation ....................................................................................................... 20  

---

Moneris® Gift Card, Loyalty, and Tracking Programs: Web Portal Operating Manual 1
Cancel Batch Activation ................................................................. 21
View Batch Activation History .......................................................... 21
Configure Email Notification Group for Batch Activation .................. 22

Reports and Extracts ........................................................................ 23
View Reports List .............................................................................. 23
View Report ..................................................................................... 23
View Report Details .......................................................................... 23
Download Report ............................................................................ 24
Scroll through Report ....................................................................... 24
Sort Data in Report .......................................................................... 24
Print Report .................................................................................... 24
Generate Extracts ............................................................................ 25
Download Extracts .......................................................................... 25
View Help for a Report or Extract .................................................... 25
Figure 1: View of a Sample Report .................................................. 26

Cardholder Web Portal ...................................................................... 27
The Moneris Cardholder Web Portal ................................................ 28
Accessing the Moneris Cardholder Web Portal from your website .... 28
Branding the Cardholder Web Portal (Pro Gift and Loyalty Programs Only) ..................... 28
  Logo Specifications ....................................................................... 28
  Header Image Specifications ......................................................... 28
Cardholder Web Portal Links (Pro Gift and Loyalty Programs Only) ........................................ 28
Cardholder Registration and Login .................................................. 29
  Cardholder Web Portal Registration ........................................... 29
  Cardholder Web Portal Login ....................................................... 29
  Reset Cardholder Web Portal Login Online Password ................. 30
Log Out and System Time-Out ......................................................... 30
My Card – View Card Information, Transaction History, and Add Card to Passbook .................. 30
  View Card Information ............................................................... 30
  View Card Transaction History .................................................. 30
  Add to Passbook (Passbook-enabled programs only) ..................... 31
My Profile – Cardholder Profile and Web Portal Login Management ...................................... 31
  Update Profile ........................................................................... 31
  Update Cardholder Login Password ............................................. 31
  Update Cardholder Security Questions .......................................... 31

Merchant support ............................................................................. 33
Welcome

In this Web Portal Operating Manual, you will find instructions on how your organization and cardholders can effectively use the Moneris Web Portals.
Welcome to the Moneris Gift and Loyalty Web Portals

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.
- view your Tracking program performance and generate reports.

The Cardholder Web Portal allows your cardholders to view their current card balance, card transaction history and update their contact information. This portal is not available for Tracking cardholders. Refer Tracking customers to the company that issues their points.

Before you begin

Please be aware that:

- The Merchant Web Portal is available to merchants enrolled in various Moneris Gift, Loyalty, and Tracking programs.
- The Cardholder Web Portal is available to customers of merchants enrolled in various Moneris Gift, Loyalty, and Tracking programs.
- In some cases, access to either Web Portal is supplied with the purchase of the Enhanced Reporting program.

To find out if you have access to either the Merchant or Cardholder Web Portal, ask your Manager or Head Office, or if you are interested in access to either Web Portal, contact your Moneris representative.
Merchant Web Portal

In this section, we go over everything you need to know to use the Merchant Web Portal.
Merchant Registration, Login, and Profile Management

Basic Loyalty, Pro Loyalty, and Tracking Locations
If you have an existing Enhanced Gift or Loyalty program, use your existing account.
To register for a new account on the Merchant Web Portal:
1. Go to moneris.com/giftloyaltycard/merchant.
2. Click on Create Online Account.
3. Enter your Registration Token (use your 13 digit Moneris Merchant ID) in the 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 the Validation Code field.
   ▪ If you do not remember the last four digits of your Location’s business phone number or if the phone number has changed since program set-up, please contact Moneris Customer Care at 1-866-319-7450.
5. Enter the Numeric Code shown in the picture on the screen, in the Numeric Code field.
6. Click Continue.
7. You will be prompted to create a login ID, password, and answers to your selected security questions.

Web Portal Registration (Enhanced, Pro, and Tracking Program)

Head Office/ Enterprise Users
If you are a Head Office/ Enterprise user, please follow the steps in Login to Your Merchant Web Portal on page 7 to access the Merchant Web Portal. Use the Login ID and Password that you have given Moneris to set-up users during launch. You will be prompted to change your password during initial login.

Location User – Login ID and Password method
If you are a Location level user and your Head Office issued a Login ID and Password to you, then follow the steps in Login to Your Merchant Web Portal on page 7 to access the Merchant Web Portal. You will be prompted to change your password during initial login.

Location User – Automatic Registration Token method
If you are a Location level user and your Head Office chose to have Moneris automatically issue registration tokens for each Location, 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, go to moneris.com/giftloyaltycard/merchant. Then, follow the instructions in the Basic Loyalty, Pro Loyalty, and Tracking Locations section above.
Login to Your Merchant Web Portal

To log in to the Merchant Web Portal and access your information after you have registered for an account (see Web Portal Registration section on page 6):

1. Go to moneris.com/giftloyaltycard/merchant.
   
   **Note:** We strongly recommend you bookmark this page for easy access.

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.

   **Note:** If you are logging in for the first time, you will be prompted to change your password and create answers to security questions.

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 your Head Office (if you are a Location or Business User) or call Moneris Customer Care 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.
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 on page 11.
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 on page 12.
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 1A: Merchant Web Portal User Authority Levels

A user’s access level within the Merchant Web Portal is defined by the roles and user authority level you assign to the user. There are three authority levels available—Enterprise, Business, and Location. Authority levels define the level of users a user can manage and scope of data a user can view. For example, an Enterprise user can view reports with data from the entire program and manage Enterprise, Business, and Location users, while a Location user can only view reports with data from their own locations and manage Location users if given that role.

<table>
<thead>
<tr>
<th>User Authority Level</th>
<th>Description</th>
<th>Available Functionalities</th>
</tr>
</thead>
</table>
| Enterprise User      | Executive level or at the corporate head office. | ▪ View and manage Enterprise, Business, Location, and Cardholder level users  
▪ View and generate Enterprise, Business, and Location level reports and extracts |
| Business User        | Management level or at a sub-brand, banner or business.  
**Note:** *Business level users may not be applicable to all programs.* | ▪ View and manage Business, Location, and Cardholder level users  
▪ View and generate Business and Location level reports and extracts |
| Location User        | Location manager or a location operator. | ▪ View and manage Location and Cardholder level users  
▪ View and generate Location level reports and extracts |

**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. Alternatively, you can add capabilities to a user by adding a new role for them.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Available Functionalities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Card Support</td>
<td>User that can make updates to a single card at a time.</td>
<td>• Update complete profile for a cardholder by making changes to the cardholder’s personal and preference information including First and Last Name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View transaction details for the card</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Adjust the balance on a card by increasing or decreasing cash or points</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Perform a card replacement transaction (Gift Rewards only)</td>
</tr>
<tr>
<td>Cardholder Manager</td>
<td>User with access to view the complete profile for cardholders, including personal and preferences information. User will be able to update all information except cardholder’s First Name, Last Name, and Birthday.</td>
<td>• View cardholders’ complete profiles</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Update cardholders’ profiles</td>
</tr>
<tr>
<td>Cardholder Search</td>
<td>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. <strong>Note:</strong> To enable Cardholder Search for a user, you must also configure the Cardholder User Admin role for the same user.</td>
<td>• Search for cardholders</td>
</tr>
<tr>
<td>Cardholder User Admin</td>
<td>User with Cardholder Web Portal administration functionalities.</td>
<td>• Enable or disable cardholders’ Web Portal accounts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Set cardholders’ Web Portal passwords</td>
</tr>
<tr>
<td>Cardholder Viewer</td>
<td>User with access to view card information only.</td>
<td>• View card status and balance information</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View card transaction information</td>
</tr>
<tr>
<td>Role</td>
<td>Description</td>
<td>Available Functionalities</td>
</tr>
<tr>
<td>--------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Moneris</td>
<td>User that can email for support services through the Web Portal.</td>
<td>▪ Email Moneris Support</td>
</tr>
<tr>
<td>POS Manager</td>
<td>User that can deactivate a single card at a time through the Merchant Web Portal.</td>
<td>▪ Deactivate cards</td>
</tr>
</tbody>
</table>
| 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 a new user 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 |
<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Available Functionalities</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Search</td>
<td>User other than an admin user that can see which users have been enabled with access to your Merchant Web Portal.</td>
<td>• Search users by role, authority level, or user ID</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> To enable User Search for a user, you must also configure the User Admin role for the same user.</td>
<td></td>
</tr>
</tbody>
</table>

### 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 on pages 12 - 14 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:
   - **User Name**: by entering a full or partial Login ID (e-mail) in the **User Name** field.
   - **Role**: by selecting a role type from the **Role** drop down menu.
   - **Authority Level**: by selecting an authority level from the drop down menus.
   - 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.

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.
   Select 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 are for each roles, please refer to Table 1B on pages 12 - 14.

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 drop down menus.

2. Click **Update**.

For more information on user authority access levels, please refer to *Table 1A* on page 11.
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
   Enter complete Postal/Zip Code in the Postal/Zip Code field.
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 be automatically 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, 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 drop down 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 Loyalty Programs Reference Guide or your Gift Card Program Reference Guide for more information.

**Adjust Cash Balance (Gift Card Solutions 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.

**Adjust Points Balance (Loyalty Program 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 the **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.

Replace Card (Gift Rewards Cards Only)
To transfer balance from a Gift Rewards card to a new Gift Rewards card in the same program:
1. Select a new non-activated Gift Rewards card from your card stock.
   Note: A Card Replacement transaction cannot be performed on cards that have been previously activated, even if the Activation transaction on that card was subsequently voided.
2. Enter the new card number in the New Card Number field.
3. Select the Business and Location to assign the transaction to a Location for tracking purposes.
4. Click Replace Card to submit the request and go to step 5.
   OR
   Click Cancel to go back to the Card Management page.
5. Once the transaction is successfully processed, you will receive a unique transaction number for each the original card and the new card. We recommend that you provide these transaction numbers to the
cardholder. The original card is now deactivated and no longer can be used, while the new card will now have the balance from the original card.

Batch Activation (Gift Card Solutions Only)

Initiate Batch Activation
To complete bulk card activations for your Gift Card Solution:
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.
   Note: Enter the full card number. Depending on your program configuration, the card numbers can have a total length between 8 and 19 digits.
8. Enter the last card number of the range of cards you want to activate in the Card Range End Number field.
   Note: Enter the full card number. The range between the Start and End Numbers must be continuous.
9. Enter 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
   Click Back to select a different Enterprise, Business or Location.
OR
   Click 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
   Click Cancel to go back to the Card Management page.
13. If the number of cards to activate is higher than 500, click Modify to change the request parameters.

   OR

   Click Continue to submit the batch activation request.

   OR

   Click 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 can no longer submit a cancel request to have these activations voided.

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.
   
   The list displays batch activation requests in descending order by request date.
6. 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**

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.

9. Click **Return to Request List** to 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 its right and then click **Submit** to complete the update.
Reports and Extracts

Your Web Portal has powerful reports that will assist in giving you more insights 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 Business level user can only access Business and Location reports for their Business, and a Location level user can only access reports for their specific Location.

Note: Reports availability vary by product and package.

View Reports List

By default, all folders and report lists are displayed when you first login to the 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 Card programs will be located within one report and therefore there are no separate steps to open additional folders when you want to generate reports for different Gift Card 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 the calendar icon).
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 on page 23).
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 on page 23).
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 Card reports, program data are organized by page and therefore you must scroll through the report by page to view data for each Gift Card 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 on page 23).
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 on page 23).
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 Download Report section on page 24 for information 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 generating the same extract multiple times as 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.
3. Select Version from the list on the right menu and click Download. Only the last generated version of the extract will appear.

   OR

   Select the My Download section from the top menu.
4. Select Download Extract from the left menu bar.
5. 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 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 helpful information on the report or extract.
Figure 1: View of a Sample Report

<table>
<thead>
<tr>
<th>Points Transaction Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Program Owner:</strong> Jeff's Training Shop</td>
</tr>
<tr>
<td><strong>Reporting Period:</strong> 01/01/2008 to 31/01/2008</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location Name</th>
<th>Share #</th>
<th>Merchant Id</th>
<th>Debit Amount</th>
<th>Debit Benefit</th>
<th>Credit Amount</th>
<th>Credit Benefit</th>
<th>Net Amount</th>
<th>Net Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>(IT area) a division of Moneris Solutions</td>
<td>00304215074760</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jeff's Training Shop</td>
<td>0030002531167</td>
<td>$0.00</td>
<td>-1,463</td>
<td>$1,142.51</td>
<td>1,142</td>
<td>$1,142.51</td>
<td>-21</td>
<td></td>
</tr>
<tr>
<td>Sale tax</td>
<td>00381002393418</td>
<td>$0.00</td>
<td>-200</td>
<td>$244.00</td>
<td>244</td>
<td>$244.00</td>
<td>-44</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>$0.00</td>
<td>-1,663</td>
<td>$1,386.51</td>
<td>1,386</td>
<td>$1,386.51</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>Jeff's Training Shop Online Business</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jeff's Training Shop Online Location</td>
<td></td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>2</td>
<td>$0.00</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>2</td>
<td>$0.00</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Report Total</td>
<td></td>
<td>$0.00</td>
<td>-1,386</td>
<td>$1,386.51</td>
<td>1,384</td>
<td>$1,386.51</td>
<td>31</td>
<td></td>
</tr>
</tbody>
</table>

1. Go to first page
2. Go to previous page
3. Go to next page
4. Go to last page
5. Go to parent report
6. Zoom
7. Find text
8. Select data export format:
   - CSV (comma delimited) – usually used for exporting data to external tools, such as an email marketing tool.
   - Acrobat (PDF) file – used for printing a report.
   - Excel – used for data analysis or manipulation.
9. Print report
10. Click link to drill-down to more detailed reports – links are blue and underlined.
11. Sort report data
Cardholder Web Portal

In this section, we go over everything you need to know to in case you need to guide a customer through the Cardholder Web Portal.

Note that the Cardholder Web Portal does not apply to the Tracking Program.
The Moneris Cardholder Web Portal

Accessing the Moneris Cardholder Web Portal from your website
To enable your cardholders to easily access the Moneris Cardholder Web Portal, you can simply provide the Portal link on your own website, or a branded URL that re-directs to the Portal link below.

Provide the following Cardholder Web Portal links to your Web Experts:
- For Gift Card Solutions, provide moneris.com/giftcard/cardholder
- For Loyalty programs, provide moneris.com/loyaltycard/cardholder

By clicking on this link, your cardholders will automatically be taken to the main login page of the Cardholder Web Portal.

Branding the Cardholder Web Portal (Pro Gift and Loyalty Programs Only)
You can brand the Cardholder Web Portal with your logo or a header image. If you are running separate Gift and Loyalty programs, you can provide a different header for each program. Please send your image files to your Program Launch Coordinator.

Logo Specifications
- **Image type:** .jpg
- **Width:** 920 pixels maximum
- **Height:** 89 pixels maximum
- **Size:** Max 100 kb maximum

Header Image Specifications
- **Image type:** .jpg
- **Width:** 920 pixels maximum
- **Height:** 89 pixels maximum
- **Size:** Max 100 kb maximum

Cardholder Web Portal Links (Pro Gift and Loyalty Programs Only)
You can have separate links for both your Gift and Loyalty programs if you have different branding for each of your programs. The format of your Cardholder Web Portal links is: https://cp.ernex.com?program=PID where PID refers to your unique Program ID provided to you by Moneris for each of your programs.
For example, a program with a PID of 0000 will have a link of https://cp.ernex.com?program=0000.
Cardholder Registration and Login

Cardholder Web Portal Registration

To register for a Cardholder Web Portal account:

- For Gift cardholders, go to moneris.com/giftcard/cardholder
- For Loyalty cardholders, go to moneris.com/loyaltycard/cardholder
- For Pro Gift or Loyalty cardholders, go to the Cardholder Web Portal link provided by Moneris. The link (URL) should look like: https://cp.ernex.com?program=PID with PID replaced with your Program ID provided to you by Moneris.

1. Click on the Create Online Password link.
2. Enter the Card Number printed on the back of the card in the Card Number field.
3. Enter the Card Validation Code or Password in the Card Password field. These numbers are usually printed underneath a scratch-off foil on the back of a card.
4. Enter a New Password in the New Password field.
5. Enter a New Password again in the Re-enter new password field.
6. Select Security question #1 from the drop down menu.
7. Enter an Answer in the Enter your answer field for Security question #1.
8. Select Security question #2 from the drop down menu.
9. Enter an Answer in the Enter your answer field for Security question #2.
10. Click Register to use the Portal.

Cardholder Web Portal Login

Log in to the Cardholder Web Portal and access cardholder account information after the cardholder has registered for an account (see Cardholder Web Portal Registration section above). Please be aware that:

- Merchants will be supplied with a Cardholder Web Portal link that can be promoted to their customers as the destination for access to the Cardholder Web Portal.
- Cardholders of the merchant’s proprietary Gift & Loyalty programs will be directed to access the Web Portal by each merchant following the merchant’s own preferred method.
- For Pro Gift or Loyalty cardholders, go to the Cardholder Web Portal link provided by Moneris. The link should look like: https://cp.ernex.com?program=PID with PID replaced with your Program ID provided to you by Moneris.

1. Enter the Login ID (use the card number as shown on the card) in the Login field.
2. Enter the Password in the Password field.
3. 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 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 page 17).

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.

My Card – View Card Information, Transaction History, and Add Card to Passbook
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 drop down menu.
4. Click **Go!**.
5. Click on **Details** to view transaction details.

**Add to Passbook (Passbook-enabled programs only)**

To add a card to Passbook application on Apple’s iPhone and iPod touch devices:

1. Enter email to send Passbook card to in the **Enter email** field and click **Send**.  
   OR

2. Open your Passbook application and select **Scan Code** on the application, or open up a QR code reader on your device to scan the QR code on the screen.

*Note:* For security purposes, the QR code will be invalid after 15 minutes. Refresh the page to generate a new active QR code.

**My Profile – Cardholder Profile and Web Portal Login Management**

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.
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.

How to contact us
Moneris Customer Care 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/support or call us at 1-866-319-7450. You can also send us a secure message 24/7 by logging in to Merchant Direct® at moneris.com/mymerchantdirect.

How to order stationery/promotional materials
You can order a number of supplies for your business from Moneris. Please visit us online at shop.moneris.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, Loyalty, and Tracking Program Web Portal Operating Manual. To obtain an updated copy, please go to moneris.com/guides
*MONERIS, MONERIS BE PAYMENT READY & Design and MERCHANT DIRECT are registered trade-marks of Moneris Solutions Corporation. Apple, iPhone, iPod touch, and Passbook are trademarks of Apple Inc., registered in the U.S. and other countries. All other marks or registered trademarks are the property of their respective owners.

© 2018 Moneris Solutions Corporation, 3300 Bloor Street West, Toronto, Ontario, M8X 2X2. All Rights Reserved. This document shall not wholly or in part, in any form or by any means, electronic, mechanical, including photocopying, be reproduced or transmitted without the authorized consent of Moneris Solutions Corporation (“Moneris”). This document is provided for informational purposes only. Neither Moneris nor any of its affiliates shall be liable for any direct, indirect, incidental, consequential or punitive damages arising out of the use of any of the information contained in this document. Neither Moneris or any of its affiliates nor any of our or their respective licensors, licensees, service providers or suppliers warrant or make any representation regarding the use or the results of the use of the information, content and materials contained in this document in terms of their correctness, accuracy, reliability or otherwise.

If you open an account on the Web Portal, you must complete the registration process by providing Moneris with current, complete and accurate information as prompted during the registration process. You are entirely responsible for maintaining the confidentiality of your password and any other account login information. Furthermore, you are entirely responsible for any and all activities that occur under your account. You agree to notify Moneris immediately of any unauthorized use of your account or any other breach of security. Moneris will not be liable for any loss that you may incur as a result of someone else using your password or account, either with or without your knowledge. However, you could be held liable for losses incurred by Moneris or another party if someone else accesses your account.

Your card processing for the Moneris Gift, Loyalty, and Tracking Program is governed by your Moneris Gift and Loyalty Program Agreement. It is your responsibility to ensure that proper card processing procedures are followed at all times. Please refer to your Program Operating Manual(s) for the Moneris Gift, Loyalty, and Tracking Program and your Program Agreement(s) for Gift, Loyalty, and Tracking Program. The Program Operating manuals for the Moneris Gift, Loyalty, and Tracking Program are available for free download at moneris.com/support.