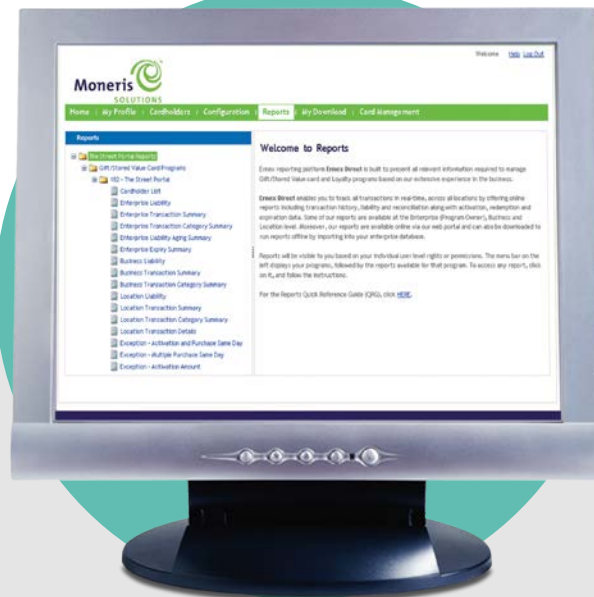




BE PAYMENT READY

# Moneris® Gift Card, Loyalty, and Tracking Programs Web Portal Operating Manual





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**BE PAYMENT READY**

## Need help?

**Web:** [moneris.com/support](https://moneris.com/support)

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Record your Moneris® merchant ID here:

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Loyalty Web

# 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](https://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](https://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](https://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](tel: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 (for Enhanced, Pro, and Tracking Programs Only)

## 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.

User Authority Level	Description	Available Functionalities
Enterprise User	Executive level or at the corporate head office.	<ul style="list-style-type: none"> <li>View and manage Enterprise, Business, Location, and Cardholder level users</li> <li>View and generate Enterprise, Business, and Location level reports and extracts</li> </ul>
Business User	Management level or at a sub-brand, banner or business. <b>Note:</b> Business level users may not be applicable to all programs.	<ul style="list-style-type: none"> <li>View and manage Business, Location, and Cardholder level users</li> <li>View and generate Business and Location level reports and extracts</li> </ul>
Location User	Location manager or a location operator.	<ul style="list-style-type: none"> <li>View and manage Location and Cardholder level users</li> <li>View and generate Location level reports and extracts</li> </ul>

**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.

Role	Description	Available Functionalities
Card Support	User that can make updates to a single card at a time.	<ul style="list-style-type: none"> <li>Update complete profile for a cardholder by making changes to the cardholder's personal and preference information including First and Last Name</li> <li>View transaction details for the card</li> <li>Adjust the balance on a card by increasing or decreasing cash or points</li> <li>Perform a card replacement transaction (Gift Rewards only)</li> </ul>
Cardholder Manager	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.	<ul style="list-style-type: none"> <li>View cardholders' complete profiles</li> <li>Update cardholders' profiles</li> </ul>
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.  <i><b>Note:</b> To enable Cardholder Search for a user, you must also configure the Cardholder User Admin role for the same user.</i>	<ul style="list-style-type: none"> <li>Search for cardholders</li> </ul>
Cardholder User Admin	User with Cardholder Web Portal administration functionalities.	<ul style="list-style-type: none"> <li>Enable or disable cardholders' Web Portal accounts</li> <li>Set cardholders' Web Portal passwords</li> </ul>
Cardholder Viewer	User with access to view card information only.	<ul style="list-style-type: none"> <li>View card status and balance information</li> <li>View card transaction information</li> </ul>

Role	Description	Available Functionalities
Moneris	User that can email for support services through the Web Portal.	<ul style="list-style-type: none"> <li>▪ Email Moneris Support</li> </ul>
POS Manager	User that can deactivate a single card at a time through the Merchant Web Portal.	<ul style="list-style-type: none"> <li>▪ Deactivate cards</li> </ul>
Program Config	User that can create and update an email group that will receive notification for Gift card batch activation events.	<ul style="list-style-type: none"> <li>▪ Create and update an e-mail group that will receive a notification for the following events: <ul style="list-style-type: none"> <li>▪ New batch activation request is submitted</li> <li>▪ Status of an existing batch activation request is changed</li> <li>▪ Batch activation request is cancelled</li> </ul> </li> </ul>
Program Manager	User with Gift card batch activation rights.	<ul style="list-style-type: none"> <li>▪ Conduct and cancel batch Gift card activations of up to 500 cards in real-time on the Web Portal <ul style="list-style-type: none"> <li>▪ Request batch Gift card activations for more than 500 cards</li> <li>▪ View Gift card batch activation history</li> </ul> </li> </ul>
Report Viewer	User that can generate and view reports and extracts.	<ul style="list-style-type: none"> <li>▪ View a list of available reports</li> <li>▪ Generate reports</li> <li>▪ View and print reports</li> </ul>
User Admin	User with Merchant Web Portal administration functionalities.	<ul style="list-style-type: none"> <li>▪ Create a new user for the Merchant Web Portal</li> <li>▪ Modify users' Merchant Web Portal authority levels and roles</li> <li>▪ Enable or Disable users' Web Portal accounts</li> <li>▪ View users' Web Portal accounts</li> <li>▪ Set users' Web Portal passwords</li> </ul>

Role	Description	Available Functionalities
User Search	<p>User other than an admin user that can see which users have been enabled with access to your Merchant Web Portal.</p> <p><b>Note:</b> To enable User Search for a user, you must also configure the User Admin role for the same user.</p>	<ul style="list-style-type: none"> <li>Search users by role, authority level, or user ID</li> </ul>

## 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 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* 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

**Moneris SOLUTIONS**

### Points Transaction Summary

Program Owner: **Jeff's Training Shop** Program: **Rewards (PID: 3153)**  
 Reporting Period: **01/01/2008 to 31/01/2008**

Location Name	Store #	Merchant Id	Debit		Credit		Net	
			Amount	Benefit	Amount	Benefit	Amount	Benefit
<b>Emex - a division of Moneris Solutions</b>								
<a href="#">IB Loyalty Admin Location</a>		0030421807450	\$0.00	0	\$0.00	0	\$0.00	0
<b>Total</b>			\$0.00	0	\$0.00	0	\$0.00	0
<b>Jeff's Training Shop</b>								
<a href="#">Jeff's Training Shop</a>		0030200293187	\$0.00	-1,163	\$1,142.51	1,142	\$1,142.51	-21
<a href="#">Sackville</a>		0030100939348	\$0.00	-200	\$244.00	244	\$244.00	44
<b>Total</b>			\$0.00	-1,363	\$1,386.51	1,386	\$1,386.51	23
<b>Jeff's Training Shop Online Business</b>								
<a href="#">Jeff's Training Shop Online Location</a>			\$0.00	0	\$0.00	2	\$0.00	2
<b>Total</b>			\$0.00	0	\$0.00	2	\$0.00	2
<b>Report Total</b>			\$0.00	-1,363	\$1,386.51	1,388	\$1,386.51	25

- 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](https://moneris.com/giftcard/cardholder)
- For *Loyalty* programs, provide [moneris.com/loyaltycard/cardholder](https://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](https://moneris.com/giftcard/cardholder)
  - For *Loyalty* cardholders, go to [moneris.com/loyaltycard/cardholder](https://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](https://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](https://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](https://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](https://moneris.com/guides)



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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](https://moneris.com/support).