

Moneris® Go portal Migrating your Go portal user account to Moneris Portal Reference Guide



(06/2024)



Need help?

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

Toll-free: 1-866-319-7450

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Getting Started

In this section, we go over everything you need to know before you begin your Moneris Portal migration.

Why you need to migrate to Moneris Portal

We have completed Moneris Go portal's transition to Moneris Portal, a new single sign-on platform for all your merchant needs. Once you migrate your user account to Moneris Portal, you will thereafter access your Moneris Go portal store(s) by logging into Moneris Portal. Through Moneris Portal you will also have access to a variety of other resources.

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

• To begin, please review the information in <u>How to get started</u> (page 6).

How to get started

To ensure a successful migration to Moneris Portal, please review the following steps:

Ensure your mobile device/PC meets the minimum requirements.

- Up-to-date supported browser installed (Google Chrome, Microsoft Edge, and Apple Safari)
- Cookies enabled
- Pop-up blocker disabled
- Internet access

Be prepared to enter these account details.

During the migration process, you will be prompted to:

- Confirm your first name and last name information.
- Create a login password.
- Select three pre-defined security questions and enter a customized answer to each question.
 Note: You must complete this step within 10: 00 minutes of being prompted to do so.
- Enter a 6-digit verification code.

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

Ready to migrate your account to Moneris Portal?

Proceed to <u>Migration steps</u> (page 8).

Migrating your Go portal Account to Moneris Portal

In this section, we describe everything you need to do to migrate your Moneris Go portal user account to Moneris Portal.

Migration steps

Important! Please ensure that you have reviewed the information in <u>How to get started</u> (page 6).

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

Moneris 🕲 Go Portal		⊕ EN
	Log in Email	
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- 2. In the **Email** field, enter the email address that was registered to your Moneris Go portal user account when you activated it, and click on the **Next** button.
- 3. When the **Password** field displays (shown below), enter your Moneris Go portal login password, and click on the **Log in** button.

Moneris 🕲 Go Portal	•	EN
Moners Co Portal	Eog in <your_address@domain.com>∠P Edit Persevord Log in Forgot password7</your_address@domain.com>	EN
Copyright Monens Go Portal yyyy	Moneris.com Terms Of Use Privacy Notice Contact Us Supplies Developer Portal	

4. When "Migrate to Moneris Portal" page displays (shown below), click on the **Migrate** button.

Moneris 🕲 Go Portal							🌐 EN
	Migrate to	Moneris F	Portal				
	Dear Valued Merchar	it,					
	Your account is ready	for migration!					
	Single sign on throug merchant portals.	h Moneris Portal	streamlines access	to all your			
	Click the 'Migrate' bu a few simple steps.	utton below to set	t up access to Mon	aris Portal in			
	Migration is required	and can only be o	deferred temporari	у.			
			Migrate	Defer			
Copyright Moneris Go Portal yyyyy	Moneris.com	Terms Of Use	Privacy Notice	Contact Us	Supplies	Developer Portal	

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

Moneris	
	Confirm the following details
	Email address < you_address@domain.com >
	First Name
	< Firstname >
	Last Name CLastname >
	Language
	English
	Cancel
	Manufacture of the Division Deliver I Connect
	Monens.com terms of Use Privacy Policy support

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

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

- b. In the "Language" drop-down, select the default display language (**English** or **French**) in which to continue the migration.
- c. Click on the **Create** button, and wait for a response.

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

Moneris	
	Create Password
	Please enter a new password and confirm the password.
	New password
	\odot
	Confirm password
	10 or more characters Upper & lower case characters
	At least one number
	⊗ New passwords match
	Cancel Submit
	Moneris.com Terms of Use Privacy Policy Support

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

Note: You may enter the same password as that which you use to log into Moneris Go portal, or you may opt to create a new password. (You can always change the password once you successfully migrate your account.) Regardless, the password must adhere to these requirements:

- 10 or more characters in length
- Include uppercase and lowercase characters
- Include at least one number
- b. In the **Confirm new password** field, re-enter the password.

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

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

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

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

Moneris		
	Time remaining to complete form: <u>10.00</u> Choose a security question that only you can answer. Security questions	
	Security questions	
Select question 1	of 3	
What was the first p	rofessional live performance that you have attended?	v
Your answer		
Select question 2	of 3	
What was your first	pet's name?	v
Your answer		
Select question 3	of 3	
What was the first	ty that you traveled to by plane?	v
Your answer		
	Cancel Submit	
	Moneris.com Terms of Use Privacy Policy Support	

- a. Click on each of the Security question # of # drop-downs, and select a security question.
- b. In each Your answer field, enter an answer to the corresponding security question you selected.
 Note: If you need to reset your Moneris Portal password after your account is migrated, Moneris Portal will prompt you to answer one of these security questions as a means of authenticating your identity.
- c. Click on the **Submit** button, and wait for a response.
- 8. When the "Account has been successfully created" dialog displays (shown below), click on its **Sign in** button.

Aoneris®	
	New account
	Account has been successfully created.
	- Concile
	3 yr m
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9. When the Moneris Portal "Log In" page displays (shown below), proceed to <u>Logging into Moneris Portal</u> (page 14).

Moneris 🗭 Use your Moneris Fortal credentials Use your Merchant Direct v2 creden	Fyou have previously logged in here. Jails if you are logging in to Moneris Portal for the first time.
Log In Ernal Pessword Export your parsword Don't have an account yet?	
Access your ultima	te business guide.
	Explore merchant stories, educational tools and other resources created for businesses just like yours.
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Accessing Your Store(s) via Moneris Portal

In this section, we describe everything you need to do to log into Moneris Portal and access your Moneris Go portal store(s).

Logging into Moneris Portal

Now that you completed the migration steps (see <u>Migration steps</u> starting on page 8) and successfully migrated your account to Moneris Portal, please follow the steps below to confirm that you can successfully log into Moneris Portal and access your Moneris Go portal store(s).

1. Start on the Moneris Portal "Log In" page (shown below).

Moneris	Use your Moneris Portal credentials if you have previously logged in here. Use your Merchant Direct v2 credentials if you are logging in to Moneris Portal for the first time.	English 🗸
Log In Email Password Don't have an account ye	Ecropolytour passwort? t yet? and a source of the first state of th	
	Access your ultimate business guide.	
	Explore merchant stories, educational tools and other resources created for businesses just like yours.	
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Note: You can access this page by visiting https://login.moneris.com/en/login.

- 2. Enter your Moneris Portal credentials:
 - a. In the **Email** field, enter the email address that you registered when you activated your Moneris Go portal account (i.e., this is the same email address that you used previously when logging into Moneris Go portal).
 - b. In the **Password** field, enter the password that you registered when you performed the migration steps (described in the previous section).
 - c. Click on the Log In button, and wait for a response.

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

Moneris		
	Verify Code	
	Verification code has been sent to your inbox. Copy the code into the input box below.	
	Email address	
	y********s@domain.com	
	Verification code	
	Send new code	
	🕕 🗌 Remember my device	
	Cancel Verify code	
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Note: If you want us to send a new code, click on **Send new code**.

- a. Open the "Moneris verification code" message in your inbox, and copy the 6-digit code (shown below) to your device's clipboard.
- b. Paste the code in the "Verify Code" dialog's Verification code field.
 - If you do not want to be prompted to enter a verification code each time you log in from the same device and browser, checkmark the **Remember my device** box in the dialog.

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

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

English version *** La version française suit ***	
Secure your account	
Your Moneris Portal verification code is:	
123456	7
If you did not request the account setup, please contact Moneris at 1-866-319-7450.	
This is automated message. Please do not reply.	
Have suppliered?	
We're here to help	
Columbus and	
Get online support	
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Votre code de vérification Moneris:	
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si vous n'avez pas demande la creation d'un compte, veuillez contacter Moneris a 1-866-319-7450.	
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Vous avez des questions?	
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4. When the "Your portal(s)" page displays (shown below), it means you have successfully migrated your user account to Moneris Portal.

Moneris				Englic Firstname Lastname > ~	
Welcome back,< Firstname	Lastname > !				
Your portal(s) This portal enh device and Mon - Early config settings, user i - Ennal paym transactions. - Realtime clo	Portal Inces your experience and utilization of your Go erits Online : ure & manage your Go device(s) and Moneris Online Jerminsions. Int requests to your customers, process & refund uid reporting.				—"MONERIS GO PORTAL" TILE
Resources	guide Launch		Useful links		
			Trails prevention 101 Tips and tactics to prevent faud. Contact us Talk to business advises for additional support.		
"Start a digital storefront" e-book Build your celine buiness with our step-by-step guide. Download free today [2]	Industry insights blog Ex Stay informed on the latest industry knowledge and practical tips from our experts. Learn now C	cclusive time-limited offer ost your sales and enhance your payment unity and flexibility. Unlock your offer 🖉			
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5. Click on the "Moneris Go portal" tile's **Launch** button (shown above) to start a login session in the Moneris Go portal application.

Note: Once you start a session in Moneris Go portal, you can access your Moneris Go portal store(s) as you normally would following a successful login.

6. Please review Things to note now that your account is migrated (page 17).

Things to note now that your account is migrated

Now that you have successfully migrated your account to Moneris Portal and confirmed access to your Moneris Go portal store(s) (see <u>Logging into Moneris Portal</u> on page 14), please review the following bulleted points:

Using Moneris Portal:

To end your login session on Moneris Portal, click on user account menu
 icon to the right of your name
 as displayed in the Moneris Portal header (shown below), and then click on Logout in the user account
 menu.



 If you forget your login password, use Moneris Portal's "Forgot password?" function. (You access this function on the Moneris Portal "Log In" page.)

Using the Moneris Go portal:

- Whenever you want to access your Moneris Go portal store(s), Log into Moneris Portal (see Logging into Moneris Portal (page 14).
- If you need to change your user account preferences (e.g., Moneris Portal login password, etc.), use Moneris Portal.
- If you have one or more POS terminals and want to change your terminal login username/password, access the terminal username/password settings on your Moneris Go portal store's "My account" page. (Ensure that you access the store to which your terminal(s) are synched.)
- If you create/add a new user in Moneris Go portal, the user will be auto-migrated to Moneris Portal when they activate their user account.
- If you are logged into your Moneris Go portal store and you want to end your login session on the Moneris Go portal, click on the user account tile in the Moneris Go portal header (shown below), and then click on **Return to Moneris Portal** in the menu.



Merchant Support

At Moneris, help is always here for you 24/7.

If you need assistance with your payment processing solution, we're here to help, 24/7

We're only one click away.

- Visit https://www.moneris.com/en/support/products/moneris-portal to download copies of this reference guide.
- Visit **shop.moneris.com** to purchase point-of-sale supplies and receipt paper.
- Visit moneris.com/insights for business and payment news, trends, customer success stories, and quarterly reports & insights.

Need us on-site? We'll be there.

One call and a knowledgeable technician can be on the way. Count on minimal disruptions to your business as our Field Services provide assistance with your payment terminals.

Can't find what you are looking for?

• Call Moneris Customer Care toll-free (available 24/7) at 1-866-319-7450. We'll be happy to help.

You can also send us a secure message 24/7 by logging into Merchant Direct at **moneris.com/mymerchantdirect**.



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