Moneris®
Hosted Tokenization

Creating a profile in Moneris Go portal

Reference Guide
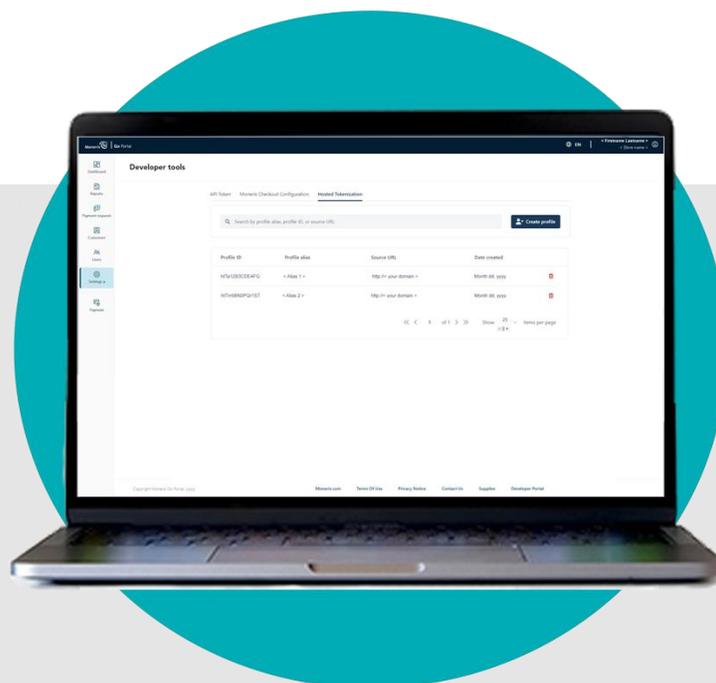
Need help?

Web: www.moneris.com/en/support/moneris-go/moneris-go-portal

Email: onlinepayments@moneris.com

Toll-free: 1-866-319-7450

Record your Moneris merchant ID here:

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Getting Started

In this section, we give you an overview of Moneris hosted tokenization and describe everything you need to know to get started on integrating your ecommerce solution with Moneris hosted tokenization.

What is Moneris hosted tokenization?

Moneris hosted tokenization (HT) is a solution that you can integrate into your ecommerce site if you prefer not to handle credit card numbers directly but still want the ability to fully customize your checkout page appearance.

How it works

Moneris Gateway will, on your behalf, present text boxes on your checkout page. The cardholder then enters their credit card information into the text boxes. When the payment information is submitted through your checkout page, Moneris Gateway generates a temporary token representing the credit card number. This token is then used in an API call to process a financial transaction directly with Moneris. When your server receives a response to the financial transaction, it generates a receipt and allows the cardholder to continue with their online shopping experience.

- To begin, please follow the How to get started steps (page 6).

How to get started

The steps below describe what you need to do to integrate Moneris hosted tokenization into your ecommerce solution.

1 Ensure your Moneris Go portal user account is activated and you can log in and access your Moneris Go portal store (for instructions, refer to the **Moneris Go portal Reference Guide***, which is available on* **https://www.moneris.com/en/support/moneris-go/moneris-go-portal**).

Note: *Your user account must be enabled with full administrative access and user-level permissions so that you can perform the setup and configuration steps as directed below. (Contact your store administrator if you need to have these permissions enabled.)*

2 Review and configure your ecommerce solution per the specifications in the **Hosted Tokenization Merchant Integration Guide**. (This guide is available on the Moneris Developer Portal at **https://developer.moneris.com**.)

Note: *If you need to view or copy your store's API token, see* API token *(page 13).*

3 Create the hosted tokenization profile (see Creating a Moneris hosted tokenization profile on page 8).

Managing Your Hosted Tokenization Profiles

In this section, we describe everything you need to know to manage your Hosted Tokenization profile from the Moneris Go portal.

Creating a Moneris hosted tokenization profile

The steps below describe how to create a new Moneris hosted tokenization profile.

Important! To integrate Moneris hosted tokenization into your ecommerce solution, you need to create and configure your hosted tokenization profile in conjunction with developing your ecommerce solution according to Moneris' integration specifications as outlined in How to get started (page 6).

1. Log into the Moneris Go portal, and access the store through which you want to create a hosted tokenization profile. (For login and store navigation instructions, refer to the *Moneris Go portal Reference Guide* available on **https://www.moneris.com/en/support/moneris-go/moneris-go-portal**.)

2. On the sidebar menu (shown here), click on **Settings** > **Developer tools**.

    Note: If the sidebar menu is not displayed on your screen, click on the "menu" ☰ *icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*

3. When the "Developer tools" page displays, click on the *Hosted Tokenization* tab to display the hosted tokenization control panel page (shown below).

    Note: Any saved profiles are listed on this page.
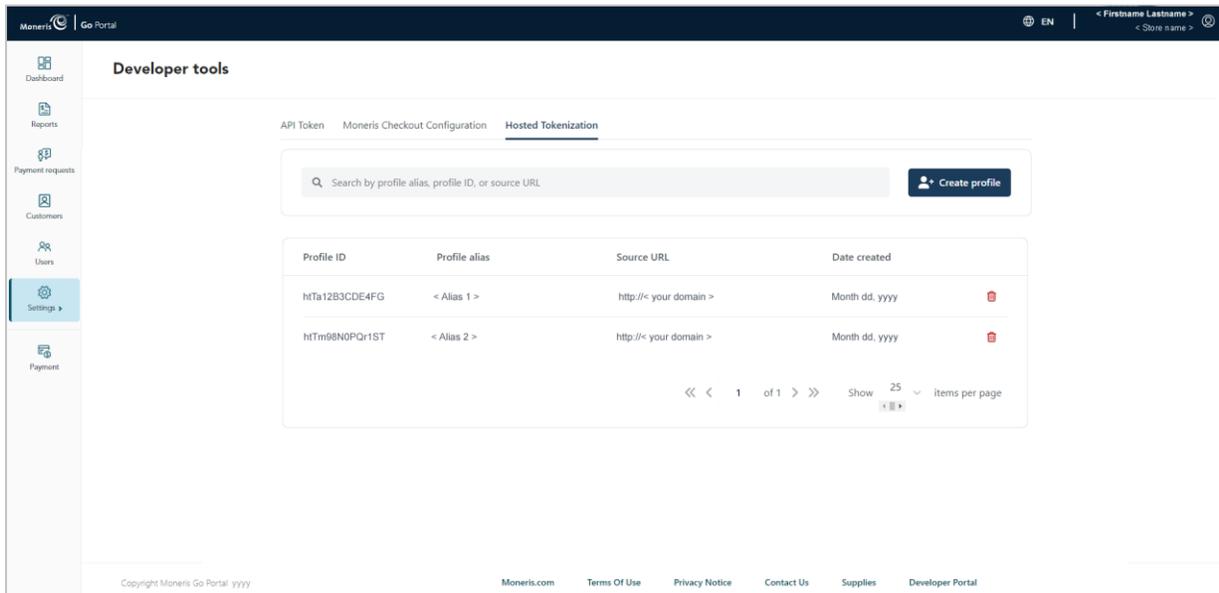
4. Click on the **Create profile** button.

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5. When the "Create profile" window displays (shown here), do the following:

   a. In the **Source URL** field, enter the address for the main outer page that will send transactions to Moneris.

   b. In the **Profile alias** field, enter a customized alias that describes the profile.

   Note: A unique alpha-numeric profile ID will be assigned to the profile once it is created.

   c. Click on the **Create profile** button.

6. When the "New profile" window displays (shown here), do the following:

   a. If you want to copy the profile ID to your clipboard now, click on the **Copy** 🗗 icon in the window.

   Note: This ID must be included in your HTML iFrame code as specified in the integration guide.

   b. When you are finished, click on the **OK** button to close the window.

7. When you confirm that the new profile is listed in the profiles list, the operation is complete.

   Note: The profile alias, profile ID, and source URL are displayed in the profiles list.

Deleting a Moneris hosted tokenization profile

Follow the steps below to delete a Moneris hosted tokenization profile.

Important! Please ensure that you perform this operation per your ecommerce solution's integration requirements. A profile's unique ID is used in the iFrame code. You must develop your ecommerce solution per Moneris' integration specifications as outlined in <u>How to get started</u> (page 6).

1. Log into the Moneris Go portal, and access the store containing the hosted tokenization profile that you want to delete. (For login and store navigation instructions, refer to the ***Moneris Go portal Reference Guide*** available on **https://www.moneris.com/en/support/moneris-go/moneris-go-portal**.)

2. On the sidebar menu (shown here), click on **Settings** > **Developer tools**.

   Note: If the sidebar menu is not displayed on your screen, click on the "menu" ☰ *icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*

3. When the "Developer tools" page displays, click on the ***Hosted Tokenization*** tab to display the hosted tokenization control panel page (shown below).

4. Locate the hosted tokenization profile that you want to delete, and click on its **Delete** 🗑 icon.

   *Note: To retrieve a specific profile, enter a full or partial alias, ID, or URL in the **Search by profile alias, profile ID, or source URL** field.*

   *To change the number of profiles listed on a page, click on the "Show # items per page" drop-down, and select a number (**10, 25**, or **50**). To advance to the next page or last page, click on the **Next page >** icon or the **Last page >>** icon respectively. To go back to the previous page or the first page, click on the **Previous <** icon or the **First page <<** icon respectively.*

5. When the "Delete profile" dialog displays, click on its **Yes** button.
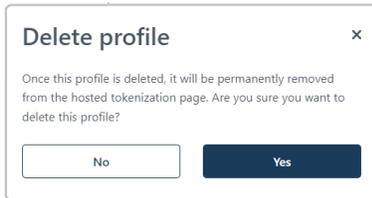
6. When the "Profile deleted successfully" response displays, the operation is complete.

   Note: *The deleted profile will be de-listed from the profiles list.*

Appendix
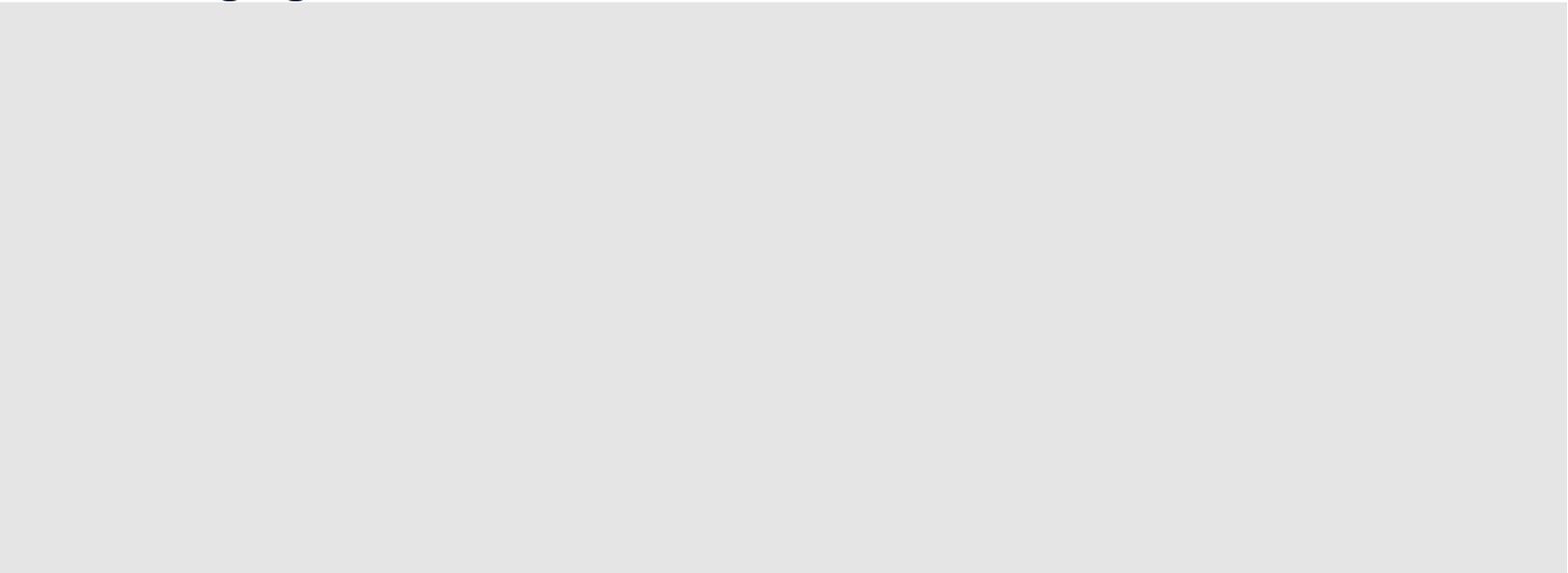
API token

The steps below describe how to view and copy your Moneris Go portal store's API token.

Note: *The API token is a unique alphanumeric value that is assigned to every Moneris Go portal store. The API token is used to authenticate a store and facilitate ecommerce transactions through that store. For information on how to use the API token in your Moneris hosted tokenization integration, refer to the* ***Merchant Integration Guide - Hosted Payment Page*** *(see* How to get started *on page 6).*

1. Log into the Moneris Go portal, and access the store containing the API token that you want to view or copy. (For login and store navigation instructions, refer to the **Moneris Go portal Reference Guide** available on **https://www.moneris.com/en/support/moneris-go/moneris-go-portal**.)

2. On the sidebar menu (shown here), click on **Settings** > **Developer tools**.

    Note: *If the sidebar menu is not displayed on your screen, click on the "menu"* ☰ *icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.*

3. When the "Developer tools" page displays, you should see the "API Token" module (shown below), which lists your store's API token and store ID.

    Note: *If the "API Token" module is not displayed, click on the* ***API token*** *tab to display the module.*

    Important! To prevent your API token from being compromised, do not share it over email, text message, etc.
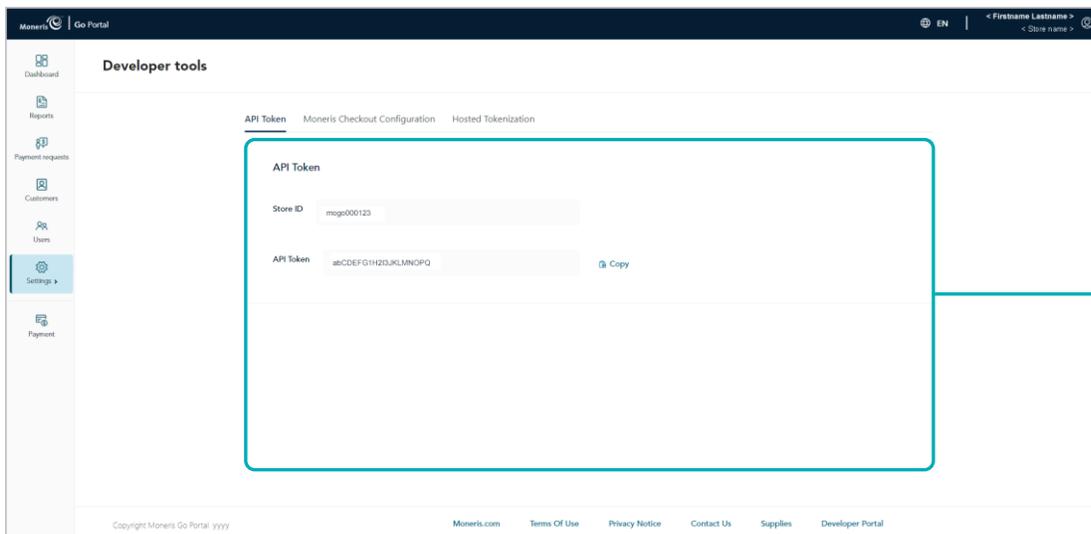
"API TOKEN" MODULE

4. If you want to copy the API token to your device's clipboard:

    a. Click on the **Copy** ⧉ icon.

    b. When the "API Token copied" response displays, the operation is complete.

    Important! To prevent your API token from being compromised, do not share it over email, text message, etc.

Merchant Support

At Moneris, help is always here for you.

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/moneris-go/moneris-go-portal** to:

    - download additional copies of this guide
    - download the *Moneris Go portal Reference Guide* and to access the online help version of the documentation

- Visit the Moneris Developer Portal (**https://developer.moneris.com/**) to download/view:

    - integration guides
    - APIs

- 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 (available 24/7) toll-free at **1-866-319-7450**, or email **onlinepayments@moneris.com**. We'll be happy to help.

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

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