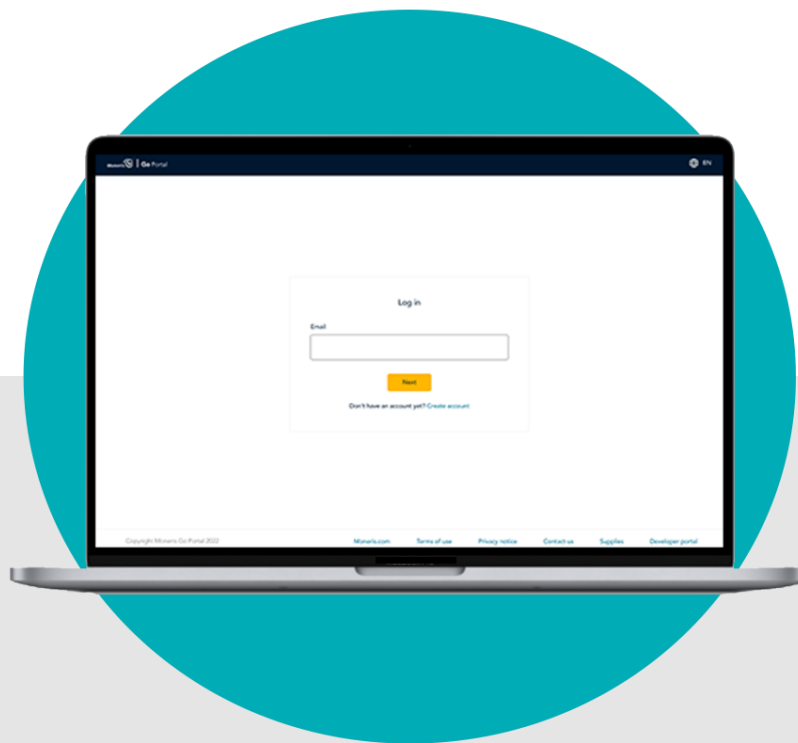




Moneris[®] Go portal

Reference Guide





Need help (general)?

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

Toll-free: 1-866-319-7450

Need help (using Go portal feature/function)?

Log into the Moneris Go portal, and use the portal feedback form
(see [Sending feedback/requesting assistance while logged in](#) on page 213)

Record your Moneris® merchant ID here:

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Getting Started

In this section, we go over everything you need to do so that you can start using the Moneris Go portal.

What is Moneris Go portal?

Moneris Go portal is an application that can help you take your business wherever you go. Moneris Go portal gives you a unified experience, whether you choose to log in through a web browser (www.monerisgo.com) or your Moneris Go terminal.

Moneris Go portal features include: secure, user-friendly interface; compatibility with all mobile devices (cellphone, tablet, or desktop); compliance with the ***Accessibility for Ontarians with Disabilities Act*** (AODA); support for English and French language; access to a dashboard and real-time sales and transactional reports; virtual terminal to complete and refund transactions and send payment requests; Vault customer profiles management; and user and roles management for terminals and the portal.

How to use this guide

This guide describes how to use the features and functions of the Moneris Go portal, including how to set up your user account for access to the portal. To begin, please follow the [How to get started](#) steps (page 9).

How to get started

The following 1-2-3 steps describe what you need to do to set up your user account and start using Moneris Go portal.

1 Ensure your mobile device/PC meets the minimum requirements

- Up-to-date supported browser installed (Google Chrome, Microsoft Edge, and Apple Safari)
- Cookies enabled
- Internet access
- Valid email address (for use in setting up your Moneris Go portal or Moneris Portal user account)

2 Set up your account

Are you the primary user?

The primary user owns the merchant account.

Signing up for merchant account via digital enrollment	Signing up for merchant account via open enrollment
<p>a. If you are a prospective Moneris merchant, please enroll for your merchant account using the Moneris online order portal (visit https://ordernow.moneris.com/).</p> <p>b. Once you are successfully enrolled and have set up your Moneris Portal user account, proceed to the next step.</p>	<p>a. Contact us to establish your merchant account. Note: <i>You may already be currently enrolled into one or more Moneris merchant accounts.</i></p> <p>b. Sign up for Moneris Go portal access (see Signing up for Moneris Go portal access on page 10).</p> <p>c. Activate your Moneris Go portal user account (see Activating your Moneris Go portal user account on page 12).</p> <p>d. Add a store to the primary user account (see Adding the first store to the primary user account on page 20). Note: <i>You will need your 13-digit merchant ID and store ID (these IDs were sent to you in your Moneris welcome email).</i></p>

Are you a secondary user?

A secondary user is a person whose Moneris Go portal user account was added/registered by another Moneris Go portal user.

- a. Activate your user account (see [Activating your Moneris Go portal user account](#) on page 12).

3 Ready to log in and use the Moneris Go portal?

You can log in and start using the Moneris Go portal features and functions (e.g., define your store settings, add new users, perform financial transactions, etc.).

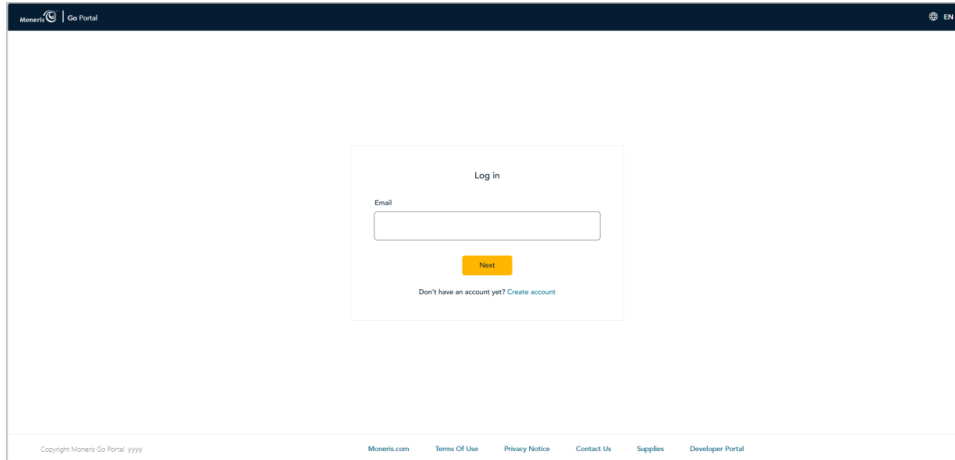
- See [List of Moneris Go portal features and functions](#) (page 22).

Signing up for Moneris Go portal access

The steps below describe how to sign up for Moneris Go portal access. This sign-up process involves creating your Moneris Go portal user account.

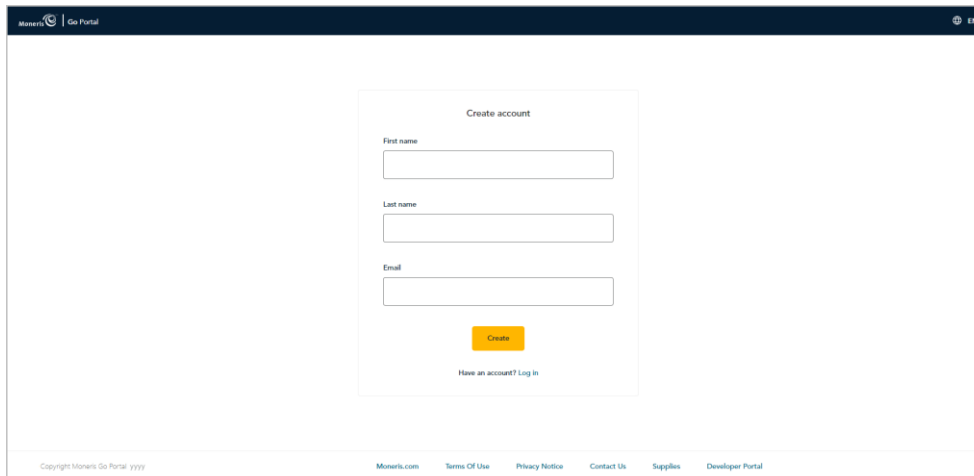
Note: *This procedure is applicable only if you are the primary user (the merchant account holder) who enrolled for their Moneris merchant account via the open enrollment process (see [How to get started](#) on page 9).*

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



The screenshot shows the Moneris Go Portal "Log in" page. At the top, there is a dark blue header with the Moneris logo and "Go Portal" text, and a language selector set to "EN". The main content area is white and contains a "Log in" form. The form has a title "Log in", an "Email" label, a text input field, and a yellow "Next" button. Below the button, there is a link: "Don't have an account yet? [Create account](#)". At the bottom of the page, there is a footer with "Copyright Moneris Go Portal yyyy" on the left and a navigation menu with links for "Moneris.com", "Terms Of Use", "Privacy Notice", "Contact Us", "Supplies", and "Developer Portal" on the right.

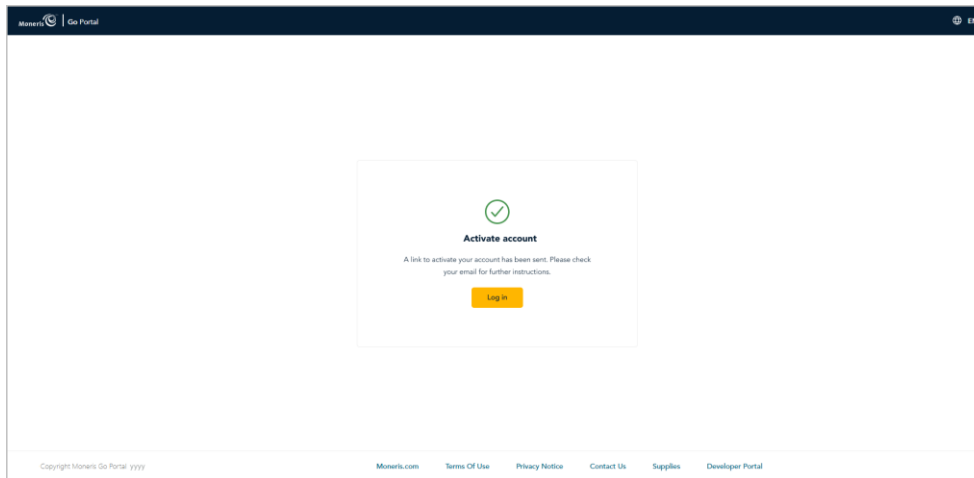
2. Click on **Create account**.
3. When the "Create account" page displays (shown below), fill in the required fields:



The screenshot shows the Moneris Go Portal "Create account" page. At the top, there is a dark blue header with the Moneris logo and "Go Portal" text, and a language selector set to "EN". The main content area is white and contains a "Create account" form. The form has a title "Create account", three input fields labeled "First name", "Last name", and "Email", and a yellow "Create" button. Below the button, there is a link: "Have an account? [Log in](#)". At the bottom of the page, there is a footer with "Copyright Moneris Go Portal yyyy" on the left and a navigation menu with links for "Moneris.com", "Terms Of Use", "Privacy Notice", "Contact Us", "Supplies", and "Developer Portal" on the right.

- a. In the **First name** field, enter your given name.
- b. In the **Last name** field, enter your surname.
- c. In the **Email** field, enter your email address.
Note: *Moneris Go will send your account activation link to this address.*
- d. Click on the **Create** button.

- When the "Activate account" page displays (shown below), it means a link to activate your account has been sent to you.



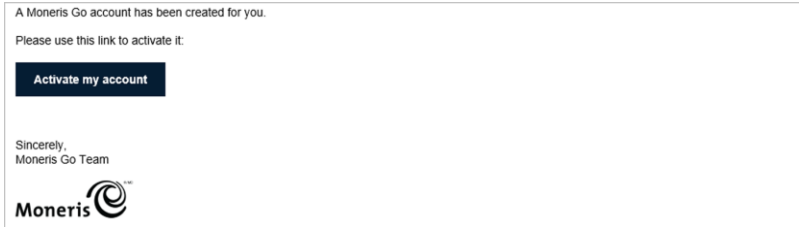
- Check your email inbox to confirm that you received your Moneris Go "User account activation" email.
- Continue in [Activating your Moneris Go portal user account](#) (page 12).

Activating your Moneris Go portal user account

If you received a Moneris Go activation email in your inbox (see [How to get started](#) on page 9), follow the steps below to activate your Moneris Go portal user account and auto-migrate it to Moneris Portal.

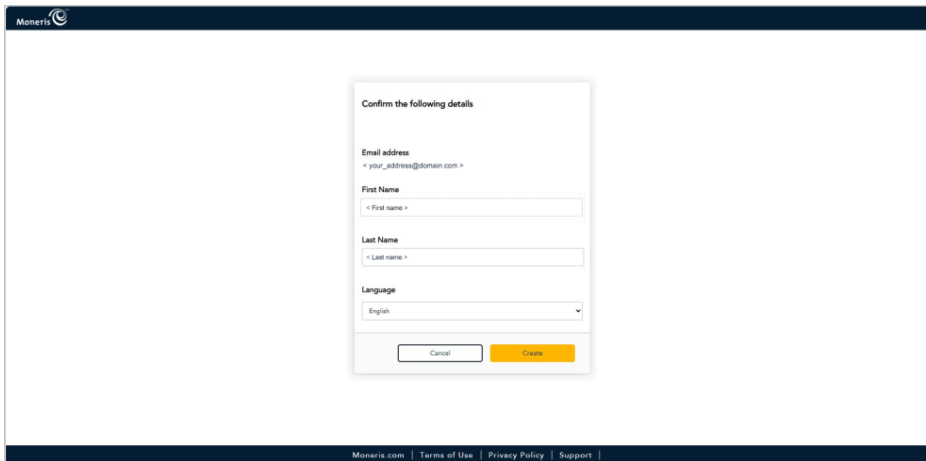
1. Open the "User account activation" email in your inbox, and click on the message's **Activate my account** link/button (shown below).

Note: *If you did not receive your activation email, see [Troubleshooting issues](#) (page 212).*

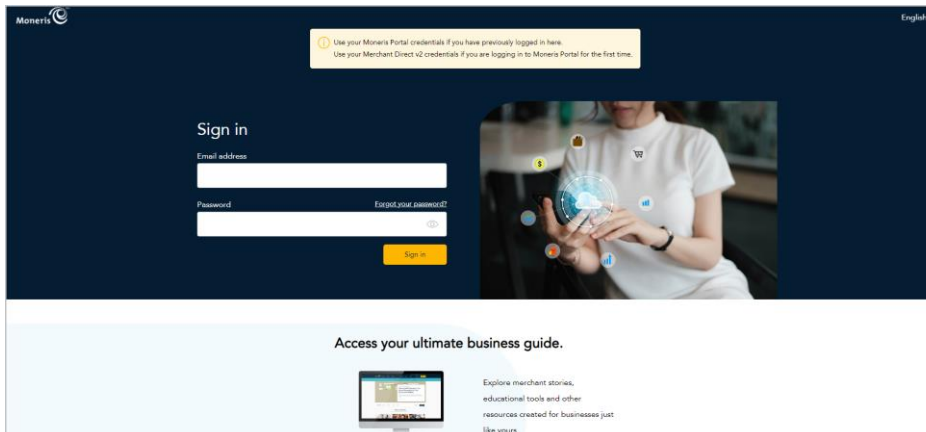


2. Do one of the following:

- If the "Confirm the following details" dialog displays (shown below), continue in [Activating a Moneris Go portal user account and auto-migrating it to Moneris Portal](#) (page 13).



- If the Moneris Portal "Sign in" page displays (shown below), continue in [Activating a Moneris Go portal user account and auto-migrating a Merchant Directv.2 account to Moneris Portal](#) (page 18).



Activating a Moneris Go portal user account and auto-migrating it to Moneris Portal

If you clicked on your user account activation link (see [Activating your Moneris Go portal user account](#) on page 12) and were directed to the "Confirm the following details" dialog (shown below), it means we have identified you as a "Go portal-only" account holder. Follow the steps below to complete your account activation and auto-migration to Moneris Portal, our new single sign-on platform.

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

- 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.

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

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

Note: 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.

3. 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: 10:00

Choose a security question that only you can answer.

Security questions

Select question 1 of 3

What was the first professional live performance that you have attended?

Your answer

Select question 2 of 3

What was your first pet's name?

Your answer

Select question 3 of 3

What was the first city that you traveled to by plane?

Your answer

Cancel Submit

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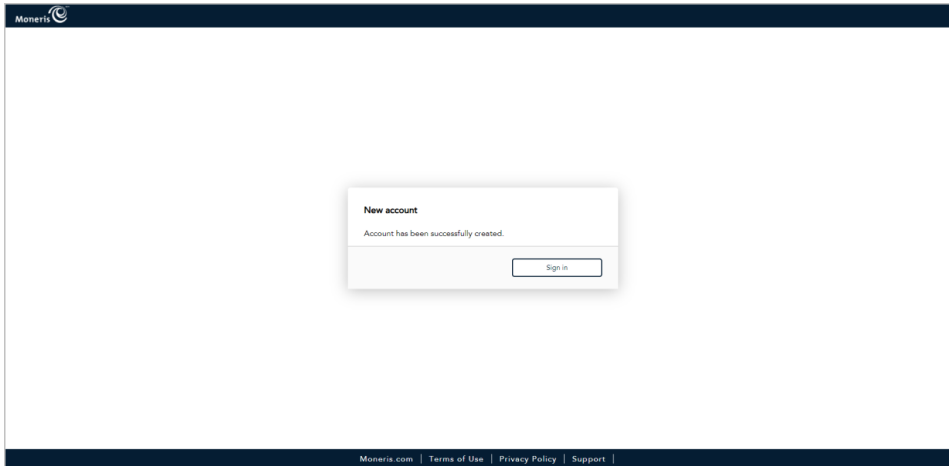
a. Click on each of the **Security question # of #** drop-downs, and select a security question.

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.

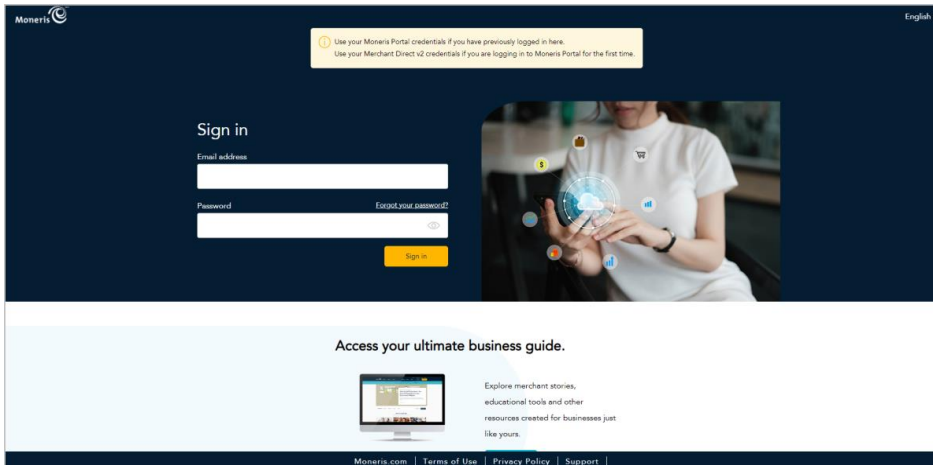
c. Click on the **Submit** button, and wait for a response.

4. When the "Account has been successfully created" dialog displays (shown below), click on its **Sign in** button.



5. When the Moneris Portal "Sign in" page displays (shown below), enter your Moneris Portal credentials:

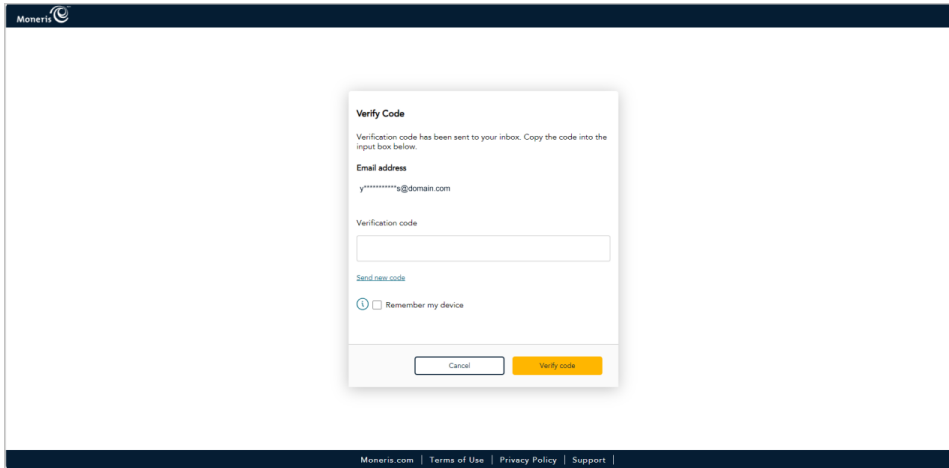
Note: You can access this page by visiting <https://login.moneris.com/en/login>.



- In the **Email address** field, enter the email address to which we sent your account activation email.
- In the **Password** field, enter the password that you created in step 2.
- Click on the **Sign in** button, and wait for a response.

- 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 sign-in email address. Do the following:

Note: If you want us to send a new code, click on **Send new code**.



- Open the "Moneris verification code" message in your inbox, and copy the 6-digit code (shown below) to your device's clipboard.

- 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 sign in from the same device and browser, checkmark the **Remember my device** box in the dialog.

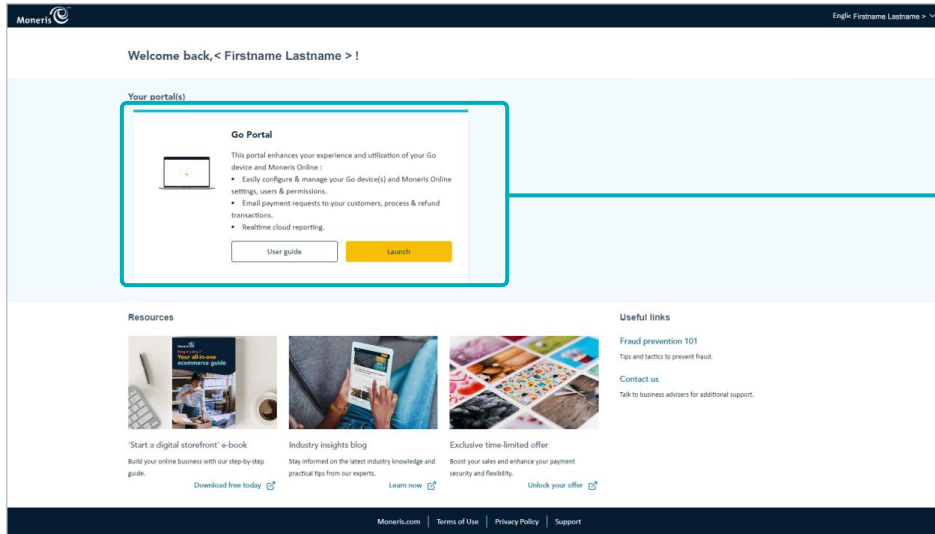
Note: If enabled (checkmarked), this setting is effective up to 30 days so long as you sign in from the same device and browser. After 30 days has elapsed, Moneris Portal will again prompt you for 2-factor authentication. When this happens, you may opt to re-enable the "Remember my device" setting.

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



6-DIGIT CODE

- When the "Your portal(s)" page displays (shown below), it means you have successfully activated and migrated your user account to Moneris Portal.



"GO PORTAL" TILE

- Click on the "Go portal" tile's **Launch** button (shown above) to start a login session in the Moneris Go portal application.
- Continue in [Accessing a store after logging into Moneris Go portal](#) (page 29).

Activating a Moneris Go portal user account and auto-migrating a Merchant Direct.v2 account to Moneris Portal

If you clicked on your user account activation link (see [Activating your Moneris Go portal user account](#) on page 12) and were directed to the Moneris Portal "Sign in" page, it means we have identified you as a Merchant Direct.v2 account holder. Follow the steps below to complete your Moneris Go portal user account activation and simultaneously migrate your Merchant Direct.v2 account to Moneris Portal, our new single sign-on platform.

1. When the Moneris Portal "Sign in" page displays (shown below), do the following:

Note: You can also access the sign-in page by visiting <https://login.moneris.com/en/login>.

- a. In the **Email address** field, enter the email address that you registered when you activated your Merchant Direct.v2 account (i.e., this is the same address that you use to sign into Merchant Direct.v2).
 - b. In the **Password** field, enter the password that you use to sign into Merchant Direct.v2.
 - c. Click on the **Sign in** button, and wait for a response.
2. When the "Verify Code" dialog displays (shown below), it means we have sent a 6-digit authentication code to your inbox. Do the following:

Note: If you want 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 sign in from the same device and browser, checkmark the **Remember my device** box in the dialog.

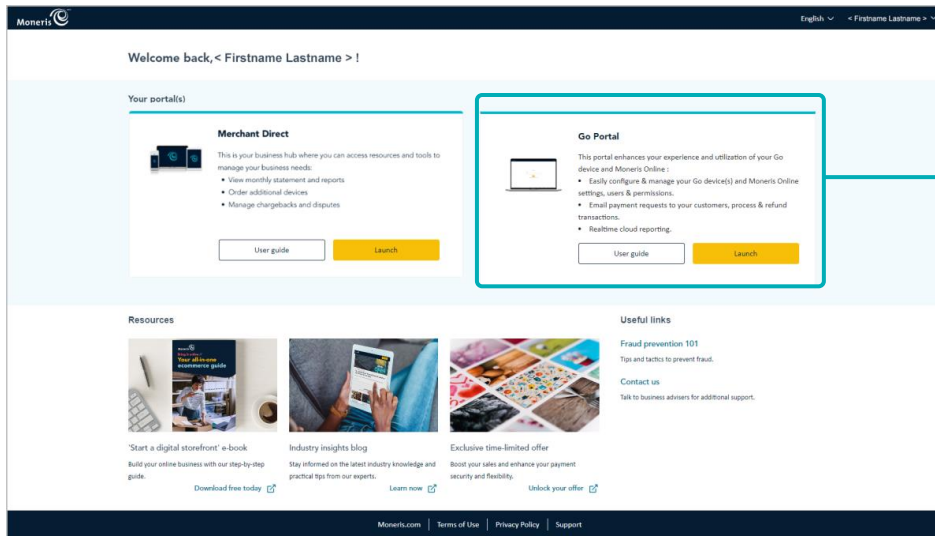
Note: *If enabled (checkmarked), this setting is effective up to 30 days so long as you sign in from the same device and browser. After 30 days has elapsed, Moneris Portal will again prompt you for 2-factor authentication. When this happens, you may opt to re-enable the "Remember my device" setting.*

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



3. When the "Your portal(s)" page displays (shown below), click on the "Go Portal" tile's **Launch** button to start a login session in the Moneris Go portal application.

Note: *You can now also access your Merchant Direct.v2 account from Moneris Portal.*



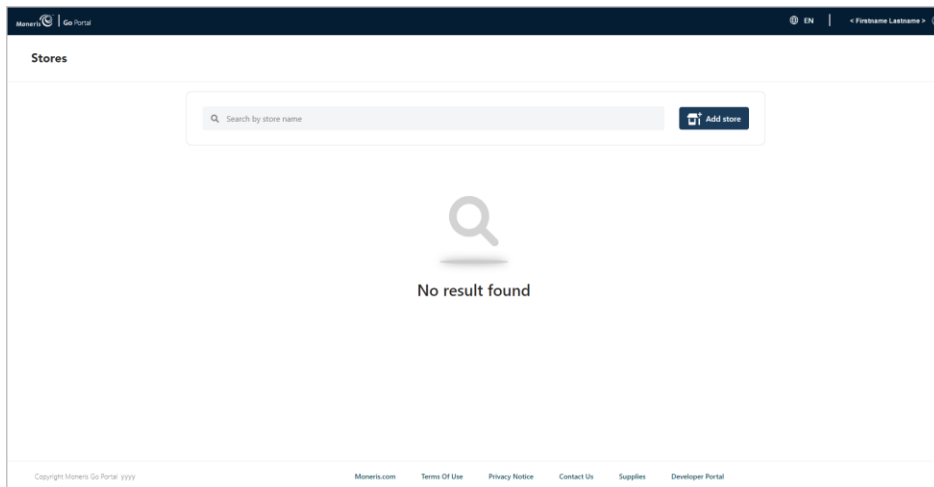
4. Continue in [Accessing a store after logging into Moneris Go portal](#) (page 29).

Adding the first store to the primary user account

If you are the merchant account holder/primary user and you have just activated your Moneris Go portal user account and logged into Moneris Go portal via Moneris Portal for the first time (see [Activating your Moneris Go portal user account](#) on page 12), follow the steps below to add/link the first store to your Moneris Go portal user account.

Note: *This procedure is applicable only if you enrolled for your merchant account via the open enrollment process. After you complete this procedure, you will have access to all the features of your Moneris Go portal store, and you can subsequently allow new users to access and use the store.*

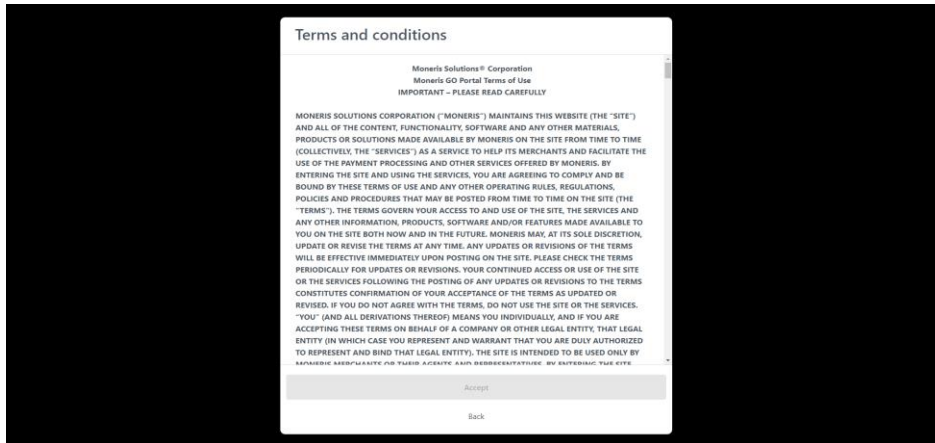
1. On the "Stores" page (shown below), click on the **Add store** button.



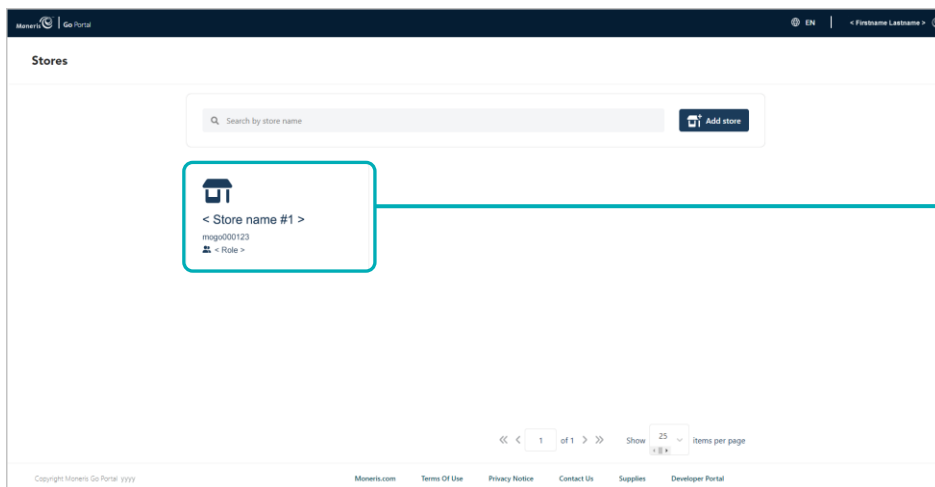
2. When the "Add store" window displays (shown here), fill in the fields with the required IDs as provided by Moneris:

- a. In the **Store ID** field, enter the store ID of the store that you want to add.
- b. In the **Merchant ID** field, enter your 13-digit merchant ID.
- c. Click on the **Submit** button.

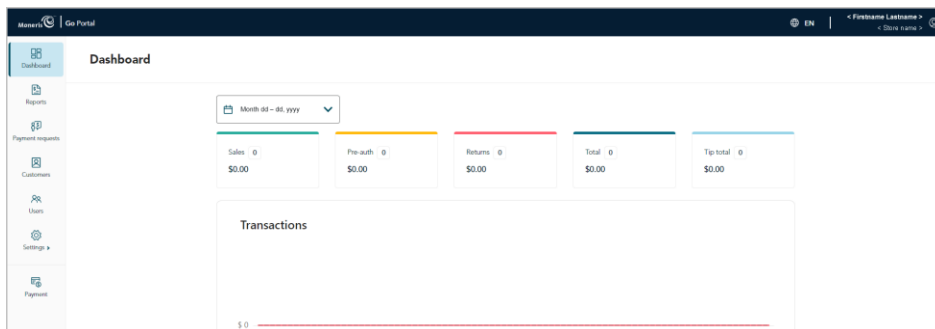
- If the "Terms and conditions" page displays (shown below), scroll through and read the terms, and then click on the **Accept** button.



- If the "Stores" page displays (shown below), click on the store tile.



- When the "Dashboard" page displays (shown below), it means you have successfully added and accessed your store.



- You can start using the store's features and functions (e.g., define your store settings, add new users, perform financial transactions, etc.). See [List of Moneris Go portal features and functions](#) (page 22).

List of Moneris Go portal features and functions

This section lists supported Moneris Go features and functions, including references to procedures that will guide you on how to use those features and functions.

Moneris Go portal access / store access

Action	See procedure:
Log in	Logging into the Moneris Go portal (page 27)
Log out	Logging out of the Moneris Go portal (page 40)
Reset login password	Forgot your login password? (page 31)
Move between stores	Using My Stores (page 36)
Add another store	Adding another store to the primary user account (page 38).

Language

Preference	See procedure:
Change default display language	Changing the default display language (page 35)

Financial transactions

Transaction type	Tender ¹	See procedure:
Purchase	credit	Purchase with credit card: manual entry (page 43)
Purchase	cash	Purchase with cash (page 45)
Preauthorization	credit	Preauthorization with credit card: manual entry (page 46)
Completion	credit	Completion with credit card: manual entry (page 48)
Void	credit	Void: manual entry (page 52)
Refund	credit/cash	Refund: manual entry (page 55)
Independent Refund	credit	Independent Refund with credit card: manual entry (page 58)

Reporting & receipts (financial transactions)

Action	See procedure:
View detailed transactions report	Financial transactions report (page 63)
View graphical summary	The dashboard (page 61)
Send/print transaction receipt	Sending/printing a transaction receipt (page 81)

¹ Some debit card brands may support manual entry for this transaction.

Payment requests

Action	See procedure:
Create payment request	Creating a payment request (page 89)
Cancel payment request	Cancelling a payment request (page 98)
Delete payment request	Deleting a payment request (page 96)
Resend payment request	Resending a payment request (page 93)
Save payment request draft	Saving a payment request as a draft (page 95)
View payment requests report	Payment requests report (page 99)

Vault customer profiles

Action	See procedure:
Create a profile	Creating a Vault customer profile (page 108)
Update a profile	Updating a Vault customer profile (page 111)
Delete a profile	Deleting a Vault customer profile (page 113)
View profiles report	Vault customer profiles report (page 114)
View transactions linked to a profile	Financial transactions associated with a Vault customer profile (page 119)
Export a report	Exporting a Vault customer profiles report (page 116)

My account preferences: Moneris Portal user

Preference	See procedure:
Change personal name identification	Changing your name information: Moneris Portal user (page 125)
Change portal login password	Changing your Moneris Go portal login password: Moneris Portal user (page 126)
Change terminal login password	Changing your terminal login password: Moneris Portal user (page 127)
Change terminal login username	Changing your terminal login username: Moneris Portal user (page 128)

My account preferences: unmigrated user

Preference	See procedure:
Change personal name identification	Changing your name information: unmigrated user (page 131)
Change portal login password	Changing your Moneris Go portal login password: unmigrated user (page 132)
Change terminal login password	Changing your terminal login password: unmigrated user (page 134)
Change terminal login username	Changing your terminal login username: unmigrated user (page 135)

Store settings

Payment field	See procedure:
Billing address (address verification)	Billing address: store settings (page 138)
Postal code (address verification)	Postal code: store settings (page 140)
Customized field	Custom ID: store settings (page 142)

User accounts/roles management

Action	See procedure:
Add user account	Adding a new user account (page 145)
Modify user account	Modifying an active user account (page 148)
Deactivate user account	Deactivating a user account (page 152)
Reactivate a user account	Reactivating a user account (page 154)
Add a user role	Adding a new user role (page 157)
Delete a user role	Deleting a user role (page 162)
Modify a user role	Modifying a user role (page 159)

Moneris Go (A920) terminal management

Feature	See procedure:
Automatic sign-out time	Moneris Go terminal: general settings (page 168)
Display timeout	Moneris Go terminal: general settings (page 168)
Sign out after transaction	Moneris Go terminal: general settings (page 168)
Report reset time	Moneris Go terminal: general settings (page 168)
Manual entry transactions	Moneris Go terminal: transaction settings (page 171)
Pass terminal timer	Moneris Go terminal: transaction settings (page 171)
Surcharge settings	Moneris Go terminal: transaction settings (page 171)
Transaction identifier (custom)	Moneris Go terminal: transaction settings (page 171)
Receipts	Moneris Go terminal: receipt settings (page 174)
Print delay (receipt)	Moneris Go terminal: receipt settings (page 174)
Print QR code (receipt)	Moneris Go terminal: receipt settings (page 174)
Receipt format options	Moneris Go terminal: receipt settings (page 174)
No. of Merchant copies (receipt)	Moneris Go terminal: receipt settings (page 174)
Header/footer (Receipt)	Moneris Go terminal: receipt settings (page 174)
Cashback settings	Moneris Go terminal: cashback settings (page 180)
Tip settings	Moneris Go terminal: tip settings (page 183)

Moneris Go Plus (DX8000) terminal management

Feature	See procedure:
Automatic sign-out time	Moneris Go Plus terminal: general settings (page 187)
Display timeout	Moneris Go Plus terminal: general settings (page 187)
Sign out after transaction	Moneris Go Plus terminal: general settings (page 187)
Report reset time	Moneris Go Plus terminal: general settings (page 187)
Manual entry transactions	Moneris Go Plus terminal: transaction settings (page 190)
Pass terminal timer	Moneris Go Plus terminal: transaction settings (page 190)
Surcharge settings	Moneris Go Plus terminal: transaction settings (page 190)
Transaction identifier (custom)	Moneris Go Plus terminal: transaction settings (page 190)
Receipts	Moneris Go Plus terminal: receipt settings (page 193)
Print delay (receipt)	Moneris Go Plus terminal: receipt settings (page 193)
Print QR code (receipt)	Moneris Go Plus terminal: receipt settings (page 193)
Receipt format options	Moneris Go Plus terminal: receipt settings (page 193)
No. of Merchant copies (receipt)	Moneris Go Plus terminal: receipt settings (page 193)
Header/footer (Receipt)	Moneris Go Plus terminal: receipt settings (page 193)
Cashback settings	Moneris Go Plus terminal: receipt settings (page 193)
Tip settings	Moneris Go Plus terminal: tip settings (page 202)

Developer tools

Integration type	See procedure:
Moneris Checkout	Moneris Checkout (page 208)
Hosted tokenization	Hosted tokenization (page 208)
API token (view/copy)	API token (page 209)



Logging in/ Logging out

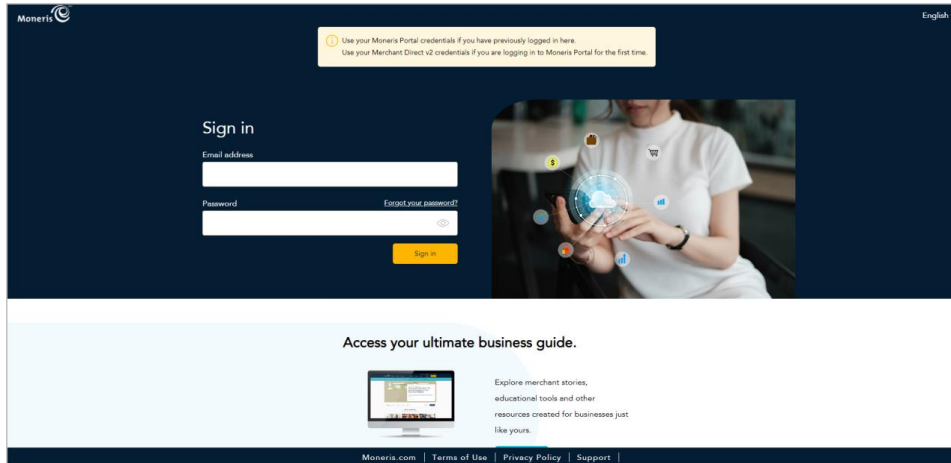
In this section, we go over everything you need to know to log into/log out of the Moneris Go portal.

Logging into the Moneris Go portal

The steps below describe how to start a session on the Moneris Go portal and access your store.

Are you a Moneris Portal user?

1. Visit <https://login.moneris.com/en/login> to start on the Moneris Portal "Sign in" page (shown below).



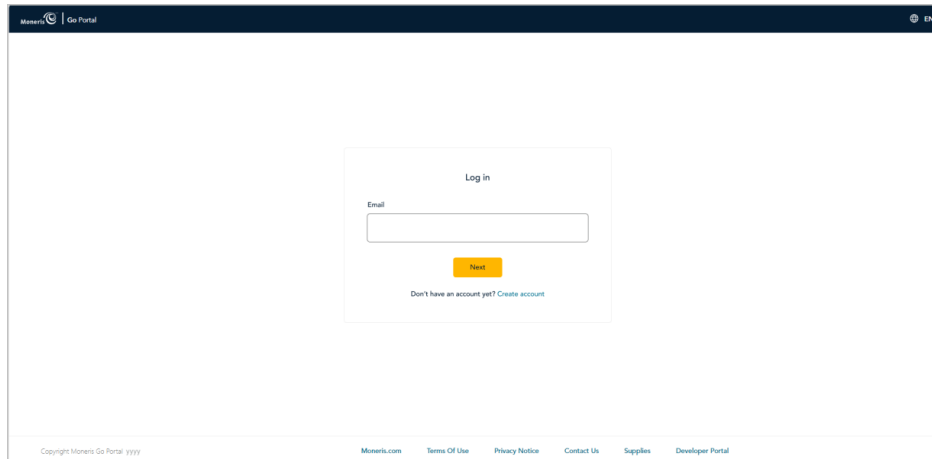
2. Sign into Moneris Portal, and launch the **Go Portal** application to start your login session on the Moneris Go portal (continue in [Accessing a store after logging into Moneris Go portal](#) on page 29).

Note: For Moneris Portal documentation, visit <https://www.moneris.com/en/support/products/moneris-portal>.

Are you an unmigrated user?

An unmigrated user is a Moneris Go portal user whose user account is not yet migrated to Moneris Portal.

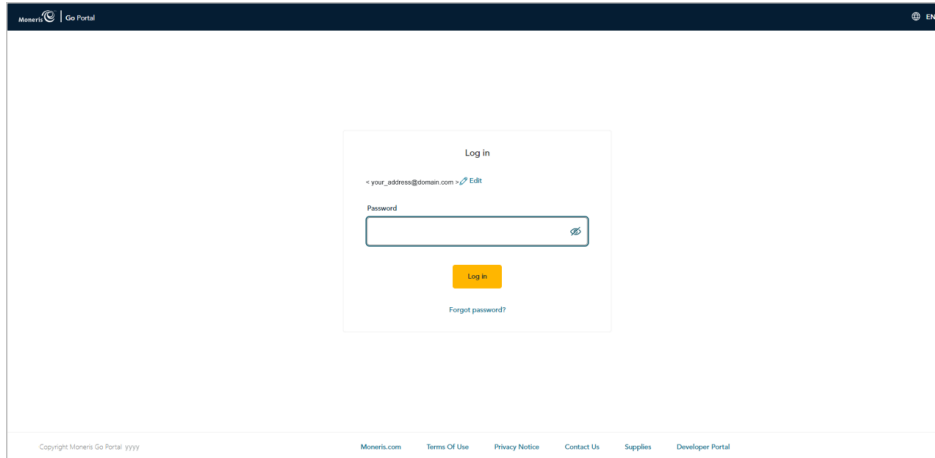
1. Visit www.monerisgo.com to start on the Moneris Go portal "Log in" page (shown below).



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.

Note: If you need to edit your login email first, click on **Edit** (go back to step 2). If you cannot remember your login password, see [Forgot your login password?](#) (page 31).



The screenshot displays the Moneris Go Portal login interface. At the top left, the Moneris logo and 'Go Portal' text are visible. The main content area features a 'Log in' form. The form includes an email address field with the placeholder '<your_address@domain.com >? Edit', a 'Password' field with a toggle icon, a yellow 'Log in' button, and a 'Forgot password?' link. The footer contains the text 'Copyright Moneris Go Portal. yyyy' and a series of links: 'Moneris.com', 'Terms Of Use', 'Privacy Notice', 'Contact Us', 'Supplies', and 'Developer Portal'.

4. Click on the **Log in** button to submit your credentials, and do one of the following:

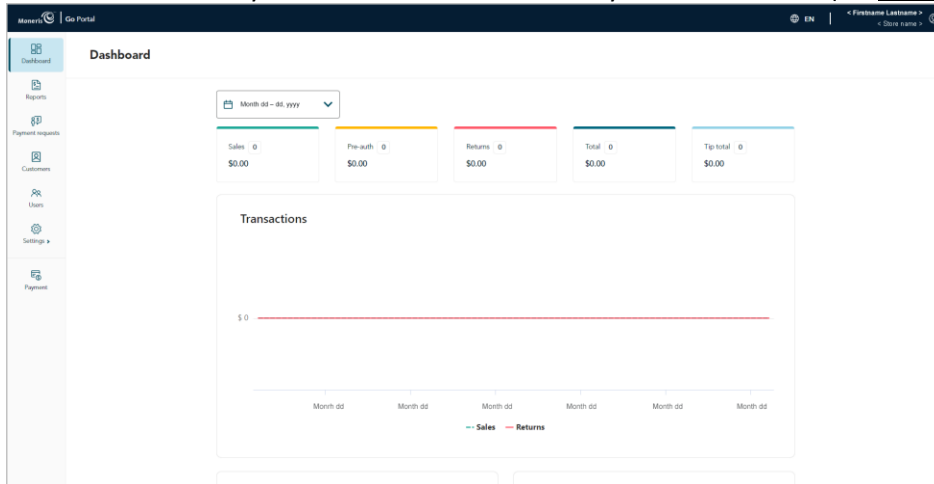
- If the "Migrate to Moneris Portal" page displays, continue in [Choosing whether to migrate to Moneris Portal](#) (page 215).
- If the "Stores" page displays, continue in [Accessing a store after logging into Moneris Go portal](#) (page 29).
- If the "Dashboard" page displays, continue in [Accessing a store after logging into Moneris Go portal](#) (page 29).

Accessing a store after logging into Moneris Go portal

After you have successfully logged into the Moneris Go portal (see [Logging into the Moneris Go portal](#) on page 27), you will see either the "Dashboard" page or a "Stores" page (empty or filled with one or more store tiles).

If the "Dashboard" page displays (shown below):

1. You have successfully accessed the store linked to your user account (see [The dashboard](#) on page 61).

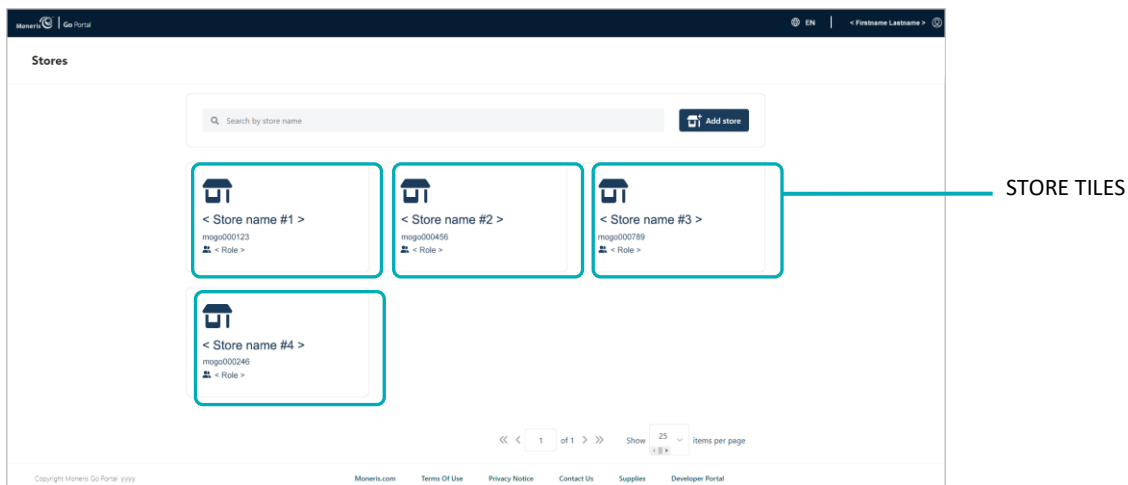


If the "Stores" page displays and one or more store tiles are shown (see example below):

1. Click on the store tile labelled with the name of the store that you want to access.

Note: To search for a specific store, enter the full/partial store name in the **Search by store name** field.

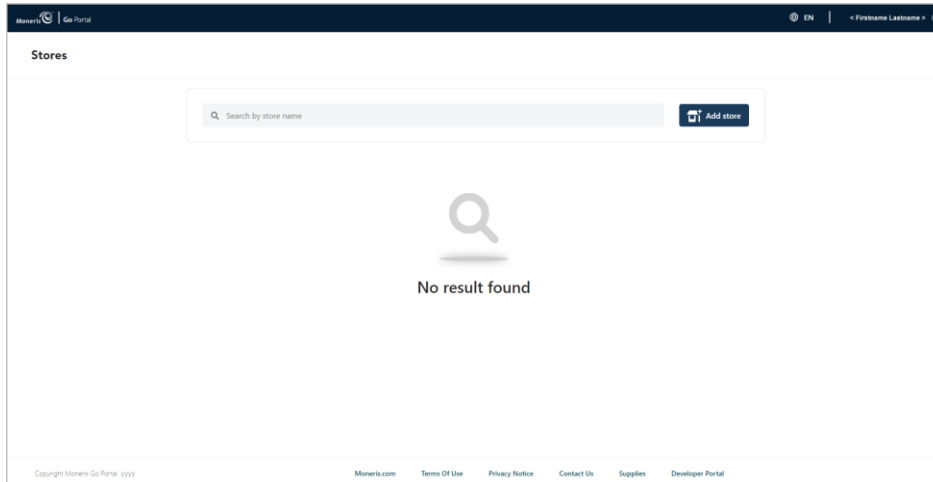
To change the number of hits listed on the page, click on the "Show # items per page" drop-down, and select a number (**10**, **25**, or **50**). To advance to the next page or last page, click on the **Next page >** icon or the **Last page >>** icon respectively. To go back to the previous page or the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



2. When the "Dashboard" page displays (see [The dashboard](#) on page 61), it means you have successfully accessed the store.

If the "Stores" page displays and no store tiles are shown (see example below):

- a. You (the primary user) must add/link a store to your user account (see [Adding the first store to the primary user account](#) on page 20).

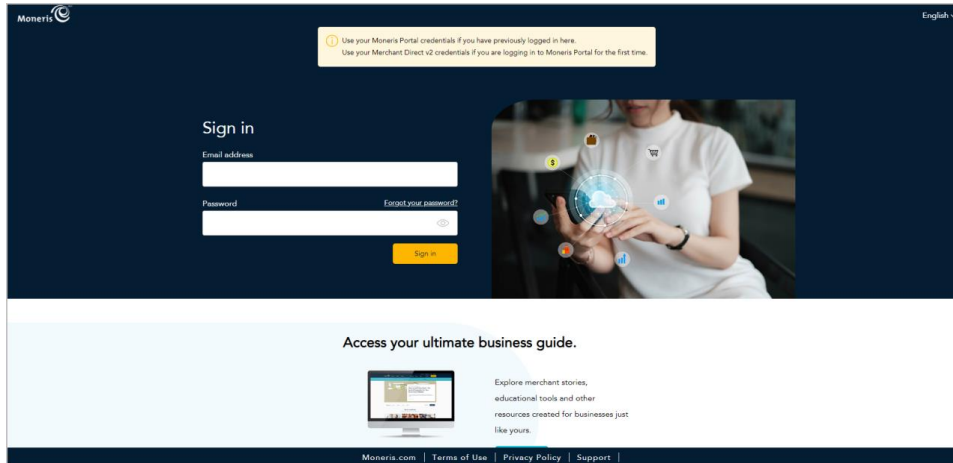


Forgot your login password?

The steps below describe how to reset your Moneris Go portal login password.

Are you a Moneris Portal user?

1. Visit <https://login.moneris.com/en/login> to start on the Moneris Portal "Sign in" page (shown below).



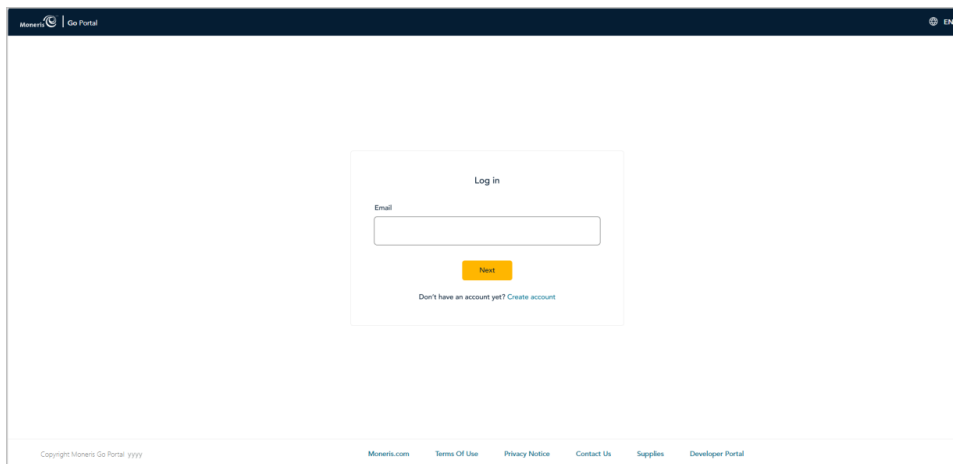
2. Click on **Forgot your password?**, and follow the prompts to reset your password.

Note: For Moneris Portal documentation, visit <https://www.moneris.com/en/support/products/moneris-portal>.

Are you an unmigrated user?

An unmigrated user is a Moneris Go portal user whose user account is not yet migrated to Moneris Portal.

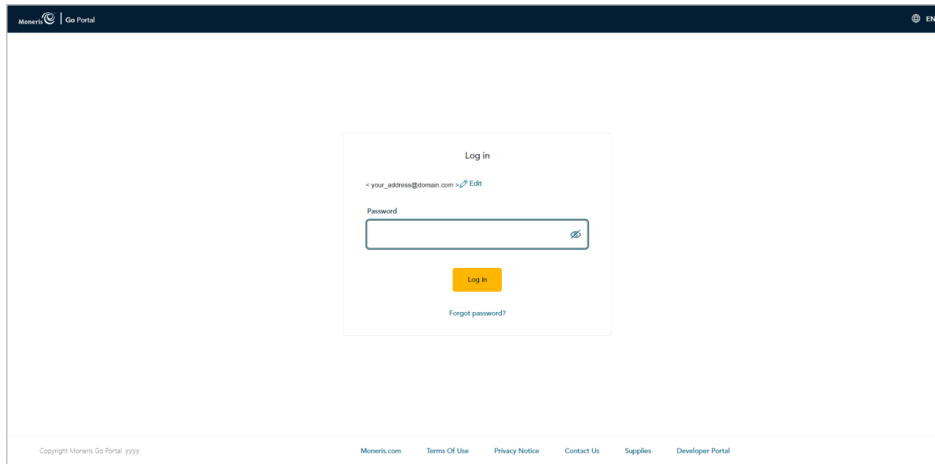
1. Visit www.monerisgo.com to start on the Moneris Go portal "Log in" page (shown below).



2. In the **Email** field, enter the email address that is registered to your Moneris Go portal user account, and then click on the **Next** button to continue.

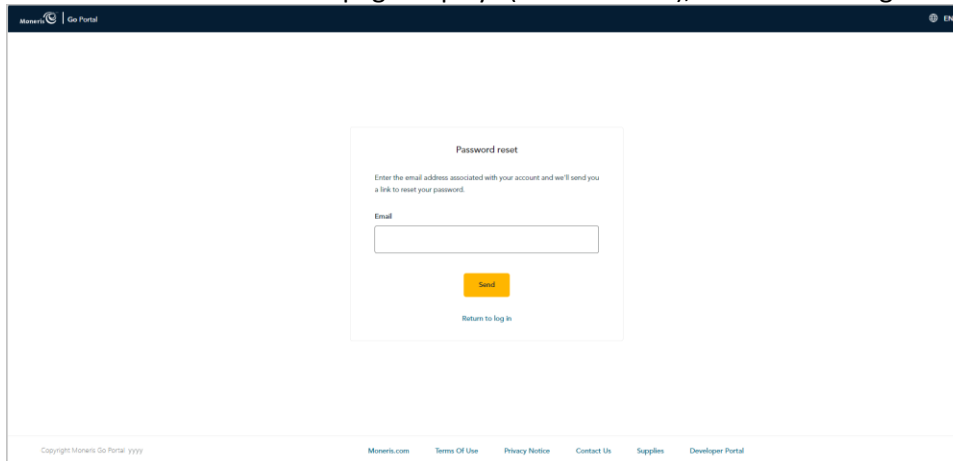
3. When the "Password" field displays (shown below), click on **Forgot password?**

Note: If you need to edit your login email first, click on **Edit** (go back to step 2).



The screenshot shows the Moneris Go Portal login interface. At the top, there is a dark header with the Moneris logo and 'Go Portal' text, and a language selector set to 'EN'. The main content area is white and contains a 'Log in' form. The form has a text input field for an email address, currently showing '<your_address@domain.com>' with an 'Edit' link to its right. Below the email field is a 'Password' label and a password input field with a visibility toggle icon. A yellow 'Log in' button is positioned below the password field. At the bottom of the form is a link for 'Forgot password?'. The footer of the page includes copyright information 'Copyright Moneris Go Portal. yyyy' and a navigation menu with links for 'Moneris.com', 'Terms Of Use', 'Privacy Notice', 'Contact Us', 'Supplies', and 'Developer Portal'.

4. When the "Password reset" page displays (shown below), do the following:

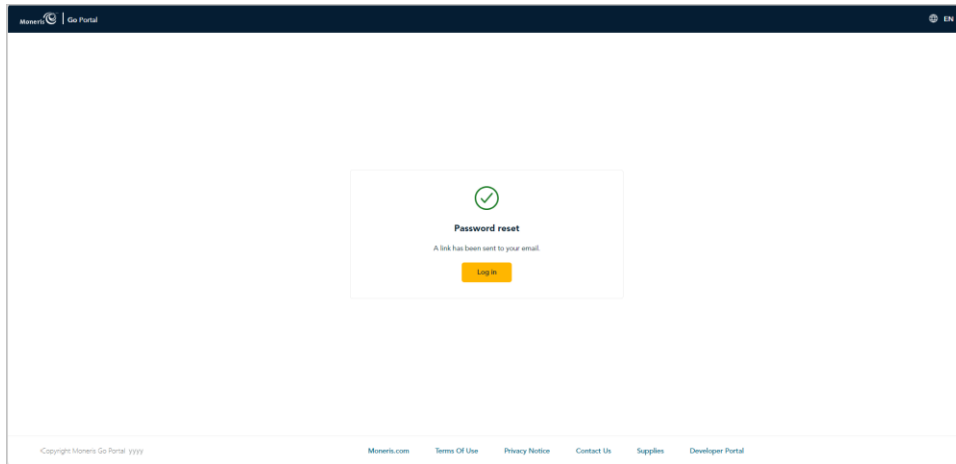


The screenshot shows the Moneris Go Portal password reset page. It features a dark header with the Moneris logo, 'Go Portal' text, and a language selector set to 'EN'. The main content area is white and contains a 'Password reset' form. The form includes a heading 'Password reset', a sub-heading 'Enter the email address associated with your account and we'll send you a link to reset your password.', and an 'Email' label above a text input field. A yellow 'Send' button is located below the email field. At the bottom of the form is a link for 'Return to log in'. The footer of the page includes copyright information 'Copyright Moneris Go Portal. yyyy' and a navigation menu with links for 'Moneris.com', 'Terms Of Use', 'Privacy Notice', 'Contact Us', 'Supplies', and 'Developer Portal'.

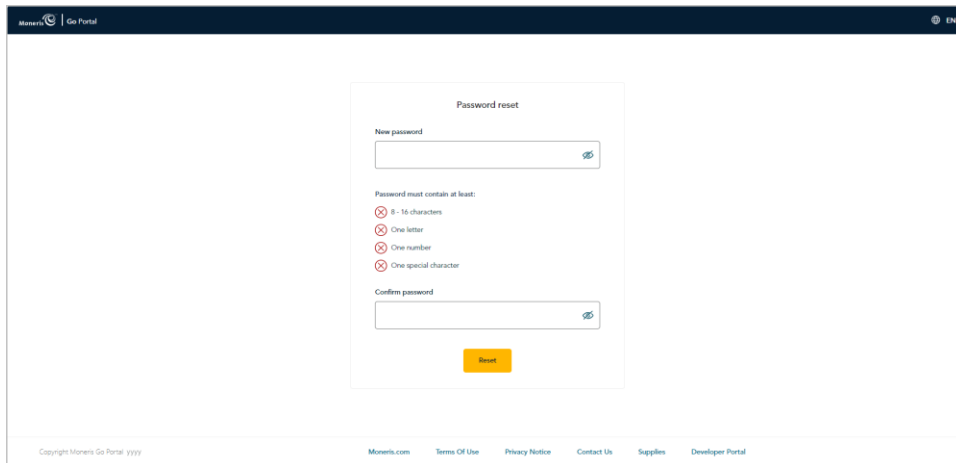
a. In the **Email** field, enter your Moneris Go portal user account login email address.

b. Click on the **Send** button.

5. When the "Password reset: A link has been sent to your email" page displays (shown below), confirm that you received the "Moneris Go Password reset" message in your email inbox.



6. Open the email, and click on the **Reset my password** link contained in the message.
7. When your browser displays the "Password reset" fields (shown below), do the following:



- a. In the **New password** field, enter a new password.

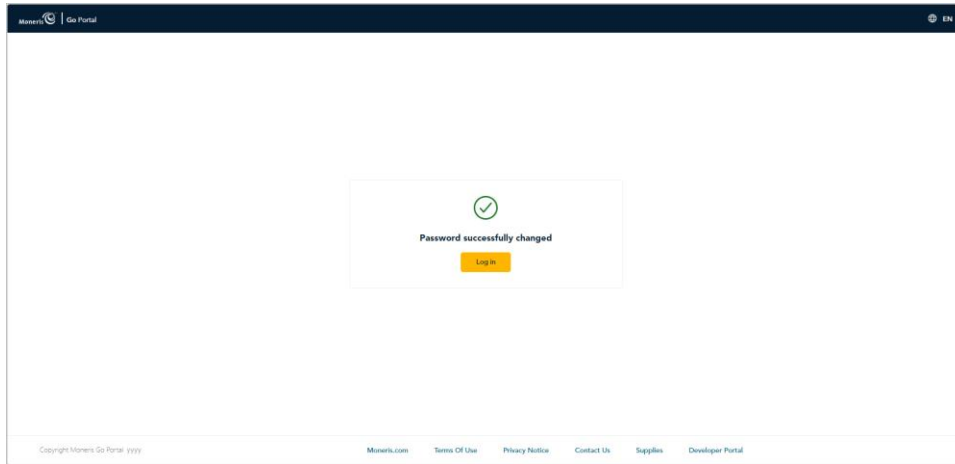
Note: Password fields are case sensitive. The password that you create must adhere to these requirements:

- The password must be 8 to 16 characters in length.
- The password must start with a letter.
- The password must include at least 1 letter, 1 number, and 1 special character.
- The password must not include any accented characters (accents are not supported).

- b. In the **Confirm password** field, re-enter the password.

- c. Click on the **Reset** button.

- When the "Password successfully changed" page displays (shown below), it means you have successfully reset your login password.




- Click on the **Log in** button to return to the Moneris Go portal "Log in" page.

Note: When you next attempt to log into Moneris Go portal, enter your newly reset password (see [Logging into the Moneris Go portal](#) on page 27).

Changing the default display language

The steps below describe how to change the Moneris Go portal's default display language (English or French) while you are accessing the Moneris Go portal (see [Logging into the Moneris Go portal](#) on page 27).

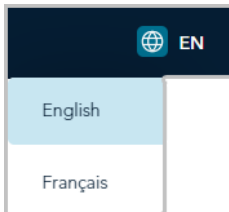
1. Start on any Moneris Go portal application page.

2. Click on the language  tile in the Moneris Go portal page header (shown below), which runs atop every Moneris Go portal application page.

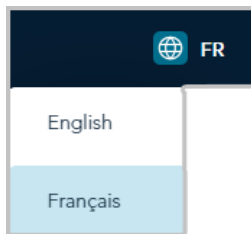


3. When the language drop-down displays (shown below), do one of the following:

- To set English as the default display language, select **English** (shown below).



- To set French as the default display language, select **Français** (shown below).




Store navigation

Using My Stores

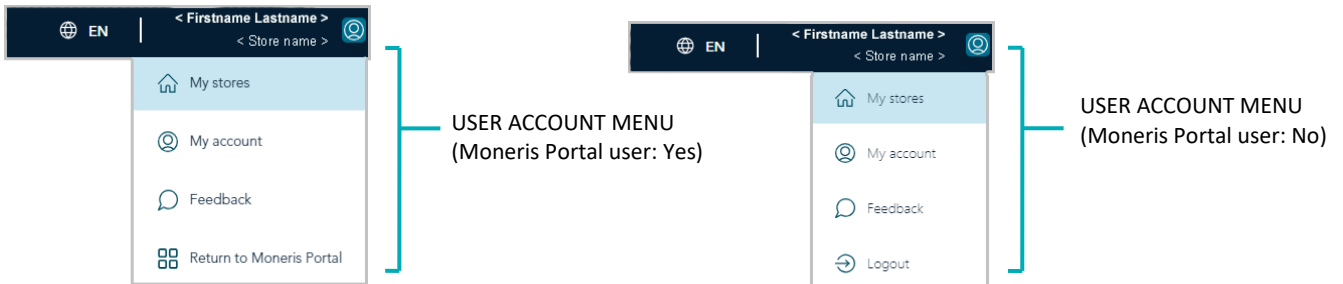
If you are logged into the Moneris Go portal and are already within (accessing) a store, follow the steps below to use the "My Stores" function to access any other store that is linked to your user account.

Note: For instructions on how to log in and access a store, see [Logging into the Moneris Go portal](#) (page 27).

1. From any page in your store, click on your user account  tile, which displays in the top right corner of the page header (shown below).



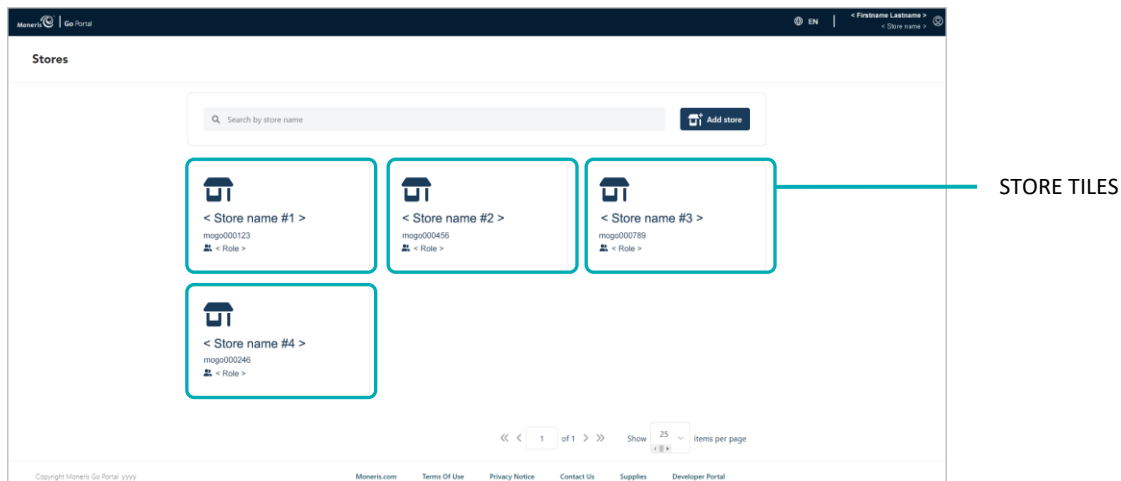
2. When the user account menu displays (shown below), click on **My stores**.



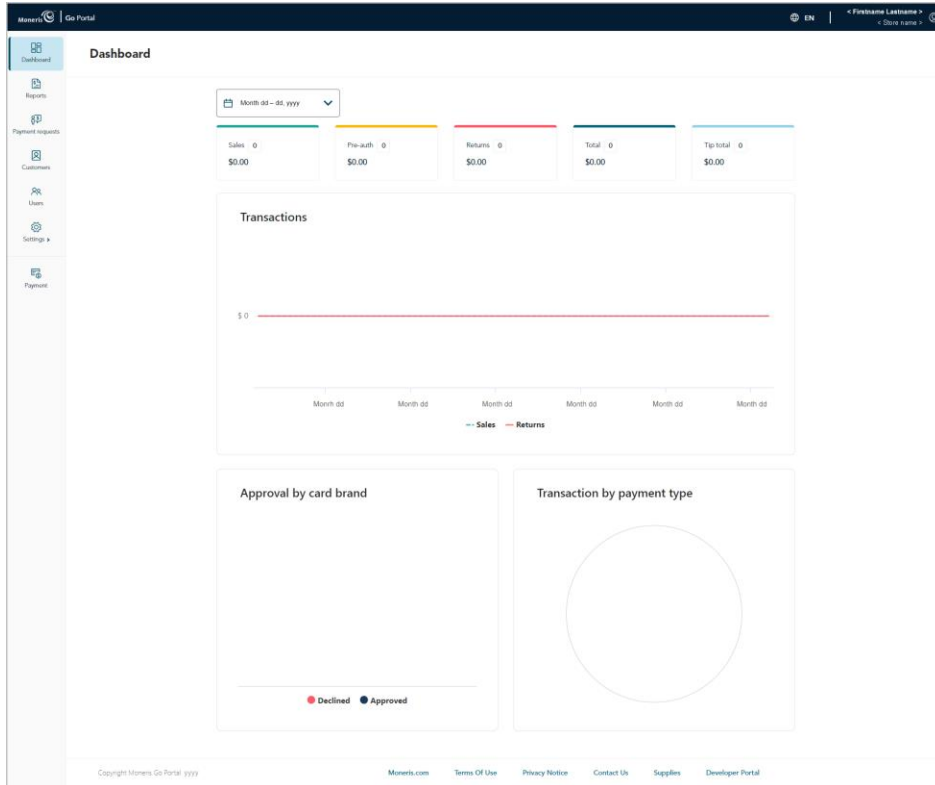
3. When the "Stores" page displays (shown below), locate the store tile labelled with the name of the store (and store ID) that you want to access, then click on that tile.

Note: To search for a specific store, enter the full/partial store name in the **Search by store name** field.

To change the number of hits listed on the 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 page <** icon or the **First page <<** icon respectively.




4. When the "Dashboard" page displays (shown below), it means you have successfully accessed your store (see [The dashboard](#) on page 61).

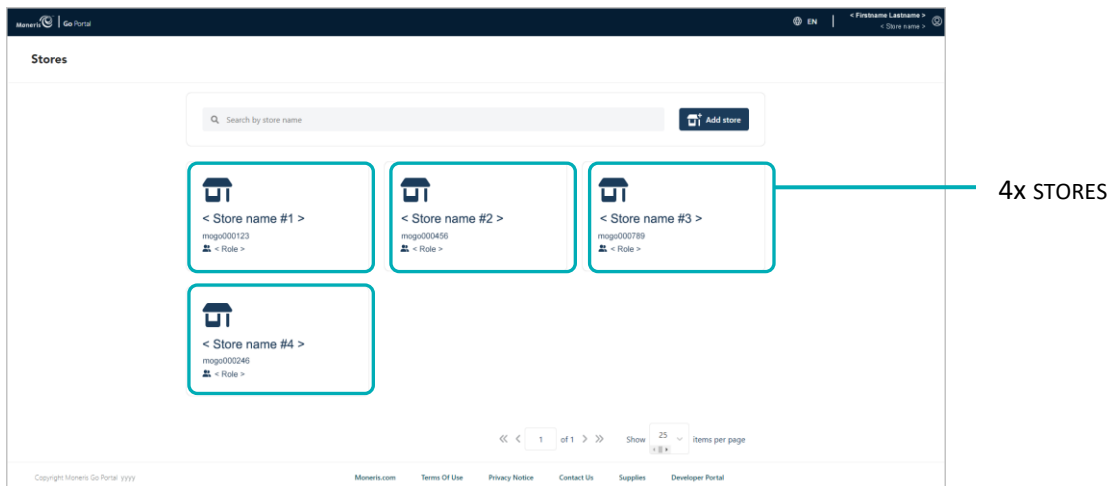


Adding another store to the primary user account

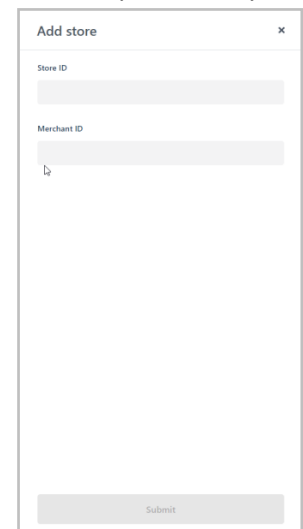
If you are the merchant account owner/primary user and want to add another store to your user account, follow the steps below to add the store. After you complete this procedure, you will have access to all the features of your Moneris Go portal store, and you can subsequently enable new users to access and use the store.

1. Log into the Moneris Go portal (see [Logging into the Moneris Go portal](#) on page 27).
2. Ensure that you are on the "Stores" page (the "Stores" page shown below depicts a scenario wherein four stores are already added).

Note: If you are not already on the "Stores" page, click on your user account  tile in the Moneris Go portal page header, and then click on **My stores** in the drop-down.

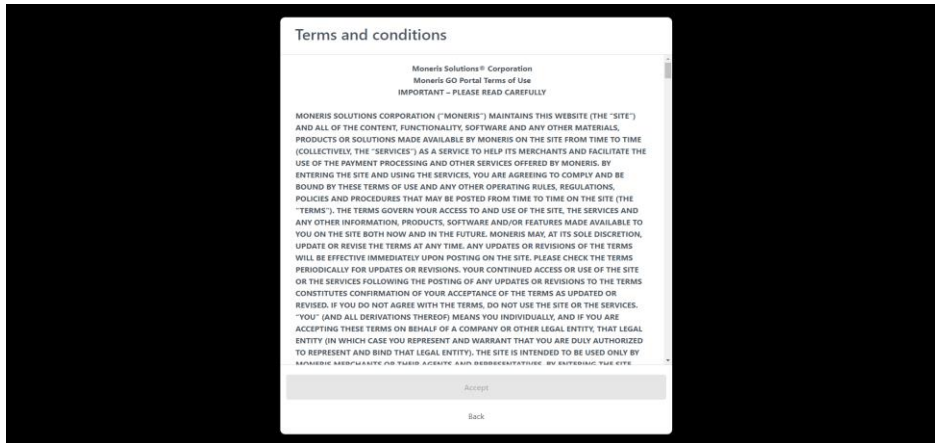


3. On the "Stores" page, click on the **Add store** button.
4. When the "Add store" window displays (shown here), fill in the fields with the required IDs as provided by Moneris:
 - a. In the **Store ID** field, enter the store ID of the store that you want to add.
 - b. In the **Merchant ID** field, enter your 13-digit merchant ID.
 - c. Click on the **Submit** button.

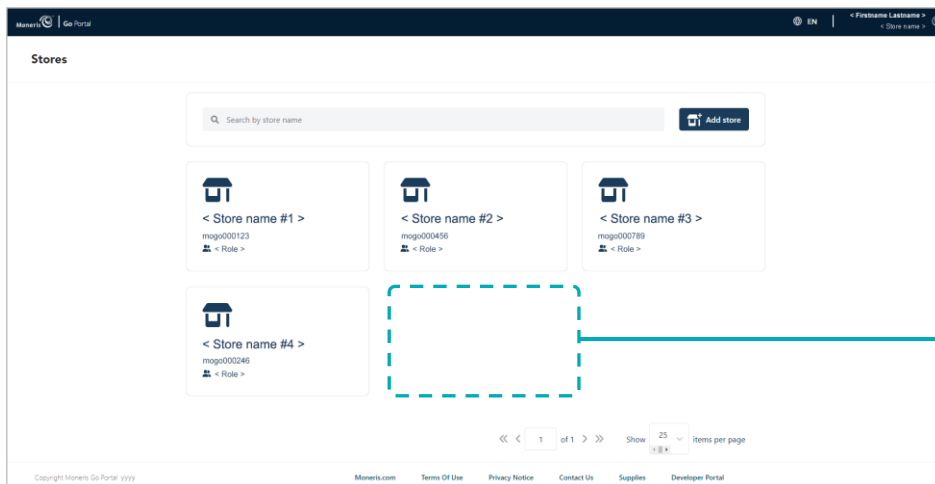


The screenshot shows the 'Add store' modal window. It has a title bar with 'Add store' and a close button (x). Below the title bar, there are two input fields: 'Store ID' and 'Merchant ID'. A 'Submit' button is located at the bottom right of the modal.

- When the "Terms and conditions" page displays (shown below), scroll through and read the terms, and then click on the **Accept** button.



- When the "Stores" page refreshes (shown below), confirm that the new store is added beside the other store tile(s) in the next available slot.



NEWLY ADDED STORE (TILE) DISPLAYS HERE

- The operation is complete. (To access the newly added store, simply click on its store tile.)


Note: If you want to permit new or existing users to access/use the features available in the newly added store, you can add the user account(s) as desired (see [Adding a new user account](#) (page 145)). You may duplicate the login credentials of an existing user account in each new store.

Logging out of the Moneris Go portal

End your current session, and log out of the Moneris Go portal.

Are you a Moneris Portal user?

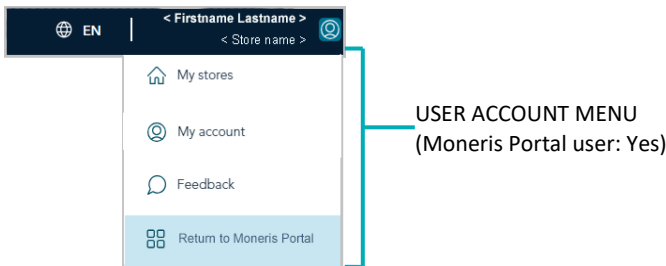
If you launched (logged into) the Moneris Go portal application from within Moneris Portal, follow the steps below to end your session on Moneris Go portal.

1. Click on your user account  tile, which displays in the top right corner of the Moneris Go portal page header (shown below).



2. When the user account menu displays (shown below), click on **Return to Moneris Portal**.


Note: The menu items "My stores", "My account", and "Feedback" are listed only if you have accessed one of your stores during the current login session.



3. For Moneris Portal documentation, visit <https://www.moneris.com/en/support/products/moneris-portal>.

Are you an unmigrated user?

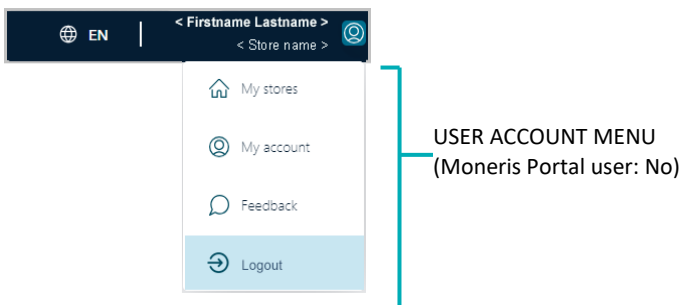
If you logged into Moneris Go portal directly from the Moneris Go portal login page (i.e., you are not a Moneris Portal user), follow the steps below to end your session on Moneris Go portal.

1. Click on your user account  tile, which displays in the top right corner of the Moneris Go portal page header (shown below).

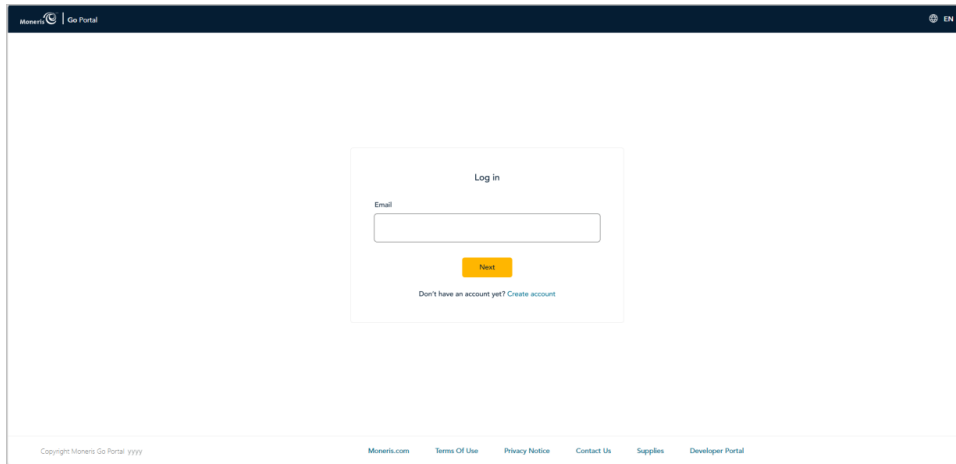


2. When the user account menu displays (shown below), click on **Logout**.

Note: The menu items "My stores", "My account", and "Feedback" are listed only if you have accessed one of your stores during the current login session.



- When the Moneris Go portal "Log in" page displays (shown below), it means you have successfully logged out and ended your session.





Financial Transactions

In this section, we go over everything you need to know to perform financial transactions through your Moneris Go portal store's virtual terminal.

Purchase with credit card: manual entry

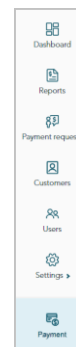
The steps below describe how to perform a credit card² sale of goods and services by entering card data in Moneris Go portal payment fields. A Purchase verifies funds on the cardholder's card, removes the funds, and prepares the funds for deposit into your merchant account.

1. Log into the Moneris Go portal, and access the store through which you want to perform the transaction (see [Logging into the Moneris Go portal](#) on page 27).³

Note: If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

2. On the sidebar menu (shown here), click on **Payment**.

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 "Payment" window displays (shown here), do the following:

- a. Click on the **Credit** button.
- b. In the "Transaction type" drop-down, select **Purchase**.
- c. In the **Amount** field, enter the purchase dollar amount (\$0.00).

4. Enter the credit card data:

- a. In the **Credit Card Number** field, enter the credit card's 16-digit PAN (personal account number).
- b. In the **Expiry date** field, enter the credit card's expiry date (mm/yy).
- c. In the **Security code** field, enter the credit card's 3- or 4-digit card verification value.

5. If the "Billing address" fields display (**Street number, Street name, City, Province, and Postal code**), enter the cardholder billing address data.

Note: To configure billing address fields, see [Store settings: payments](#) (page 137).

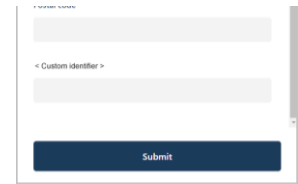
² Some card brands support debit card manual entry for this transaction.

³ Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 35).

6. If the custom transaction identifier field displays, enter the requested data.

Note: To configure a custom transaction identifier, see [Custom ID: store settings](#) (page 142).

7. Click on the **Submit** button to send the transaction for processing.

A screenshot of a web form. It features a text input field at the top, followed by a dropdown menu labeled '< Custom identifier >'. Below the dropdown is another text input field. At the bottom of the form is a dark blue button with the word 'Submit' in white text.

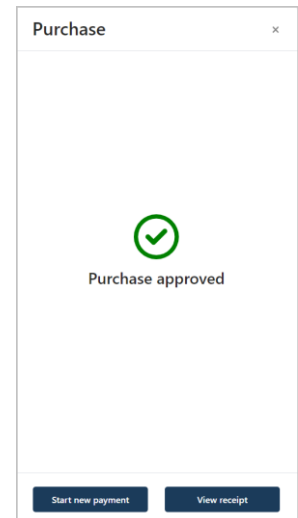
8. When the "Purchase" window displays the "approved" or "declined" response (shown here), the transaction is complete. Do any of the following:

To view, print, or send (email/text) the transaction receipt:

- a. Click on the **View receipt** button.
- b. Continue in [Sending/printing a transaction receipt](#) (page 81).

To initiate a new Purchase, Preauthorization, or independent Refund:

- a. Click on the **Start New Payment** button.



Purchase with cash

The steps below describe how to perform a cash sale of goods and services.

1. Log into the Moneris Go portal, and access the store through which you want to perform the transaction (see [Logging into the Moneris Go portal](#) on page 27).⁴

Note: If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

2. On the sidebar menu (shown here), click on **Payment**.

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.



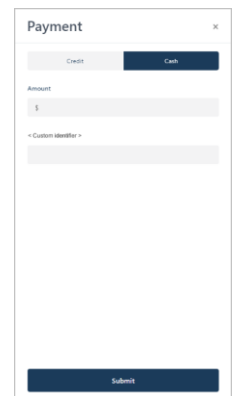
3. When the "Payment" window displays, click on the **Cash** button (shown here).

4. In the **Amount** field, enter the purchase dollar amount (\$0.00).

5. If the custom transaction identifier field displays, enter the requested data.

Note: To configure a custom transaction identifier, see [Custom ID: store settings](#) (page 142).

6. Click on the **Submit** button to send the transaction for processing.



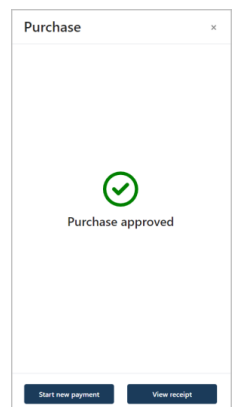
7. When the "Purchase" window displays the "approved" response (shown here), the transaction is complete. Do any of the following:

To view, print, or send (email/text) the transaction receipt:

- a. Click on the **View receipt** button.
- b. Continue in [Sending/printing a transaction receipt](#) (page 81).

To initiate a new Purchase, Preauthorization, or independent Refund:

- a. Click on the **Start New Payment** button.



⁴ Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 35).

Preauthorization with credit card: manual entry

The steps below describe how to perform a Preauthorization of goods and services by entering card data in Moneris Go portal payment fields. A Preauthorization verifies and locks funds on the cardholder's credit card.⁵ The funds are locked for a specified amount of time based on the card issuer.

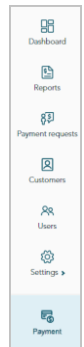
Important! To unlock and receive (or release) funds for this transaction, you must perform a Completion (see [Completion with credit card: manual entry on page 48](#)).

1. Log into the Moneris Go portal, and access the store through which you want to perform the transaction (see [Logging into the Moneris Go portal on page 27](#)).⁶

Note: If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores on page 36](#)).

2. On the sidebar menu (shown here), click on **Payment**.

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 "Payment" window displays (shown here), do the following:

- a. Click on the **Credit** button.
- b. In the "Transaction type" drop-down, select **Pre-auth**.
- c. In the **Amount** field, enter the preauthorization dollar amount (\$0.00).

4. Enter the credit card data:

- a. In the **Credit Card Number** field, enter the credit card's 16-digit PAN (personal account number).
- b. In the **Expiry date** field, enter the credit card's expiry date (mm/yy).
- c. In the **Security code** field, enter the credit card's 3- or 4-digit card verification value.

⁵ Some card brands support debit card manual entry for this transaction.

⁶ Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 35).

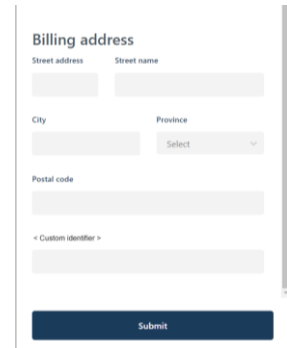
- If the "Billing address" fields display (**Street number, Street name, City, Province, and Postal code**), enter the cardholder billing address data.

Note: To configure billing address fields, see [Store settings: payments](#) (page 137).

- If the custom transaction identifier field displays, enter the requested data.

Note: To configure a custom transaction identifier, see [Custom ID: store settings](#) (page 142).

- Click on the **Submit** button to send the transaction for processing.



The image shows a "Billing address" form with the following fields: "Street address" and "Street name" (text input), "City" (text input), "Province" (dropdown menu with "Select" button), "Postal code" (text input), and "< Custom identifier >" (text input). A "Submit" button is located at the bottom right of the form.

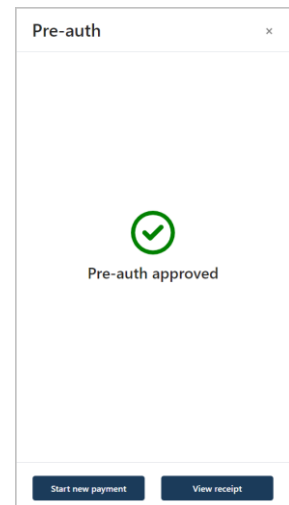
- When the "Pre-auth" window displays the "approved" or "declined" response (shown here), do one of the following:

To view, print, or send (email/text) the transaction receipt:

- Click on the **View receipt** button.
- Continue in [Sending/printing a transaction receipt](#) (page 81).

To initiate a new Purchase, Preauthorization, or independent Refund:

- Click on the **Start New Payment** button.



The image shows a "Pre-auth" window with a green checkmark icon and the text "Pre-auth approved". At the bottom, there are two buttons: "Start new payment" and "View receipt".


Completion with credit card: manual entry

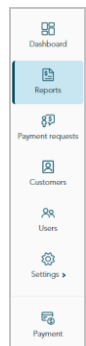
The steps below describe how to perform a Completion to capture a Moneris Go portal-referenced credit Preauthorization for a full or partial amount so that the authorized funds are transferred to your account at settlement. This procedure can also be used to cancel/void a Preauthorization.

1. Log into the Moneris Go portal, and access the store through which the original Preauthorization was processed (see [Logging into the Moneris Go portal](#) on page 27).⁷

Note: If you need to identify the store through which the original Preauthorization was processed (i.e., you have multiple stores linked to your account), view/print the receipt and refer to the store name on the receipt (see [Receipts](#) on page 80). This name correlates with the tile label of the Moneris Go portal store that you must access in order to do the Completion. (If you need to move to a different store, see [Using My Stores](#), page 36.)

2. On the sidebar menu (shown here), click on **Reports**.

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 "Reports" page displays (shown below), locate the Preauthorization that you want to complete, and click on it.

Note: The "Order ID" is unique to each transaction. If the desired transaction is not listed, you can do a general search by entering a full or partial amount or order ID in the **Search by amount or order ID** field. You may also use additional filters to refine the search (for details, see [Financial transactions report](#) on page 63).

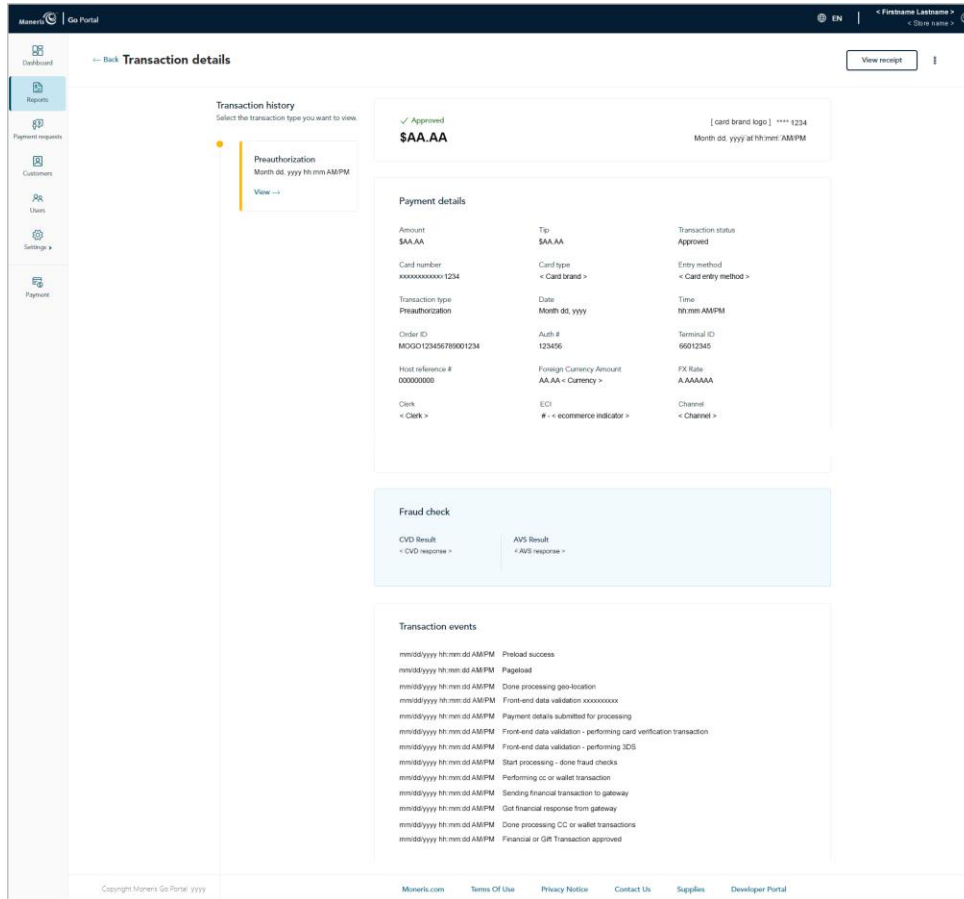
The screenshot shows the 'Reports' page in the Moneris Go portal. At the top, there are navigation links for 'Dashboard', 'Reports', 'Payment requests', 'Customers', 'Users', 'Settings', and 'Payment'. The 'Reports' section is active. Below the navigation, there are summary cards for 'Sales', 'Pre-auth', 'Returns', 'Total', and 'Tip total', each showing a value of '\$AA.AA'. A search bar is present with the text 'Search by amount or order ID'. Below the search bar, there is a table of transactions with the following columns: Amount, Tip, Type, Status, Order ID, Clerk, Custom ID, Channel, and Date. The table contains four rows of transaction data, all with a status of 'Approved'.

Amount	Tip	Type	Status	Order ID	Clerk	Custom ID	Channel	Date
[card logo] \$AA.AA	\$AA.AA	< Transaction >	✓ Approved	MOG00000000...	< clerk >	< Custom ID >	< Channel >	Month d1, yyyy
[card logo] \$AA.AA	\$AA.AA	< Transaction >	✓ Approved	MOG00000000...	< clerk >	< Custom ID >	< Channel >	Month d1, yyyy
[card logo] \$AA.AA	\$AA.AA	< Transaction >	✓ Approved	MOG00000000...	< clerk >	< Custom ID >	< Channel >	Month d1, yyyy
[card logo] \$AA.AA	\$AA.AA	< Transaction >	✓ Approved	MOG00000000...	< clerk >	< Custom ID >	< Channel >	Month d1, yyyy

⁷ Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 35).


- When the "Transaction details" page displays (shown below), review the payment details to ensure this is the Preauthorization that you want to complete.

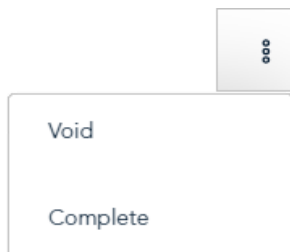
Note: For descriptions of payment details, fraud check results, and other line items that may display on the "Transaction details" page, see [Transaction details \(page 65\)](#).



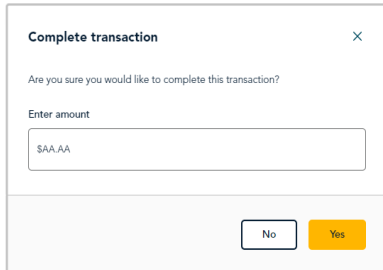
- Complete the Preauthorization for a full/partial amount or cancel/void the transaction:

To complete the Preauthorization for a full or partial amount:

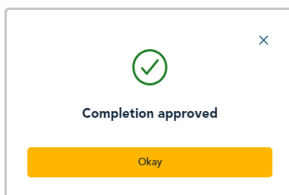
- In the upper right corner on the "Transaction details" page, click on the (more options) ellipsis .
- When the drop-down displays (shown below), click on **Complete**.



- c. When the "Complete transaction" dialog displays (shown below), enter a new dollar value in the **Enter amount** field if you want to change the completion amount. Otherwise, leave the displayed amount unchanged to complete the transaction for the originally authorized amount.




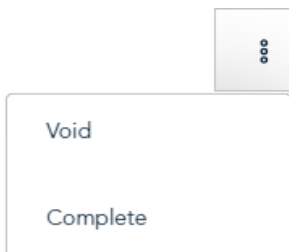
- d. Click on the dialog's **Yes** button, and wait while the transaction is processed.
- e. When the "Completion approved" dialog displays (shown below), click on its **Okay** button to close the dialog.



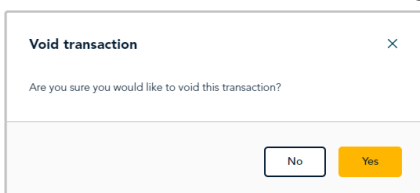
- f. Print or send (email/text) a transaction receipt (see [Sending/printing a transaction receipt](#) on page 81).

To cancel the Preauthorization and release the authorized funds:

- a. In the upper right corner on the "Transaction details" page, click on the (more options) ellipsis .
- b. When the drop-down displays (shown below), click on **Void**.

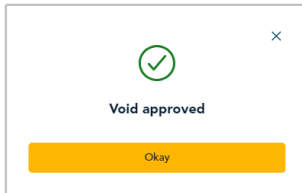


- c. When the "Void transaction" dialog displays (shown below), click on its **Yes** button.



d. Wait while the transaction is processed.

e. When the "Void approved" dialog displays (shown below), click on its **Okay** button to close the dialog.



f. Print or send (email/text) a transaction receipt (see [Sending/printing a transaction receipt](#) on page 81).

Void: manual entry

The steps below describe how to reverse (cancel) a Moneris Go portal-referenced Purchase or Completion transaction for the full amount. The funds of the original Purchase or Completion transaction are fully restored to the cardholder's card. Neither the original transaction nor the Void transaction will appear on the cardholder's statement.

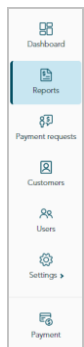
Note: Transactions originally processed with an Interac card cannot be voided from the Moneris Go portal.

1. Log into the Moneris Go portal, and access the store through which you want to perform this transaction (see [Logging into the Moneris Go portal](#) on page 27).⁸

Note: If you need to identify the store through which the original transaction was processed (i.e., you have multiple stores linked to your account), view/print the receipt and refer to the store name on the receipt (see [Receipts](#) on page 80). This name correlates with the tile label of the Moneris Go portal store that you must access in order to do the Void. (If you need to move to a different store, see [Using My Stores](#) on page 36.)

2. On the sidebar menu (shown here), click on **Reports**.

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 "Reports" page displays (shown below), locate the Purchase or Completion that you want to void, and click on it.

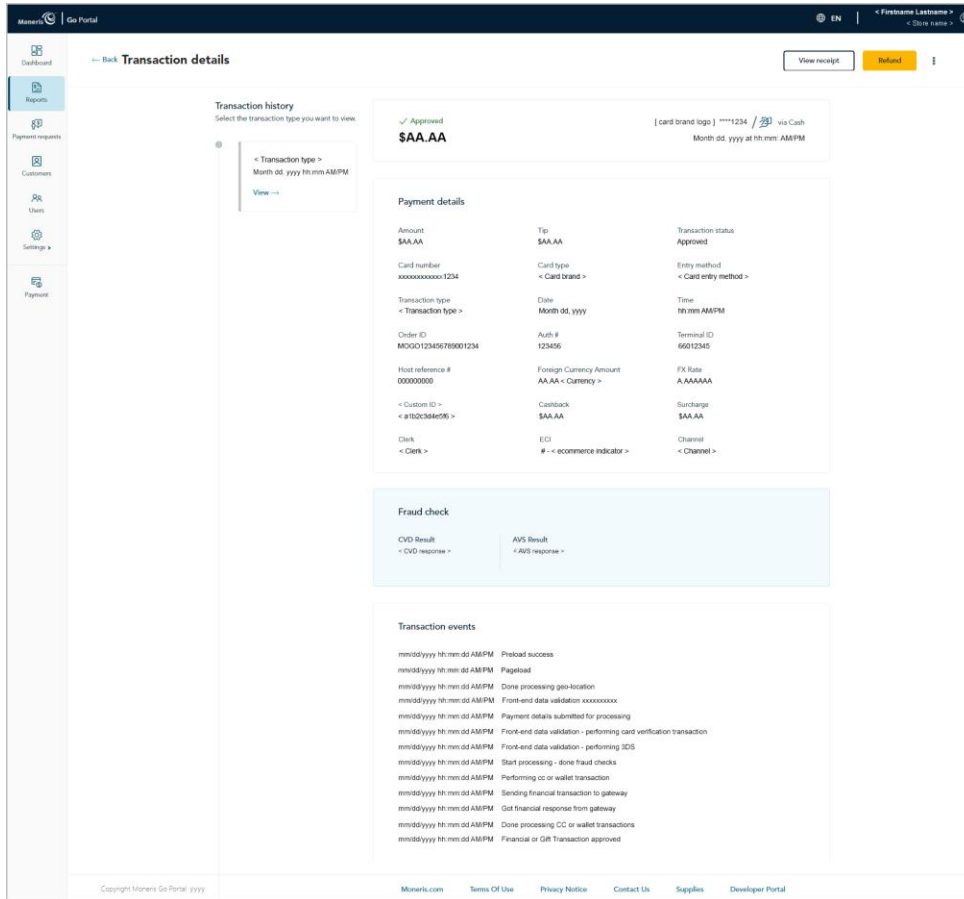
Note: The "Order ID" is unique to each transaction. If the desired transaction is not listed, you can do a general search by entering a full or partial amount or order ID in the **Search by amount or order ID** field. You may also use additional filters to refine the search (for details, see [Financial transactions report](#) on page 63).


Amount	Tip	Type	Status	Order ID	Clerk	< Custom ID >	Channel	Date
[card logo] \$AA.AA	\$AA.AA	< Transaction >	✓ Approved	MOGD00000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy
[card logo] \$AA.AA	\$AA.AA	< Transaction >	✓ Approved	MOGD00000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy

⁸ Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 35).

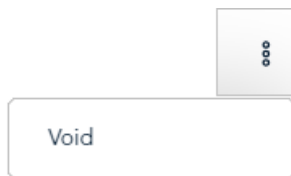
- When the "Transaction details" page displays (shown below), review the payment details to ensure this is the transaction that you want to void.

Note: For descriptions of payment details, fraud check results, and other line items that may display on the "Transaction details" page, see [Transaction details](#) (page 65).

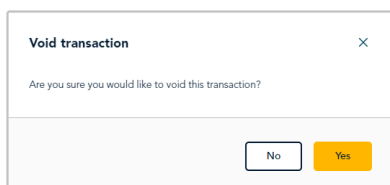


- In the upper right corner on the "Transaction details" page, click on the (more options) ellipsis .

- When the "Void" drop-down displays (shown below), click on **Void**.

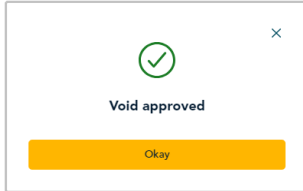


- When the "Void transaction" dialog displays (shown below), click on its **Yes** button.



8. Wait while the transaction is processed.

9. When the "Void approved" dialog displays (shown below), click on its **Okay** button to close the dialog.



10. Print or send (email/text) a transaction receipt (see [Sending/printing a transaction receipt](#) on page 81).


Refund: manual entry

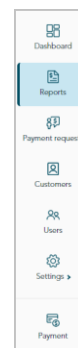
The steps below describe how to reverse (refund) a Moneris Go portal-referenced Purchase or Completion transaction for a full or partial amount. The funds of the original Purchase or Completion transaction are fully/partially restored to the cardholder's card.⁹

1. Log into the Moneris Go portal, and access the store from which you want to perform this transaction (see [Logging into the Moneris Go portal](#) on page 27).¹⁰

Note: If you need to identify the store through which the original transaction was processed (i.e., you have multiple stores linked to your account), view/print the receipt and refer to the store name on the receipt (see [Receipts](#) on page 80). This name correlates with the tile label of the Moneris Go portal store that you must access in order to do the Refund. (If you need to move to a different store, see [Using My Stores](#) on page 36.)

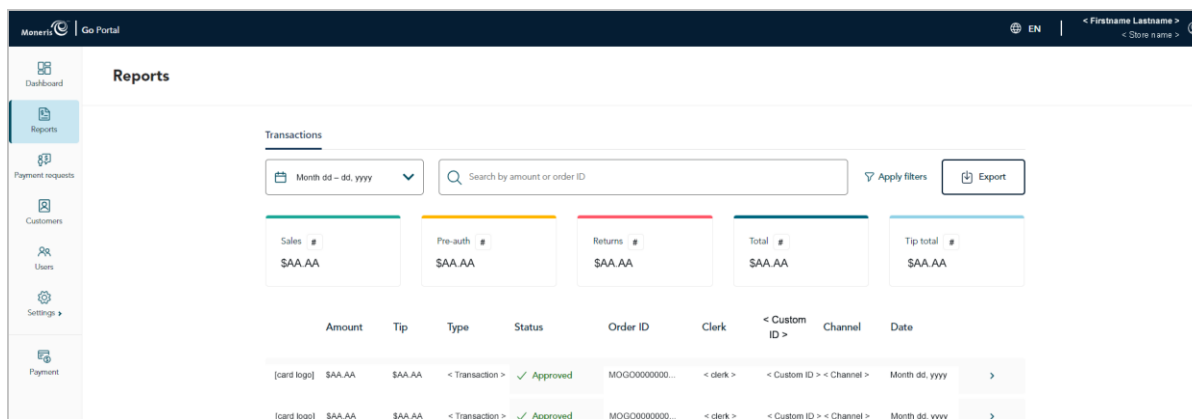
2. On the sidebar menu (shown here), click on **Reports**.

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 "Reports" page displays (shown below), locate the Purchase or Completion that you want to refund, and click on it.

Note: The "Order ID" is unique to each transaction. If the desired transaction is not listed, you can do a general search by entering a full or partial amount or order ID in the **Search by amount or order ID** field. You may also use additional filters to refine the search (for details, see [Financial transactions report](#) on page 63).



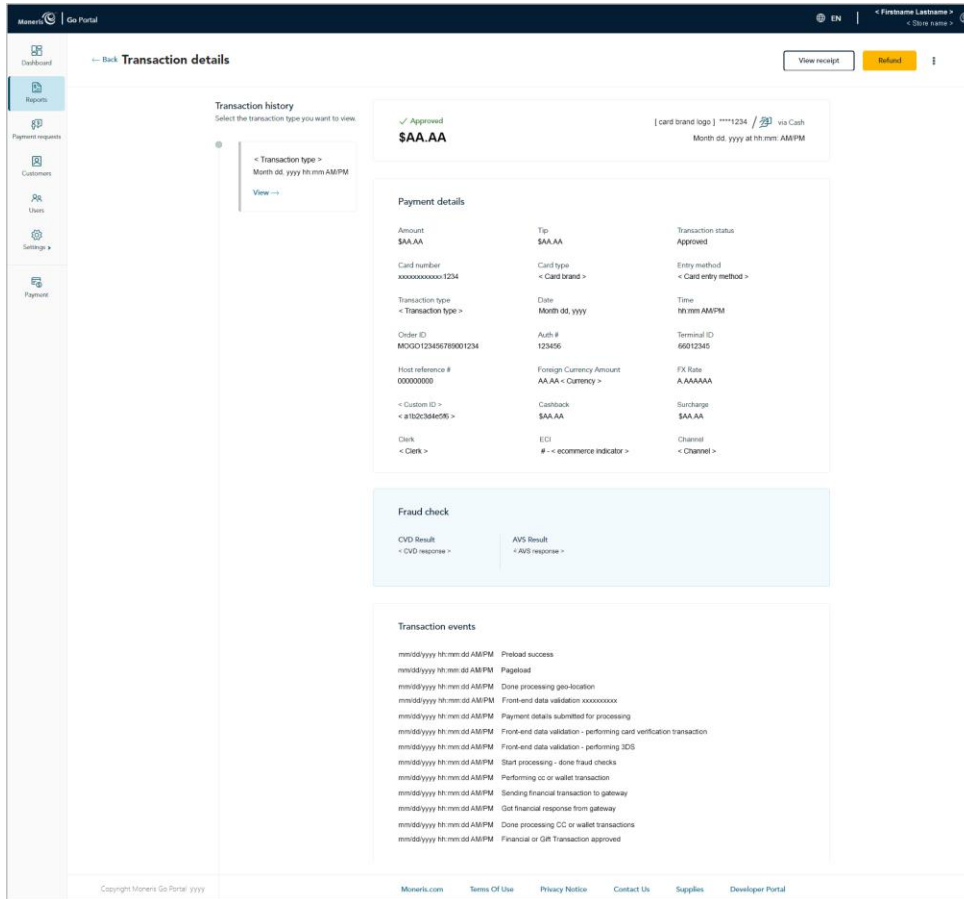
Amount	Tip	Type	Status	Order ID	Clerk	Custom ID	Channel	Date
[card logo] \$AA.AA	\$AA.AA	< Transaction >	✓ Approved	MOG00000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy
[card logo] \$AA.AA	\$AA.AA	< Transaction >	✓ Approved	MOG00000000...	< clerk >	< Custom ID >	< Channel >	Month dd, yyyy

⁹ Transactions originally processed with an *Interac card* cannot be refunded from the Moneris Go portal.

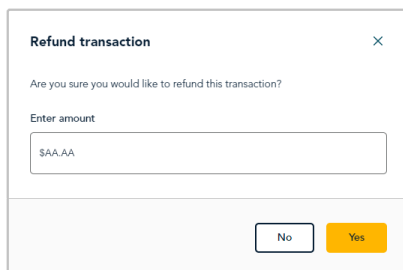
¹⁰ Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 35).

- When the "Transaction details" page displays (shown below), review the payment details to ensure this is the transaction that you want to refund.

Note: For descriptions of payment details, fraud check results, and other line items that may display on the "Transaction details" page, see [Transaction details](#) (page 65).

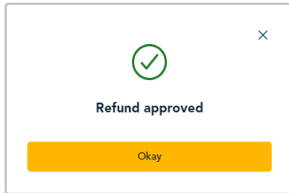


- In the upper right corner on the "Transaction details" page, click on the **Refund** button.
- When the "Refund transaction" dialog displays (shown below), leave the displayed amount unchanged or enter a new amount in the **Enter amount** field, and click on the dialog's **Yes** button.



- Wait while the transaction is processed.

8. When the "Refund approved" dialog displays (shown below), click its the **Okay** button to close the dialog.



9. Print or send (email/text) a transaction receipt (see [Sending/printing a transaction receipt](#) on page 81).

Independent Refund with credit card: manual entry

The steps below describe how to do an independent Refund of goods and services by entering card data in Moneris Go portal payment fields. The independent Refund fully or partially reverses (refunds) an unreferenced credit card¹¹ sale and restores funds to a cardholder's credit card.

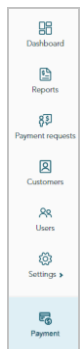
Note: *The independent Refund is disabled by default but can be enabled (temporarily or for a longer period) for your store upon request. If you want to perform independent Refunds through your store, please contact us.*

1. Log into the Moneris Go portal, and access the store through which you want to perform this transaction (see [Logging into the Moneris Go portal](#) on page 27).¹²

Note: *If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).*

2. On the sidebar menu (shown here), click on **Payment**.

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 "Payment" window displays (shown here), do the following:

- a. Click on the **Credit** button.
- b. In the "Transaction type" drop-down, select **Refund**.
- c. In the **Amount** field, enter the refund dollar amount (\$0.00).

4. Enter the credit card data:

- a. In the **Credit Card Number** field, enter the credit card's 16-digit PAN (personal account number).
- b. In the **Expiry date** field, enter the credit card's expiry date (mm/yy).
- c. In the **Security code** field, enter the credit card's 3- or 4-digit card verification value.

5. If the "Billing address" fields display (**Street number**, **Street name**, **City**, **Province**, and **Postal code**), enter the cardholder billing address data.

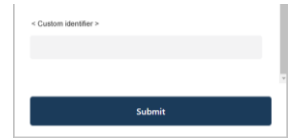
Note: *To configure billing address fields, see [Store settings: payments](#) (page 137).*

¹¹ Some card brands support debit card manual entry for this transaction.

¹² Your user account's current default display language determines the language format of the transaction receipt (once the receipt is generated, its language format cannot be altered). If you want to change your default display language before starting this transaction, see [Changing the default display language](#) (page 35).

6. If the custom transaction identifier field displays, enter the requested data.

Note: To configure a custom transaction identifier, see [Custom ID: store settings](#) (page 142).



7. Click on the **Submit** button to send the transaction for processing.

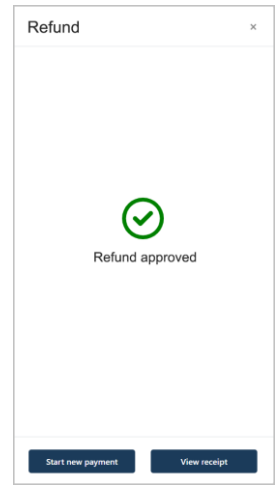
8. When the "Refund" window displays the "approved" or "declined" response (shown here), the transaction is complete. Do one of the following:

To view, print, or send (email/text) the transaction receipt:

- a. Click on the **View receipt** button.
- b. Continue in [Sending/printing a transaction receipt](#) (page 81).

To initiate a new Purchase, Preauthorization, or independent Refund:

- a. Click on the **Start New Payment** button.





Reporting & Receipts

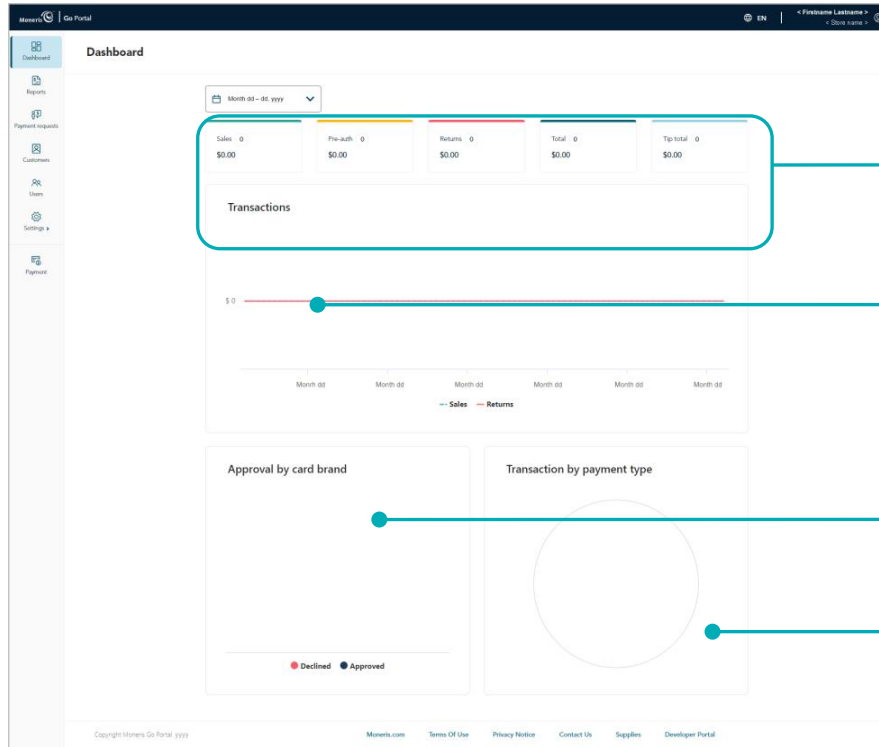
In this section, we go over everything you need to know to generate financial transaction reports and access receipts from your Moneris Go portal store, including reporting and receipt data from any point-of-sale device or application that is synchronized to your store.

The dashboard

The "Dashboard" page (shown below) provides an at-a-glance graphical and numeric summary of your store's financial transactions, including net totals for the date range that you specify in the calendar (the default date range is "Current week").

Note: The "Dashboard" is the first page that displays when you have successfully accessed your Moneris Go portal store. For a list of Moneris Go portal features and functions that you may now use, see [List of Moneris Go portal features and functions](#) (page 22).

- To change the dashboard reporting period, see [Changing your dashboard's report period](#) (page 62).



Tabs area displays transaction and tip totals:

- **Sales:** # of Purchases and Completions; with \$ total.
- **Pre-auth:** # of Preauthorizations; with \$ total.
- **Returns:** # of Refunds and Voids; with \$ total.
- **Total:** # of "Sales" and "Returns"; with \$ net total.
- **Tip total:** # of tips; with \$ total.

"Transactions" module displays line graph charting sales and returns totals (see "Sales" and "Returns" definitions above).

"Approval by card brand" module shows bar chart of approved and declined totals by card brand.

"Transaction by payment type" module displays pie chart of transaction percentages by card brand.

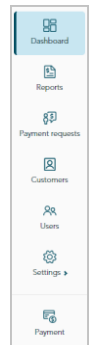
Returning to your store's dashboard

The steps below describe how to return to your store's "Dashboard" page.

Note: If you have multiple stores linked to your user account, you can use the [My Stores](#) function to move between your stores (see [Using My Stores](#) on page 36).


1. On the sidebar menu (shown here), click on **Dashboard**.

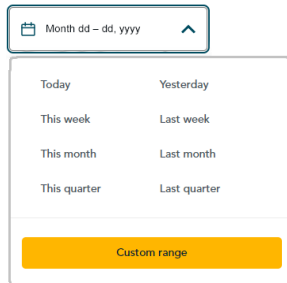
Note: If the sidebar menu is not displayed on your screen, click on the "menu" icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



Changing your dashboard's report period

Follow the steps below to select a new date range for your Moneris Go portal store's dashboard report.

1. Go to your store's "Dashboard" page (see [The dashboard](#) on page 61).
2. On the "Dashboard" page, click on the calendar  icon.
3. When the date range drop-down displays (shown below), select a pre-defined date range, or customize your own date range:



To select a pre-defined date range:

- a. In the date range drop-down (shown above), click on the desired date range (**Today, Yesterday, This week, Last week, This month, Last month, This quarter, or Last quarter**).
- b. Wait while the dashboard request is processed.

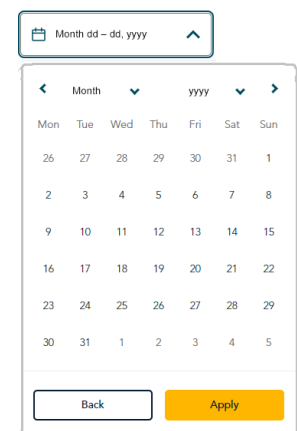
To customize a date range of your own:

- a. In the date range drop-down (shown above), click on **Custom range**.
- b. When the calendar displays (shown here), click on a start date to highlight it.

Note: To roll the calendar date backward or forward, click on the back < icon or the next > icon beside the month or year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down ▼ icon beside the month and/or year, and then select a specific month/year.

- c. Click on an end date to highlight it.

Note: To roll the calendar month/year backward or forward, click on the back < icon or the next > icon beside the month/year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down ▼ icon beside the month/year, and then select a specific month/year.



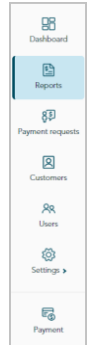
- d. Click on the calendar's **Apply** button.
- e. Wait while the dashboard request is processed.

Financial transactions report

The steps below describe how to generate a detailed report about financial transactions performed through your Moneris Go portal store, including transactions performed on any POS device/app that is synced to the store. You can set filters to narrow/widen the report scope and export the report to a spreadsheet file or CSV text file.

1. Log into the Moneris Go portal, and access the store for which you want to generate this report (see [Logging into the Moneris Go portal](#) on page 27).

Note: If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).



2. On the sidebar menu (shown here), click on **Reports**.

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 "Reports" page displays the report (shown below), it will feature a numerical summary of totals by transaction type and list any transaction processed within the default search period (i.e., the current week):

Note: To narrow the report scope, enter a dollar amount or order ID (a full or partial) in the **Search by amount or order ID** field. You may also use additional filters to refine the search by date, transaction type, card type, user, and channel (see [Changing the search filters for your financial transactions report](#) on page 70).

of active search filters indicated.

Export the report (see [Exporting a financial transactions report](#) on page 78).

Tabs area displays transaction and tip totals:

- **Sales:** # of Purchases + Completions; with \$ total.
- **Pre-auth:** # of Preauthorizations; with \$ total.
- **Returns:** # of Refunds + Voids; with \$ total.
- **Total:** # of "Sales" + "Returns"; with \$ net total.
- **Tip total:** # of tips; with \$ total.

Report headers include "Amount", "Tip", "Type", "Status", "Order ID", "Clerk", "Custom ID", "Channel", and "Date" (Month dd, yyyy). For more information about each header, see [Payment details descriptions](#) (page 67).

Merchant Direct note: Any data populating under Moneris Go portal's custom ID field/header in a Go portal receipt or report will always be listed under the header "Customer ID" in Merchant Direct's financial transactions reports regardless of the field/header label that is configured in Moneris Go portal.

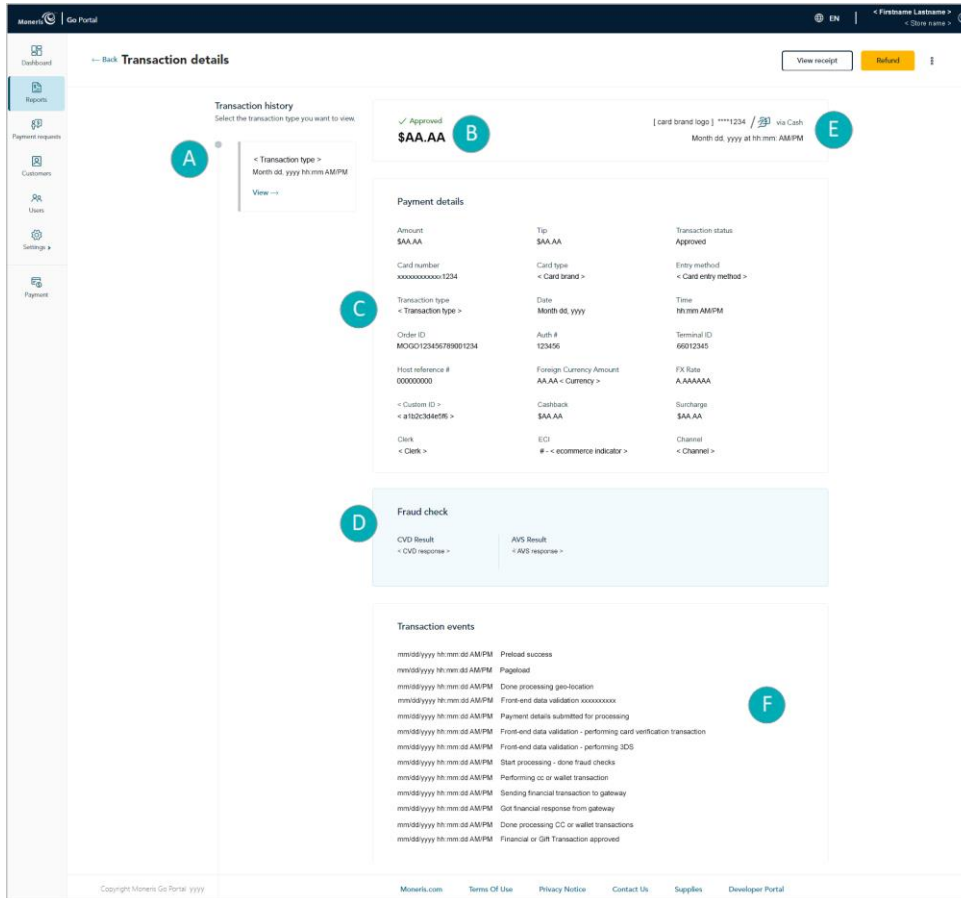
- To view the payment details, or perform a follow-on (Void, Refund, or Completion) transaction, or send/print a transaction receipt, click on the transaction to open its "Transaction details" page (see [Transaction details](#) on page 65).

- To change the number of hits listed on the page, click on the "Show # 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 page <** icon or the **First page <<** icon respectively.

Transaction details

The steps below describe how to view the "Transaction details" page for an approved/declined financial transaction. The "Transaction details" page lists all the transaction's attributes as described in the table below. You can view, print, and send (email/text) the transaction receipt; and you can initiate a follow-on Void, Refund, or Completion if applicable.

1. Initiate a financial transactions report to retrieve the desired transaction (see [Financial transactions report](#) on page 63), and then click on the transaction to open its "Transaction details" page (shown below).



Note: The table below describes the labelled "Transactions details" image shown above.

Label	Descriptions
A	The "Transaction history" area chronologically lists any associated follow-on transactions (Void, Refund, and Completion), which are linked to the original transaction via the order ID. (You can click on a listed follow-on transaction to open its own "Transaction details" page.)
B	The total transaction amount (CAD) and the transaction status. Note: Funds are settled in CAD according to this dollar amount.
C	The "Payment details" module displays the line items "Amount", "Surcharge", "Transaction status", "Card type", "Transaction type", "Time", "Auth #", "Host reference #", "Cashback", "Tip", "Card number", "Entry method", "Date", "Order ID", "Terminal ID", "< Custom ID >", "Foreign currency amount", "FX rate", "Clerk", "ECI", and "Channel". For line-item descriptions of payment details, see Payment details descriptions (page 67).

Label	Descriptions
D	The "Fraud check" module displays the "AVS result" (address verification service) and "CVD result" (card verification digits). For line-item descriptions of fraud check results, see Fraud check result descriptions (page 69).
E	<ul style="list-style-type: none"> ▪ For a debit/credit/gift transaction: Displays the logo of the card brand used in the transaction and the last four digits of the masked card number. ▪ For a cash transaction: Displays the cash indicator logo "via Cash".
F	The "Transaction events" module displays if the transaction (debit/credit) that was initiated through a Moneris Checkout integration. Transaction events are logged in chronological order.

2. From the "Transaction details" page, you can do any of the following:

View, print, or send (email/text) the transaction receipt:

- a. Click on the **View receipt** button.
- b. Continue in [Sending/printing a transaction receipt](#) (page 81).

Initiate a follow-on transaction:

- To do a Void, continue at step 4 in [Void: manual entry](#) (page 53).
- To do a Refund, continue at step 4 in [Refund: manual entry](#) (page 56).
- To do a Completion, continue at step 4 in [Completion with credit card: manual entry](#) (page 49).

Return to your financial transactions report:

- a. Click on **Back** (appears in the top left corner on the "Transaction details" page).

Payment details descriptions

The "Payment details" module (shown below) displays on the "Transaction details" page of every approved/declined financial transaction (see [Transaction details](#) on page 65). The table below describes each line item that can appear in the "Payment details" module depending on the transaction.

Note: Some of these line items are also featured as standard report headers in the financial transactions report (see [Financial transactions report](#) on page 63). These line items are also identified in the table below.

Payment details

<p>A Amount \$AA.AA</p>	<p>H Tip \$AA.AA</p>	<p>O Transaction status Approved</p>
<p>B Card number xxxxxxxxxxxx1234</p>	<p>I Card type < Card brand ></p>	<p>P Entry method < Card entry method ></p>
<p>C Transaction type < Transaction type ></p>	<p>J Date Month dd, yyyy</p>	<p>Q Time hh:mm AM/PM</p>
<p>D Order ID MOGO123456789001234</p>	<p>K Auth # 123456</p>	<p>R Terminal ID 66012345</p>
<p>E Host reference # 000000000</p>	<p>L Foreign Currency Amount AA.AA < Currency ></p>	<p>S FX Rate A.AAAAAA</p>
<p>F < Custom ID > < a1b2c3d4e5f6 ></p>	<p>M Cashback \$AA.AA</p>	<p>T Surcharge \$AA.AA</p>
<p>G Clerk < Clerk ></p>	<p>N ECI # - < ecommerce indicator ></p>	<p>U Channel < Channel ></p>

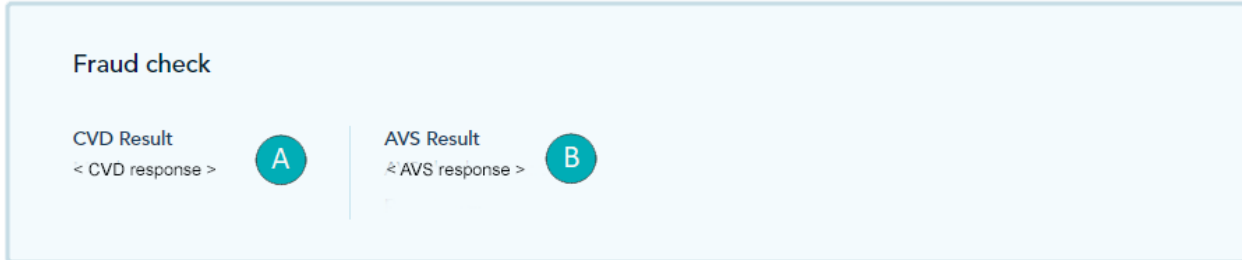
The table below describes the labelled line items in the "Payment details" module image shown above. The circle (●) in the "Header" column indicates the line item is also featured as a standard header in the financial transactions report.

Label	Line item	Report header	Description
A	Amount	●	Total transaction amount (CAD), including any tip, cashback, and/or surcharge. Note: Funds are settled in CAD according to this dollar amount.
B	Card number		Masked card number of the card used for the transaction.
C	Transaction type	●	Transaction type (e.g., Purchase, Preauthorization, Refund, Void, Completion, or Verification).
D	Order ID	●	Unique transaction identifier (also referred to as "Order #").
E	Host reference #		Host reference number.

Label	Line item	Report header	Description
F	< Custom ID >	•	<p>Custom transaction identifier (see Custom ID: store settings on page 142; see Moneris Go terminal: transaction settings on page 171; and see Moneris Go Plus terminal: transaction settings on page 190).</p> <p>Merchant Direct note: Any data populating under Moneris Go portal's custom ID field/header in a Go portal receipt or report will always be listed under the header "Customer ID" in Merchant Direct's financial transactions reports regardless of the field/header label that is configured in Moneris Go portal.</p>
G	Clerk	•	Login ID (email) of the user who initiated the transaction. If the transaction was initiated through an ecommerce integration (e.g., Moneris Checkout), the integration type is indicated in place of the login ID.
H	Tip	•	Tip amount (see Moneris Go terminal: tip settings on page 183; and see Moneris Go Plus terminal: tip settings on page 202).
I	Card type	•	Card brand (type) used for transaction.
J	Date	•	Date (Month dd, yyyy) of the transaction.
K	Auth #		Authorization number.
L	Foreign currency amount		<p>The non-Canadian currency in which the transaction was processed (see "FX Rate" line item in row "S").</p> <p>Note: Multi-currency pricing (MCP)/dynamic currency conversion (DCC) must be enabled. Funds are settled in CAD (see "Amount" line item in row "A").</p>
M	Cashback		Cashback amount (see Moneris Go terminal: cashback settings on page 180; and see Moneris Go Plus terminal: cashback settings on page 199).
N	ECI		Ecommerce indicator. Indicates the level of security that was used to obtain the cardholder's payment data. (For a list of ecommerce indicators and descriptions, see Ecommerce indicator descriptions on page 236.)
O	Transaction status	•	Card issuer response (e.g., "Approved" or "Declined").
P	Entry method		Card entry method used for the transaction.
Q	Time		Time (hh:mm AM/PM) of the transaction.
R	Terminal ID		8-digit identifier associated with one or more card types and/or the point-of-sale device or application through which the transaction was initiated (see Terminal ID descriptions on page 237).
S	FX rate		Exchange rate at the time the transaction was processed in the foreign currency (see "Foreign Currency Amount" line item in row "L").
T	Surcharge		Configurable surcharge amount (see Moneris Go terminal: transaction settings on page 171; and see Moneris Go Plus terminal: transaction settings on page 190).
U	Channel	•	The device, application, or ecommerce integration through which payment data (debit, credit, gift, or cash) were originally captured prior to being sent to the Moneris host for processing as a transaction. (For a list of channels and descriptions, see Channel indicator descriptions on page 234.)

Fraud check result descriptions

The "Fraud check" module (shown below) displays on the "Transaction details" page of every approved/declined financial transaction (see [Transaction details](#) on page 65). The table below describes each line item that can display in the "Fraud check" module.



The table below describes the labelled line items in the "Fraud check" module image shown above.

Label	Line item	Description
A	CVD Result	Card verification digits (also known as card verification value) response: Generated when the card issuer receives the CVD/CVV data submitted in a transaction and compares them with the corresponding digits on the cardholder's card.
B	AVS Result	Address verification service response: Generated when the card issuer receives the street number, street name, and postal code data submitted in the transaction and compares them with the corresponding data on the cardholder's statement.

Changing the search filters for your financial transactions report

You can narrow/widen the scope of a Moneris Go portal financial report by changing one or more of the report search filters.

1. Initiate a Moneris Go portal financial transactions report (see [Financial transactions report](#) on page 63).
2. Select your report search filter(s) as desired (see filter list in the table below):

Search filter	See procedure:
Amount	Retrieving transactions by amount or order ID (page 71)
Card type	<p>Manually selecting filter:</p> <ul style="list-style-type: none"> ▪ Retrieving transactions by transaction type, card type, user, and/or channel: manual select (page 74) <p>Selecting as part of pre-defined filter set:</p> <ul style="list-style-type: none"> ▪ Retrieving transactions by using pre-defined filter set (page 76)
Channel	<p>Manually selecting filter:</p> <ul style="list-style-type: none"> ▪ Retrieving transactions by transaction type, card type, user, and/or channel: manual select (page 74) <p>Selecting as part of pre-defined filter set:</p> <p>Retrieving transactions by using pre-defined filter set (page 76)</p>
Date range (customized)	Retrieving transactions by custom date range (page 73)
Date range (pre-defined)	Retrieving transactions by pre-defined date range (page 72)
Order ID	Retrieving transactions by amount or order ID (page 71)
Transaction type	<p>Manually selecting filter:</p> <ul style="list-style-type: none"> ▪ Retrieving transactions by transaction type, card type, user, and/or channel: manual select (page 74) <p>Selecting as part of pre-defined filter set:</p> <ul style="list-style-type: none"> ▪ Retrieving transactions by using pre-defined filter set (page 76)
User	<p>Manually selecting filter:</p> <ul style="list-style-type: none"> ▪ Retrieving transactions by transaction type, card type, user, and/or channel: manual select (page 74) <p>Selecting as part of pre-defined filter set:</p> <ul style="list-style-type: none"> ▪ Retrieving transactions by using pre-defined filter set (page 76)

Retrieving transactions by amount or order ID

Follow the steps below to generate a financial transactions report for your Moneris Go portal store by entering a transaction amount or order ID as the search criterion.

1. Initiate a financial transactions report (see [Financial transactions report](#) on page 63).
2. On the "Reports" page, go to the search bar (shown below), and enter a full or partial amount or order ID in the **Search by amount or order ID** field.




The screenshot shows a web interface for "Transactions". On the left, there is a date range selector with a calendar icon and the text "Month dd - dd, yyyy" and a downward arrow. In the center is a search input field with a magnifying glass icon and the placeholder text "Search by amount or order ID". To the right of the search field are two buttons: "Apply filters" with a funnel icon and "Export" with a download icon.

3. If you need to change the date range:
 - For pre-defined date, continue at step 2 in [Retrieving transactions by pre-defined date range](#) (page 72).
 - For custom date, continue at step 2 in [Retrieving transactions by custom date range](#) (page 73).
4. Wait while the report request is processed.

Note: To use a different search filter, see [Changing the search filters for your financial transactions report](#) (page 70).

Retrieving transactions by pre-defined date range

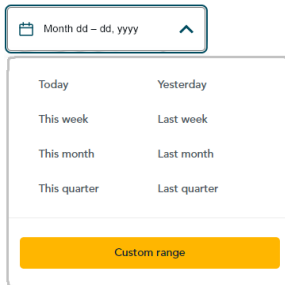
Follow the steps below to generate a financial transactions report for your Moneris Go portal store by selecting a pre-defined report date range such as today, yesterday, week, or quarter.

1. Initiate a financial transactions report (see [Financial transactions report](#) on page 63).
2. On the "Reports" page, click on the calendar  icon in the search bar (shown below).



The screenshot shows the 'Transactions' search bar. On the left, there is a date range selector with a calendar icon and the text 'Month dd - dd, yyyy' and a downward arrow. In the center is a search input field with a magnifying glass icon and the placeholder text 'Search by amount or order ID'. On the right, there are two buttons: 'Apply filters' with a funnel icon and 'Export' with a download icon.

3. When the date range drop-down displays (shown below), click on a date range (**Today, Yesterday, This week, Last week, This month, Last month, This quarter, or Last quarter**).



The screenshot shows the date range drop-down menu. At the top, there is a header with a calendar icon, the text 'Month dd - dd, yyyy', and an upward arrow. Below this is a list of pre-defined date ranges: 'Today', 'Yesterday', 'This week', 'Last week', 'This month', 'Last month', 'This quarter', and 'Last quarter'. At the bottom of the menu is a yellow button labeled 'Custom range'.

4. Wait while the report request is processed.

Note: To use a different search filter, see [Changing the search filters for your financial transactions report](#) (page 70).

Retrieving transactions by custom date range

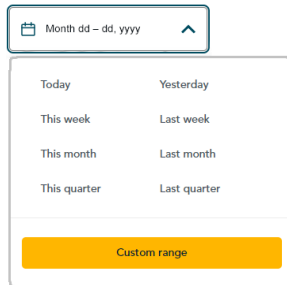
Follow the steps below to generate a financial transactions report for your Moneris Go portal store by selecting your own report date range.

1. Initiate a financial transactions report (see [Financial transactions report](#) on page 63).

2. On the "Reports" page, click on the calendar  icon in the search bar (shown below).

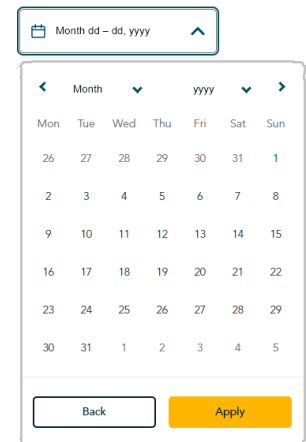


3. When the date range drop-down displays (shown below), click on **Custom range**.



4. When the calendar displays (shown here), click on a start date to highlight it.

Note: To roll the calendar month/year backward or forward, click on the back < icon or the next > icon beside the month/year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down ▼ icon beside the month/year, and then select a specific month/year.



5. Click on an end date to highlight it.

Note: To roll the calendar month/year backward or forward, click on the back < icon or the next > icon beside the month/year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down ▼ icon beside the month/year, and then select a specific month/year.

6. Click on the calendar's **Apply** button.

7. Wait while the report request is processed.

Note: To use a different search filter, see [Changing the search filters for your financial transactions report](#) (page 70).

Retrieving transactions by transaction type, card type, user, and/or channel: manual select

Follow the steps below to generate a financial transactions report for your Moneris Go portal store by manually selecting one or more search filters including transaction type, card type, user, and/or channel.

Note: To use a pre-defined filter set, see [Retrieving transactions by using pre-defined filter set \(page 76\)](#).

1. Initiate a financial transactions report (see [Financial transactions report](#) on page 63).
2. On the "Reports" page, click on **Apply filters** in the search bar (shown below).

Note: If one filter is already active, you will click on **1 filter applied**. If multiple filters are already active, you will click on **# filters applied**.



The screenshot shows the 'Transactions' search bar. It includes a date selector with a calendar icon and the text 'Month dd - dd, yyyy'. To the right is a search input field with a magnifying glass icon and the placeholder text 'Search by amount or order ID'. Further right are two buttons: 'Apply filters' with a funnel icon and 'Export' with a document icon.

3. When the "Filter transactions" window displays (shown here), manually select one or more search filters:

Note: To clear all selected filters, click on **Clear all**. To clear an individual filter, click on the "X" beside the filter that you want to disable.

To search by transaction type:

- a. Click on the "Transaction type" drop-down, and checkmark the box beside one or more transaction types (**Purchase, Refund, Void, Preauthorization, Completion, and Reauthorization**).

Note: To clear all selected transaction types, click on **Clear**.

To search by card type:

- a. Click on the "Card type" drop-down, and checkmark the box beside one or more card types (e.g. **Visa, Mastercard**, etc.).

Note: To clear all selected card types, click on **Clear**.

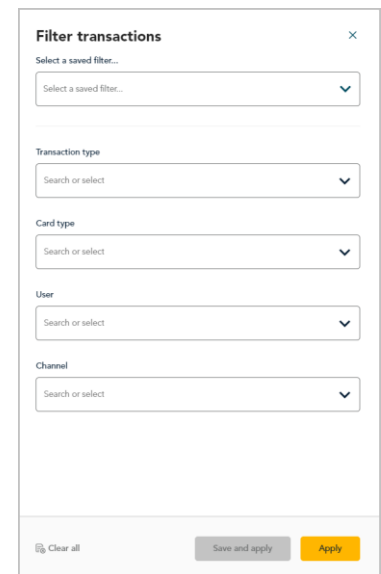
To search by user account:

- a. Click on the "User" drop-down, and checkmark the box beside one or more users (**Firstname Lastname**).

Note: To clear all selected users, click on **Clear**.

To search by channel type:

- a. Click on the "Channel" drop-down, and checkmark the box beside one or more channels (**Terminal, Virtual Terminal, Vault, E-commerce API, E-commerce (Moneris Checkout), Payment Request, WIX, Cash, Tap to Pay, and Go Retail POS**).



The screenshot shows the 'Filter transactions' modal window. It has a close button (X) in the top right corner. Below the title is a section for 'Select a saved filter...' with a dropdown menu. The main area contains four filter categories, each with a dropdown menu: 'Transaction type', 'Card type', 'User', and 'Channel'. At the bottom, there are three buttons: 'Clear all' with a trash icon, 'Save and apply' in a grey button, and 'Apply' in a yellow button.

Note: To clear all selected channels, click on **Clear**.

- Click on the **Apply** button, and wait while the report request is processed.
- When the "Reports" page refreshes, the number of active filters is indicated in the search bar (shown below).



Note: To use a different search filter, see [Changing the search filters for your financial transactions report](#) (page 70).

Retrieving transactions by using pre-defined filter set

Follow the steps below to generate a financial transactions report for your Moneris Go portal store by selecting a pre-defined search filter set, which can include any combination of the filters transaction type, card type, user, and/or channel.

Note: To define a new filter set, see [Defining a new search filter set \(page 77\)](#).

1. Initiate a financial transactions report (see [Financial transactions report on page 63](#)).

2. On the "Reports" page, click on **Apply filters** in the search bar (shown below).

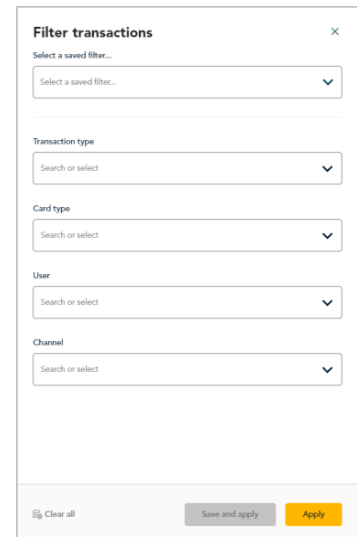
Note: If one filter is already active, you will click on **1 filter applied**. If multiple filters are already active, you will click on **# filters applied**.



The screenshot shows the 'Transactions' search bar. It includes a date selector with a calendar icon and the text 'Month dd - dd, yyyy'. To the right is a search input field with a magnifying glass icon and the placeholder text 'Search by amount or order ID'. Further right is a button with a funnel icon and the text 'Apply filters', and a final button with a download icon and the text 'Export'.

3. When the "Filter transactions" window displays (shown here), click on the "Select a saved filter" drop-down, and select a (pre-defined) filter group.

Note: To clear all selected filters, click on **Clear all**. To clear an individual filter, click on the "X" beside the filter that you want to disable.



The 'Filter transactions' dialog box is shown. It has a close button (X) in the top right corner. Below the title, there is a 'Select a saved filter...' dropdown menu. Underneath, there are four filter categories, each with a 'Search or select' dropdown: 'Transaction type', 'Card type', 'User', and 'Channel'. At the bottom of the dialog, there are three buttons: 'Clear all' (with a trash icon), 'Save and apply' (disabled), and 'Apply' (highlighted in yellow).

4. Click on the **Apply** button, and wait while the report request is processed.

5. When the "Reports" page refreshes, the number of active filters is indicated in the search bar (shown below).



The screenshot shows the 'Transactions' search bar after filters are applied. A red line points from the text '# OF ACTIVE FILTERS' to the text '# filters applied' in the search bar. The search bar also shows the date selector, search input field, and 'Export' button.

Note: To use a different search filter, see [Changing the search filters for your financial transactions report \(page 70\)](#).

Defining a new search filter set

Follow the steps below to generate a financial transactions report for your Moneris Go portal store by defining and saving a new search filter set, which can include any combination of the filters including transaction type, card type, user, and/or channel.

1. Initiate a financial transactions report (see [Financial transactions report](#) on page 63).
2. On the "Reports" page, click on **Apply filters** in the search bar (shown below).

Note: If one filter is already active, you will click on **1 filter applied**. If multiple filters are already active, you will click on **# filters applied**.

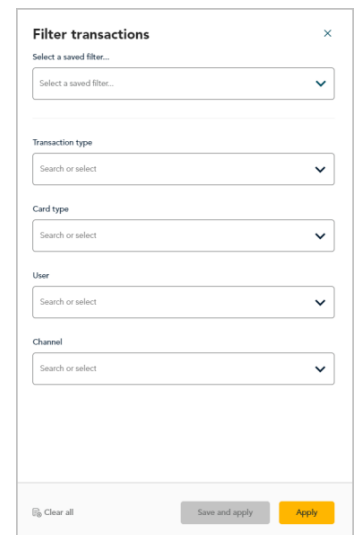


The screenshot shows the top of the Transactions page. On the left, there is a date selector with a calendar icon and the text "Month dd - dd, yyyy". In the center is a search input field with a magnifying glass icon and the placeholder text "Search by amount or order ID". On the right, there are two buttons: "Apply filters" with a downward arrow icon and "Export" with a document icon.

3. When the "Filter transactions" window displays (shown here), do the following:
 - a. Click on the drop-down for the filter group containing the filter type(s) that you want to add, and then checkmark the box beside the desired filter type(s).

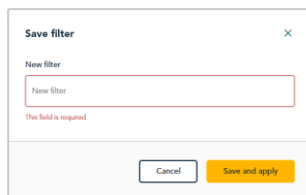
Note: To add all filter types in a group, checkmark the **Select all** box. To clear all selected filters in a group, click on **Clear**. To clear an individual filter, click on the **"X"** beside the filter that you want to disable.

- b. Click on the **Save and apply** button.



The screenshot shows the "Filter transactions" dialog box. It has a title bar with a close button. Below the title bar is a section "Select a saved filter..." with a dropdown menu. Below that are four filter groups, each with a dropdown menu and a "Search or select" input field: "Transaction type", "Card type", "User", and "Channel". At the bottom of the dialog, there are three buttons: "Clear all" with a trash icon, "Save and apply" (disabled), and "Apply" (active).

4. When the "Save filter" dialog displays (shown below), enter the name to apply to the new filter set, and click on the dialog's **Save and apply** button.



The screenshot shows the "Save filter" dialog box. It has a title bar with a close button. Below the title bar is a section "New filter" with a text input field. Below the input field is a red error message: "This field is required". At the bottom of the dialog, there are two buttons: "Cancel" and "Save and apply" (disabled).

5. Wait while the report request is processed.
6. When the "Reports" page refreshes, the number of active filters is indicated in the search bar (shown below).



The screenshot shows the Transactions search bar after filters have been applied. The "Apply filters" button is now replaced by "# filters applied", where the number is highlighted in red. A red line points from the text "# OF ACTIVE FILTERS" to the red number. The "Export" button remains visible.

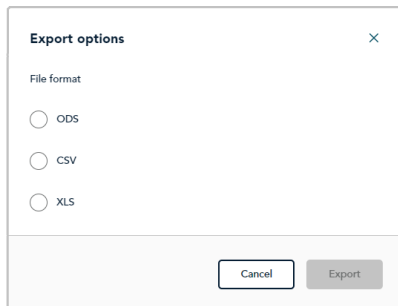
Exporting a financial transactions report

The steps below describe how to export your Moneris Go portal financial transactions report to a spreadsheet file (Excel or open document format) or to a text file (comma separated values format).

1. Initiate a financial transactions report (see [Financial transactions report](#) on page 63).
2. On the "Reports" page, go to the search bar, and click on the **Export** button (shown below).



3. When the "Export options" dialog displays (shown below), select the radio button beside the desired export file format (**ODS**, **CSV**, or **EXCEL**).



4. Click on the dialog's **Export** button.
5. When "File downloaded successfully" displays, the operation is complete.

Note: When your device prompts you to save the downloaded file, save the file to the desired location.

Other reports

Payment request reporting

- See [Payment requests report](#) (page 99).

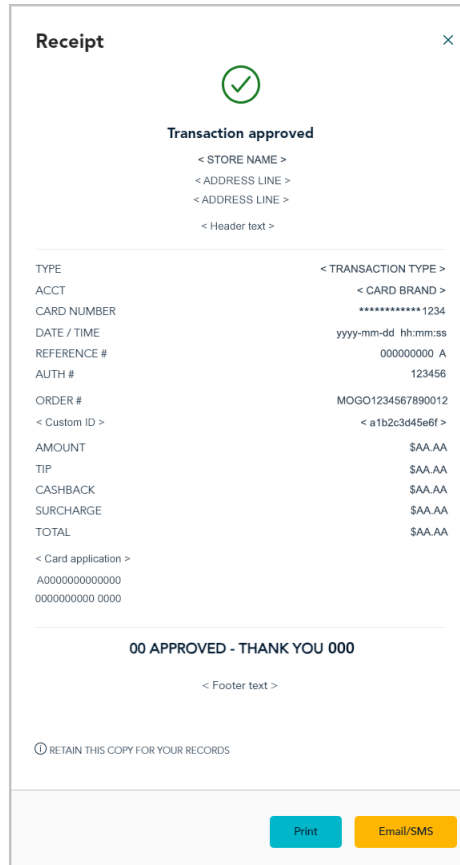
Vault customer profile reporting

- See [Vault customer profiles report](#) (page 114).
- See [Financial transactions associated with a Vault customer profile](#) (page 119).

Receipts

A transaction receipt (shown below) is generated for every approved/declined transaction that is processed through your Moneris Go portal store, including any transaction that was performed on a point-of-sale device or application that is synched to your store.

Note: To view, print, or send (email/text) a transaction receipt from the Moneris Go portal, see [Sending/printing a transaction receipt \(page 81\)](#).



Debit/credit receipt

- For receipt line-item descriptions, see [Receipt example: debit/credit \(page 82\)](#).

Gift receipt

- For receipt line-item descriptions, see [Receipt example: gift \(page 84\)](#).

Cash receipt

For receipt line-item descriptions, see [Receipt example: cash \(page 86\)](#).

Sending/printing a transaction receipt

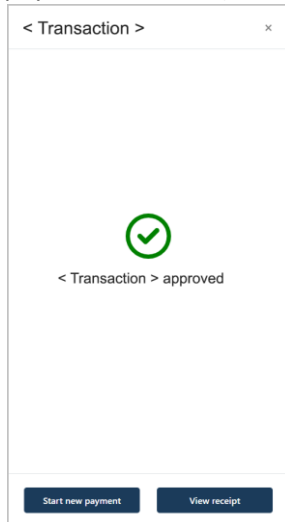
The steps below describe how to view, send, and/or print a financial transaction receipt (see [Receipts](#) on page 80) from the Moneris Go portal.

1. Access the "Transaction details" page of the desired transaction (see [Transaction details](#) on page 65), and then click on the **View receipt** button near the upper right corner on the page (shown below).



OR

If you just submitted a Purchase, Preauthorization, or an independent Refund through the virtual terminal payment window (shown below), click on its **View receipt** button while the window is open.



2. When the "Receipt" window displays (shown here), do any of the following:

To print the transaction receipt:

- a. In the "Receipt" window (shown here), click on the **Print** button.
- b. Follow the prompts for your device operating system to execute the print job.

To email/text the transaction receipt:

- a. In the "Receipt" window (shown here), click on the **Email/SMS** button.
- b. When the "Receipt options" dialog displays (shown below), enter the email address or the mobile phone number (include the area code) of the recipient to whom you want to send the receipt.
- c. Click on the **Send** button to close the dialog.
- d. When the response "Email successfully sent" or "SMS successfully sent" displays, the operation is complete.



Receipt example: debit/credit

The labelled receipt image shown below is a generic example of a Moneris Go portal debit/credit transaction receipt.

Note: To view, print, or send (email/text) a transaction receipt from the Moneris Go portal, see [Sending/printing a transaction receipt](#) (on page 81).



The table below describes line items in the labelled receipt image above.

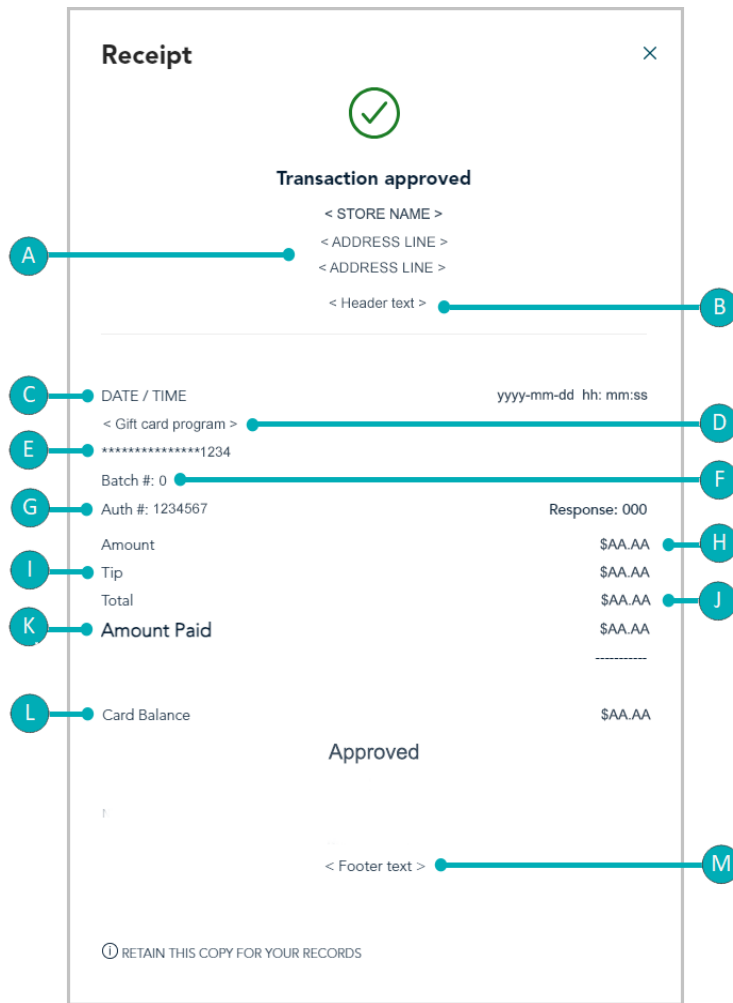
Label	Line item	Description
A	< Store name > < ADDRESS LINE # 1 > < ADDRESS LINE # 2 >	Store name (same as the store tile label on your "Stores" page) and address. Note: The store name can be used to identify the Moneris Go portal store to which a point-of-sale device or application is synched.
B	< Header text >	Customizable message in the header (see Moneris Go terminal: receipt settings on page 174; and see Moneris Go Plus terminal: receipt settings on page 193).
C	TYPE	Transaction type.
D	ACCT	Card brand (type) used for transaction.
E	CARD NUMBER	Masked debit/credit card number.

Label	Line item	Description
F	DATE/TIME	Date (Month dd, yyyy)/time (hh:mm:ss am/pm) of the transaction.
G	REFERENCE #	Host reference number.
H	AUTH #	Authorization number.
I	ORDER #	Unique transaction identifier (also referred to as "Order ID").
J	< Custom ID >	<p>Custom transaction identifier (see Custom ID: store settings on page 142; see Moneris Go terminal: transaction settings on page 171; and see Moneris Go Plus terminal: transaction settings on page 190).</p> <p>Merchant Direct note: Any data populating under Moneris Go portal's custom ID field/header in a Go portal receipt or report will always be listed under the header "Customer ID" in Merchant Direct's financial transactions reports regardless of the field/header label that is configured in Moneris Go portal.</p>
K	AMOUNT	Transaction amount, not including any tip, cashback, and surcharge.
L	TIP	Tip amount (see Moneris Go terminal: tip settings on page 183; and see Moneris Go Plus terminal: tip settings on page 202).
M	CASHBACK	Cashback amount (see Moneris Go terminal: cashback settings on page 180; and see Moneris Go Plus terminal: cashback settings on page 199).
N	SURCHARGE	Surcharge amount (see Moneris Go terminal: transaction settings on page 171; and see Moneris Go Plus terminal: transaction settings on page 190).
O	TOTAL	Total transaction amount, including any tip, cashback, and surcharge.
P	< Footer text >	Customizable message in the footer (see Moneris Go terminal: receipt settings on page 174); and Moneris Go Plus terminal: receipt settings on page 193).

Receipt example: gift

The labelled receipt image shown below is a generic example of a Moneris Go portal gift transaction receipt.

Note: To view, print, or send (email/text) a transaction receipt from the Moneris Go portal, see [Sending/printing a transaction receipt](#) (on page 81).



The table below describes line items in the labelled receipt image above.

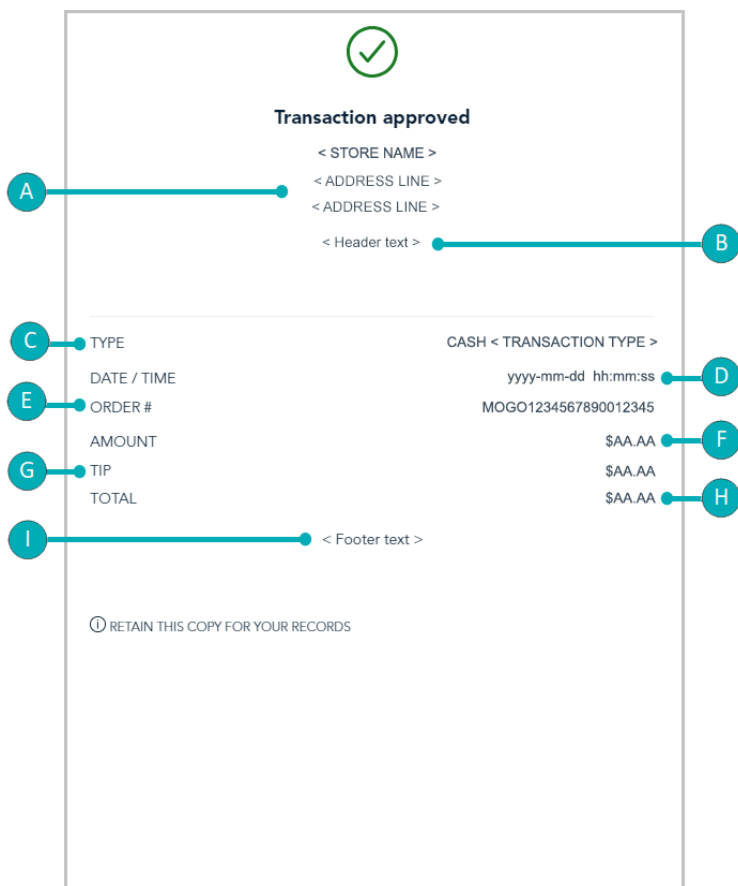
Label	Line item	Description
A	< Store name > < ADDRESS LINE # 1 > < ADDRESS LINE # 2 >	Store name (same as the store tile label on your "Stores" page) and address. Note: The store name can be used to identify the Moneris Go portal store to which a point-of-sale device or application is synced.
B	< Header text >	Customizable message in the header (see Moneris Go terminal: receipt settings on page 174; and see Moneris Go Plus terminal: receipt settings on page 193).
C	DATE/TIME	Date (Month dd, yyyy)/time (hh:mm:ss am/pm) of the transaction.
D	< Gift card program >	Gift card program.
E	*****1234	Masked gift card number.
F	Batch #	Batch number (gift).

Label	Line item	Description
G	Auth #	Authorization number.
H	Amount	Transaction amount, not including any tip.
I	Tip	Tip amount (see Moneris Go terminal: tip settings on page 183; and see Moneris Go Plus terminal: tip settings on page 202).
J	Total	Total transaction amount, including any tip.
K	Amount Paid	Purchase: The dollar amount removed from the gift card to pay for the Purchase. OR Refund: The dollar amount restored to the gift card.
L	Card Balance	The dollar amount remaining on the gift card.
M	< Footer text >	Customizable message in the footer (see Moneris Go terminal: receipt settings on page 174); and Moneris Go Plus terminal: receipt settings on page 193).

Receipt example: cash

The labelled receipt image (shown below) is a generic example of a Moneris Go portal cash transaction receipt.

Note: To view, print, or send (email/text) a transaction receipt from the Moneris Go portal, see [Sending/printing a transaction receipt \(on page 81\)](#).



The table below describes line items in the labelled receipt image shown above.

Label	Line item	Description
A	< Store name > < ADDRESS LINE # 1 > < ADDRESS LINE # 2 >	Store name (same as the store tile label on your "Stores" page) and address. Note: The store name can be used to identify the Moneris Go portal store to which a point-of-sale device or application is synced.
B	< Header text >	Customizable message in the header (see Moneris Go terminal: receipt settings on page 174; and see Moneris Go Plus terminal: receipt settings on page 193).
C	TYPE	Transaction type.
D	DATE/TIME	Date (Month dd, yyyy)/time (hh:mm:ss am/pm) of the transaction.
E	ORDER #	Unique transaction identifier (also referred to as "Order ID").
F	AMOUNT	Transaction amount not including tip.

Label	Line item	Description
G	TIP	Tip amount (see Moneris Go terminal: tip settings on page 183; and see Moneris Go Plus terminal: tip settings on page 202).
H	TOTAL	Total transaction amount, including any tip.
I	< Footer text >	Customizable message in the footer (see Moneris Go terminal: receipt settings on page 174; and see Moneris Go Plus terminal: receipt settings on page 193).



Payment Requests

In this section, we go over everything you need to know to create and manage your payment requests from your Moneris Go portal store.


Creating a payment request

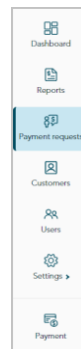
The steps below describe how to create a new credit card payment request through your Moneris Go portal store.

1. Log into the Moneris Go portal, and access the store through which you want to perform this action (see [Logging into the Moneris Go portal](#) on page 27).

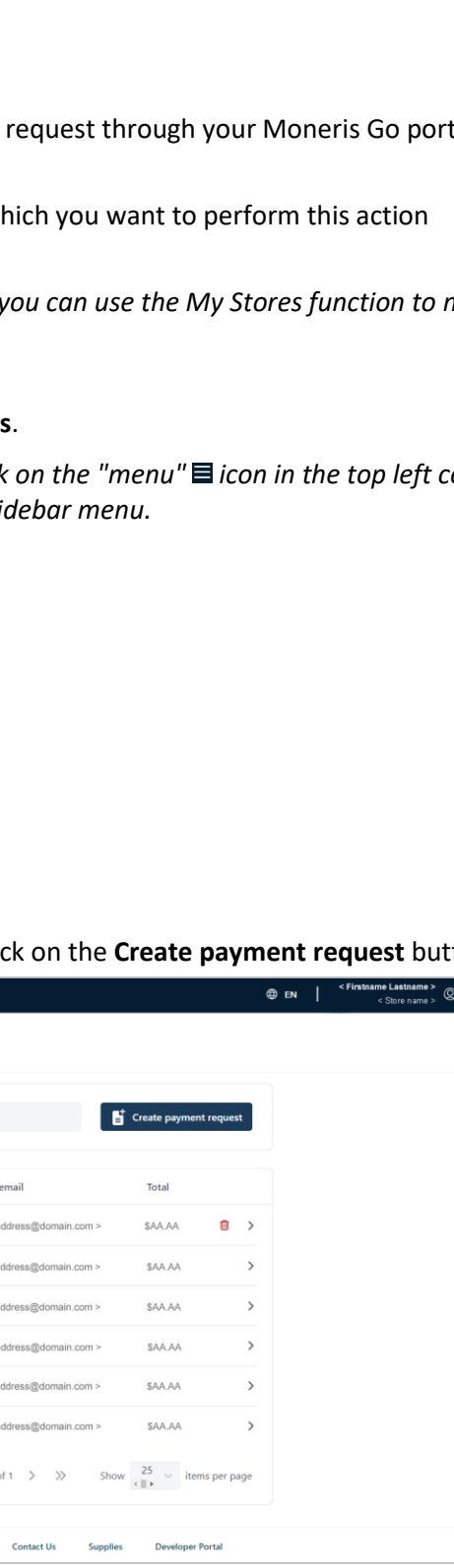
Note: If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).








2. On the sidebar menu (shown below), click on **Payment requests**.

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.

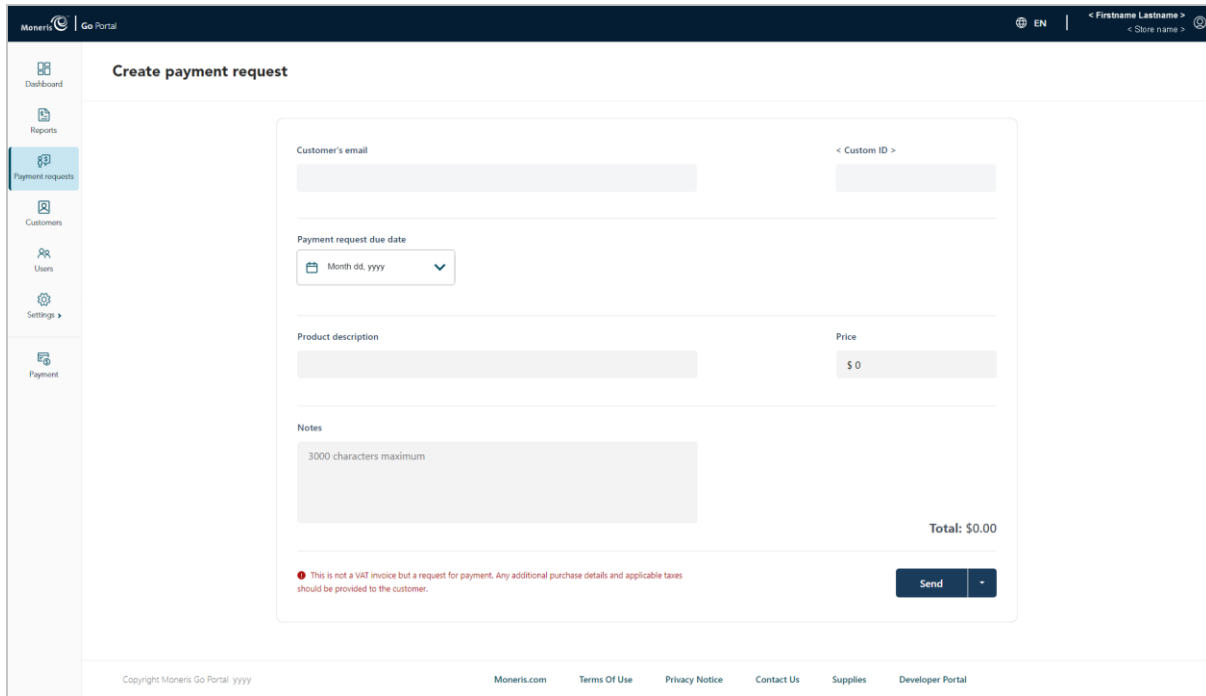



3. When the "Payment requests" page displays (shown below), click on the **Create payment request** button.

The screenshot shows the 'Payment requests' page in the Moneris Go Portal. It features a search bar, a 'Create payment request' button, and a table with columns for Status, Date created, Payment request ID, Customer's email, and Total. The table lists various request statuses like Draft, Pending, Sent, Overdue, Cancelled, and Paid. A footer contains copyright information and links to Moneris.com, Terms Of Use, Privacy Notice, Contact Us, Supplies, and Developer Portal.

Status	Date created	Payment request ID	Customer's email	Total
 Draft	Month dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA  >
 Pending	Month dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA >
 Sent	Month dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA >
 Overdue	Month dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA >
 Cancelled	Month dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA >
 Paid	Month dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA >

4. When the "Create payment request" page displays (shown below), continue to the next step.

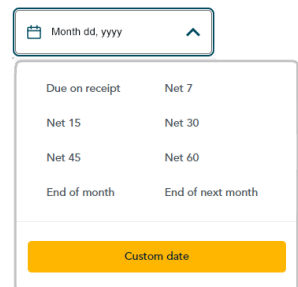


5. Click on the calendar  icon in the "Payment request due date" bar to display the date-range drop-down (shown below), and do one of the following:

To select a preset due date:

Note: The default due date is "Net 7" (i.e., seven days from date of this payment request's creation).

- a. In the date range drop-down (shown here), click on **Due on receipt** (payment is due the day on which the payment request is created), **Net 7**, **Net 15**, **Net 30**, **Net 45**, **Net 60**, **End of month**, or **End of next month**.

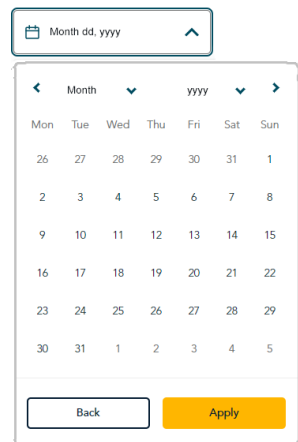


To select a custom due date:

- a. In the date range drop-down (shown above), click on the **Custom date** button.
- b. When the calendar displays (shown here), click on a specific calendar date to highlight it.

Note: To roll the calendar month/year backward or forward, click on the back < icon or the next > icon beside the month/year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down v icon beside the month/year, and then select a specific month/year.

- c. Click on the calendar's **Apply** button.



6. Fill in the mandatory payment fields:
 - a. In the **Customer email** field, enter the customer's email address (the payment request will be sent to this address).
 - b. In the **Product description** field, enter a description of the product/service for which you are sending the payment request.
 - c. In the **Price** field, enter the payment request amount (\$0.00).

7. Fill in the other payment fields as required:
 - a. In the **Notes** field, optionally enter supplementary information about the payment request.
Note: *The information that you enter in the "Notes" field will not be seen by your customer.*
 - b. If the custom transaction identifier field displays, optionally enter the requested data.
Note: *To configure the custom transaction identifier field, see [Store settings: payments](#) (page 137).*

8. You have the following options with respect to this payment request:
To send the payment request to the customer now:
 - a. Continue in [Sending a payment request](#) (page 92).
To save the payment request as a draft without sending it:
 - a. Continue in [Saving a payment request as a draft](#) (page 95).
To delete the payment request:
 - a. Click on any other menu item on the sidebar, or click on your Web browser's back button to return to a previous page.
Note: *The deleted payment request will not be logged in any Moneris Go portal store report.*

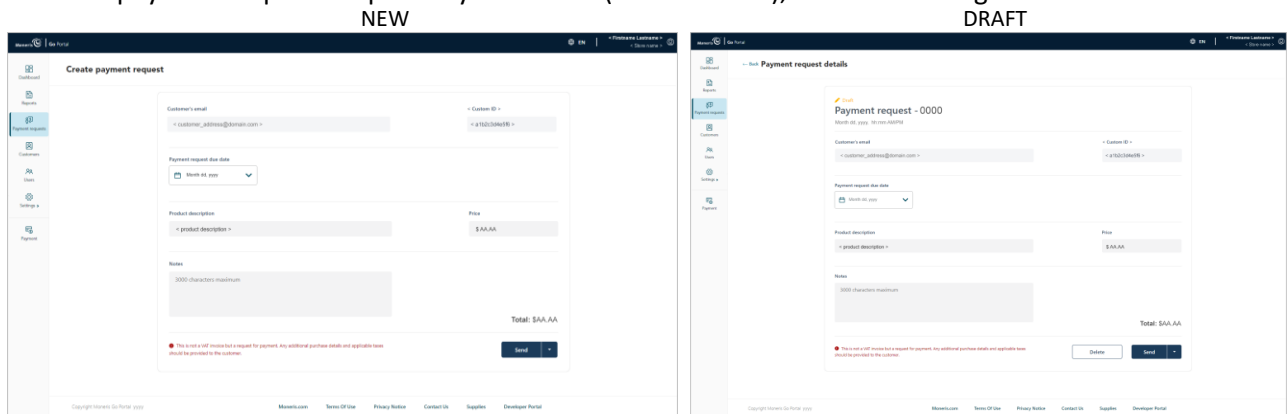
Send and save options

Sending a payment request

Once you finalize the details of a new or "draft" payment request (i.e., you filled in the mandatory payment fields), you can proceed to send the payment request to your customer for payment by following the steps below.¹³

Note: To start a new payment request, see [Creating a payment request](#) (page 89). To reopen a draft payment request, see [Payment request details](#) (page 101).

1. While the payment request is open on your screen (shown below), do the following:



- a. Click on the payment request's **Send** button.
- b. When the "Payment request sent successfully" response displays, the operation is complete.

Note: When your screen transitions to the "Payment requests" page, the payment request that you just sent will have a status indicating "Sent" or "Pending". (For status definitions, see [Payment request status indicators defined on page 100](#).)

2. You have the following options with respect to this payment request:

Wait for the customer to make the payment:

- a. See [Paying a payment request](#) (page 104).

Resend the payment request to the customer:

- a. See [Resending a payment request](#) (see page 93).

Cancel the payment request:

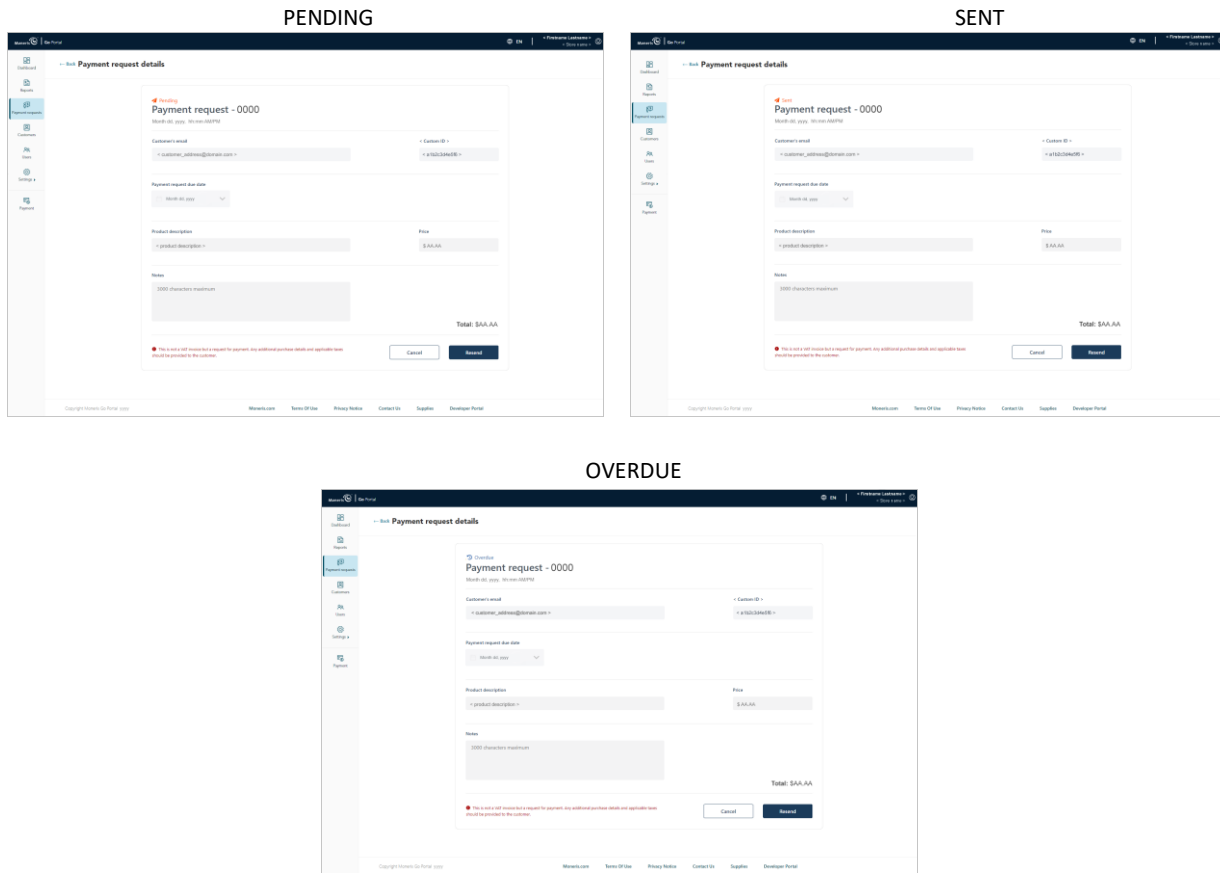
- a. See [Cancelling a payment request](#) (page 98).

¹³ Your user account's current default display language determines the language format of the payment request your customer receives. If you want to change your default display language before sending this payment request, see [Changing the default display language](#) (page 35).

Resending a payment request

If you reopen a payment request that has the status "Pending", "Sent", or "Overdue", you can opt to resend the same payment request to the customer although you cannot alter any of payment request details. The steps below describe how to resend an overdue/sent/pending payment request.¹⁴

1. Initiate a payment requests report, and retrieve the record of the payment request that you want to resend (see [Payment requests report](#) on page 99).
2. Once you retrieve the desired record, click on it to view its "Payment request details" page (shown below):



- a. Click on the payment request's **Resend** button.
- b. When the "Payment request sent successfully" response displays, the operation is complete.

Note: Your screen will transition back to the "Payment requests" page. The status of the newly re-sent payment request should indicate "Overdue" or "Sent". However, it may indicate "Pending". (For status definitions, see [Payment request status indicators defined](#) on page 100.)

¹⁴ Your user account's current default display language determines the language format of the payment request your customer receives. If you want to change your default display language before resending this payment request, see [Changing the default display language](#) (page 35).

3. You now have the following options with respect to this payment request:

Wait for the customer to make the payment:

a. See [Paying a payment request](#) (page 104).

Resend the payment request to the customer:

a. See [Resending a payment request](#) (see page 93).

Cancel the payment request:

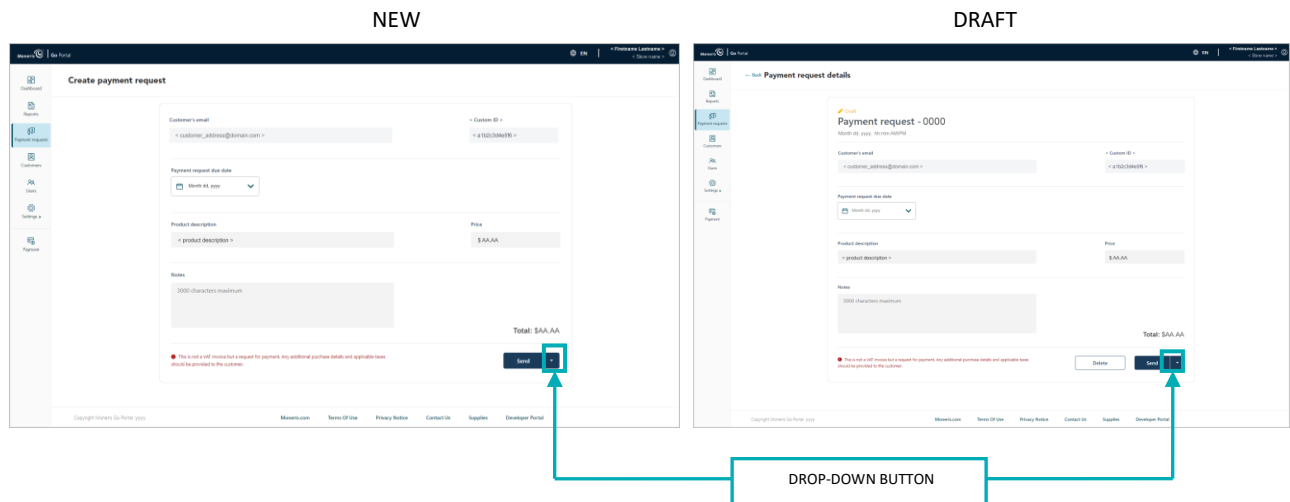
a. See [Cancelling a payment request](#) (page 98).


Saving a payment request as a draft

If you are working on a new or draft payment request but you are not ready to send the payment request to a customer (e.g., because you have not finalized the payment request details), you can proceed to save/re-save the payment request as a draft by following the steps below.

Note: The steps for creating a new payment request are described in [Creating a payment request](#) (page 89). The steps to reopen a draft payment request are described in [Payment request details](#) (page 101).

1. While the payment request is open on your screen (shown below), do the following:



- a. Click on the drop-down  button (shown above).
- b. When the drop-down displays (shown below), click on **Save as draft**.



2. When the "Payment request saved as draft successfully" response displays, the operation is complete.



Note: When your screen transitions to the "Payment requests" page, the status of this payment request will indicate "Draft" (see [Payment requests report](#) on page 99).

Deleting a payment request

If you discard (delete) a "draft" payment request, all record of it is also deleted from your Moneris Go portal store's logs. The steps below describe how to delete a draft payment request that was created through your Moneris Go portal store.

Note: If you want to rescind a payment request that has already been sent to a customer, see [Cancelling a payment request](#) (page 98).

1. Initiate a payment requests report, and retrieve the record of the "draft" payment request that you want to delete (see [Payment requests report](#) on page 99).
2. Once the desired payment request record is retrieved (shown below), you have two deletion options:

Status	Date created	Payment request ID	Customer's email	Total	
 Draft	Month, dd, yyyy	0000	< customer_address@domain.com >	\$AA.AA	 >

Delete the payment request now:

- a. Click on the payment request record's **Delete**  icon (shown above).
- b. When the "Delete payment request" dialog displays (shown below), click on the **Yes** button.

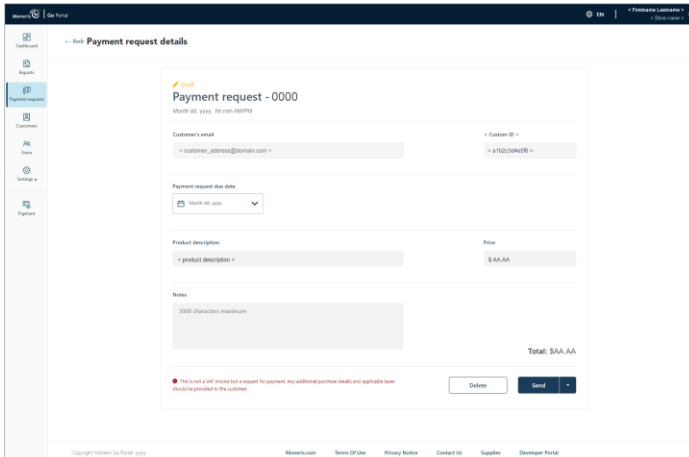
Delete payment request ×

Are you sure you want to delete this payment request?

- c. When the "Payment request successfully deleted" response displays, the operation is complete.

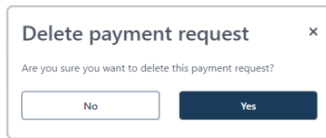
View the payment details first, and then delete the payment request:

- a. Click on the payment request record to view its "Payment request details" (shown below).



- b. Click on the payment request's **Delete** button.

- c. When the "Delete payment request" dialog displays (shown below), click on the **Yes** button.

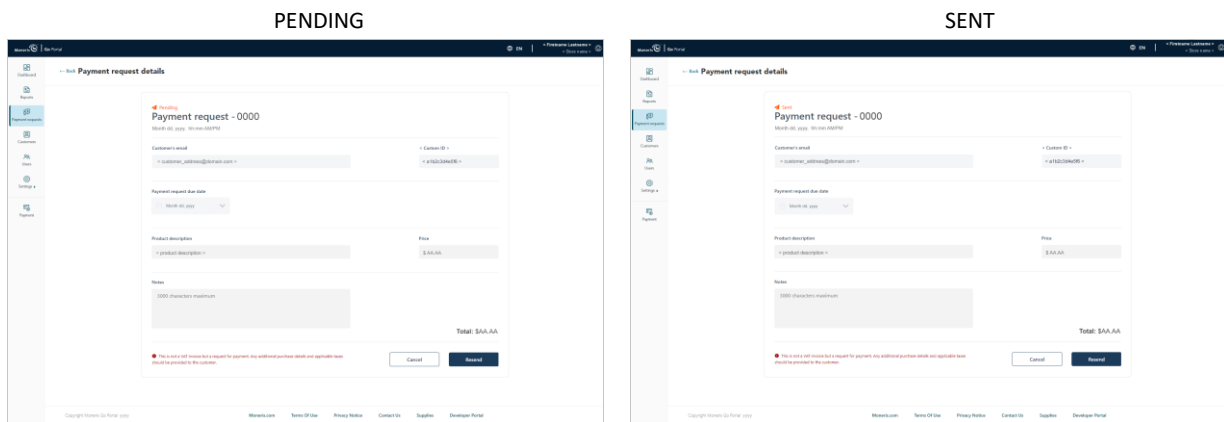


- d. When the "Payment request successfully deleted" response displays, the operation is complete.

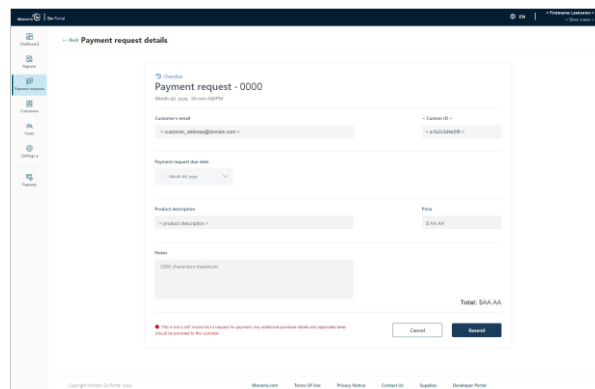
Cancelling a payment request

You can rescind (cancel) a payment request that has the status "Pending", "Sent" or "Overdue" (i.e., the customer has not yet made the payment). When you cancel a payment request, it permanently deactivates the payment request link that your customer received (or will receive) in their payment request email, thereby preventing the possibility of payment. The steps below describe how to cancel a payment request that was sent through your Moneris Go portal store.

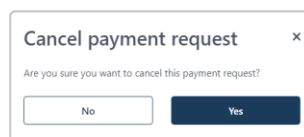
1. Initiate a payment requests report, and retrieve the record of the payment request that you want to cancel (see [Payment requests report](#) on page 99).
2. Once you retrieve the desired record, click on it to view its "Payment request details" page (shown below).



OVERDUE



3. Click on the payment request's **Cancel** button.
4. When the "Cancel payment request" dialog displays (shown below), click on the **Yes** button.



5. When the "Payment request successfully cancelled" response displays, the operation is complete.
Note: When your screen transitions to the "Payment requests" page, the status of this payment request will indicate "Cancelled".

Payment requests report

The payment requests report lists the payment requests that were processed through your Moneris Go portal store. Report data include status, creation date, payment request ID, customer email, and total amount. From this report, you may view/edit the details of a payment request, or start a new payment request. The steps below describe how to initiate a payment requests report.

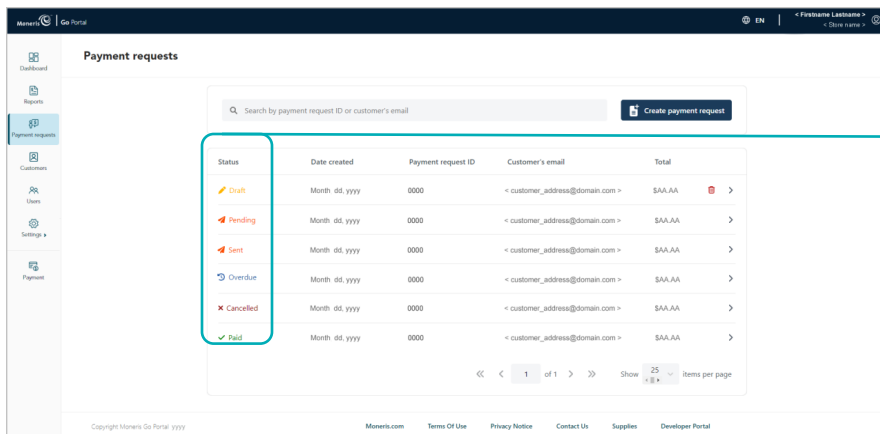
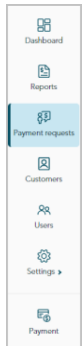
1. Log into the Moneris Go portal, and access the store through which you want to perform this action (see [Logging into the Moneris Go portal](#) on page 27).

Note: If you have multiple stores linked to your user account, you can use the *My Stores* function to move between your stores (see [Using My Stores](#) on page 36).

2. On the sidebar menu (shown here), click on **Payment requests**.

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 "Payment requests" page displays, it lists your store's payment requests.



Status indicators include "Draft", "Pending", "Sent", "Overdue", "Cancelled", and "Paid".

(For status definitions, see [Payment request status indicators defined](#) on page 100).

4. From this report, you can do any of the following:

- To narrow the report scope, enter a full payment request ID or a full/partial customer email in the **Search by payment request ID or customer's email** field.
- To view the details of a specific payment request record, see [Payment request details](#) (page 101).
- To change the number of hits listed on the 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 page <** icon or the **First page <<** icon respectively.
- To start a new payment request, click on the **Create payment request** button (continue at step 4 in [Creating a payment request](#) on page 90).

Payment request status indicators defined

Any payment request that you process through your Moneris Go portal store is appended with a status indicator that describes the current state of the payment request.

The payment request status indicator is listed beside every payment request that is logged in your payment requests report (see [Payment requests report](#) on page 99) and displays on the "Payment request details" page of each payment request (see [Payment request details](#) on page 101).

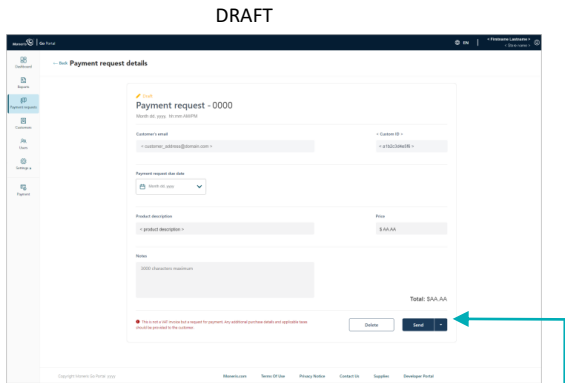
The status indicators are described in the table below.

Status indicator	Description
Cancelled	The payment request was sent to the customer but subsequently cancelled prior to payment (see Cancelling a payment request on page 98).
Draft	The payment request is saved but has not yet been sent to a customer. The payment request can be reopened to be edited, saved/sent, or deleted (see Payment request details on page 101). <i>Note: A draft can be saved indefinitely until you opt to send it or delete it.</i>
Overdue	The payment request was sent and emailed to the customer, but the due date elapsed, and the customer has not made their payment. The payment request will remain in this state indefinitely until either the customer makes the payment (see Paying a payment request on page 104) or you cancel the payment request first (see Cancelling a payment request on page 98). <i>Note: You can also resend an overdue payment request (see Resending a payment request on page 93).</i>
Pending	The payment request was sent but the Moneris Go portal server has not yet emailed the payment request to the customer. <i>Note: This status will change once the server retries and successfully emails the payment request. In the interim, you can opt to manually initiate a resend (see Resending a payment request on page 93).</i>
Paid	The customer made their payment (see Payment request details on page 101).
Sent	The payment request was sent, the Moneris Go portal server was able to successfully email the payment request to the customer, and payment is pending before the due date. <i>Note: You can allow the customer to make their payment (see Paying a payment request on page 104), you can cancel the request to prevent the customer from making the payment (see Cancelling a payment request on page 98), or you can resend the payment request (see Resending a payment request on page 93).</i>

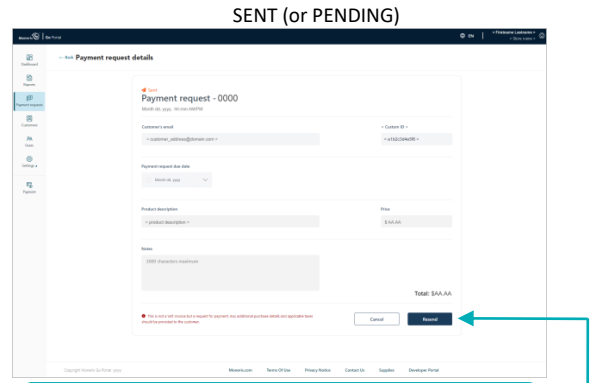
Payment request details

You can display the payment request details of any payment request that is logged in your Moneris Go portal store's payment requests report. Payment details include status ("Draft", "Sent", "Pending", "Overdue", "Paid", or "Cancelled") customer email, due date, product description, price/total, and a note if appended. You may also cancel, resend, or delete a payment request and view a payment receipt as described below.

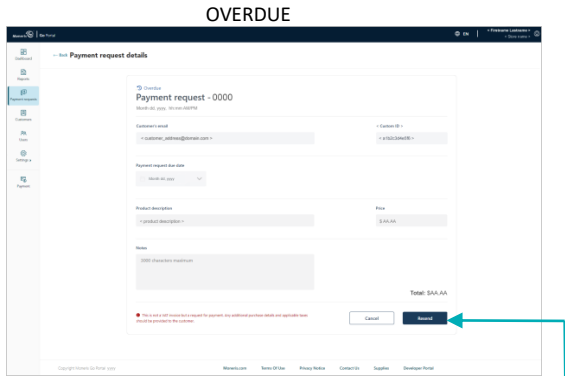
1. Initiate a payment requests report, and retrieve the desired payment request record (see [Payment requests report](#) on page 99).
2. When you retrieve the desired record, click on it to view its "Payment request details" page (shown below).



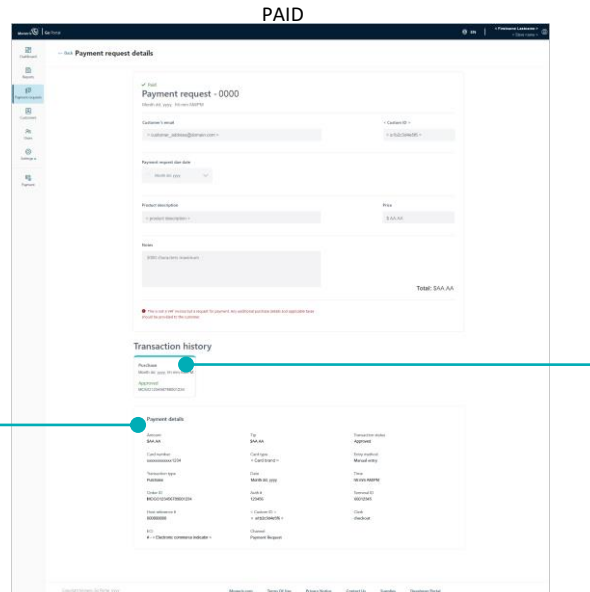
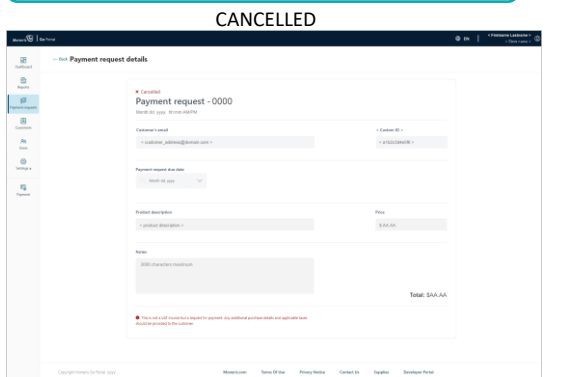
To send, see [Sending a payment request](#) (page 92).
To delete, see [Deleting a payment request](#) (page 96).



To resend, see [Resending a payment request](#) (page 93).
To cancel, see [Cancelling a payment request](#) (page 98).



To resend, see [Resending a payment request](#) (page 93).
To cancel, see [Cancelling a payment request](#) (page 98).



To view/send a receipt to the customer and/or perform a follow-on Refund or Void, see [Cross-referencing a paid payment request with its Purchase record](#) (page 103).

For line-item descriptions of the "Payment details" shown here, see [Payment details: paid payment request](#) (page 102).

Payment details: paid payment request

The "Payment details" module (shown below) displays on the "Payment request details" page (see [Payment request details](#) on page 101) of every paid payment request.

Payment details

<p>A Amount \$AAA.AA</p> <p>B Card number xxxxxxxxxxx1234</p> <p>C Transaction type Purchase</p> <p>D Order ID MOGO123456789001234</p> <p>E Host reference # 000000000</p> <p>F ECI # - < ecommerce indicator ></p>	<p>G Tip \$AA.AA</p> <p>H Card type < Card brand ></p> <p>I Date Month dd, yyyy</p> <p>J Auth # 123456</p> <p>K < Custom ID > < a1b2c3d4e5f6 ></p> <p>L Channel Payment Request</p>	<p>M Transaction status Approved</p> <p>N Entry method Manual entry</p> <p>O Time hh:mm AM/PM</p> <p>P Terminal ID 66012345</p> <p>Q Clerk checkout</p>
---	---	--

The table below describes line items in the labelled "Payment details" image above.

Label	Line item	Description
A	Amount	Total transaction amount.
B	Card number	Masked card number of the card used for the transaction.
C	Transaction type	Transaction type (i.e., "Purchase").
D	Order ID	Unique transaction identifier (also referred to as "Order #").
E	Host reference #	Host reference number.
F	ECI	Ecommerce indicator. Indicates the level of security that was used to obtain the cardholder's payment data. (For a list of ecommerce indicators and descriptions, see Ecommerce indicator descriptions on page 236.)
G	Tip	This is a default field. Tip entry is not supported for payment requests.
H	Card type	Card type (brand) used for the transaction.
I	Date	Date (Month dd, yyyy) of the transaction.
J	Auth #	Authorization number.
K	< Custom ID >	Custom transaction identifier (see Custom ID: store settings on page 142). Merchant Direct note: Any data populating under Moneris Go portal's custom ID field/header in a Go portal receipt or report will always be listed under the header "Customer ID" in Merchant Direct's financial transactions reports regardless of the field/header label that is configured in Moneris Go portal.
L	Channel	The device, application, or ecommerce integration (i.e., "Payment Request") through which payment data were originally captured prior to being sent to the Moneris host for processing as a transaction.
M	Transaction status	Response from card issuer (e.g., "Approved" or "Declined").
N	Entry method	Card entry method (i.e., "Manual entry").
O	Time	Time (hh:mm AM/PM) of the transaction.
P	Terminal ID	8-digit device identifier ("66" prefix indicates the transaction was processed through the Moneris Go portal and the checkout).
Q	Clerk	Username (always referenced as "checkout" for payment requests).

Cross-referencing a paid payment request with its Purchase record

When a customer completes a payment on a payment request, the payment request's status changes to "Paid" while the payment is logged as a credit Purchase in your store's financial transactions report.

Note: If you access the Purchase record, you can view additional transaction details, send a transaction receipt to the customer, and perform a follow-on Refund or Void transaction if required.

The steps below describe how to cross-reference a "Paid" payment request with its Purchase record:

1. Retrieve the desired "Paid" payment request record (see [Payment requests report](#) on page 99), and click on it to open its "Payment request details" page (shown below).

Moneris Go Portal

EN | Firstname Lastname | Store Name

← Back Payment request details

✓ Paid
Payment request - 0000
Month dd, yyyy, hh:mm AM/PM

Customer's email: < customer_address@domain.com > | Custom ID: < a1b2c3d4e5f6 >

Payment request due date: Month dd, yyyy

Product description: < product description > | Price: \$ AA.AA

Notes: 3000 characters maximum

Total: SAA.AA

⚠ This is not a VAT invoice but a request for payment. Any additional purchase details and applicable taxes should be provided to the customer.

Transaction history

Purchase
Month dd, yyyy, hh:mm AM/PM
Approved
MOGO12345678901234

Payment details

Amount: SAA.AA	Tip: SAA.AA	Transaction status: Approved
Card number: xxxxxxxxxxx1234	Card type: < Card brand >	Entry method: Manual entry
Transaction type: Purchase	Date: Month dd, yyyy	Time: hh:mm AM/PM
Order ID: MOGO12345678901234	Auth #: 123456	Terminal ID: 66012345
Host reference #: 00000000	Custom ID: < a1b2c3d4e5f6 >	Clerk: checkout
ECI #: < e-commerce indicator >	Channel: Payment Request	

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"ORDER ID": The alphanumeric string beginning with "MOGO" or "MGO".

2. Go to the "Payment details" module, and copy the "Order ID" (shown above) to your clipboard.
3. Initiate a financial transactions report, and use the order ID as your search filter to retrieve the corresponding Purchase transaction (see [Financial transactions report](#) on page 63).

Customer actions

Paying a payment request

When you send a payment request through your Moneris Go portal store (see [Sending a payment request](#) on page 92), the recipient customer/cardholder must follow the steps below to make their payment.

1. When the customer receives the "Payment request - 0000" email in their inbox, they open it.
2. When the payment request is open on their screen (shown below), the customer clicks on the **Complete your purchase** hyperlink.

The screenshot shows an email interface for a payment request. At the top, it says "< Store name >". Below that is the amount "\$ AA.AA" and a blue hyperlink "Complete your purchase". The email body includes the following text: "Date: < mm/dd/yy >", "Payment request ID: 0000", and "Due date: < mm/dd/yy >". There is an "Order Summary" section with a table:

Item	Amount
< Product description >	\$AA.AA
Subtotal: \$ AA.AA	

At the bottom, it says "Thank you, The Moneris Team" and a blue hyperlink "Continue to payment". A footer note says "Please contact us at moneris@moneris.com or [unsubscribe](#)".

3. When the "Checkout" page displays (shown below), the customer fills in the following fields:

Contact information:

- a. In the **First Name** field, the customer enters their given name.
- b. In the **Last Name** field, the customer enters their surname.
- c. In the **Email** field, the customer enters their email address.
- d. In the **Phone Number** field, the customer enters their contact phone number.

Card information:

- a. In the **Cardholder Name** field, the customer enters the name on their credit card.
- b. In the **Card Number** field, the customer enters their credit card's 16-digit PAN (personal account number).
- c. In the **MMYY** field, the customer enters their credit card's due date (mm/yy).
- d. In the **CVV** field, the customer enters their credit card's 3- or 4-digit card verification number.

The screenshot shows a checkout page with a dark blue header containing "< Store name >" and "Payment request - 0000". The main content area is titled "Checkout" and is divided into two columns. The left column contains the following sections: "Contact Information" with fields for "First Name", "Last Name", "Email", and "Phone Number"; "Card Information" with fields for "Cardholder Name", "Card Number", "MMYY", and "CVV"; "Billing Address" with fields for "Address Line 1", "Address Line 2 (optional)", "City", "Country", "Province", and "Postal Code"; and an "Order Summary" table:

Item	Amount
< Product description >	AA.AA
Subtotal: AA.AA	

The right column contains a "Cart" section with a table:

Item	Amount
< Product description >	AA.AA
Subtotal: AA.AA	

At the bottom of the checkout page, there is a blue "Checkout" button.

Billing address:

- a. In the **Address Line 1** field, the customer enters their street address.
 - b. In the **Address Line 2** field, the customer optionally enters additional address information.
 - c. In the **City** field, the customer enters the city.
 - d. In the **Country** drop-down, the customer enters their country.
 - e. In the **Province** drop-down, the customer enters their province/state.
 - f. In the **Postal** code field, the customer enters their postal code.
4. The customer clicks on the **Checkout** button to submit their payment.
 5. When the transaction is processed, the "Completed payment request Thank you" response displays, but note the following:

About the transaction:

- The transaction is processed as a credit card Purchase.
- In your payment requests report, the status of the original payment request will now indicate "Paid" (see [Payment requests report](#) on page 99).

Viewing/sending a transaction receipt:

- You can opt to send a transaction receipt to the customer. To do this, you need to retrieve the corresponding Purchase transaction so that you can access/view its transaction receipt, see [Cross-referencing a paid payment request with its Purchase record](#) on page 103).

Unsubscribing from your mailing list:

- The customer can opt to unsubscribe from your mailing list (see [Unsubscribing from your mailing list](#) on page 106).

Unsubscribing from your mailing list

If the recipient of your payment request does not wish to receive email from your business, they must follow the steps below to unsubscribe from your mailing list.

Note: *The recipient (customer) can unsubscribe before or after they make their payment.*

1. When the customer receives the "Payment request - 0000" email in their inbox, they open it.
2. When the payment request is open on their screen (shown below), the customer clicks on the **unsubscribe** hyperlink.

< Store name >	
\$ AA.AA	
Complete your purchase	
Date: < mm/dd/yy > Payment request ID: 0000 Due date: < mm/dd/yy >	
Order Summary	
Item	Amount
<hr/>	
< Product description >	\$AA.AA
<hr/>	
	Subtotal: \$AA.AA
Thank you, The Moneris Team	Continue to payment
<small>Please contact us at moneris@moneris.com or unsubscribe</small>	

3. When "The merchant has been notified of your request to be removed from their mailing list" response displays, the operation is complete.

Note: *We will notify you about the customer's request so that you can take the appropriate action to remove them from your mailing list.*

4. If the customer still needs to make their payment, they must follow the steps in [Paying a payment request](#) (page 104).



Vault Customer Profiles Management

In this section, we go over everything you need to know to manage your Vault customer profiles from the Moneris Go portal.

Creating a Vault customer profile

The steps below describe how to generate an alpha-numeric data key (Moneris Vault token) that is associated with a customer profile you will create by capturing payment card details, billing address details, and personal customer details, including a customer ID and contact information.

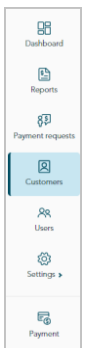
Note: When you save the profile, your Moneris Go portal store simultaneously processes a zero-dollar Verification transaction, which sends captured payment details, including billing address details (if submitted) to the card issuer and an address verification service (AVS). You can subsequently view the results of the Verification transaction and decide whether to retain or delete the profile.

1. Log into the Moneris Go portal, and access the store in which you want to create the Vault customer profile (see [Logging into the Moneris Go portal](#) on page 27).

Note: If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

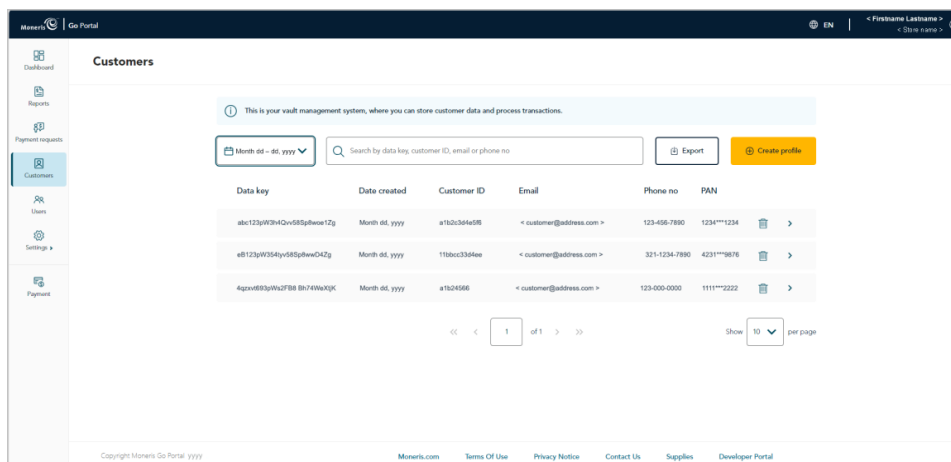
2. On the sidebar menu (shown here), click on **Customers**.

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 "Customers" page displays (shown below), click on the **Create profile** button.

Note: Any profile that was created within the date range specified in the calendar will be listed in the report.



4. When the "Create profile" page displays (shown below), go to the next step.

The screenshot shows the "Create profile" page in the Moneris Go Portal. The page is divided into three main sections, each highlighted with a red box and labeled with a red line pointing to a text label on the right:

- "CUSTOMER DETAILS" MODULE**: This section includes fields for Customer ID, Phone number, Email address, and Special instructions.
- "PAYMENT DETAILS" MODULE**: This section includes fields for Credit card number, Expiry date, and Security code.
- "ADDRESS VERIFICATION" MODULE**: This section includes fields for Street address and Postal code.

5. Go to the "Customer details" module (shown above), and optionally fill in the fields:

Note: If you fill in the "Customer ID", "Phone number", and "Email address" fields, it will make it easier to subsequently retrieve the profile in a report should you ever need to update/delete the profile.

- a. In the **Customer ID** field, optionally enter a customer identifier.

Note: Any data that you enter in this field will populate the "Custom ID" field of the Verification transaction that results when you save this profile.

- b. In the **Phone number** field, optionally enter the customer's phone number.
- c. In the **Email address** field, optionally enter the customer's email address.
- d. In the **Special instructions** field, optionally enter additional information about the profile.

6. Go to the "Payment details" module (shown above), and fill in all the fields:

- a. In the **Credit card number** field, enter the customer's/cardholder's credit card number. (Some card brands support debit card manual entry in this field.)
- b. In the **Expiry date** field, enter the credit card's expiry date (mm/yy).
- c. In the **Security code** field, enter the credit card's 3- or 4-digit card verification number (this number will not be stored in the profile).

7. Go to the "Address verification" module (shown above), and optionally enter the customer's/cardholder's billing address:

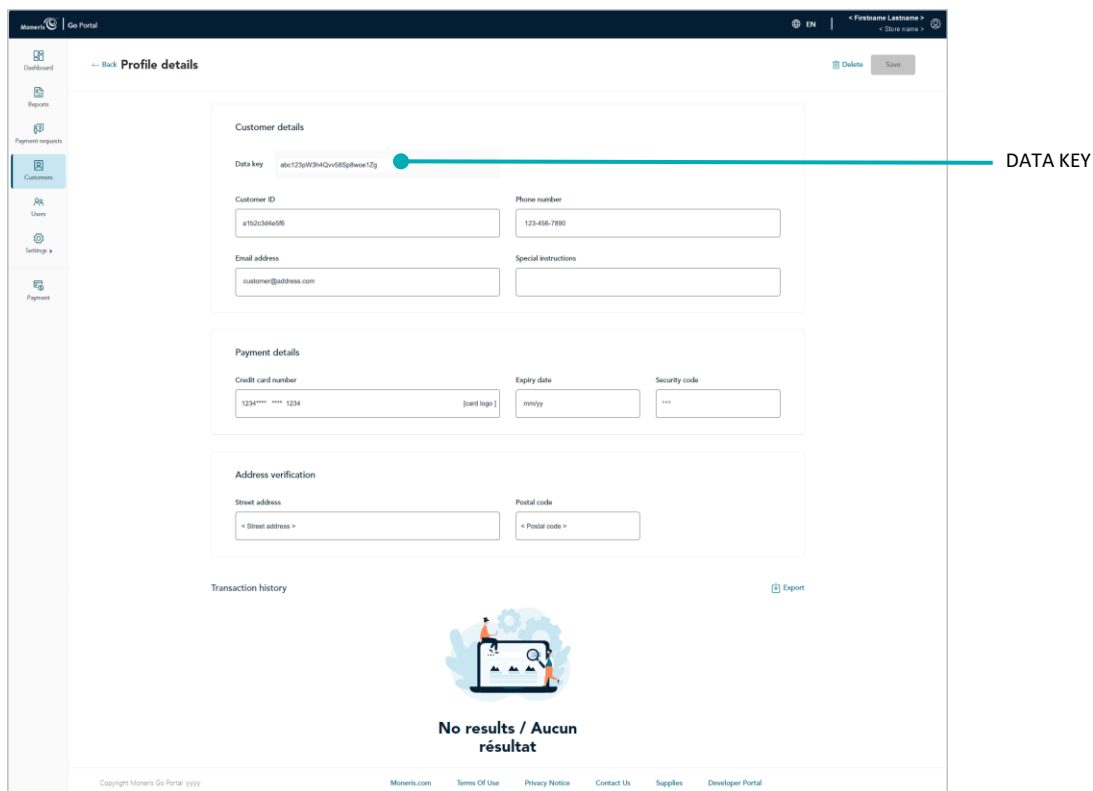
- a. In the **Street address** field, enter the cardholder billing street address.
- b. In the **Postal code** field, enter the cardholder billing postal code.

8. When you are finished capturing the profile details, click on the **Save** button.

Note: This action triggers Moneris Go portal to initiate a Verification transaction, which is sent to the Moneris host for processing as a zero-dollar transaction. If the Verification transaction is approved, the Vault customer profile will be successfully created (see Verification transaction: Vault customer profile on page 121).

9. When the "Profile successfully created" response displays, the operation is complete.

10. When the page refreshes into the "Profile details" page (shown below), the profile's unique data key will be listed in the "Customer details" module.

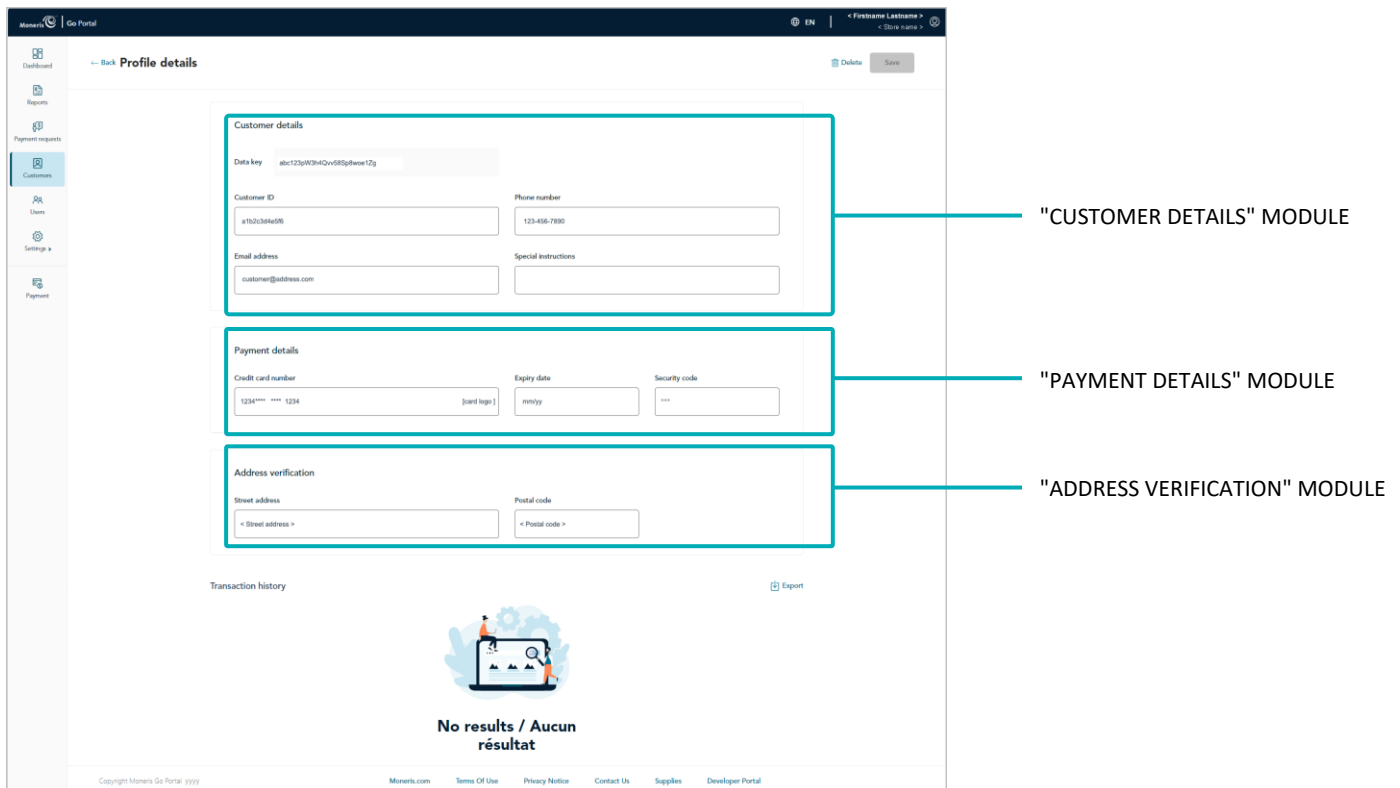


Updating a Vault customer profile

The steps below describe how to update the details (customer, payment, and/or address) of a saved Vault customer profile in your Moneris Go portal store.

Note: When you save the updated profile, your Moneris Go portal store simultaneously processes a zero-dollar Verification transaction, which sends captured payment details, including billing address details (if submitted) to the card issuer and an address verification service (AVS). You can subsequently view the results of the Verification transaction and decide whether to retain or delete the profile.

1. Initiate a Vault customer profiles report to retrieve the profile that you want to update (see [Vault customer profiles report](#) on page 114), and then click on the desired profile to open it.
2. When the "Profile details" page displays (shown below), update the customer, payment, and/or address verification details as desired:



Updating the customer details:

- a. Go to the "Customer details" module (shown above), and update the desired field(s):

Note: If you fill in the "Customer ID", "Phone number", and "Email address" fields, it will make it easier to subsequently retrieve the profile in a report should you ever need to update/delete the profile.

- In the **Customer ID** field, optionally enter a customer identifier.

Note: Any data that you enter in this field will populate the "Custom ID" field of the Verification transaction that results when you save this profile.

- In the **Phone number** field, optionally enter the customer's phone number.
- In the **Email address** field, optionally enter the customer's email address.
- In the **Special instructions** field, optionally enter additional information about the profile.

Updating the payment details:

- a. Go to the "Payment details" module (shown on previous page), and update all the field(s):
 - In the **Credit card number** field, enter the customer's/cardholder's credit card number.
Note: Some card brands support debit card manual entry in this field.
 - In the **Expiry date** field, enter the credit card's expiry date (mm/yy).
 - In the **Security code** field, enter the credit card's 3- or 4-digit card verification number (this number will not be saved in the profile).

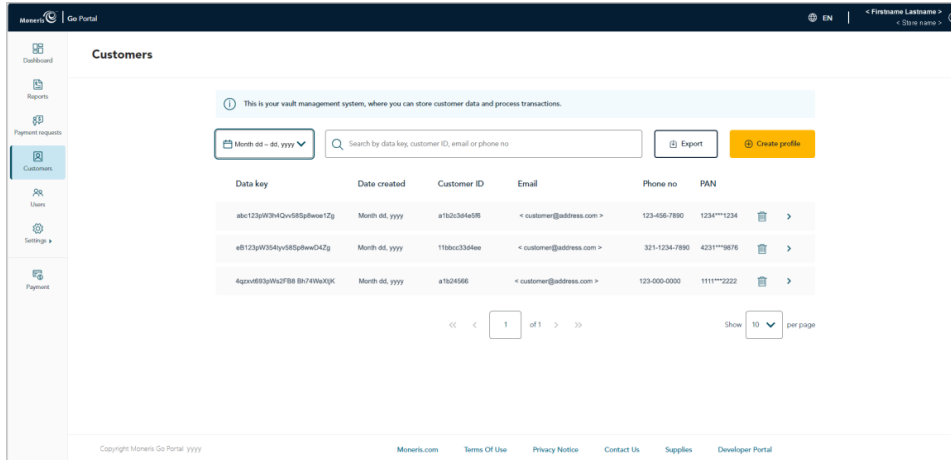
Updating the address verification details:

- a. Go to the "Address verification" module (shown on previous page), and update the customer's/cardholder's billing address field(s):
 - In the **Street address** field, enter the cardholder billing street address.
 - In the **Postal code** field, enter the cardholder billing postal code.
3. When you are finished updating the profile details, click on the **Save** button.
Note: This action triggers Moneris Go portal to initiate a Verification transaction, which is sent to the Moneris host for processing as a zero-dollar transaction. If the Verification transaction is approved, the profile will be successfully updated (see [Verification transaction: Vault customer profile](#) on page 121).
4. When the "Profile successfully updated" response displays, the operation is complete.


Deleting a Vault customer profile

The steps below describe how to delete a saved Vault customer profile in your Moneris Go portal store.

1. Initiate a Vault customer profiles report, and retrieve the profile that you want to delete (see [Vault customer profiles report](#) on page 114).
2. When the desired profile is listed on the "Customers" page (shown below), do one of the following:

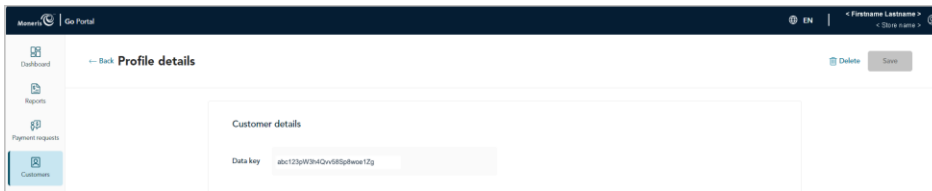


Delete the profile without opening it:

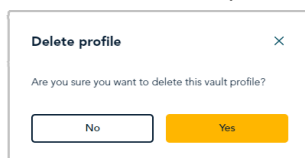
- a. On the "Customers" page (shown above), click on the **Delete**  icon corresponding to the profile that you want to delete.

Open the profile, and then delete it:

- a. On the "Customers" page (shown above), click on the profile that you want to delete to open it.
- b. When the "Profile details" page displays (shown partially below), click on **Delete**.



3. When the "Delete profile" dialog displays (shown below), click on its **Yes** button.



4. When "Profile deleted successfully" response displays, the operation is complete.

Note: The deleted profile will no longer be listed on the "Customers" page.


Vault customer profiles report

The steps below describe how to view/initiate a Vault customer profiles report listing all saved profiles created in your Moneris Go portal store for a specified date. Report headers include "Data key" (alpha-numeric Vault token string), "Date created", "Customer ID", "Email", "Phone no", and "PAN" (first four and last four digits of the card number).

1. Log into the Moneris Go portal, and access the store in which you want to view/initiate the Vault customer profiles report (see [Logging into the Moneris Go portal](#) on page 27).

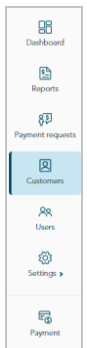
Note: If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

2. On the sidebar menu (shown here), click on **Customers**.

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 "Customers" page displays (shown below), it will list any profile that was created within the calendar week (Sunday to Saturday).


Note: To narrow the search by data key, customer ID, email, or phone number, enter a full or partial data key, customer ID, email, or phone number in the **Search by data key, customer ID, email, or phone number** field.



Data key	Date created	Customer ID	Email	Phone no	PAN
abc123jW3HqV58SpIhwoe12g	Month d4, yyyy	a1b2c3d4e5f6	< customer@address.com >	123-456-7890	1234****1234
e8123pW354ty58SpIhwoeD4Zg	Month d4, yyyy	11bbcc33d4ee	< customer@address.com >	321-1234-7890	4231****9876
4qzv6883jWz3F8B bh74WwXjK	Month d4, yyyy	a1b24566	< customer@address.com >	123-000-0000	1111****2222

4. You can do any of the following:

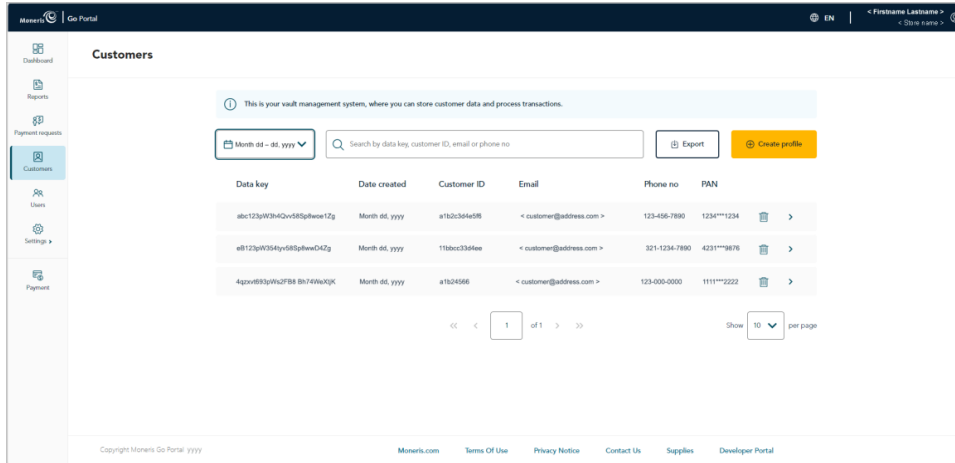
- To view the details of a listed profile, click on the desired profile to open it.
- To export the report results, see [Exporting a Vault customer profiles report](#) (page 116).
- To view/export a list of financial transactions associated with a profile, see [Financial transactions associated with a Vault customer profile](#) (page 119).
- To update the details of a profile, see [Updating a Vault customer profile](#) (page 111).

- To delete a profile, see [Deleting a Vault customer profile](#) (page 113).
- To change the report calendar date, click on the calendar  icon, and select a date, or customize a date range of your own (for instructions, see [Selecting a Vault customer profiles calendar date](#) on page 117).
- To change the number of hits listed on the page, click on the "Show # 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 page <** icon or the **First page <<** icon respectively.

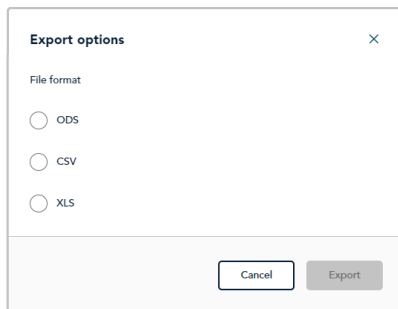
Exporting a Vault customer profiles report

The steps below describe how to export your Moneris Go portal store's Vault customer profiles report to a spreadsheet file (Excel or open document format) or a text file (comma separated values format).

1. Initiate a Vault customer profiles report (see [Vault customer profiles report](#) on page 114).
2. When the "Customers" page displays (shown below), click on the **Export** button.



3. When the "Export options" dialog displays (shown below), select the radio button beside the desired export file format (**ODS**, **CSV**, or **EXCEL**).




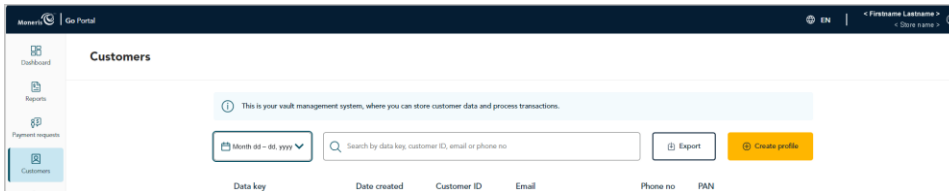
4. Click on the dialog's **Export** button.
5. When "File downloaded successfully" displays, the operation is complete.

Note: When your device prompts you to save the downloaded file, save the file to the desired location.

Selecting a Vault customer profiles calendar date

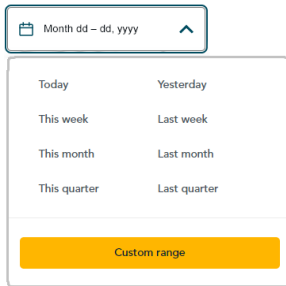
The steps below describe how to use the Vault customer profiles report calendar functions to specify a desired profile creation date or date range.

1. Initiate a Vault customer profiles report (see [Vault customer profiles report](#) on page 114).
2. When the "Customers" page displays (shown partially below), click on the calendar  icon to display the date-range drop-down. Do one of the following:



To select a pre-defined date range:

- a. When the date range drop-down displays (shown below), click on the desired date range (**Today**, **Yesterday**, **This week**, **Last week**, **This month**, **Last month**, **This quarter**, or **Last quarter**)



- b. Wait while the request is processed.

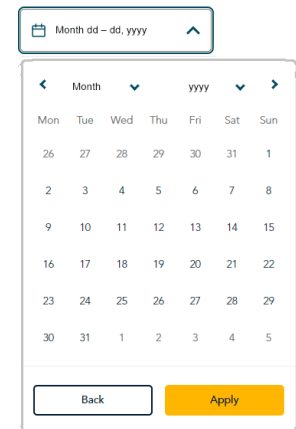
To customize a date range of your own:

- a. In the date range drop-down (shown above), click on **Custom range**.
- b. When the calendar displays (shown here), click on a start date to highlight it.

Note: To roll the calendar date backward or forward, click on the back < icon or the next > icon beside the month or year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down v icon beside the month and/or year, and then select a specific month/year.

- c. Click on an end date to highlight it.

Note: To roll the calendar month/year backward or forward, click on the back < icon or the next > icon beside the month/year shown in the calendar header until you reach the desired month/year. Alternatively, you can click on the down v icon beside the month/year, and then select a specific month/year.



- d. Click on the calendar's **Apply** button.
- e. Wait while the request is processed.

Financial transactions associated with a Vault customer profile

The steps below describe how to view and/or export a listing of approved/declined Purchases, Preauthorizations, and independent Refunds that were processed using the data key (tokenized card data) from a saved Vault customer profile in your Moneris Go portal store.

1. Initiate a Vault customer profiles report to retrieve the profile for which you want to view the list of associated financial transactions (see [Vault customer profiles report](#) on page 114), and then click on the desired profile to open it.
2. When the "Profile details" page displays, scroll to the "Transaction history" area (shown below) to view the list of Purchases, Preauthorizations, and independent Refunds that were processed using the data key from this profile.

Note: Financial transactions are listed by "Date", "Type", "Order ID", "Amount", and "Status".

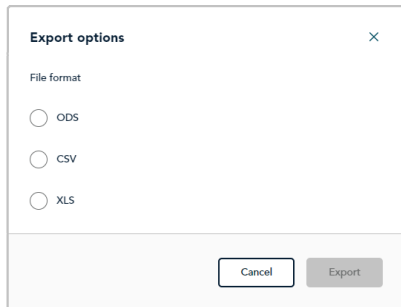
The screenshot shows the 'Profile details' page in the Moneris Go Portal. The page is divided into several sections: Customer details, Payment details, Address verification, and Transaction history. The Transaction history section is highlighted with a red box and contains a table with the following data:

Date	Type	Order ID	Amount	Status
Month, dd yyyy	= Transaction =	MDG000000001123	\$AA.AA	✓ Approved
Month, dd yyyy	= Transaction =	MDG000000000456	\$AA.AA	✓ Approved

"TRANSACTION HISTORY" AREA

3. If you want to export the transactions to a spreadsheet file (Excel or open document format) or a text file (comma separated values format), do the following:
 - a. Click on **Export** in the upper right corner of the "Transaction history" area.

- b. When the "Export options" dialog displays (shown below), select the radio button beside the desired export file format (**ODS**, **CSV**, or **EXCEL**).



- c. Click on the dialog's **Export** button.
- d. When "File downloaded successfully" displays, the operation is complete.

Note: When your device prompts you to save the downloaded file, save the file to the desired location.

Verification transaction: Vault customer profile

Whenever you execute a save action in a Vault customer profile, (see [Creating a Vault customer profile](#) on page 108; and see [Updating a Vault customer profile](#) on page 111), it triggers your Moneris Go portal store to initiate a Verification transaction, which is immediately sent to the Moneris host for processing as a zero-dollar transaction. If the Verification transaction is approved, the profile is saved/updated successfully.

Through the Verification transaction, the payment card details and billing address details (if submitted) are sent to one or more anti-fraud services for assessment. Card data are sent to the card issuer. Billing address data are sent to an address verification service (AVS), which allows the card issuer compare the submitted billing address with the billing address they have on file.

- To view the Verification transaction that is associated with a Vault customer profile, see [Cross-referencing a Verification transaction with a Vault customer profile](#) below.

Cross-referencing a Verification transaction with a Vault customer profile

To retrieve/view the Verification transaction that is associated with a saved/updated Vault customer profile in your Moneris Go portal store, initiate a financial transactions report from the store (see [Financial transactions report](#) on page 63). Please note the following:

- The Verification transaction's "Channel" indicator will show "Vault" in your financial transactions report.
- Each time you update and save an existing profile (see [Updating a Vault customer profile](#) on page 111), it triggers your Moneris Go portal store to initiate a new Verification transaction.




My Account

In this section, we go over everything you need to know to manage your own user account preferences.

"My account" settings: Moneris Portal user

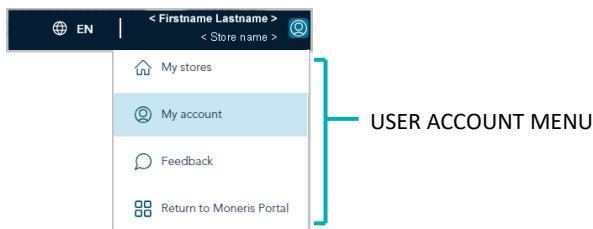
The steps below describe how to configure your Moneris Go portal/terminal user account settings, including name information and login credentials.

Note: If you do not have Moneris Portal access (i.e., you are an unmigrated user), this procedure is not applicable to you. Instead, please refer to ["My account" settings: unmigrated user \(page 129\)](#).

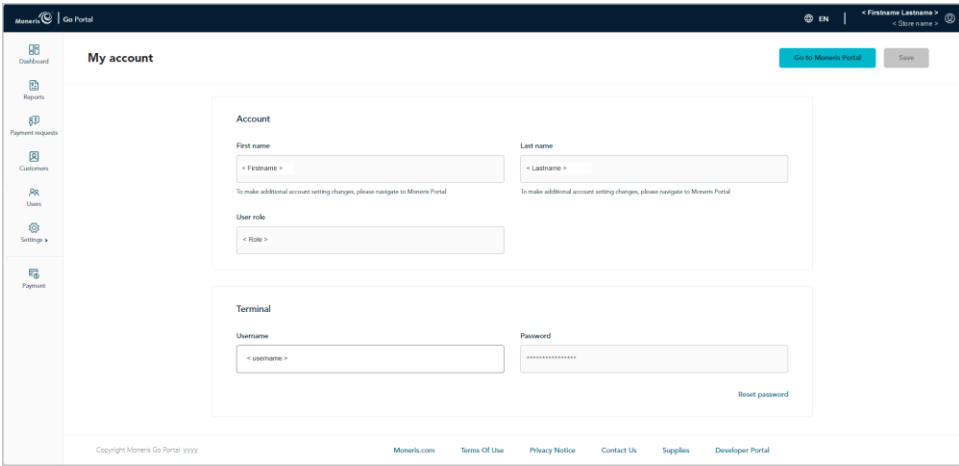
1. Log into the Moneris Go portal, and access any store (see [Logging into the Moneris Go portal](#) on page 27).
2. From any page in your store, click on your user account  tile, which displays in the top right corner of the Moneris Go portal page header (shown below).



3. When the user account menu displays (shown below), click on **My account**.



4. When the "My account" page displays (shown below), configure your user account preferences as desired:



The screenshot shows the "My account" page in the Moneris Go Portal. The page has a dark blue header with the Moneris logo and "Go Portal" text. Below the header is a navigation sidebar on the left with icons for Dashboard, Reports, Payment requests, Customers, Users, Settings, and Payment. The main content area is titled "My account" and contains two sections: "Account" and "Terminal". The "Account" section has input fields for "First name" and "Last name", a "User role" dropdown, and a "Role" dropdown. The "Terminal" section has input fields for "Username" and "Password", and a "Reset password" link. At the bottom of the page, there is a footer with copyright information and links for Moneris.com, Terms Of Use, Privacy Notice, Contact Us, Supplies, and Developer Portal.

Moneris Go portal

- To update your name information, see [Changing your name information: Moneris Portal user \(page 125\)](#).
- To change your login password, see [Changing your Moneris Go portal login password: Moneris Portal user \(page 126\)](#).

Terminal

- To change your login password, see [Changing your terminal login password: Moneris Portal user](#) (page 127).
- To change your login username, see [Changing your terminal login username: Moneris Portal user](#) (page 128).

Changing your name information: Moneris Portal user

The steps below describe how to update the first name and last name associated with your user account.

Note: If you do not have Moneris Portal access (i.e., you are an unmigrated user), this procedure is not applicable to you. Instead, please refer to [Changing your name information: unmigrated user](#) (page 131).

1. Access your user account settings (see "[My account](#)" settings: Moneris Portal user on page 123).
2. On the "My account" page (shown below), click on the **Go to Moneris Portal** button to return to Moneris Portal (you must edit your user account settings/name information from within Moneris Portal).

Note: The name change may not be applied in Moneris Go portal. For Moneris Portal documentation, visit <https://www.moneris.com/en/support/products/moneris-portal>.

The screenshot displays the "My account" settings page in the Moneris Go Portal. The page features a sidebar with navigation options: Dashboard, Reports, Payment requests, Customers, Users, Settings, and Payment. The main content area is titled "My account" and includes a "Go to Moneris Portal" button. Below this, there are two sections: "Account" and "Terminal". The "Account" section contains input fields for "First name" and "Last name", both with placeholder text "< Firstname >" and "< Lastname >". Below these fields, a note reads: "To make additional account setting changes, please navigate to Moneris Portal." There is also a "User role" dropdown menu with the placeholder "< Role >". The "Terminal" section contains input fields for "Username" (placeholder "< username >") and "Password" (masked with asterisks). A "Reset password" link is located below the password field. The footer of the page includes the text "Copyright Moneris Go Portal. yyyy" and several links: "Moneris.com", "Terms Of Use", "Privacy Notice", "Contact Us", "Supplies", and "Developer Portal".

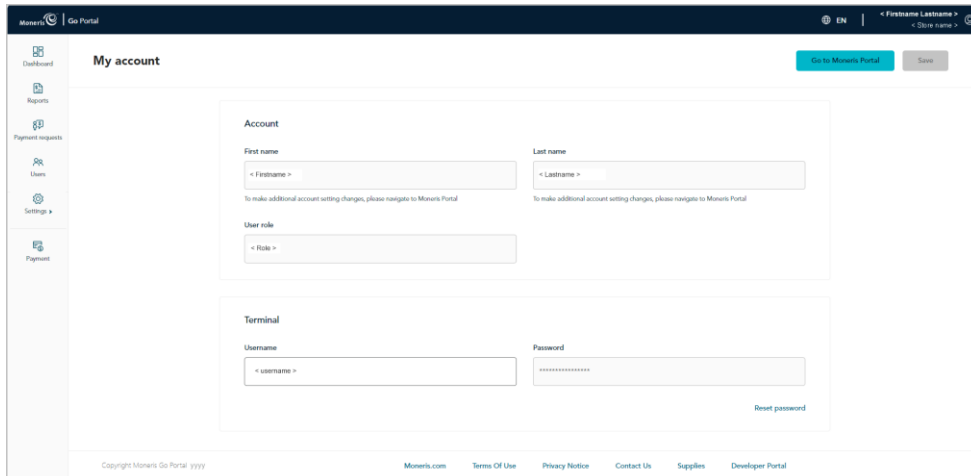
Changing your Moneris Go portal login password: Moneris Portal user

The steps below describe how to change your Moneris Go portal login password.

Note: If you do not have Moneris Portal access (i.e., you are an unmigrated user), this procedure is not applicable to you. Instead, please refer to [Changing your Moneris Go portal login password: unmigrated user \(page 132\)](#).

1. Access your user account settings (see "[My account](#)" settings: Moneris Portal user on page 123).
2. On the "My account" page (shown below), click on the **Go to Moneris Portal** button to return to Moneris Portal (you must edit your user account settings/login credentials from within Moneris Portal).

Note: For Moneris Portal documentation, visit <https://www.moneris.com/en/support/products/moneris-portal>.

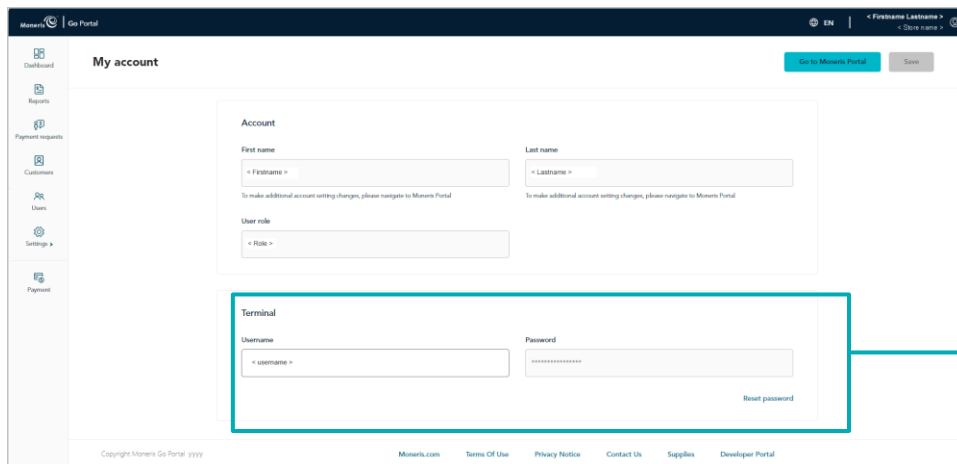


Changing your terminal login password: Moneris Portal user

The steps below describe how to change your terminal login password. (The change applies to any terminal that is synched to the store through which you are resetting your terminal login password.¹⁵)

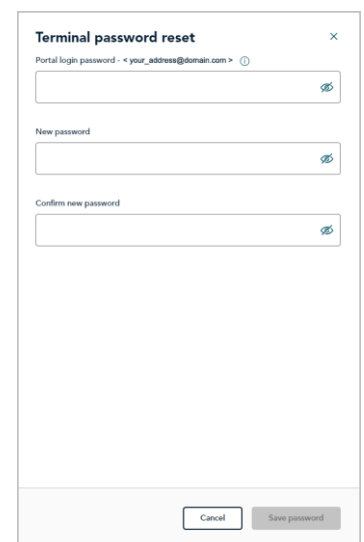
Note: If you do not have Moneris Portal access (i.e., you are an unmigrated user), this procedure is not applicable to you. Instead, please refer to [Changing your terminal login password: unmigrated user](#) (page 134).

1. Access your user account settings (see ["My account" settings: Moneris Portal user](#) on page 123).
2. On the "My account" page, scroll to the "Terminal" module (shown below).



"TERMINAL" MODULE

3. In the "Terminal" module, click on **Reset password**.
4. When the "Terminal password reset" window displays (shown here), do the following:
 - a. In the **Portal login password** field, enter your current Moneris Portal login password.
 - b. In the **New password** field, enter the new login password for your terminal.
 - c. In the **Confirm password** field, re-enter the new login password for your terminal.
 - d. Click on the **Save password** button.
 - e. When the "User updated successfully" response displays, the operation is complete.

A screenshot of a 'Terminal password reset' dialog box. The dialog has a title bar with 'Terminal password reset' and a close button. Below the title bar is the text 'Portal login password - <your_address@domain.com>'. There are three input fields: 'Portal login password', 'New password', and 'Confirm new password'. Each input field has a small icon on the right side. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Save password'.

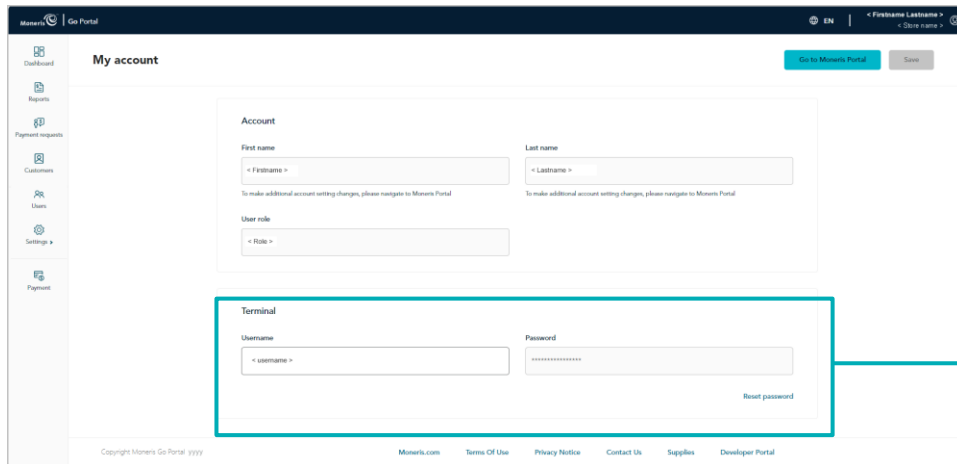
¹⁵ If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

Changing your terminal login username: Moneris Portal user

The steps below describe how to change your terminal login username. (The change applies to any terminal that is synced to the store through which you are resetting your terminal login username.¹⁶)

Note: If you do not have Moneris Portal access (i.e., you are an unmigrated user), this procedure is not applicable to you. Instead, please refer to [Changing your terminal login username: unmigrated user \(page 135\)](#).

1. Access your user account settings (see "[My account](#)" settings: Moneris Portal user on page 123).
2. On the "My account" page, scroll to the "Terminal" module (shown below).



"TERMINAL" MODULE


3. In the **Username** field, enter a new terminal login username.
4. Click on the **Save** button.
5. When the "User updated successfully" response displays, the operation is complete.

¹⁶ If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

"My account" settings: unmigrated user

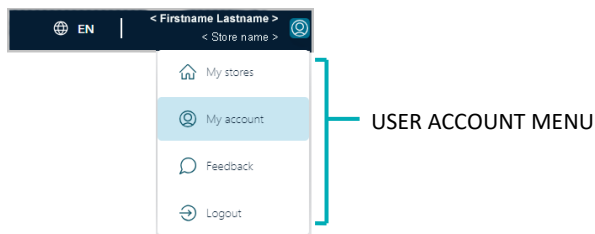
The steps below describe how to configure your Moneris Go portal/terminal user account settings, including name information and login credentials.

Note: If you are a Moneris Portal user, this procedure is not applicable to you. Instead, please refer to "My account" settings: Moneris Portal user (page 123).

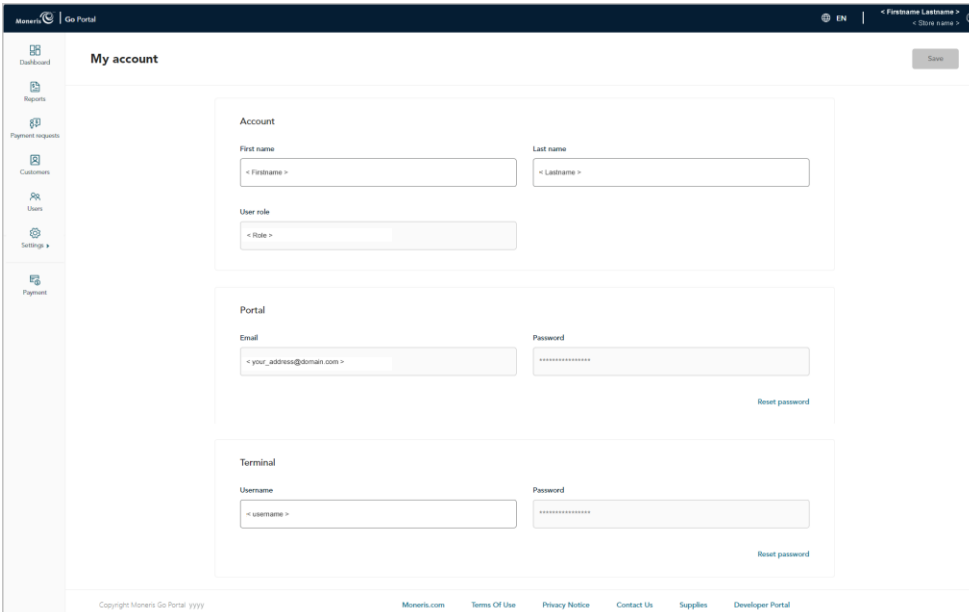
1. Log into the Moneris Go portal, and access any store (see Logging into the Moneris Go portal on page 27).
2. From any page in your store, click on your user account  tile, which displays in the top right corner of the Moneris Go portal page header (shown below).



3. When the user account menu displays (shown below), click on **My account**.



4. When the "My account" page displays (shown below), configure your user account preferences as desired:



The screenshot shows the "My account" settings page. The page has a dark blue header with the Moneris Go logo and the text "My account" in the center. On the left side, there is a sidebar with icons for Dashboard, Reports, Payment requests, Customers, Users, Settings, and Payment. The main content area is divided into three sections: "Account", "Portal", and "Terminal". Each section contains input fields for user information and a "Reset password" link. The "Account" section has fields for "First name" and "Last name", and a "User role" dropdown. The "Portal" section has fields for "Email" and "Password". The "Terminal" section has fields for "Username" and "Password". At the bottom of the page, there is a footer with copyright information and links for Moneris.com, Terms Of Use, Privacy Notice, Contact Us, Supplies, and Developer Portal.

Moneris Go portal

- To update your name information, see [Changing your name information: unmigrated user](#) (page 131).
- To change your login password, see [Changing your Moneris Go portal login password: unmigrated user](#) (page 132).

Terminal

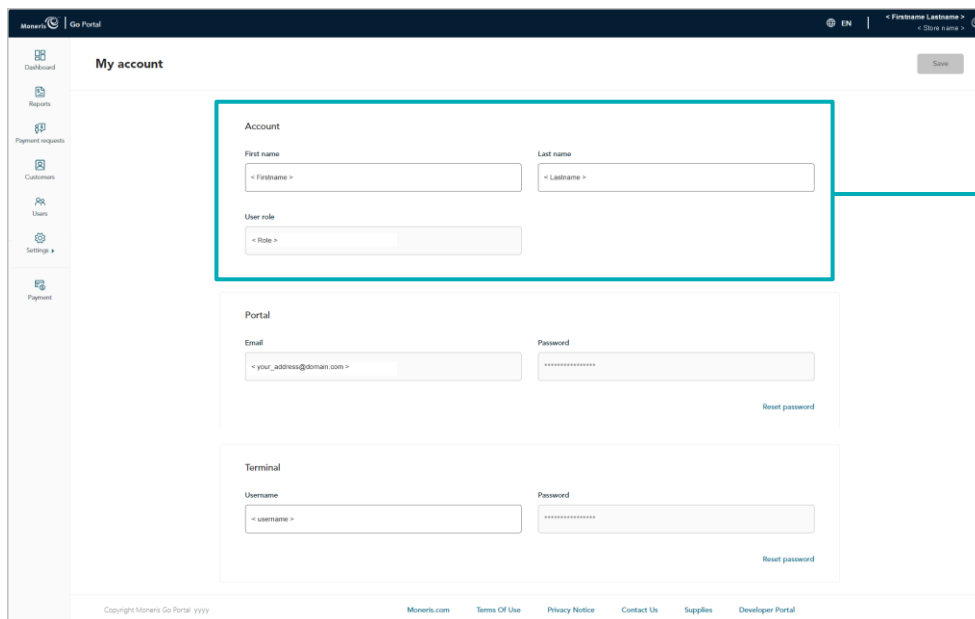
- To change your login password, see [Changing your terminal login password: unmigrated user](#) (page 134).
- To change your login username, see [Changing your terminal login username: unmigrated user](#) (page 135).

Changing your name information: unmigrated user

The steps below describe how to configure your Moneris Go portal/terminal user account settings, including name information, and login credentials.

Note: *If you are a Moneris Portal user, this procedure is not applicable to you. Instead, please refer to [Changing your name information: Moneris Portal user \(page 125\)](#).*

1. Access your user account settings (see "[My account](#)" settings: unmigrated user on page 129).
2. On the "My account" page, scroll to the "Account" module (shown below).



The screenshot shows the "My account" page in the Moneris Go Portal. The "Account" module is highlighted with a red box. The "Account" module contains the following fields:

- First name: < Firstname >
- Last name: < Lastname >
- User role: < Role >

Below the "Account" module are the "Portal" and "Terminal" modules, each with "Email" and "Password" fields. A red arrow points from the text "ACCOUNT" MODULE to the highlighted "Account" module.

"ACCOUNT" MODULE

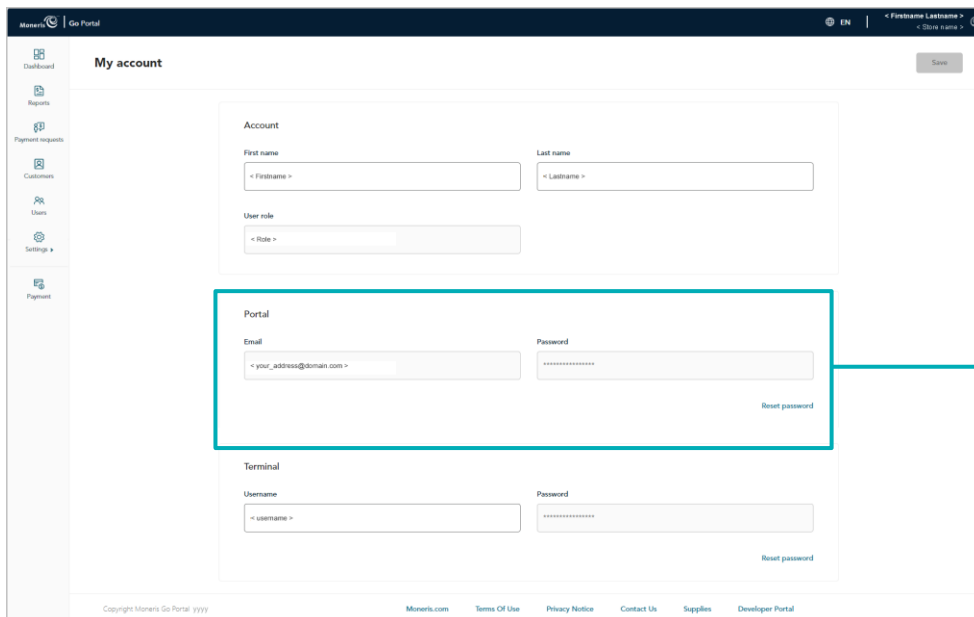
3. Edit your name information as desired:
 - In the **First name** field, enter your first name.
 - In the **Last name** field, enter your surname.
4. Click on the **Save** button.
5. When the "User updated successfully" response displays, the operation is complete.

Changing your Moneris Go portal login password: unmigrated user

The steps below describe how to change your Moneris Go portal login password.

Note: *If you are a Moneris Portal user, this procedure is not applicable to you. Instead, please refer to [Changing your terminal login password: Moneris Portal user](#) (page 127).*

1. Access your user account settings (see "[My account](#)" settings: unmigrated user on page 129).
2. On the "My account" page, scroll to the "Portal" module (shown below).

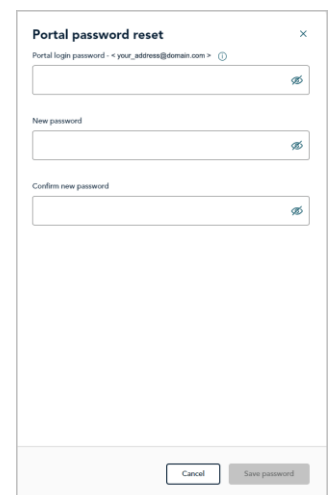


"PORTAL" MODULE

3. In the "Portal" module, click on **Reset password**.
4. When the "Portal password reset" window displays (shown here), do the following:
 - a. In the **Portal login password** field, enter your current Moneris Go portal login password.
 - b. In the **New password** field, enter the new Moneris Go portal login password.

Note: *Password fields are case sensitive. The password that you create must adhere to these requirements:*

- *The password must be 8 to 16 characters in length.*
- *The password must start with a letter.*
- *The password must include at least 1 letter, 1 number, and 1 special character.*
- *The password must not include any accented characters (accents are not supported).*



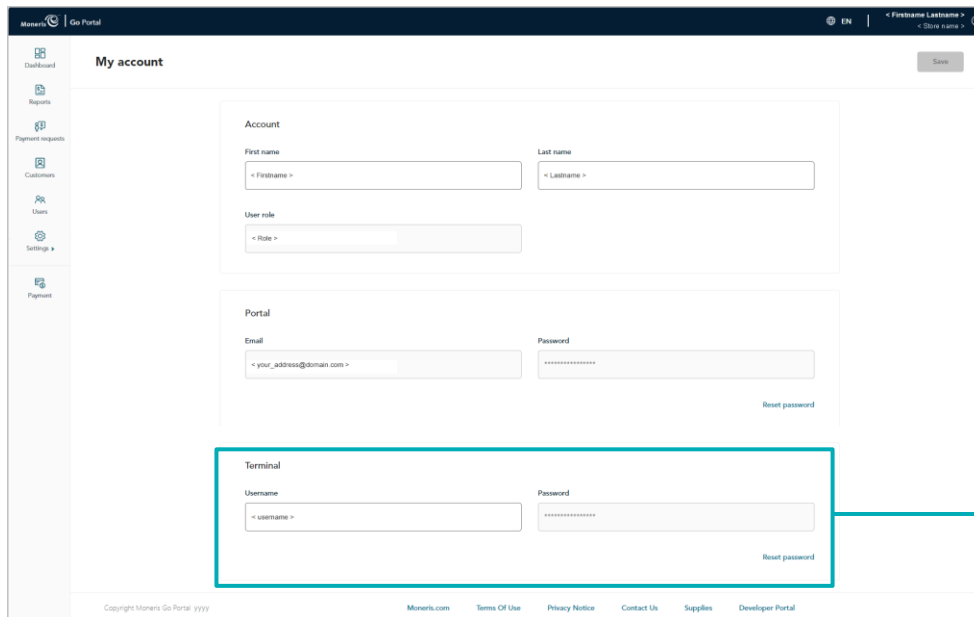
- c. In the **Confirm password** field, re-enter the new Moneris Go portal login password.
- d. Click on the **Save password** button.
- e. When the "User updated successfully" response displays, the operation is complete.

Changing your terminal login password: unmigrated user

The steps below describe how to change your terminal login password. (The change applies to any terminal that is synched to the store through which you are resetting your terminal login password.¹⁷)

Note: If you are a Moneris Portal user, this procedure is not applicable to you. Instead, please refer to [Changing your terminal login password: Moneris Portal user \(page 127\)](#).

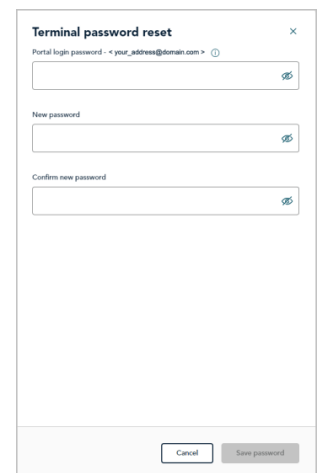
1. Access your user account settings (see "[My account](#)" settings: unmigrated user on page 129).
2. On the "My account" page, scroll to the "Terminal" module (shown below).



The screenshot shows the "My account" settings page. The "Terminal" module is highlighted with a red box. The "Terminal" module contains fields for "Username" and "Password", and a "Reset password" button. A red line points from the text "TERMINAL" MODULE to the Terminal section.

"TERMINAL" MODULE

3. In the "Terminal" module, click on **Reset password**.
4. When the "Terminal password reset" window displays (shown here), do the following:
 - a. In the **Portal login password** field, enter your current Moneris Go portal login password.
 - b. In the **New password** field, enter the new login password for your terminal.
 - c. In the **Confirm password** field, re-enter the new login password for your terminal.
 - d. Click on the **Save password** button.
 - e. When the "User updated successfully" response displays, the operation is complete.



The screenshot shows the "Terminal password reset" dialog box. It contains three input fields: "Portal login password", "New password", and "Confirm new password". There are "Cancel" and "Save password" buttons at the bottom.

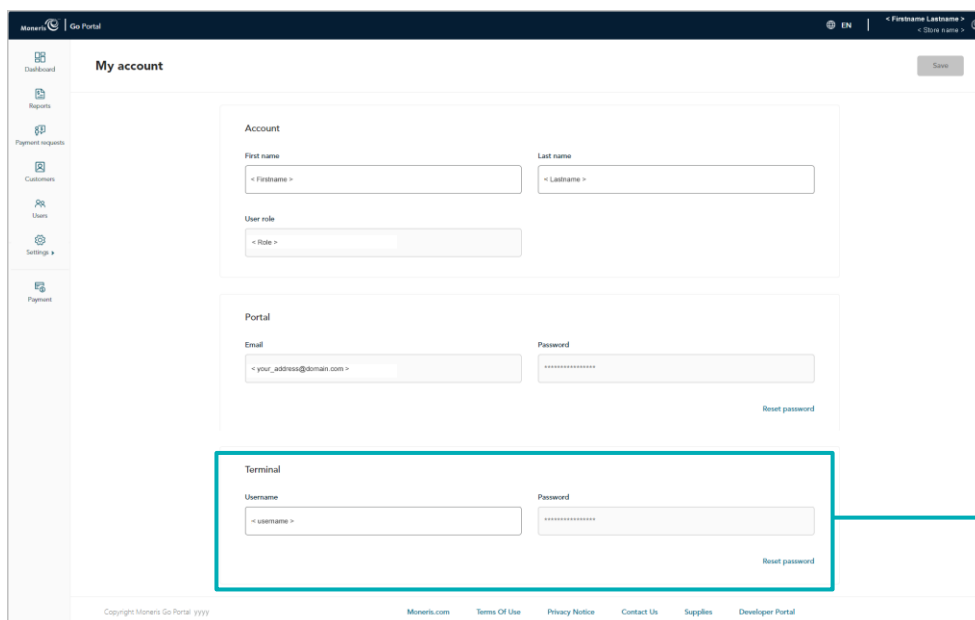
¹⁷ If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

Changing your terminal login username: unmigrated user

The steps below describe how to change your terminal login username. (The change applies to any terminal that is synched to the store through which you are resetting your terminal login username.¹⁸)

Note: *If you are a Moneris Portal user, this procedure is not applicable to you. Instead, please refer to [Changing your terminal login username: Moneris Portal user](#) (page 128).*

1. Access your user account settings (see "[My account](#)" settings: unmigrated user on page 129).
2. On the "My account" page, scroll to the "Terminal" module (shown below).



The screenshot shows the 'My account' settings page in the Moneris Go Portal. The page has a dark blue header with the Moneris logo and 'Go Portal' text. A sidebar on the left contains navigation icons for Dashboard, Reports, Payment requests, Customers, Users, Settings, and Payment. The main content area is titled 'My account' and has a 'Save' button in the top right. It is divided into three sections: 'Account' with fields for First name, Last name, and User role; 'Portal' with fields for Email and Password, and a 'Reset password' link; and 'Terminal' with fields for Username and Password, and a 'Reset password' link. The 'Terminal' section is highlighted with a red box, and a red arrow points from the text 'TERMINAL' MODULE to it. The footer contains copyright information and links to Moneris.com, Terms Of Use, Privacy Notice, Contact Us, Supplies, and Developer Portal.

"TERMINAL" MODULE

3. In the **Username** field, enter a new terminal login username.
4. Click on the **Save** button.
5. When the "User updated successfully" response displays, the operation is complete.

¹⁸ If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).



Store Settings

In this section, we go over everything you need to know to manage your Moneris Go portal store's optional payment fields.


Store settings: payments

The steps below describe how to configure billing address payment fields (including the postal code field) and a custom ID payment field for manual or optional data entry during Purchases, Preauthorizations, and independent Refunds that you initiate from your Moneris Go portal store's virtual terminal. (Billing address and postal code fields are used for address verification.) The custom ID field can be used to append an identifier of your own to virtual terminal transactions, reports, transaction receipts, and payment requests.

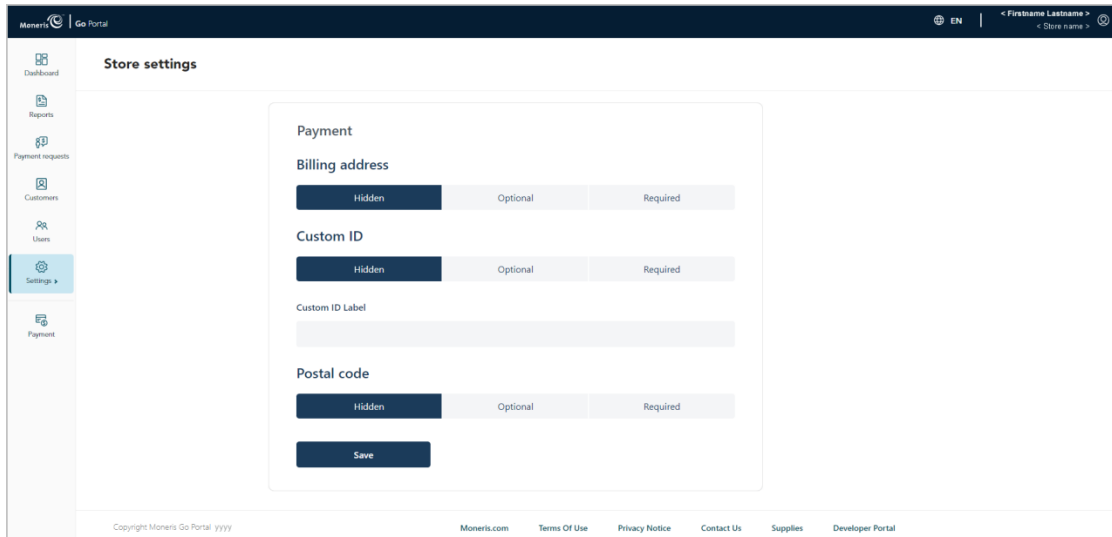
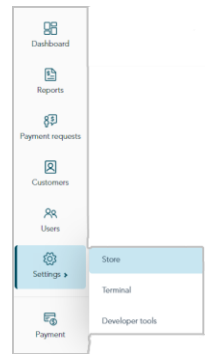
1. Log into the Moneris Go portal, and access the store for which you want to configure the payment fields (see [Logging into the Moneris Go portal](#) on page 27).

Note: If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

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

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 "Store settings" page displays (shown below), configure the payment settings as desired:



Billing address fields

- See [Billing address: store settings](#) (page 138).

Postal code field

- See [Postal code: store settings](#) (page 140).

Custom ID field

- See [Custom ID: store settings](#) (page 142).

Billing address: store settings

The steps below describe how to collectively enable/disable the "Street number", "Street name", "City", and "Province" fields, which can display as billing address payment fields in the virtual terminal "Payment" window through which you perform Purchases (see [Purchase with credit card: manual entry](#) on page 43), Preauthorizations (see [Preauthorization with credit card: manual entry](#) on page 46), and independent Refunds (see [Independent Refund with credit card: manual entry](#) on page 58) in your Moneris Go portal store. Billing address capture is used for address verification.¹⁹

1. Access your Moneris Go portal store's payment settings (see [Store settings: payments](#) on page 137).
2. On the "Store settings" page (shown below), click on a "Billing address" option:

Option	Description
Hidden	Disables the billing address fields so that they do not display as payment fields in the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.
Optional	Enables the billing address fields so that they display as payment fields (optional data entry) in the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.
Mandatory	Enables the billing address fields so that they display as payment fields (mandatory data entry) in the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.

¹⁹ Address verification service (AVS) is a fraud-prevention feature that enables the card issuer to compare the street number, street name, and postal code data entered during a transaction with the corresponding data that appears on the cardholder's statement. It is strongly recommend that you include AVS details with all of your manually entered (keyed) transactions (MOTO/ecommerce). Doing so will ensure transactions are qualifying at the best possible interchange rate and may minimize costs to accept credit cards. If AVS data are not present, the transaction may be assessed a higher interchange fee. AVS is not supported for UnionPay cards.

3. Click on the **Save** button.
4. When the "Payment settings updated" response displays, the operation is complete.

Postal code: store settings

The steps below describe how to enable/disable the "Postal code" field, which can display as a payment field in the virtual terminal "Payment" window through which you perform Purchases (see [Purchase with credit card: manual entry](#) on page 43), Preauthorizations (see [Preauthorization with credit card: manual entry](#) on page 46), and independent Refunds (see [Independent Refund with credit card: manual entry](#) on page 58) in your Moneris Go portal store. Postal code capture is used for address verification.²⁰

1. Access your Moneris Go portal store's payment settings (see [Store settings: payments](#) on page 137).
2. On the "Store settings" page (shown below), click on a "Postal code" option:

The screenshot shows the 'Store settings' page in the Moneris Go Portal. The 'Payment' section is expanded, showing three configuration options: 'Billing address', 'Custom ID', and 'Postal code'. Each option has three radio buttons: 'Hidden', 'Optional', and 'Required'. The 'Postal code' 'Hidden' option is selected. A 'Save' button is located at the bottom of the form. The page footer includes 'Copyright Moneris Go Portal. yyyy', 'Moneris.com', 'Terms Of Use', 'Privacy Notice', 'Contact Us', 'Supplies', and 'Developer Portal'.

Option	Description
Hidden	Disables the "Postal code" field so that it does not display as one of the payment fields in the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.
Optional	Enables the "Postal code" field so that it displays as one of the payment fields (optional data entry) in the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.
Mandatory	Enables the "Postal code" field so that it displays as one of the payment fields (mandatory data entry) in the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.

²⁰ Address verification service (AVS) is a fraud-prevention feature that enables the card issuer to compare the street number, street name, and postal code data entered during a transaction with the corresponding data that appears on the cardholder's statement. It is strongly recommend that you include AVS details with all of your manually entered (keyed) transactions (MOTO/ecommerce). Doing so will ensure transactions are qualifying at the best possible interchange rate and may minimize costs to accept credit cards. If AVS data are not present, the transaction may be assessed a higher interchange fee. AVS is not supported for UnionPay cards.

3. Click on the **Save** button.
4. When the "Payment settings updated" response displays, the operation is complete.

Custom ID: store settings

The steps below describe how to configure and enable/disable a custom transaction identifier (custom ID) field. If enabled, the custom ID field can be appended to payment requests and transactions that are initiated from the virtual terminal "Payment" window in your Moneris Go portal store. The custom ID also appears as a header²¹ in your store's financial transaction report and can appear as a line item on the "Transaction details" page and in transaction receipts.

Note: For a complete list of transactions, reports, and receipt types that feature the custom ID, see [Custom ID: list of transactions and reports](#) (page 238).

1. Access your Moneris Go portal store's payment settings (see [Store settings: payments](#) on page 137).
2. On the "Store settings" page (shown below), click on a "Custom ID" option:

Option	Description
Hidden	Hides/disables the custom ID field in payment requests and the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store. Note: The default label "Custom ID" continues to be used as a header in your store's financial transactions report. If you enter your own custom label in step 3, it will be used as the header.
Optional	The custom ID field displays (optional data entry) in payment requests and the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store. Note: The custom ID field displays as a header in the financial transactions report and as line item on the transaction receipt (debit/credit only) and the "Transaction details" page of every logged transaction.

²¹ For all Verification transactions, the "Custom ID" header in your financial transaction report populates with data from the associated Vault customer profile's "Customer ID" field (see [Verification transaction: Vault customer profile](#) on page 121).

Option	Description
Mandatory	<p>The custom ID displays as a payment field (mandatory data entry) in payment requests and the virtual terminal "Payment" window through which you perform Purchases, Preauthorizations, and independent Refunds in your Moneris Go portal store.</p> <p>Note: <i>The custom ID field displays as a header in the financial transactions report and as line item on the transaction receipt (debit/credit only) and the "Transaction details" page of every logged transaction.</i></p>

3. Do one of the following:

- If you selected "Optional" or "Mandatory" in step 2, enter a custom label in the **Custom ID Label** field.
- If you selected "Hidden" in step 2, leave the **Custom ID Label** field unfilled (blank).

Note: *If you leave the field unfilled, the default label "Custom ID" will be used as a header only in your store's financial transactions report. If you enter your own custom label, it will be used as the header in your store's financial transactions report.*

4. Click on the **Save** button.

5. When the "Payment settings updated" response displays, the operation is complete.

Note: *If you opted to configure/enable a customized identifier field of your own and you have one or more terminals synched to your store, you should also enable the equivalent custom "Transaction identifier" feature on the terminals (see [Moneris Go terminal: transaction settings](#) on page 171; and see [Moneris Go Plus terminal: transaction settings](#) on page 190).*



User Management

In this section, we go over everything you need to know to manage user accounts for your Moneris Go portal store, including user accounts for any Moneris Go terminal(s) that are synched to your store.

User accounts

Adding a new user account


The steps below describe how to add a new user account to a Moneris Go portal store and define the user's access to store features and functions, including any point-of-sale device or application that is synched to the store.

Important! Each user account must be assigned with a user role. Ensure that you configure your store's user roles appropriately (i.e., enable/disable portal and terminal permissions as desired) before you attempt to assign them to user accounts. For instructions on how to add, modify, or delete user roles, see the [User roles](#) section (pages 157 to 165).

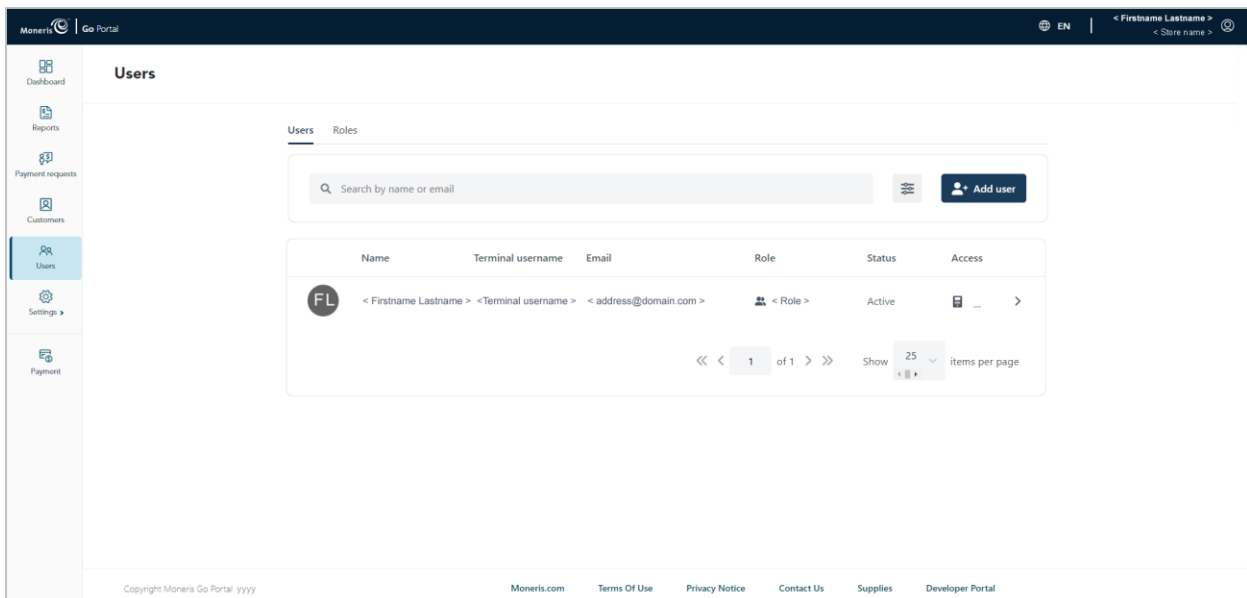
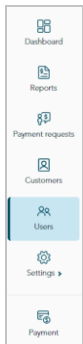
1. Log into the Moneris Go portal, and access the store through which you want to add the new user account (see [Logging into the Moneris Go portal](#) on page 27).

Note: If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

2. On the sidebar menu (shown here), click on **Users**.

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 "Users" page displays (shown below), click on the **Add user** button.



4. When the "Add user" window displays (shown here), configure the account settings:

- In the **First name** field, enter the user's given name.
- In the **Last name** field, enter the user's surname.
- Under "Language", click on language button (**English** or **French**) to select the Moneris Go portal display language for when the user first logs in to activate their account.
- Click on the "User role" drop-down, and select the role that you want to assign to this user:

Note: Default user roles and descriptions are listed in the table below. To view/modify the parameters of a user role (e.g., change role name or define new permissions for a role) or add/delete a user role, see the [User roles](#) section (pages 157 to 165).

User role	Portal access	Terminal access	Description
Admin	Yes	Yes	Access to all functionality in the application.
High	No	Yes	Access to all transactions types and reports but limited access to settings.
Low	No	Yes	Access to all transaction types but limited to their own transactions within reports.

The screenshot shows a window titled "Add user" with a close button (x) in the top right corner. It contains the following fields and controls:

- First name:** A text input field.
- Last name:** A text input field.
- Language:** Two buttons labeled "English" and "French". The "English" button is currently selected and highlighted in dark blue.
- User role:** A dropdown menu with "Select" and a downward arrow.
- Terminal access:** A toggle switch that is currently turned off (grey).
- Add user:** A button at the bottom right of the window.

5. If the "Add user" window displays the **Terminal access** switch (shown below), toggle it to the right ("yes"/blue) to enable terminal access, or toggle it to the left ("no"/grey) to disable terminal access.

If "Terminal access" is toggled to "Yes":

The user will have access to specific terminal functions as defined by the role's permissions.

- In the **Username** field, enter the user name credential this user needs to enter to log into any terminal that is synched to this store.
- In the **Password** field, enter the user password credential this user needs to enter to log into any terminal that is synched to this store.
- In the **Confirm Password** field, re-enter the user's terminal login password.

This screenshot shows a close-up of the "Terminal access" section of the "Add user" window. The toggle switch is now turned on (blue). Below it are three text input fields:

- Username:** A text input field.
- Password:** A text input field.
- Confirm password:** A text input field.

At the bottom right of this section is a dark blue button labeled "Add user".

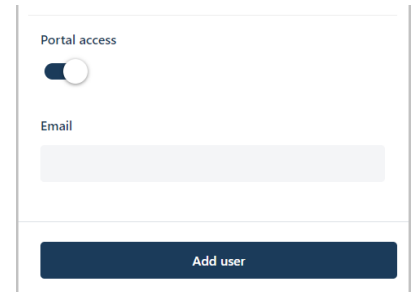
6. If the "Add user" window displays the **Portal access** switch (shown below), toggle it to the right ("yes"/blue) to enable Moneris Go portal access, or toggle it to the left ("no"/grey) to disable portal access.

If "Portal access" is toggled to "Yes":

This option is supported only if the role assigned to this user is configured with the "Access to portal" permission enabled. The user will have access to specific Moneris Go portal functions as defined by the role's other permissions.

- a. In the **Email** field, enter the user's email address.

Note: Once the new user account is added to the system, an email containing an activate hyperlink will be sent to the user so that they can activate and complete the setup of their user account. The email address will also serve as the user's Moneris Go portal login ID/username.



The screenshot shows a user configuration form. At the top, there is a section labeled 'Portal access' with a toggle switch that is currently turned on (blue). Below this is an 'Email' field with a light grey input box. At the bottom of the form is a dark blue button labeled 'Add user'.

7. Click on the **Add user** button to add the new user account.
8. When the new user account is listed on the "Users" page, the operation is complete. But note:
 - If you granted the user portal access and their email address has not previously been registered to an active account, their account status will indicate "Pending" until the user receives their email and sets up their account per the steps documented in [Activating your Moneris Go portal user account](#) (page 12).

Note: If the user did not receive their activation email, advise them to check their email spam filter. If this does not work, confirm that you entered a valid email address in the "Portal Access" **Email** field. If necessary, repeat the [Add a new user account](#) procedure, but try registering a different email address.
 - If you granted the user portal access and their email address is already registered to an active account, the user will not receive an activation email. Rather, the user has immediate access to the store when they log in.
9. If you want this user to have access to another store, access the desired store and repeat the [Add a new user account](#) procedure (you can configure the same login credentials for the other store).

Modifying an active user account

The steps below describe how to modify a Moneris Go portal user account's name profile, assign a new user role, enable Moneris Go portal access, and update the user's terminal login credentials.

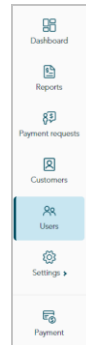
Note: If you have Moneris Portal access and you want to modify your own account, please refer to "My account" settings: Moneris Portal user (page 123).

1. Log into the Moneris Go portal, and access the store containing the active user account that you want to modify (see Logging into the Moneris Go portal on page 27).

Note: If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see Using My Stores on page 36).

2. On the sidebar menu (shown here), click on **Users**.

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 "Users" page displays (shown below), locate the user account that you want to modify, and click on it.

Note: To do a general search for an account, enter a full/partial name or a full email address in the **Search by name or email** field. To use filters to refine the search, see Using filters to search for users (page 156).

To change the number of hits listed on the 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 page <** icon or the **First page <<** icon respectively.

Name	Terminal username	Email	Role	Status	Access
FL < Firstname Lastname >	< Terminal username >	< address@domain.com >	< Role >	Active	...

4. When the "Edit user" window displays (shown here), edit the user account profile as desired:

To change username information:

- a. In the **First name** field, enter the user's given name.
- b. In the **Last name** field, enter the user's surname.
- c. Click on a "Language" button (**English** or **French**) to change the user's default display language when they activate their account for the first time.
- d. Click on the **Update** button.
- e. When the "User updated successfully" response displays, the operation is complete.

To change the user role:

- a. Click on the "User role" drop-down, and select the new role that you want to assign to this user:

Note: Default user roles and descriptions are listed in the table below. To view/modify the parameters of a user role (e.g., change role name or define new permissions for a role) or add/delete a user role, see the [User roles](#) section (pages 157 to 165).

User role	Portal access	Terminal access	Description
Admin	Yes	Yes	Access to all functionality in the application.
High	No	Yes	Access to all transactions types and reports but limited access to settings.
Low	No	Yes	Access to all transaction types but limited to their own transactions within reports.

- b. Click on the **Update** button.
- c. When the "User updated successfully" response displays, the operation is complete.

The screenshot shows the "Edit user" interface. It includes a close button (X) in the top right corner. The form contains the following elements:

- First name:** A text input field with a placeholder "< Firstname >".
- Last name:** A text input field with a placeholder "< Lastname >".
- Language:** Two buttons, "English" (which is highlighted in dark blue) and "French".
- User role:** A dropdown menu with a placeholder "< Role >" and a downward arrow.
- Portal/Terminal:** Two radio buttons, "Portal" (which is selected) and "Terminal".
- Email:** A status indicator "Active" with a green checkmark and a small info icon, followed by a text input field with a placeholder "< address@domain.com >" and a domain dropdown.
- Buttons:** A large grey "Update" button and a smaller "Deactivate" button below it.

To update the existing terminal login credentials:

- a. Click on the **Terminal** tab (shown here).
- b. Click on the **Reset password >** button to display the password fields.
- c. In the **Portal login password** field, enter your current Moneris Go portal login password.

Note: *If you are a Moneris Portal user, enter your current Moneris Portal password.*

- d. In the **Username** field, enter the user's new terminal login username.
- e. In the **Password** field, enter the user's new terminal login password.
- f. In the **Confirm new password** field, re-enter the user's new terminal login password.
- g. Click on the **Save password** button.
- h. When the "Password changed successfully" response displays, the operation is complete.

Note: *The user must enter these new credentials to log into any terminal that is synched to this store.*

The screenshot shows the 'Terminal' tab selected. It contains a form with the following fields and buttons: 'Username' (text input with placeholder '<username >'), 'Reset password' (dropdown menu), 'Portal login password <your_address@domain.com >' (text input with placeholder), 'New password' (text input), 'Confirm new password' (text input), 'Save password' (button), 'Update' (button), and 'Deactivate' (button).

To enable terminal access:

- a. Click on the **Terminal** tab (shown here).
- b. In the **Username** field, enter the user's terminal login username.
- c. In the **Password** field, enter the user's terminal login password.
- d. In the **Confirm password** field, re-enter the user's terminal login password.
- e. Click on the **Update** button.
- f. When the "User updated successfully" response displays, the operation is complete.

Note: *The user must enter these credentials to log into any terminal that is synched to this store.*

The screenshot shows the 'Terminal' tab selected. It contains a form with the following fields and buttons: 'Username' (text input with a required field indicator), 'Password' (text input), 'Confirm password' (text input), 'Update' (button), and 'Deactivate' (button).

To enable Moneris Go portal access:

Note: This option is supported only if the role assigned to this user is configured with the "Access to portal" permission enabled (see [To change the user role on page 149](#)).

- a. Click on the **Portal** tab (shown here).
- b. In the **Email** field, enter the user's email address.
- c. Click on the **Update** button.
- d. When the "User updated successfully" response displays, the operation is complete.

Note: An email containing an activate hyperlink will be sent to the user so that they can activate and complete the setup of their user account. If the user did not receive their activation email, advise them to check their email spam filter.

The screenshot shows a user management interface with two tabs: 'Portal' (selected) and 'Terminal'. Below the tabs, there is an 'Email' label with a help icon, followed by a text input field. At the bottom of the form, there are two buttons: 'Update' and 'Deactivate'.

Deactivating a user account

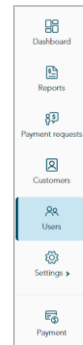
The steps below describe how to deactivate a Moneris Go portal user account. Once the account is deactivated, the user associated with it will be unable to use their login credentials to start a session on the Moneris Go portal nor any point-of-sale device or application that is synched to your Moneris Go portal store.

1. Log into the Moneris Go portal, and access the store containing the user account that you want to deactivate (see [Logging into the Moneris Go portal](#) on page 27).

Note: If you have multiple stores linked to your user account, you can use the *My Stores* function to move between your stores (see [Using My Stores](#) on page 36).

2. On the sidebar menu (shown here), click on **Users**.

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.



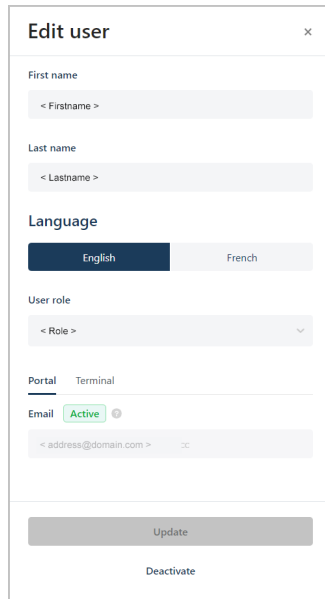
3. When the "Users" page displays (shown below), locate the user account that you want to deactivate, and click on it.

Note: To do a general search for an account, enter a full/partial name or a full email address in the **Search by name or email** field. To use filters to refine the search, see [Using filters to search for users](#) (page 156).

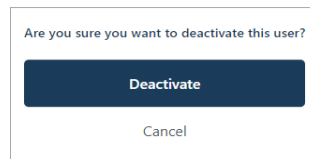
To change the number of hits listed on the page, click on the "Show # items per page" drop-down, and select a number (**10**, **25**, or **50**). To advance to the next page or last page, click on the **Next page** > icon or the **Last page** >> icon respectively. To go back to the previous page or the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

Name	Terminal username	Email	Role	Status	Access
< Firstname Lastname >	< Terminal username >	< address@domain.com >	< Role >	Active	...

4. When the "Edit user" window displays (shown below), click on the **Deactivate** button.



5. When the "Are you sure you want to deactivate this user?" dialog displays (shown below), click on the **Deactivate** button to close the dialog.



6. When the "User updated successfully" response displays, the operation is complete. But note:

- The user account status will indicate "Inactive" until you reactivate the account (see [Reactivating a user account](#) (page 154)).
- Once the user logs out, they will be unable to use the deactivated user account credentials to start a new session on the Moneris Go portal nor any point-of-sale device or application that is synched to the store.

Reactivating a user account

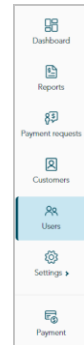
The steps below describe how to reactivate an existing Moneris Go portal user account. Once the user account is reactivated, the user reacquires their previous access to the Moneris Go portal store and/or point-of-sale device or application functionality.

1. Log into the Moneris Go portal, and access the store containing the user account that you want to reactivate (see [Logging into the Moneris Go portal](#) on page 27).

Note: If you have multiple stores linked to your user account, you can use the *My Stores* function to move between your stores (see [Using My Stores](#) on page 36).

2. On the sidebar menu (shown here), click on **Users**.

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.



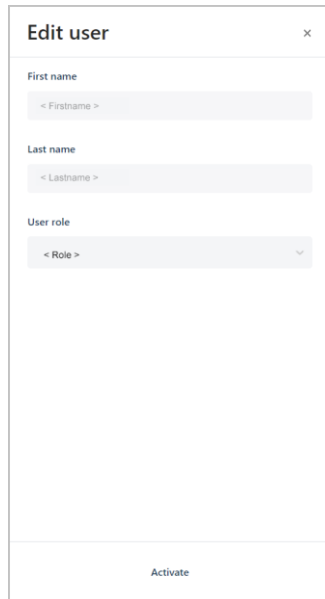
3. When the "Users" page displays (shown below), locate the user account that you want to reactivate, and click on it.

Note: To do a general search for an account, enter a full/partial name or a full email address in the **Search by name or email** field. To use filters to refine the search, see [Using filters to search for users](#) (page 156).

To change the number of hits listed on the 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 page <** icon or the **First page <<** icon respectively.

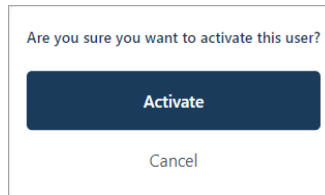
Name	Terminal username	Email	Role	Status	Access
< Firstname Lastname >	< Terminal username >	< address@domain.com >	< Role >	Active	...

4. When the "Edit user" window displays (shown below), click on the **Activate** button.



The screenshot shows a dialog box titled "Edit user" with a close button (X) in the top right corner. It contains three input fields: "First name" with a placeholder "< Firstname >", "Last name" with a placeholder "< Lastname >", and "User role" with a dropdown menu showing "< Role >". At the bottom center of the dialog is an "Activate" button.

5. When the "Are you sure you want to activate this user?" dialog displays (shown below), click on the **Activate** button to close the dialog.



The screenshot shows a confirmation dialog box with the text "Are you sure you want to activate this user?". It features two buttons: a dark blue "Activate" button and a light gray "Cancel" button.

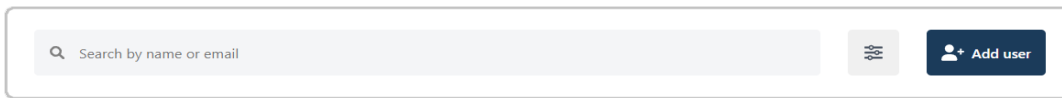
6. When the "User updated successfully" response displays, the operation is complete. But note:
- The account status will indicate "Active", and the user will again be able to log into the Moneris Go portal store or any point-of-sale device or application that is synched to the store.

Using filters to search for users

If you are attempting to locate a specific user account that you want to configure (e.g., to modify, deactivate, or reactivate), follow the steps below to employ filters to narrow the scope of your search and retrieve the desired user account. Search filters include user role, status, and access type.

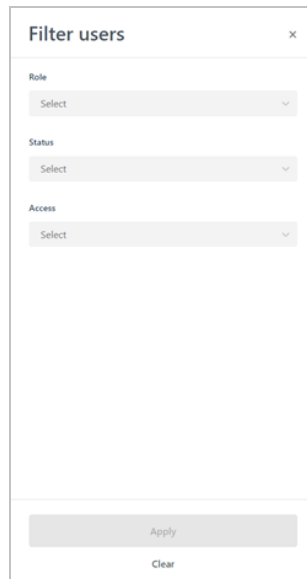
1. Start on the "Users" page:
 - See [Modifying an active user account](#) (page 148).
 - See [Deactivating a user account](#) (page 152).
 - See [Reactivating a user account](#) (page 154).

2. On the "Users" page, click on the **Filter**  icon in the search bar (shown below).



The image shows a search bar with the placeholder text "Search by name or email". To the right of the search bar is a filter icon (three vertical bars) and a dark blue button with a white plus sign and the text "Add user".

3. When the "Filter users" window displays (shown below), click on one or more of the desired filter drop-downs (**Role**, **Status**, and/or **Access**).



The image shows a "Filter users" dialog box with a close button (x) in the top right corner. It contains three filter sections: "Role", "Status", and "Access", each with a "Select" dropdown menu. At the bottom of the dialog, there are two buttons: "Apply" and "Clear".

4. Click on the **Apply** button.
5. When the desired user account is retrieved, do one of the following:
 - If you are modifying an active user account, continue at step 3 on page 148 ([Modifying an active user account](#)).
 - If you are deactivating an active user account, continue at 3 on page 152 ([Deactivating a user account](#)).
 - If you are reactivating an inactive user account, continue at step 3 on page 154 ([Reactivating a user account](#)).

User roles

Adding a new user role

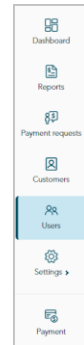
The steps below describe how to add a new user role. Each Moneris Go portal user account must be assigned with a user role. The user role defines which features and functions a user can utilize during their login session in a specific Moneris Go portal store and/or any point-of-sale device or application that is synched to that store.

1. Log into the Moneris Go portal, and access the store through which you want to create the new role (see [Logging into the Moneris Go portal on page 27](#)).

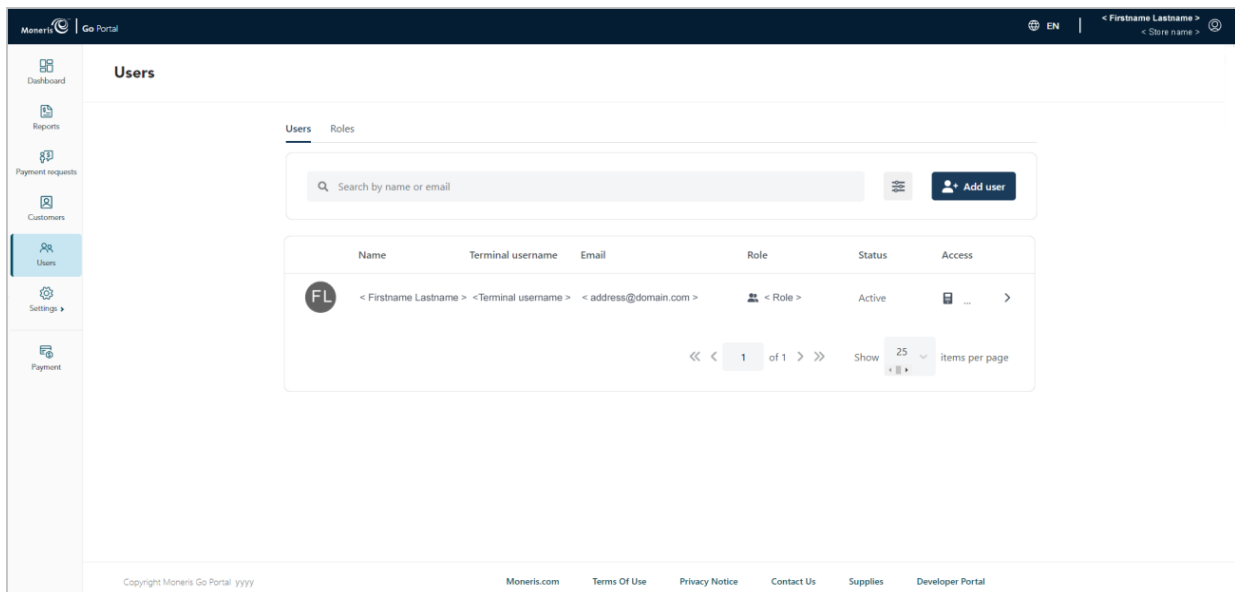
Note: *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores on page 36](#)).*

2. On the sidebar menu (shown here), click on **Users**.

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.*

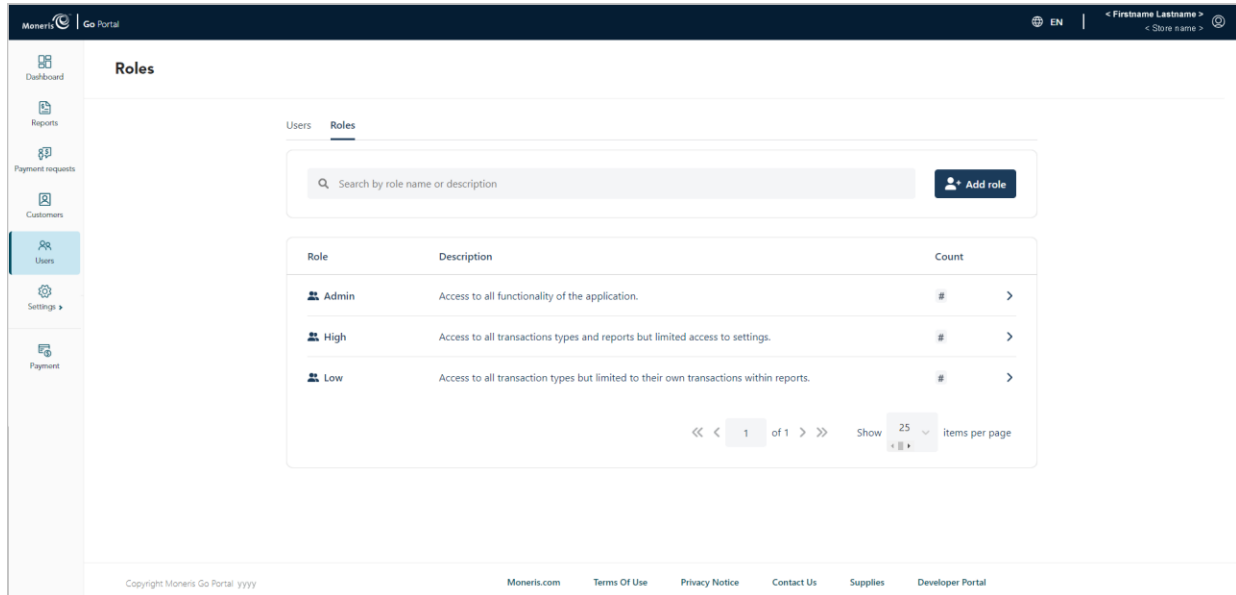


3. When the "Users" page displays (shown below), click on the **Roles** tab.



- When the "Roles" page displays (shown below), click on the **Add role** button.

Note: The default user roles are "Admin", "High", and "Low".



- When the "Add role" window display (shown here), configure the new user role's description and permissions:

- In the **Name** field, enter the user role name.
- In the **Description** field, enter the user role description.

To enable/disable user role permissions for the Moneris Go portal:

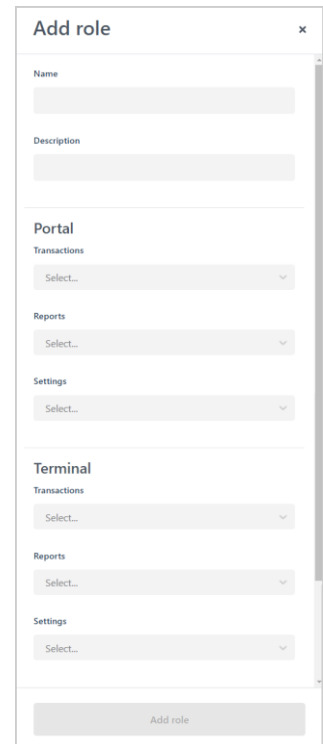
- In the "Portal" area, click on the "Transactions", "Reports", and/or "Settings" drop-down, and select one or more permissions to enable (add) them as desired. Click on the "X" beside a permission to disable (remove) it.

Note: "Portal" permissions are also applicable to the Moneris Go app. For a list of supported permissions, see [List of user role permissions](#) on page 165.

To enable/disable user role permissions for the terminal:

- In the "Terminal" area, click on the "Transactions", "Reports", and/or "Settings" drop-down, and select one or more permissions to enable (add) them as desired. Click on the "X" beside a permission to disable (remove) it.

Note: For a list of supported permissions, see [List of user role permissions](#) on page 165.



- Click on the **Add role** button.
- When the "User role added successfully" response displays, the operation is complete.

Modifying a user role

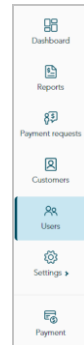
The steps below describe how to modify a user role's parameters, including name, description, and user permissions.

1. Log into the Moneris Go portal, and access the store containing the user role that you want to edit (see [Logging into the Moneris Go portal](#) on page 27).

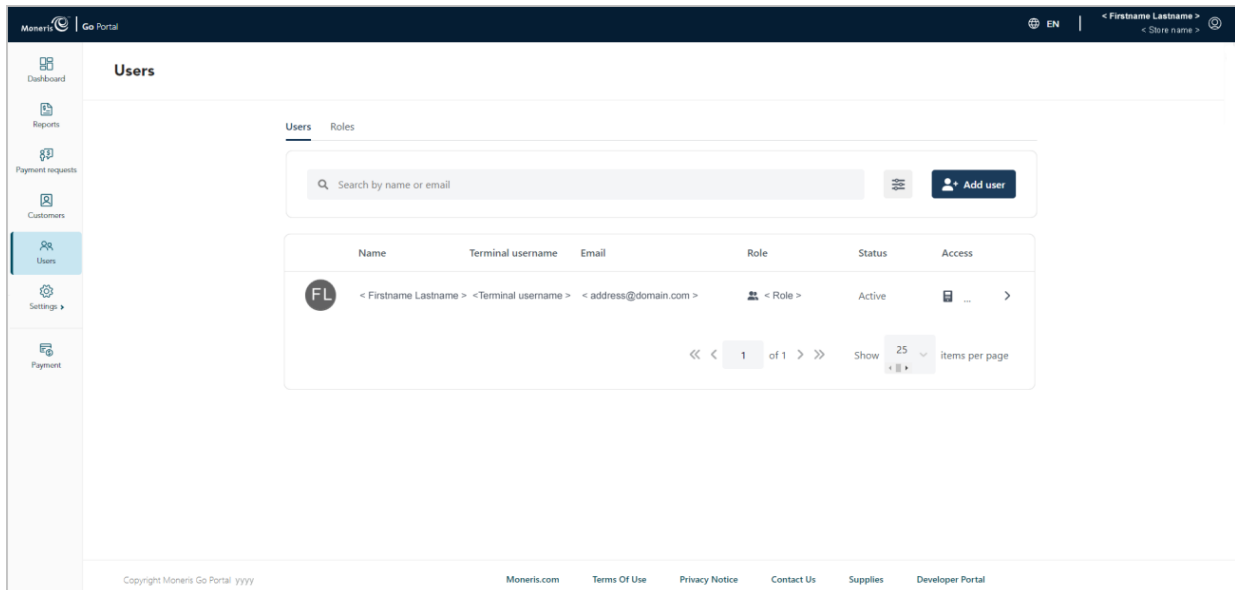
Note: If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

2. On the sidebar menu (shown here), click on **Users**.

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 "Users" page displays (shown below), click on the **Roles** tab.



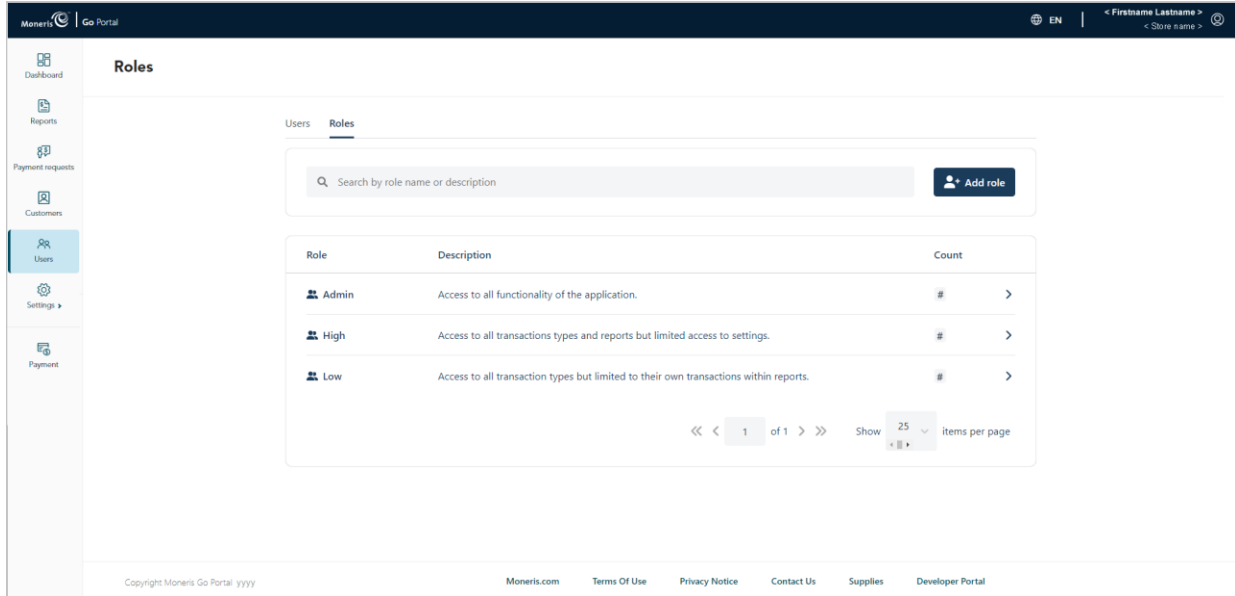
The screenshot shows the 'Users' page in the Moneris Go portal. The 'Roles' tab is selected. A search bar is present with the text 'Search by name or email' and an 'Add user' button. Below the search bar is a table with the following columns: Name, Terminal username, Email, Role, Status, and Access. The table contains one row of data. At the bottom of the table, there is a pagination control showing '1 of 1' and a 'Show 25 items per page' dropdown.

Name	Terminal username	Email	Role	Status	Access
FL < Firstname Lastname >	< Terminal username >	< address@domain.com >	< Role >	Active	...

- When the "Roles" page displays (shown below), locate and click on the user role that you want to modify.

Note: To search for a user role, enter a full/partial role name or a full role description in the **Search by role name or description** field.

To change the number of hits listed on the 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 page <** icon or the **First page <<** icon respectively.



- When the "Edit role" window displays (shown here), edit the parameters of the user role:

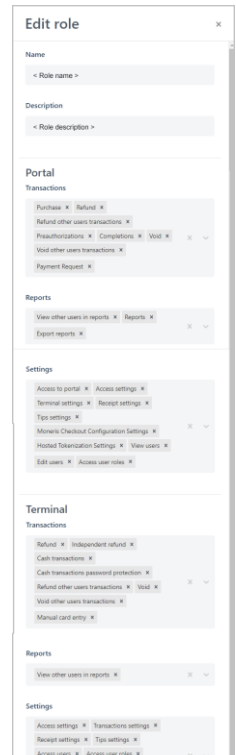
To edit the user role name/description:

- In the **Name** field, enter the new name of the user role.
- In the **Description** field, enter the new description for the user role.


To enable/disable user role permissions for the Moneris Go portal:

- In the "Portal" fields, click on the "X" beside a permission to disable (remove) it. OR Click on the drop-down icon, and click on the desired permission to enable (add) it.

Note: If no permission is currently enabled, select one or more from the "Transactions", "Settings", and/or "Reports" drop-down as desired. "Portal" permissions are also applicable to the Moneris Go app. (For a list of supported permissions, see List of user role permissions on page 165.)

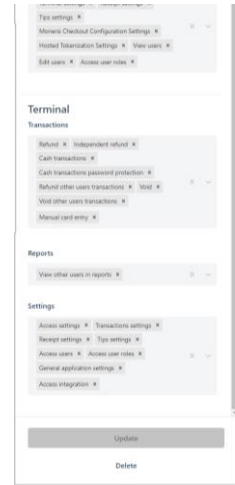


To enable/disable user role permissions for the terminal:

- a. In the "Terminal" fields, click on the "X" beside a permission to disable (remove) it. OR Click on the drop-down  icon, and click on the desired permission to enable (add) it.

Note: *If no permission is currently enabled, select one or more from the "Transactions", "Settings", and/or "Reports" drop-down as desired. (For a list of supported permissions, see [List of user role permissions](#) on page 165.)*

- 6. Click on the **Update** button.
- 7. When the "User successfully updated" response displays, the operation is complete.



Deleting a user role

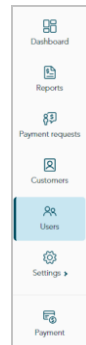
The steps below describe how to delete a user role so that it cannot be assigned to a Moneris Go portal user account.

1. Log into the Moneris Go portal, and access the store containing the user role that you want to delete (see [Logging into the Moneris Go portal](#) on page 27).

Note: If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

2. On the sidebar menu (shown here), click on **Users**.

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.



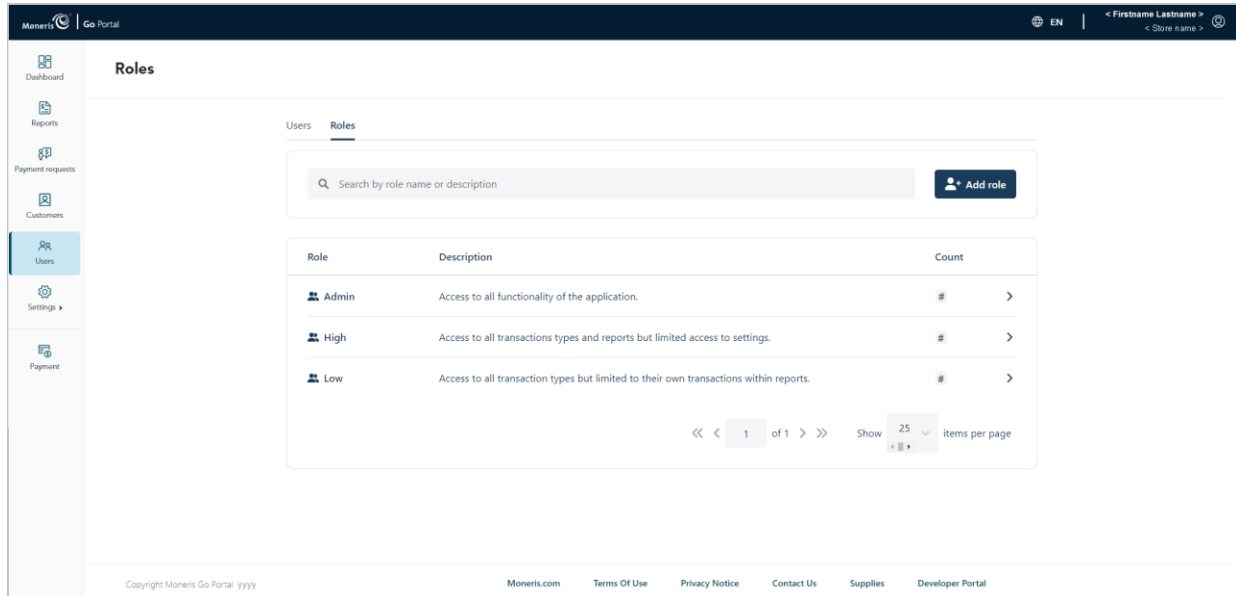
3. When the "Users" page displays (shown below), click on the **Roles** tab.

Name	Terminal username	Email	Role	Status	Access
FL	<Firstname Lastname >	<address@domain.com >	< Role >	Active	...

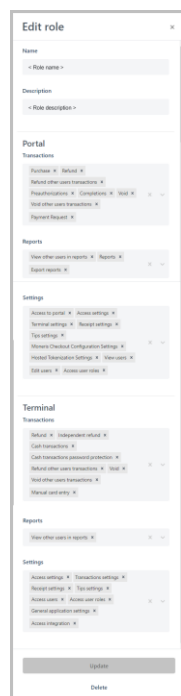
- When the "Roles" page displays (shown below), locate and click on the user role that you want to delete.

Note: To search for a user role, enter a full/partial role name or a full role description in the **Search by role name or description** field.

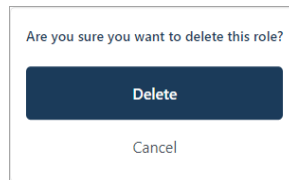
To change the number of hits listed on the page, click on the "Show # items per page" drop-down, and select a number (**10, 25, or 50**). To advance to the next page or last page, click on the **Next page >** icon or the **Last page >>** icon respectively. To go back to the previous page or the first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



- When the "Edit role" window displays (shown below), on the **Delete** button.



- When the "Are you sure you want to delete this role?" dialog displays (shown below), click on the **Delete** button.



- When the "User role successfully deleted" response displays, the operation is complete.

List of user role permissions

You can configure a user role by enabling/disabling the permissions listed in the tables below.

Note: "Portal" permissions are applicable to the Moneris Go app.

- For instructions on how to add a new user role, see [Adding a new user role](#) (page 157).
- For instructions on how to modify an existing user role, see [Modifying a user role](#) (page 159).

Portal

Group	Permission
Transactions	Completions
	Payment Request
	Preauthorizations
	Purchase
	Refund
	Refund other users transactions
	Void
	Void other users transactions

Group	Permission
Reports	Export reports
	Reports
	View other users in reports

Group	Permission
Settings	Access API Token
	Access settings
	Access to portal
	Access user roles
	Customer Management
	Edit users
	Hosted Tokenization settings
	Moneris Checkout Configuration settings

Terminal

Group	Permission
Transactions	Cash transactions
	Cash transactions password protection
	Independent refund
	Manual card entry
	Purchase
	Refund
	Refund other users transactions
	Void
	Void other users transactions

Group	Permission
Reports	View other users in reports

Group	Permission
Settings	Access integration
	Access settings
	Access user roles
	Access users
	General Application Settings
	Receipt settings
	Transactions settings
	Tips settings

Group	Permission
	Receipt settings

Portal (continued...)

Group	Permission
Settings	Terminal settings
	Tips settings
	View users

Moneris Go (A920) Terminal Management

In this section, we go over everything you need to know to manage the Moneris Go portal settings that govern the behaviour of your Moneris Go terminals.

(For information and resources on how to use your Moneris Go terminal to process transactions, visit <https://www.moneris.com/en/support/moneris-go/monerisgo>.)


Moneris Go terminal: general settings

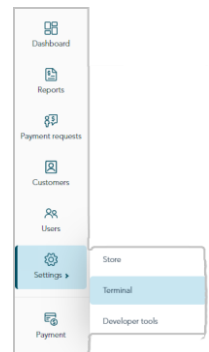
The steps below describe how to access the general settings for all Moneris Go terminals that are synced to your Moneris Go portal store. General settings include automatic sign-out time, automatic sign-out after transaction, report reset time, and display timeout.

1. Log into the Moneris Go portal, and access the store that is synced to the Moneris Go terminal(s) that you want to modify (see [Logging into the Moneris Go portal on page 27](#)).

Note: *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores on page 36](#)).*

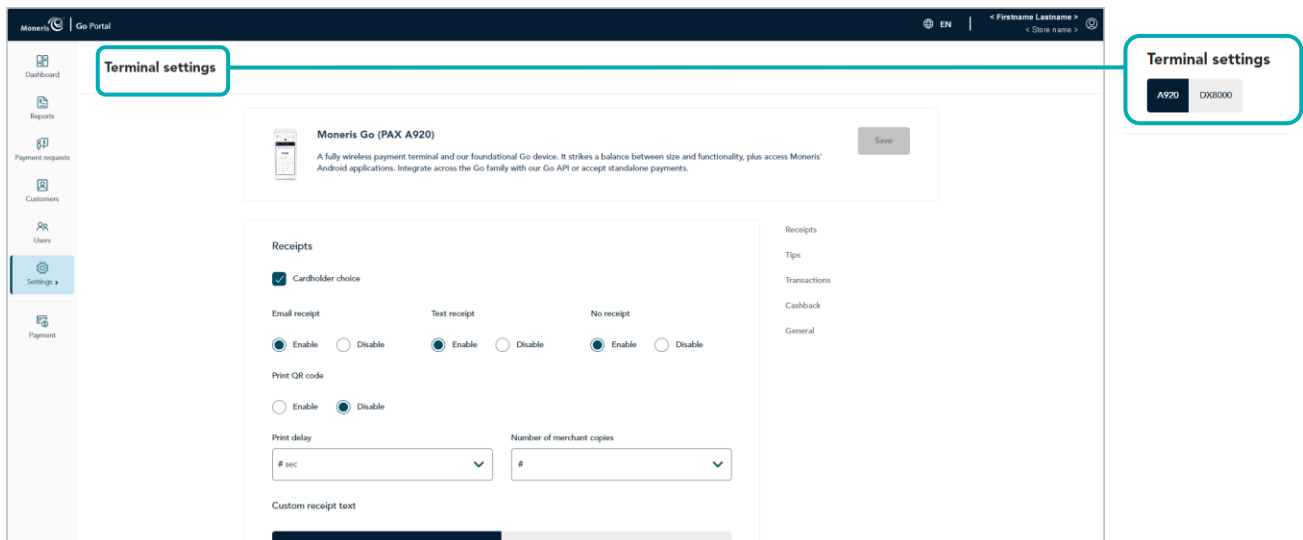
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

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.*



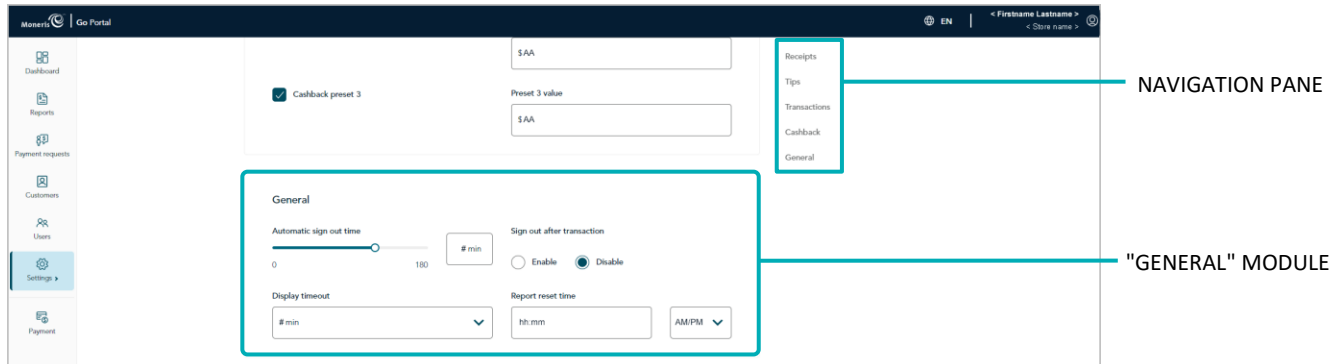
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "Moneris Go (PAX A920)" terminal before continuing to the next step.

Note: *If two or more different device types are synced to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **A920** tab to display the settings for the "Moneris Go (PAX A920)" terminal.*



4. Scroll to the "General" module (shown below), and configure the general settings as desired:

Note: To jump directly to the "General" module, click on **General** in the navigation pane (shown below).



Automatic sign-out time

Configure when the Moneris Go terminal automatically logs off a user after X seconds of inactivity.

- a. Move the **Automatic sign-out time** slider to the desired value (0 sec to 180 sec).
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Display timeout

Set the number of minutes of inactivity after which the Moneris Go terminal enters into sleep mode to conserve battery power.

- a. Click on the **Display timeout** drop-down, and select the desired value (1 min, 2 min, or 5 min).
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Sign out after transaction

Enable/disable automatic logoff after a user performs a Moneris Go terminal transaction.

- a. Go to the "Sign out after transaction" setting, and do one of the following:
 - To enable, select the **Enable** radio button.
 - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal.*

Report reset time

Set the 23-hour and 59-second period starting at time X, when Moneris Go terminal reports reset to \$0.

- a. In the **Report reset time** field, enter a reset time; then select **AM** (morning) / **PM** (night).
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*


Moneris Go terminal: transaction settings

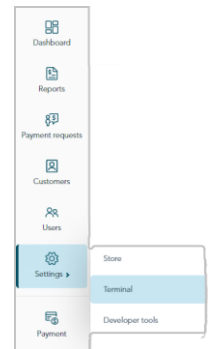
The steps below describe how to access the transaction settings for all Moneris Go terminals that are synched to your Moneris Go portal store. Transaction settings include, pass terminal time, debit surcharging, manual entry transactions, and custom transaction identifier.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 27).

Note: If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

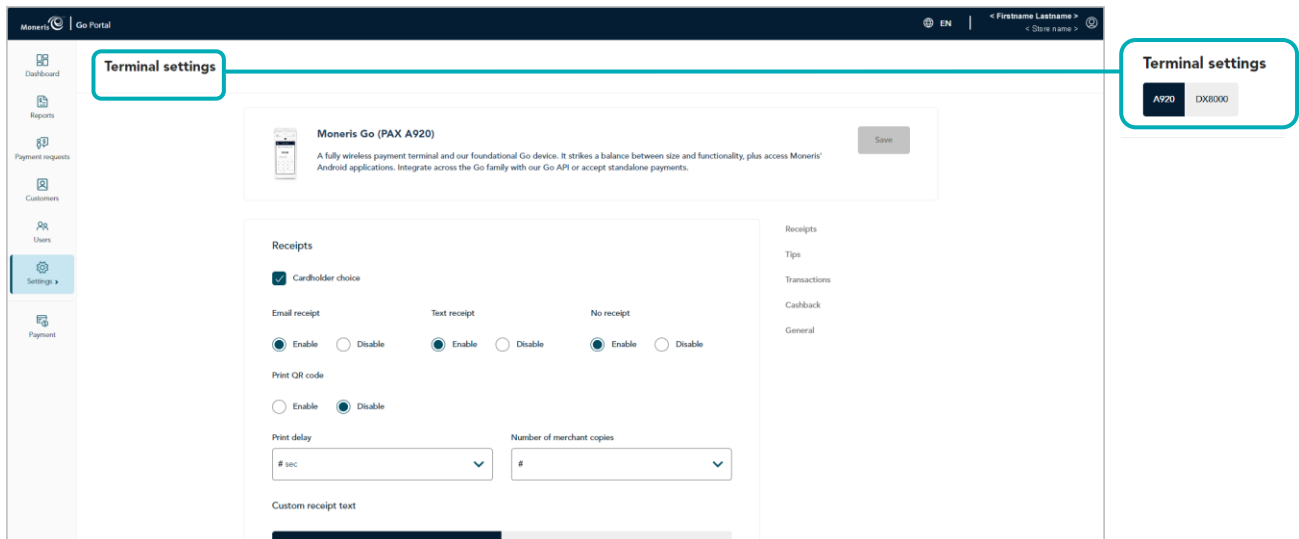
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

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.



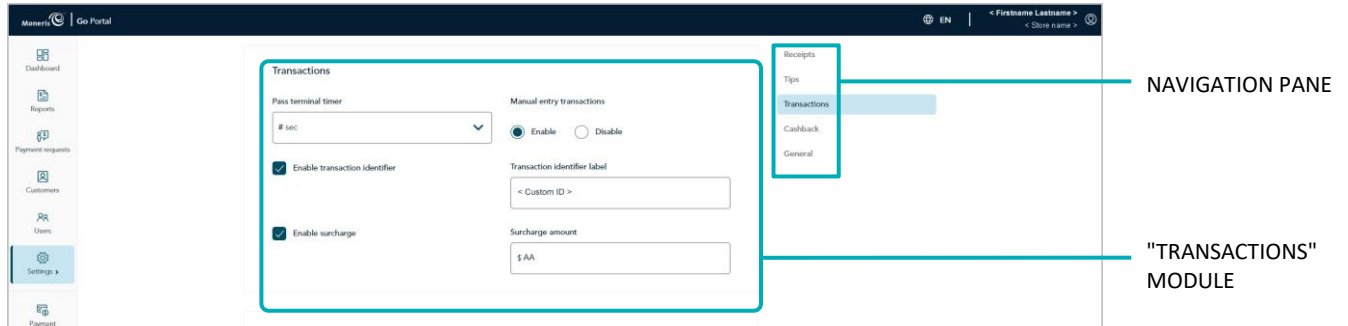
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "Moneris Go (PAX A920)" terminal before continuing to the next step.

Note: If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **A920** tab to display the settings for the "Moneris Go (PAX A920)" terminal.



4. Scroll to the "Transactions" module (shown below), and configure the transaction settings as desired:

Note: To jump directly to the "Transactions" module, click on **Transactions** in the navigation pane (shown below).



Manual entry transactions

Enable/disable keying in transactions on the Moneris Go terminal.

- a. Go to the "Manual entry transactions" setting, and do one of the following:
 - To enable, select the **Enable** radio button.
 - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Pass terminal timer

Configure how long the Moneris Go terminal displays the "Please pass the terminal to your customer" prompt (e.g., this prompt would display when tip prompting is enabled).

- a. Click on the **Pass terminal timer** drop-down, and select a value (0 sec to 10 sec).
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Surcharge

- a. Enable/disable the addition of a fixed dollar amount (surcharge) to debit Purchase transactions on the Moneris Go terminal:

Note: *Surcharging is applicable only to Purchase transactions processed with an Interac debit card.*

- To enable, checkmark the **Enable surcharge** box, and enter the surcharge amount in the **Surcharge amount** field.
- To disable, unmark the **Enable surcharge** box.

- b. Click on the **Save** button.

- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

Transaction identifier

Enable/disable the option to append a custom transaction identifier to debit/credit/cash Purchases, Preauthorizations, and independent Refunds performed on the Moneris Go terminal. If enabled, the custom transaction identifier field will appear as a line item in reports and receipts.

Note: *If you opt to enable this feature on the terminal, you should also enable the equivalent "Custom ID" feature on the virtual terminal (see [Store settings: payments](#) on page 137).*

- a. Go to the "Transaction identifier" setting, and do one of the following:

- To enable, checkmark the **Enable transaction identifier** box, and enter your custom identifier in the **Transaction identifier label** field.
- To disable, unmark the **Enable transaction identifier** box.

- b. Click on the **Save** button.

- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*


Moneris Go terminal: receipt settings

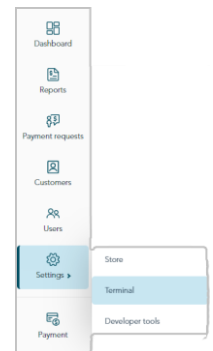
The steps below describe how to access the settings for receipts issued from all Moneris Go terminals that are synced to your Moneris Go portal store. Receipt settings include transaction receipt format choice, print QR code, print delay, and customizable greeting headers and footers.

1. Log into the Moneris Go portal, and access the store that is synced to the Moneris Go terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 27).

Note: If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

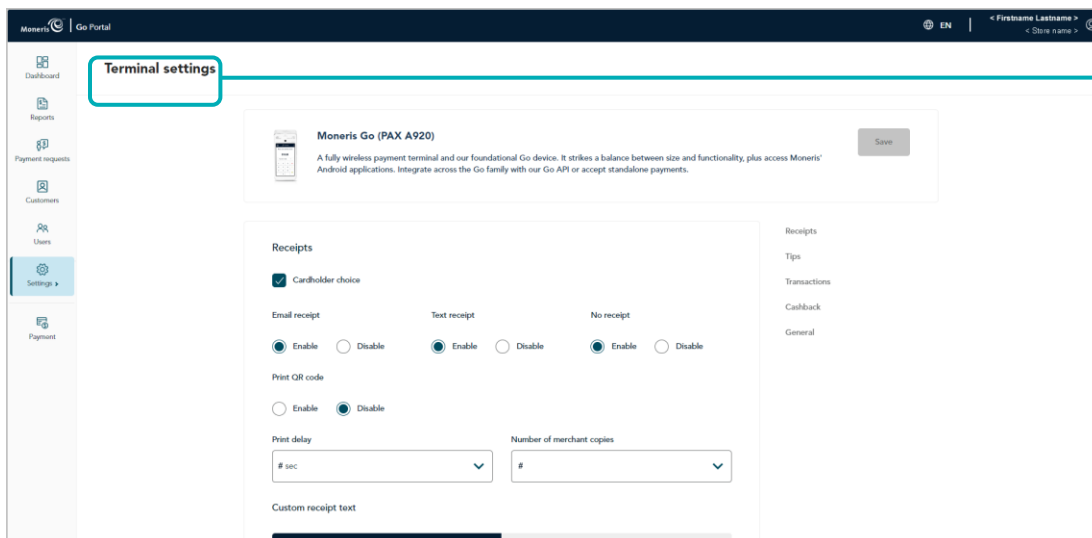
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

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.



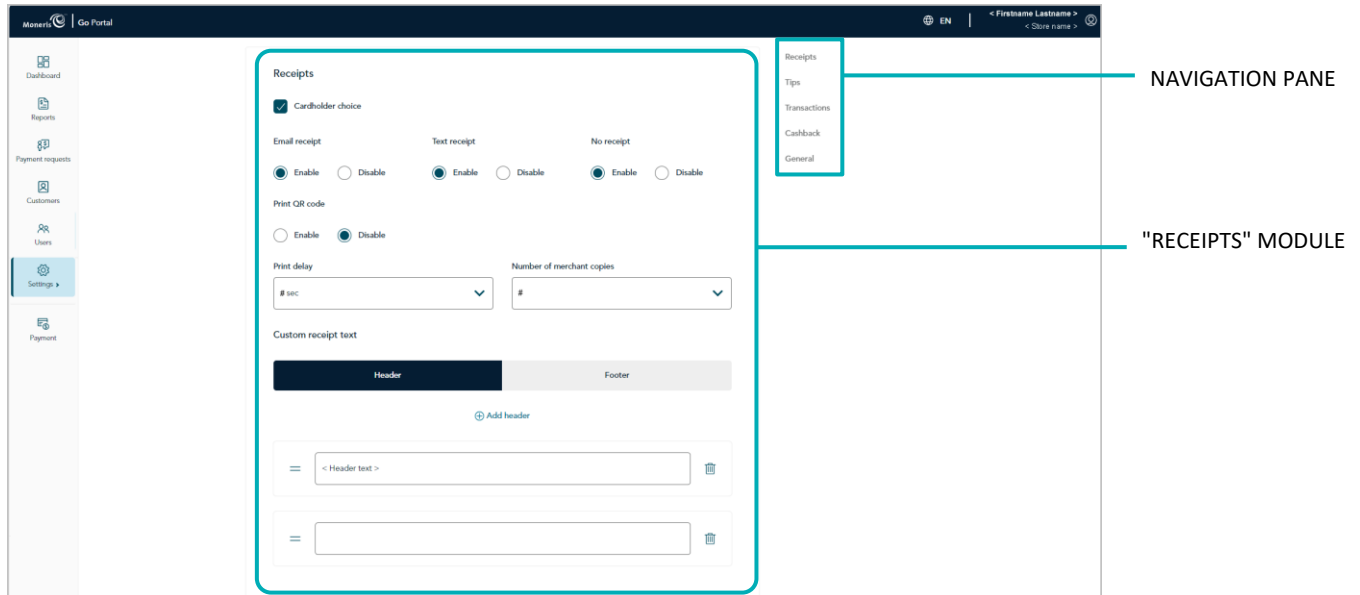
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "Moneris Go (PAX A920)" terminal before continuing to the next step.

Note: If two or more different device types are synced to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **A920** tab to display the settings for the "Moneris Go (PAX A920)" terminal.



4. Scroll to the "Receipts" module (shown below), and configure the receipt settings as desired:

Note: To jump directly to the "Receipts" module, click on **Receipts** in the navigation pane (shown below).



Cardholder choice

- Enable/disable receipt format prompting on the Moneris Go terminal:
 - To enable, checkmark the **Cardholder choice** box.
 - To disable, unmark the **Cardholder choice** box.
- Click on the **Save** button.
- When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Email receipt²²

Enable/disable the "Email receipt" option on the Moneris Go terminal.

- Go to the "Email receipt" setting, and do one of the following:
 - To enable, select the **Enable** radio button.
 - To disable, select the **Disable** radio button.
- Click on the **Save** button.

²² This option is supported only if "Cardholder choice" is enabled (see [Cardholder choice](#) above).

- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

Text receipt²³

Enable/disable the "Text receipt" option on the Moneris Go terminal.

- a. Go to the "Text receipt" setting, and do one of the following:
 - To enable, select the **Enable** radio button.
 - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

No receipt²⁴

Enable/disable the "No receipt" option on the Moneris Go terminal.

- a. Go to the "No receipt" setting, and do one of the following:
 - To enable, select the **Enable** radio button.
 - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal that is connected to an ECR, the change is effected when the terminal reboots or receives a manual Sync command.*

²³ This option is supported only if "Cardholder choice" is enabled (see [Cardholder choice](#) on page 175).

²⁴ This option is supported only if "Cardholder choice" is enabled (see [Cardholder choice](#) on page 175).

Number of merchant copies

Set the number of merchant copy receipts that the Moneris Go terminal prints for each transaction:

- a. Click on the **Number of merchant copies** drop-down, and select a number (0 to 2).
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

Print QR code

Enable/disable the appearance of a QR code on Moneris Go terminal transaction receipts. (If the QR code is printed on a receipt, you can use the terminal to scan the receipt and retrieve the transaction record.)

- a. Go to the "Print QR code" setting, and do one of the following:
 - To enable, select the **Enable** radio button.
 - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

Print delay

Set the delay time (in seconds) between when the Moneris Go terminal prints the cardholder copy receipt and when it prints the merchant copy receipt.

- a. Click on the **Print delay** drop-down, and select a value (2 sec to 5 sec).
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

Header


Configure a customized greeting message in the header line(s) on Moneris Go terminal transaction receipts.

To configure a header line:

- a. Go to the "Custom receipt text" area, and click on the **Header** button to display the header settings.
 - To add a new header line, click on **Add header**, and enter your greeting text in the new header field (or leave the field unfilled if you want to add a blank header line).
 - To reposition a header line, click on it and drag the header line to the desired position above/below another header line.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

To remove one or more header lines:

- a. Go to the "Custom receipt text" area, and click on the **Header** button to display the header settings.
- b. Locate any header line that you want to remove, and click on its **Delete**  icon.
- c. Click on the **Save** button.
- d. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*


Footer

Configure a customized greeting message in the footer line(s) on Moneris Go terminal transaction receipts.

- a. Go to the "Custom receipt text" area, and click on the **Footer** button to display the footer settings.
 - To add a new footer line, click on **Add footer**, and enter your greeting text in the new footer field (or leave the field unfilled if you want to add a blank footer line).
 - To reposition a footer line, click on it and drag the footer line to the desired position above/below another footer line.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

To remove one or more footer lines:

- a. Go to the "Custom receipt text" area, and click on the **Footer** button to display the footer settings.
- b. Locate any footer line that you want to remove, and click on its **Delete**  icon.
- c. Click on the **Save** button.
- d. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*


Moneris Go terminal: cashback settings

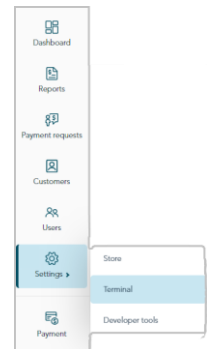
The steps below describe how to access the settings for cashback prompting on all Moneris Go terminals that are synched to your Moneris Go portal store. When enabled, cashback prompting displays during contact-based debit Purchase transactions performed on the Moneris Go terminal.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 27).

Note: If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

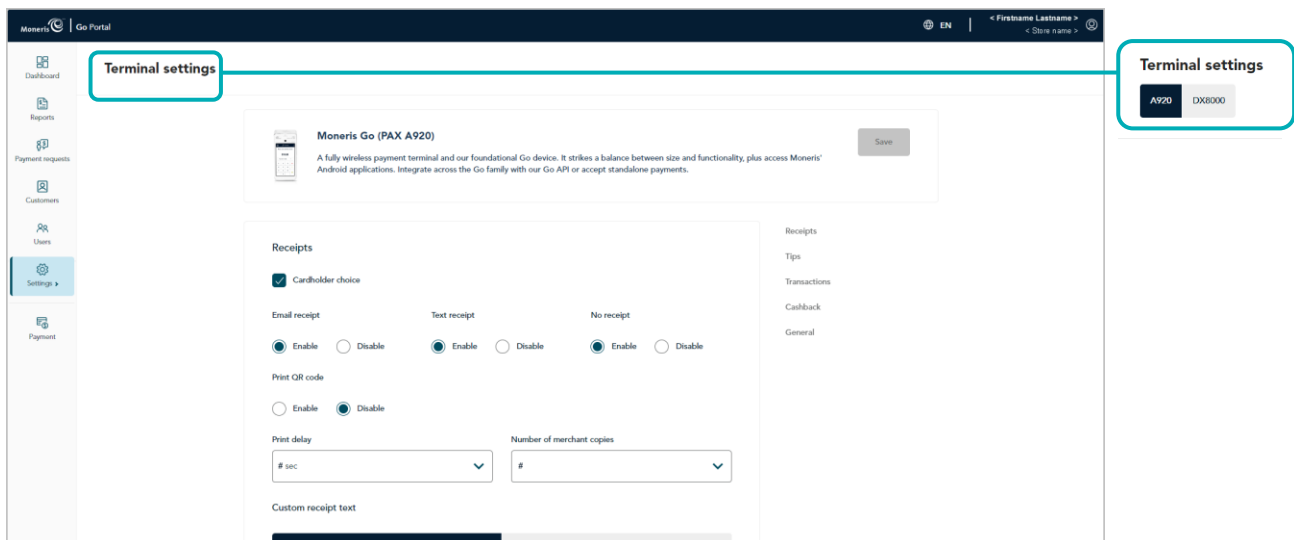
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

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.



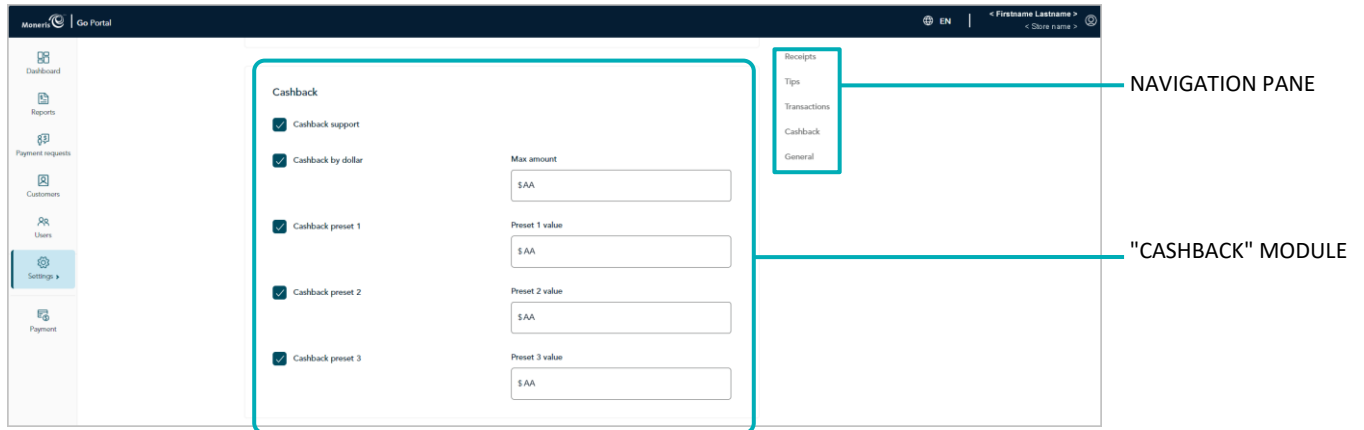
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "Moneris Go (PAX A920)" terminal before continuing to the next step.

Note: If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **A920** tab to display the settings for the "Moneris Go (PAX A920)" terminal.



4. Scroll to the "Cashback" module (shown below), and configure the cashback settings as desired:

Note: To jump directly to the "Cashback" area, click on **Cashback** in the navigation pane (shown below).



Cashback support

- a. Enable/disable cashback prompting on the Moneris Go terminal:
 - To enable, checkmark the **Cashback support** box.
 - To disable, unmark the **Cashback support** box.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Cashback by dollar²⁵

- a. Enable/disable the option for cardholders to enter a cashback amount on the Moneris Go terminal to a maximum dollar amount that you define:
 - To enable, checkmark the **Cashback by dollar** box, and enter the maximum dollar amount limit in the **Max amount** field.
 - To disable, unmark the **Cashback by dollar** box.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated

²⁵ This option is supported only if "Cashback support" is enabled (see [Cashback support](#) above).

terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Cashback by preset²⁶

- a. Enable/disable the option for cardholders to select a pre-defined cashback dollar amount on the Moneris Go terminal:

Note: *There are three pre-defined dollar amount settings; each can be configured/enabled independently.*

- To enable, checkmark the **Cashback preset #** box, and enter a dollar amount in the corresponding **Preset value** field.
- To disable, unmark the **Cashback preset #** box.

- b. Click on the **Save** button.

- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

²⁶ This option is supported only if "Cashback support" is enabled (see [Cashback support](#) on page 181).


Moneris Go terminal: tip settings

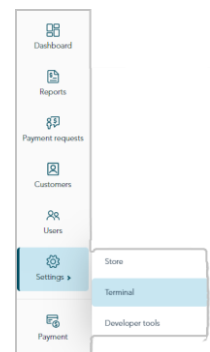
The steps below describe how to access the settings for tip prompting on all Moneris Go terminals that are synched to your Moneris Go portal store. When enabled, tip prompting displays during Purchase and Preauthorization transactions.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go terminal(s) that you want to modify (see [Logging into the Moneris Go portal on page 27](#)).

Note: *If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores on page 36](#)).*

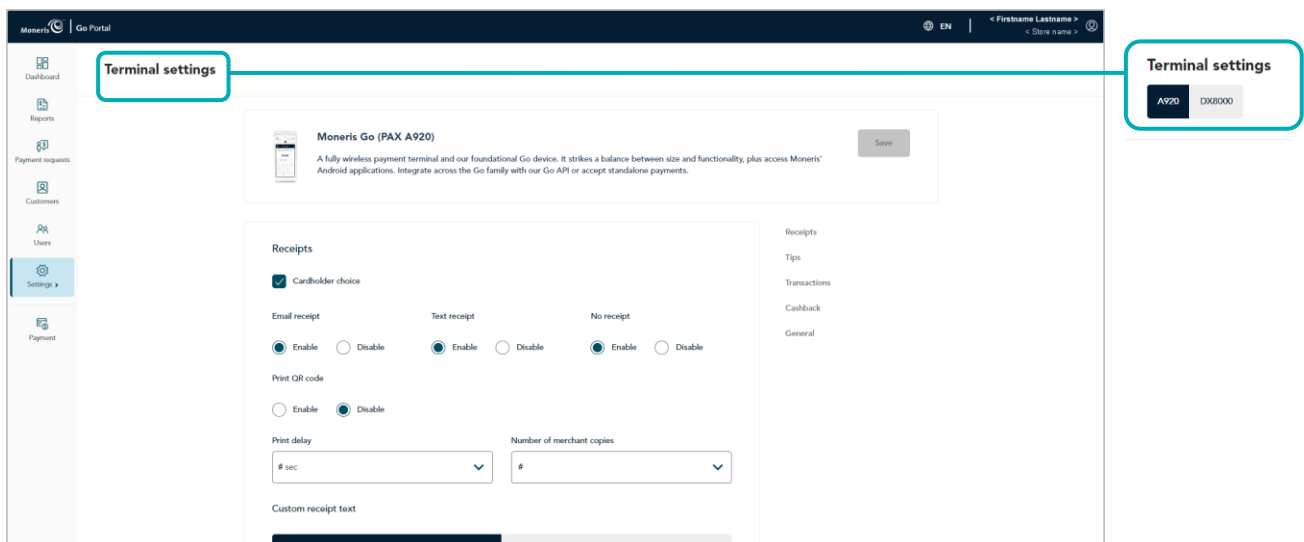
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

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.*



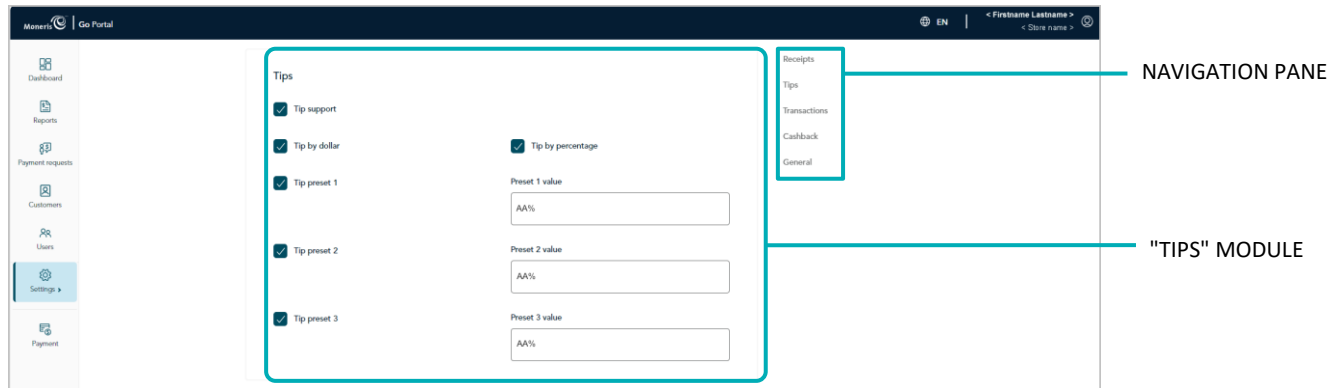
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "Moneris Go (PAX A920)" terminal before continuing to the next step.

Note: *If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **A920** tab to display the settings for the "Moneris Go (PAX A920)" terminal.*



4. Scroll to the "Tips" module (shown below), and configure the tip settings as desired:

Note: To jump directly to the "Tips" module, click on **Tips** in the navigation pane (shown below).



Tip support

- Enable/disable tip prompting on the Moneris Go terminal:
 - To enable, checkmark the **Tip support** box.
 - To disable, unmark the **Tip support** box.
- Click on the **Save** button.
- When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Tip by dollar²⁷

- Enable/disable the option for customers to enter a tip as a dollar amount on the Moneris Go terminal:
 - To enable, checkmark the **Tip by dollar** box.
 - To disable, unmark the **Tip by dollar** box.
- Click on the **Save** button.
- When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

²⁷ This option is supported only if "Tip support" is enabled (see [Tip support](#) above).

Tip by percent²⁸

- a. Enable/disable the option for customers to enter a tip as a percentage on the Moneris Go terminal:
 - To enable, checkmark the **Tip by percent** box.
 - To disable, unmark the **Tip by percent** box.
- b. Click on the **Save** button.
- c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

Tip by preset percentage²⁹

- a. Enable/disable the option for customers to select a pre-defined tip percentage on the Moneris Go terminal:

Note: *There are three pre-defined tip percentage settings; each can be configured/enabled independently.*

- To enable, checkmark the **Tip preset #** box, and enter a percentage value in the corresponding **Preset # value** field.
 - To disable, unmark the **Tip preset #** box.
- b. Click on the **Save** button.
 - c. When the "Moneris Go (PAX A920) settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

²⁸ This option is supported only if "Tip support" is enabled (see [Tip support](#) on page 184).

²⁹ This option is supported only if "Tip by percent" is enabled (see [Tip by percent](#) above).

Moneris Go Plus (DX8000) Terminal Management

In this section, we go over everything you need to know to manage the Moneris Go portal settings that govern the behaviour of your Moneris Go Plus terminals.

(For information and resources on how to use your Moneris Go Plus terminal to process transactions, visit <https://www.moneris.com/en/support/moneris-go/moneris-go-plus>.)


Moneris Go Plus terminal: general settings

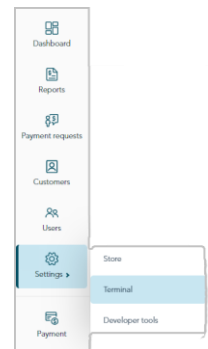
The steps below describe how to access the general settings for all Moneris Go Plus terminals that are synced to your Moneris Go portal store. General settings include automatic sign-out time, automatic sign-out after transaction, report reset time, and display timeout.

1. Log into the Moneris Go portal, and access the store that is synced to the Moneris Go Plus terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 27).

Note: If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

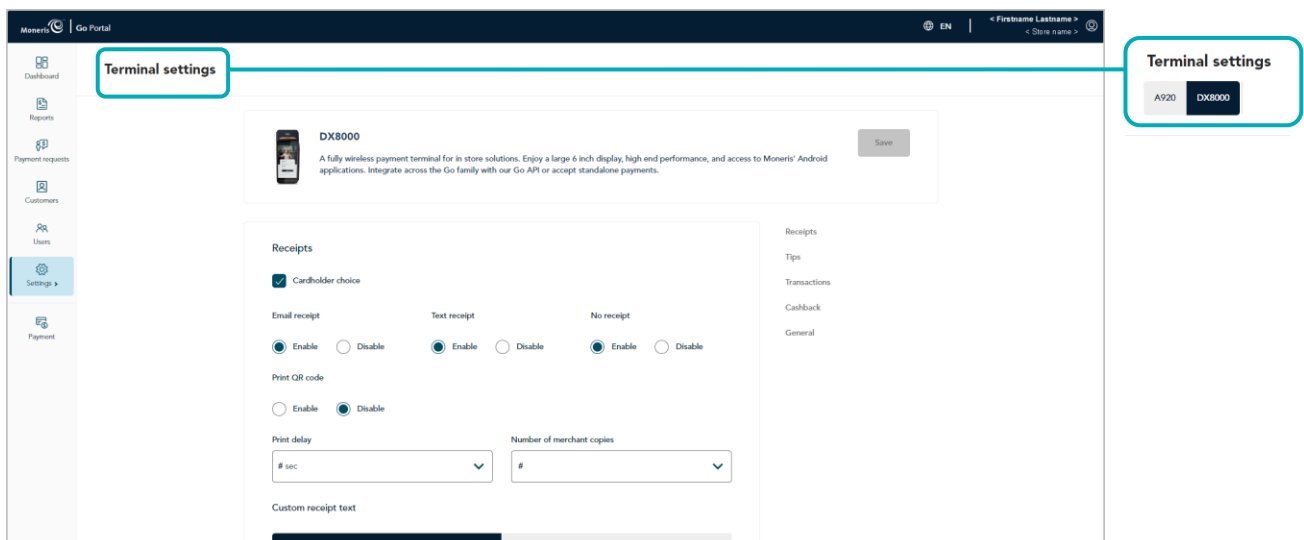
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

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.



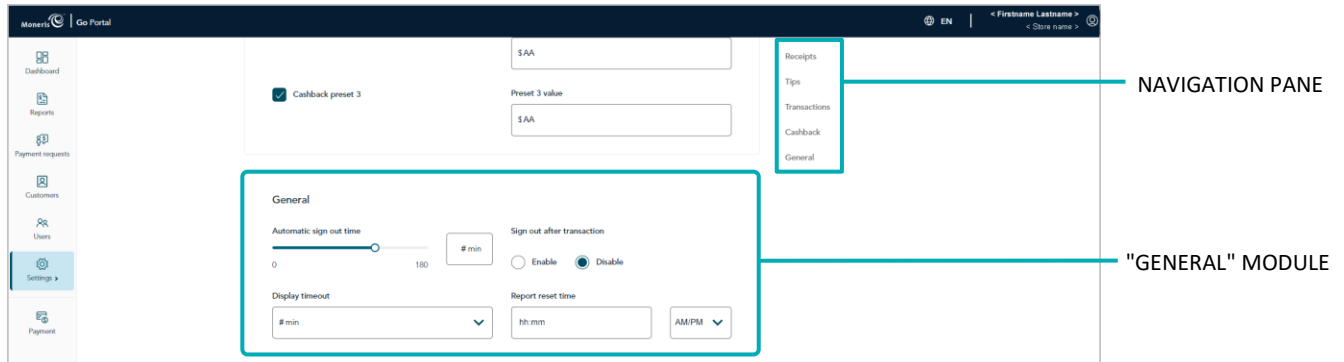
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "DX8000" terminal (Moneris Go Plus) before continuing to the next step.

Note: If two or more different device types are synced to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **DX8000** tab to display the settings for the "DX8000" terminal.



4. Scroll to the "General" module (shown below), and configure the general settings as desired:

Note: To jump directly to the "General" module, click on **General** in the navigation pane (shown below).



Automatic sign-out time

Configure when the Moneris Go Plus terminal automatically logs off a user after X seconds of inactivity:

- a. Move the **Automatic sign-out time** slider to the desired value (0 sec to 180 sec).
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Display timeout

Set the number of minutes of inactivity after which the Moneris Go Plus terminal enters into sleep mode to conserve battery power.

- a. Click on the **Display timeout** drop-down, and select the desired value (1 min, 2 min, or 5 min).
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Sign out after transaction

Enable/disable automatic logoff after a user performs a Moneris Go Plus terminal transaction:

- a. Go to the "Sign out after transaction" setting, and do one of the following:
 - To enable, select the **Enable** radio button.
 - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal.*

Report reset time

Set the 23-hour and 59-second period starting at time X, when Moneris Go Plus terminal reports reset to \$0:

- a. In the **Report reset time** field, enter a reset time; then select **AM** (morning) /**PM** (night).
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*


Moneris Go Plus terminal: transaction settings

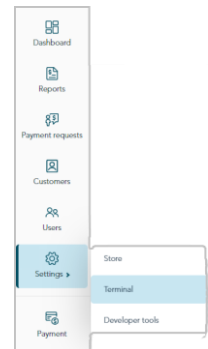
The steps below describe how to access the transaction settings for all Moneris Go Plus terminals that are synched to your Moneris Go portal store. Transaction settings include, pass terminal time, debit surcharging, manual entry transactions, and custom transaction identifier.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go Plus terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 27).

Note: If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

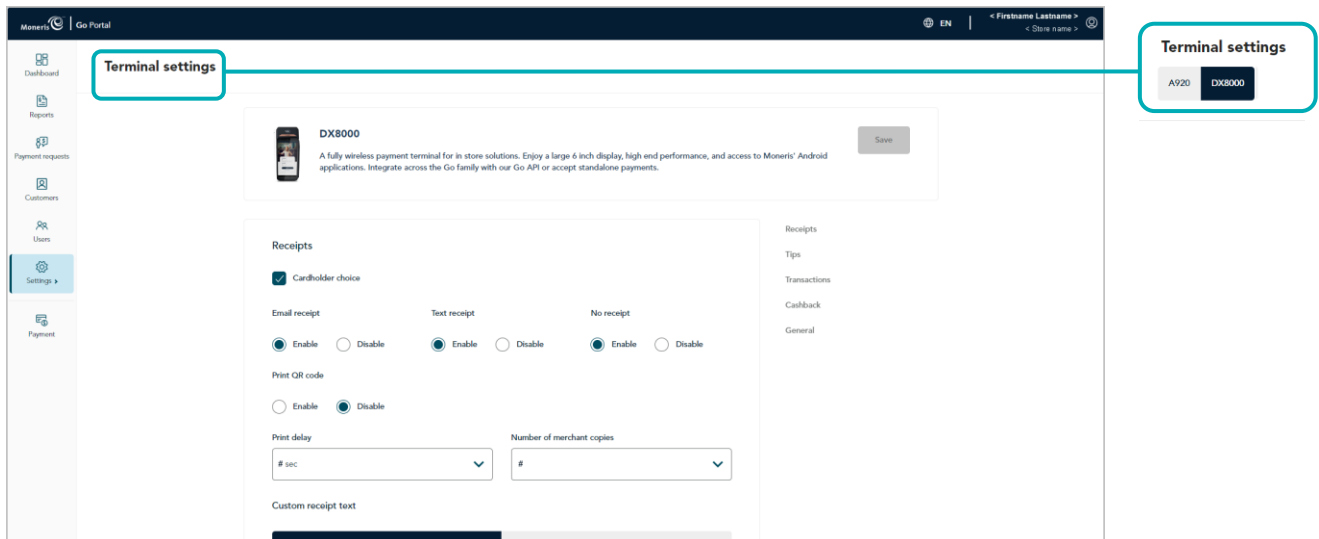
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

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.



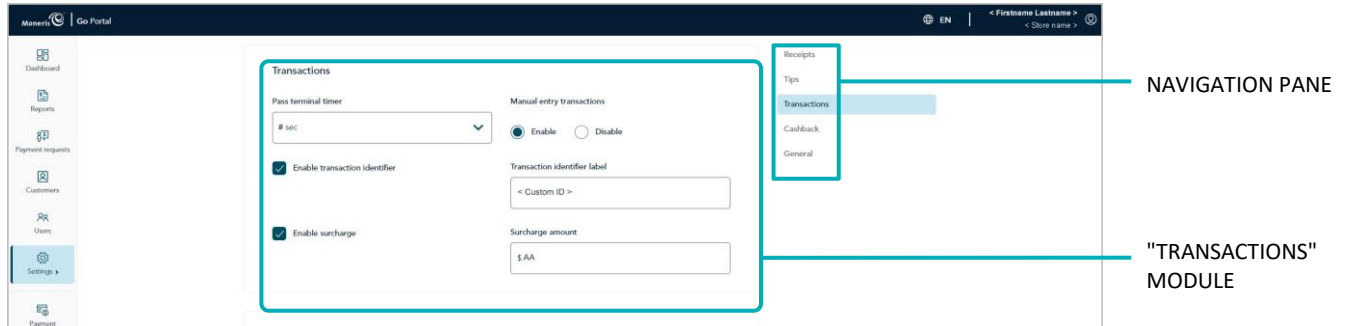
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "DX8000" terminal (Moneris Go Plus) before continuing to the next step.

Note: If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **DX8000** tab to display the settings for the "DX8000" terminal.



4. Scroll to the "Transactions" module (shown below), and configure the transaction settings as desired:

Note: To jump directly to the "Transactions" module, click on **Transactions** in the navigation pane (shown below).



Manual entry transactions

Enable/disable keying in transactions on the Moneris Go Plus terminal:

- Go to the "Manual entry transactions" setting, and do one of the following:
 - To enable, select the **Enable** radio button.
 - To disable, select the **Disable** radio button.
- Click on the **Save** button.
- When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Pass terminal timer

Configure how long the Moneris Go Plus terminal displays the "Please pass the terminal to your customer" prompt (e.g., this prompt would display when tip prompting is enabled):

- Click on the **Pass terminal timer** drop-down, and select a value (0 sec to 10 sec).
- Click on the **Save** button.
- When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Surcharge

- a. Enable/disable the addition of a fixed dollar amount (surcharge) to debit Purchase transactions on the Moneris Go Plus terminal:

Note: *Surcharging is applicable only to Purchase transactions processed with an Interac debit card.*

- To enable, checkmark the **Enable surcharge** box, and enter the surcharge amount in the **Surcharge amount** field.
- To disable, unmark the **Enable surcharge** box.

- b. Click on the **Save** button.

- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

Transaction identifier

Enable/disable the option to append a custom transaction identifier to debit/credit/cash Purchases, Preauthorizations, and independent Refunds performed on the Moneris Go Plus terminal. If enabled, the custom transaction identifier field will appear as a line item in reports and receipts.

Note: *If you opt to enable this feature on the terminal, you should also enable the equivalent "Custom ID" feature on the virtual terminal (see [Store settings: payments](#) on page 137).*

- a. Go to the "Transaction identifier" setting, and do one of the following:

- To enable, checkmark the **Enable transaction identifier** box, and enter your custom identifier in the **Transaction identifier label** field.
- To disable, unmark the **Enable transaction identifier** box.

- b. Click on the **Save** button.

- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*


Moneris Go Plus terminal: receipt settings

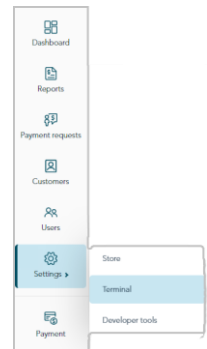
The steps below describe how to access the settings for receipts issued from all Moneris Go Plus terminals that are synched to your Moneris Go portal store. Receipt settings include transaction receipt format choice, print QR code, print delay, and customizable greeting headers and footers.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go Plus terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 27).

Note: If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

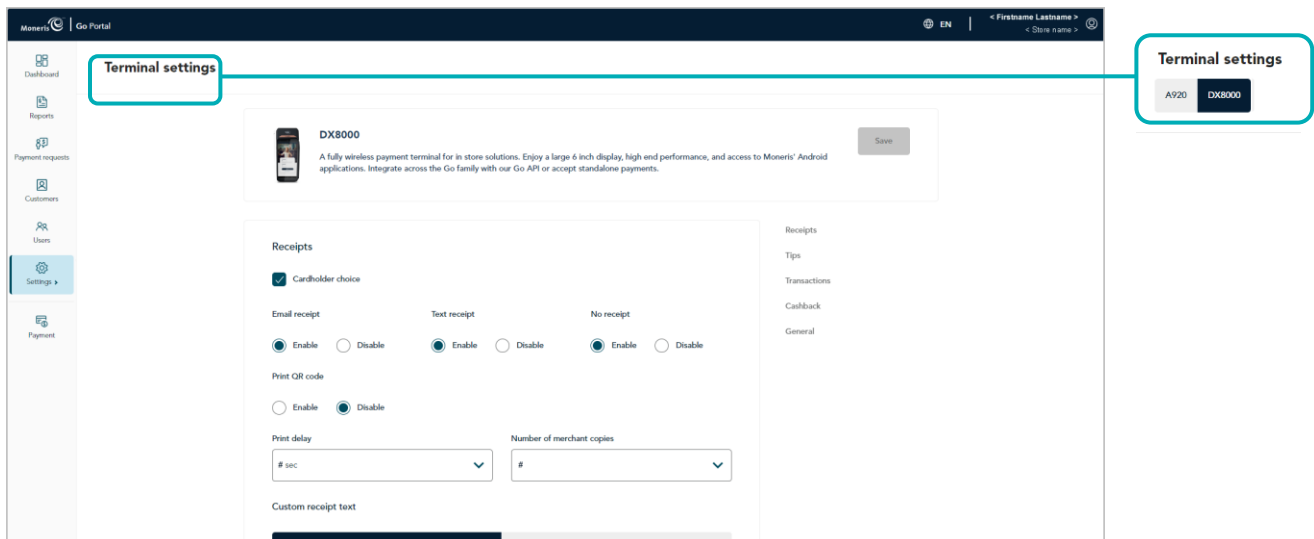
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

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.



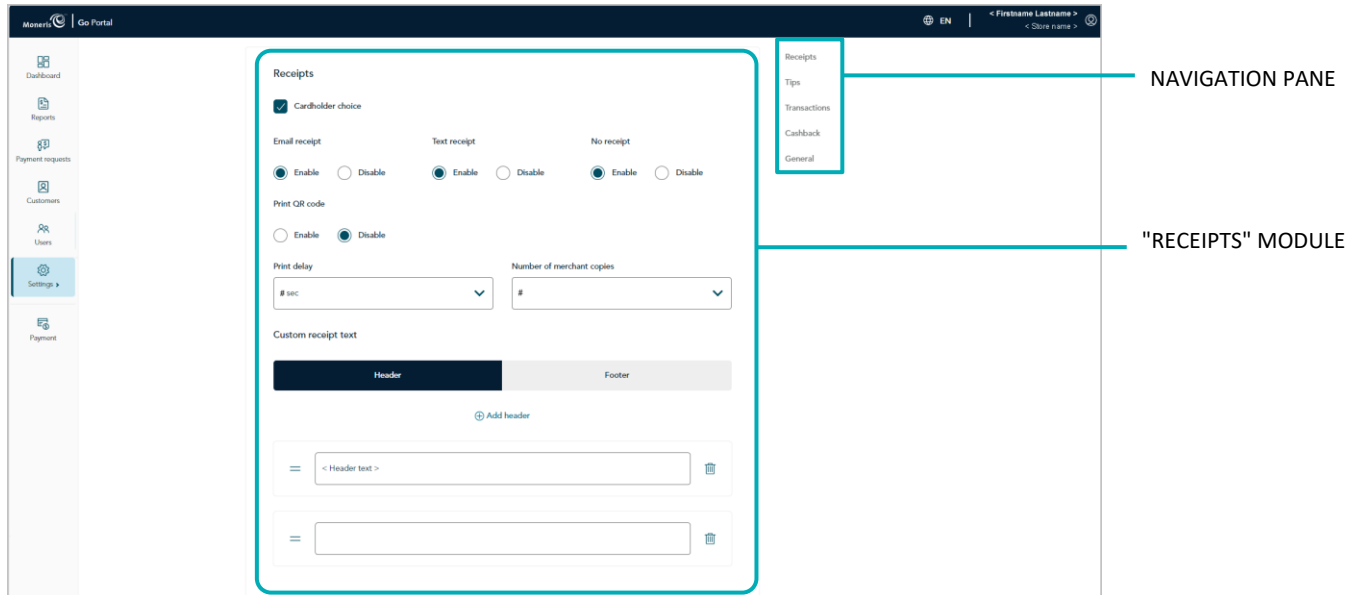
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "DX8000" terminal (Moneris Go Plus) before continuing to the next step.

Note: If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **DX8000** tab to display the settings for the "DX8000" terminal.



4. Scroll to the "Receipts" module (shown below), and configure the receipt settings as desired:

Note: To jump directly to the "Receipts" module, click on **Receipts** in the navigation pane (shown below).



Cardholder choice

- Enable/disable receipt format prompting on the Moneris Go Plus terminal:
 - To enable, checkmark the **Cardholder choice** box.
 - To disable, unmark the **Cardholder choice** box.
- Click on the **Save** button.
- When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Email receipt³⁰

Enable/disable the "Email receipt" option on the Moneris Go Plus terminal.

- Go to the "Email receipt" setting, and do one of the following:
 - To enable, select the **Enable** radio button.
 - To disable, select the **Disable** radio button.
- Click on the **Save** button.
- When the "DX8000 settings updated successfully" response displays, the operation is complete.

³⁰ This option is supported only if "Cardholder choice" is enabled (see [Cardholder choice](#) above).

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Text receipt³¹

Enable/disable the "Text receipt" option on the Moneris Go Plus terminal.

- a. Go to the "Text receipt" setting, and do one of the following:
 - To enable, select the **Enable** radio button.
 - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

No receipt³²

Enable/disable the "No receipt" option on the Moneris Go Plus terminal.

- a. Go to the "No receipt" setting, and do one of the following:
 - To enable, select the **Enable** radio button.
 - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal that is connected to an ECR, the change is effected when the terminal reboots or receives a manual Sync command.

³¹ This option is supported only if "Cardholder choice" is enabled (see [Cardholder choice](#) on page 194).

³² This option is supported only if "Cardholder choice" is enabled (see [Cardholder choice](#) on page 194).

Number of merchant copies

Set the number of merchant copy receipts that the Moneris Go Plus terminal prints for each transaction:

- a. Click on the **Number of merchant copies** drop-down, and select a number (0 to 2).
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

Print QR code

Enable/disable the appearance of a QR code on Moneris Go Plus terminal transaction receipts. (If the QR code is printed on a receipt, you can use the terminal to scan the receipt and retrieve the transaction record.)

- a. Go to the "Print QR code" setting, and do one of the following:
 - To enable, select the **Enable** radio button.
 - To disable, select the **Disable** radio button.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

Print delay

Set the delay time (in seconds) between when the Moneris Go Plus terminal prints the cardholder copy receipt and when it prints the merchant copy receipt.

- a. Click on the **Print delay** drop-down, and select a value (2 sec to 5 sec).
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

Header


Configure a customized greeting message in the header line(s) on Moneris Go Plus terminal transaction receipts.

To configure a header line:

- a. Go to the "Custom receipt text" area, and click on the **Header** button to display the header settings.
 - To add a new header line, click on **Add header**, and enter your greeting text in the new header field (or leave the field unfilled if you want to add a blank header line).
 - To reposition a header line, click on it and drag the header line to the desired position above/below another header line.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

To remove one or more header lines:

- a. Go to the "Custom receipt text" area, and click on the **Header** button to display the header settings.
- b. Locate any header line that you want to remove, and click on its **Delete**  icon.
- c. Click on the **Save** button.
- d. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*


Footer

Configure a customized greeting message in the footer line(s) on Moneris Go Plus terminal transaction receipts.

- a. Go to the "Custom receipt text" area, and click on the **Footer** button to display the footer settings.
 - To add a new footer line, click on **Add footer**, and enter your greeting text in the new footer field (or leave the field unfilled if you want to add a blank footer line).
 - To reposition a footer line, click on it and drag the footer line to the desired position above/below another footer line.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

To remove one or more footer lines:

- a. Go to the "Custom receipt text" area, and click on the **Footer** button to display the footer settings.
- b. Locate any footer line that you want to remove, and click on its **Delete**  icon.
- c. Click on the **Save** button.
- d. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.


Moneris Go Plus terminal: cashback settings

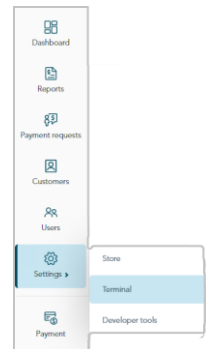
The steps below describe how to access the settings for cashback prompting on all Moneris Go Plus terminals that are synched to your Moneris Go portal store. When enabled, cashback prompting displays during contact-based debit Purchase transactions performed on the Moneris Go Plus terminal.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go Plus terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 27).

Note: If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

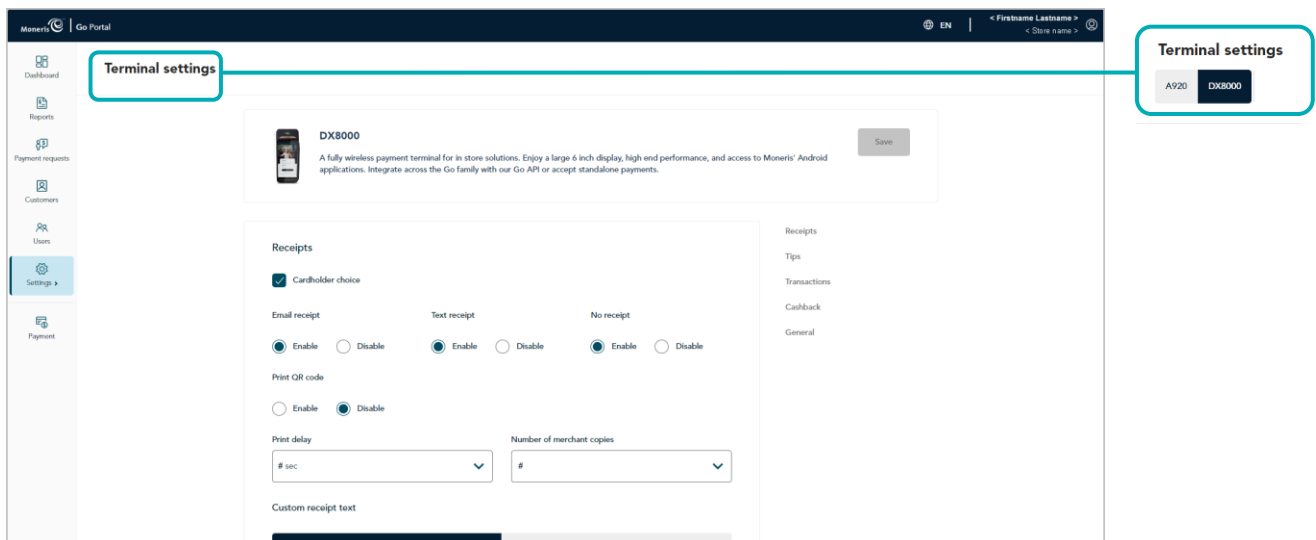
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

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.



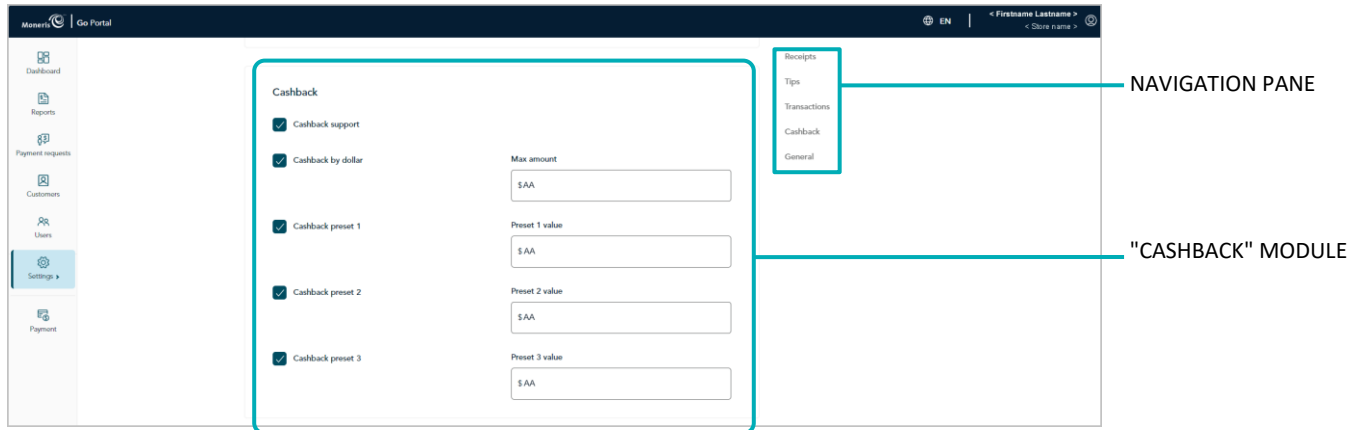
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "DX8000" terminal (Moneris Go Plus) before continuing to the next step.

Note: If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **DX8000** tab to display the settings for the "DX8000" terminal.



4. Scroll to the "Cashback" module (shown below), and configure the cashback settings as desired:

Note: To jump directly to the "Cashback" area, click on **Cashback** in the navigation pane (shown below).



Cashback support

- a. Enable/disable cashback prompting on the Moneris Go Plus terminal:
 - To enable, checkmark the **Cashback support** box.
 - To disable, unmark the **Cashback support** box.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Cashback by dollar³³

- a. Enable/disable the option for cardholders to enter a cashback amount on the Moneris Go Plus terminal to a maximum dollar amount that you define:
 - To enable, checkmark the **Cashback by dollar** box, and enter the maximum dollar amount limit in the **Max amount** field.
 - To disable, unmark the **Cashback by dollar** box.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

³³ This option is supported only if "Cashback support" is enabled (see [Cashback support](#) above).

Cashback by preset³⁴

- a. Enable/disable the option for cardholders to select a pre-defined cashback dollar amount on the Moneris Go Plus terminal:

Note: *There are three pre-defined dollar amount settings; each can be configured/enabled independently.*

- To enable, checkmark the **Cashback preset #** box, and enter a dollar amount in the corresponding **Preset value** field.
 - To disable, unmark the **Cashback preset #** box.
- b. Click on the **Save** button.
 - c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

³⁴ This option is supported only if "Cashback support" is enabled (see [Cashback support](#) on page 200).


Moneris Go Plus terminal: tip settings

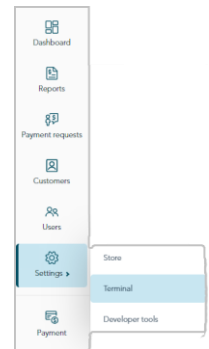
The steps below describe how to access the settings for tip prompting on all Moneris Go Plus terminals that are synched to your Moneris Go portal store. When enabled, tip prompting displays during Purchase and Preauthorization transactions.

1. Log into the Moneris Go portal, and access the store that is synched to the Moneris Go Plus terminal(s) that you want to modify (see [Logging into the Moneris Go portal](#) on page 27).

Note: If multiple stores are linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

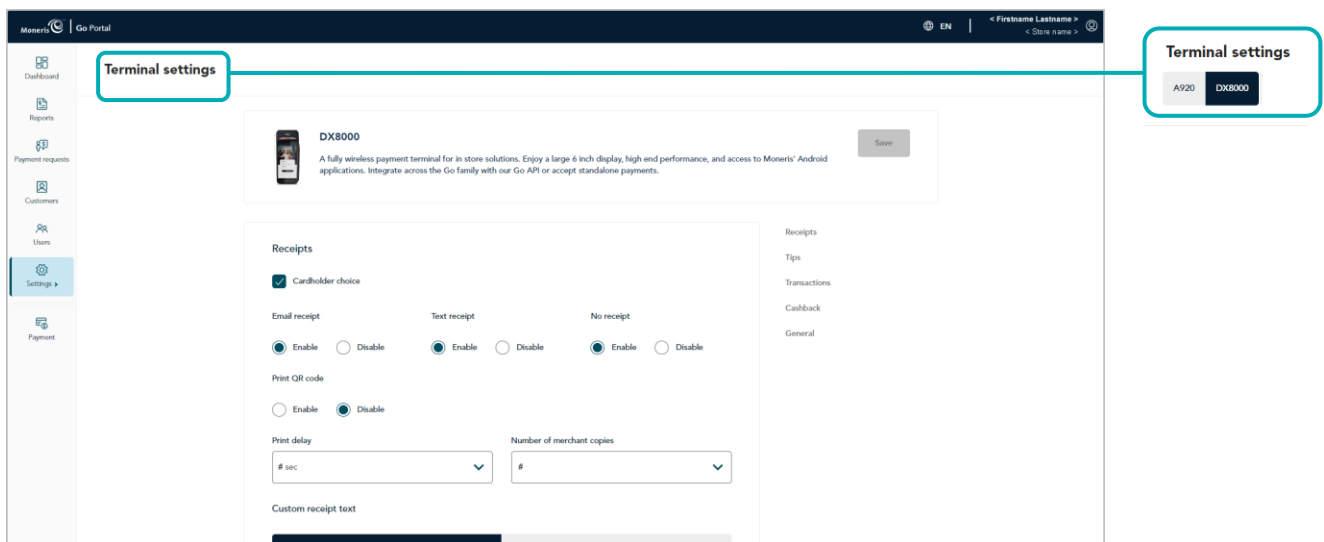
2. On the sidebar menu (shown here), click on **Settings > Terminal**.

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.



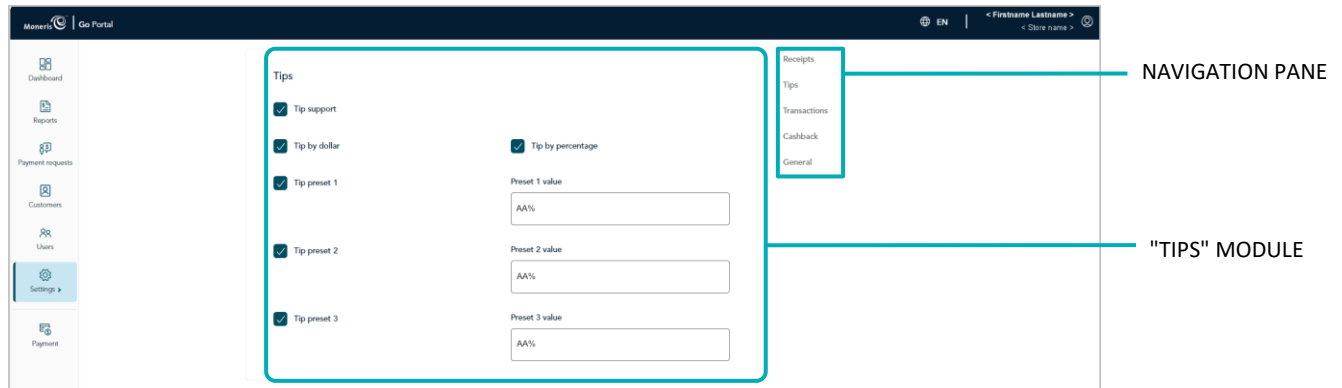
3. When the "Terminal settings" page displays (shown below), confirm that you are viewing the settings for the "DX8000" terminal (Moneris Go Plus) before continuing to the next step.

Note: If two or more different device types are synched to your store, a tab for each device type will display in the upper left corner on your "Terminal settings" page (see callout below). When this happens, click on the **DX8000** tab to display the settings for the "DX8000" terminal.



4. Scroll to the "Tips" module (shown below), and configure the tip settings as desired:

Note: To jump directly to the "Tips" module, click on **Tips** in the navigation pane (shown below).



Tip support

- Enable/disable tip prompting on the Moneris Go Plus terminal:
 - To enable, checkmark the **Tip support** box.
 - To disable, unmark the **Tip support** box.
- Click on the **Save** button.
- When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

Tip by dollar³⁵

- Enable/disable the option for customers to enter a tip as a dollar amount on the Moneris Go Plus terminal:
 - To enable, checkmark the **Tip by dollar** box.
 - To disable, unmark the **Tip by dollar** box.
- Click on the **Save** button.
- When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.

³⁵ This option is supported only if "Tip support" is enabled (see [Tip support](#) above).

Tip by percent³⁶

- a. Enable/disable the option for customers to enter a tip as a percentage on the Moneris Go Plus terminal:
 - To enable, checkmark the **Tip by percent** box.
 - To disable, unmark the **Tip by percent** box.
- b. Click on the **Save** button.
- c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

Tip by preset percentage³⁷

- a. Enable/disable the option for customers to select a pre-defined tip percentage on the Moneris Go Plus terminal:

Note: *There are three pre-defined tip percentage settings; each can be configured/enabled independently.*

- To enable, checkmark the **Tip preset #** box, and enter a percentage value in the corresponding **Preset # value** field.
 - To disable, unmark the **Tip preset #** box.
- b. Click on the **Save** button.
 - c. When the "DX8000 settings updated successfully" response displays, the operation is complete.

Note: *On a synched standalone terminal, the change is effected when a user ends their login session on the terminal, reboots the terminal, or performs a manual Sync on the terminal. On a synched integrated terminal, the change is effected when the terminal reboots or receives a manual Sync command from the ECR to which the terminal is connected.*

³⁶ This option is supported only if "Tip support" is enabled (see [Tip support](#) on page 203).

³⁷ This option is supported only if "Tip by percent" is enabled (see [Tip by percent](#) above).



End-of-Day Procedures

In this section, we go over everything you need to know to reconcile financial transactions in your daily batch.

Verifying your daily batch totals

Debit, credit, and gift transactions that are processed through your Moneris Go portal store³⁸ are stored in a batch that closes automatically each day, usually at 11 pm based on your account region. Once the batch closes, Moneris can settle the transactions and transfer the funds to your business account.

To verify the daily batch total for your store, follow the steps below.

1. Any time after 7:00 am the next day (i.e., following the batch close date of the batch that you want to verify), log into the Merchant Direct® web portal (visit moneris.com/mymerchantdirect).

Note: *If you have Moneris Portal access, please sign into Moneris Portal (visit <https://login.moneris.com/en/login>, and launch "Merchant Direct" application).*

2. Once you are logged in, select **Daily Transaction Report Menu**, and then select **Daily Batch Summary Report** to view the report.

Moneris Go portal note: *Any data populating under Moneris Go portal's custom ID field/header in a Go portal receipt or report will always be listed under the header "Customer ID" in Merchant Direct's financial transactions reports regardless of the field/header label that is configured in Moneris Go portal (see [Custom ID: store settings](#) on page 142).*

3. Compare the batch summary report with your receipts or other business records:

If there are no discrepancies between the report and your records:

- a. No further action is required.

If there are discrepancies between the report and your records:

- a. Call Moneris Customer Care toll-free at **1-866-319-7450** now or the next business day to obtain assistance with reconciliation.

³⁸ Includes all transactions performed on point-of-sale devices or applications that are synched to your store.



Developer Tools

In this section, we present some of our
ecommerce integration options.

Integration options

Moneris Checkout

For information on Moneris Checkout integration, please refer to the ***Moneris Checkout Using the Moneris Go portal's MCO Configurator Reference Guide***, available for download from <https://www.moneris.com/en/support/moneris-go/moneris-go-portal>

Hosted tokenization

For information on Moneris hosted tokenization integration, please refer to the ***Moneris Hosted Tokenization Creating a profile in Moneris Go portal Reference Guide***, available for download from <https://www.moneris.com/en/support/moneris-go/moneris-go-portal>

API token


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

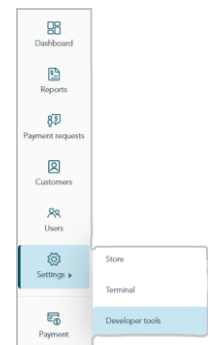
Note: The API token is a unique alphanumeric value that is assigned to every Moneris Go portal store. The API token is used to authenticate a store and facilitate ecommerce transactions through that store. For information on how to use the API token in your ecommerce integration, visit the Moneris Developer Portal (<https://developer.moneris.com>), and refer to the ecommerce integration guide for your integration type.

1. Log into the Moneris Go portal, and access the store containing the API token that you want to view or copy (see [Logging into the Moneris Go portal](#) on page 27).

Note: If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores (see [Using My Stores](#) on page 36).

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

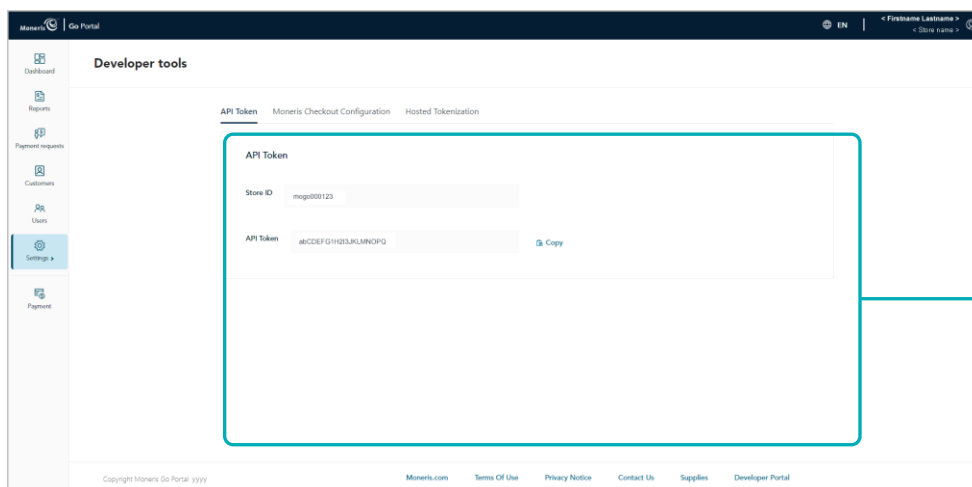
Note: If the sidebar menu is not displayed on your screen, click on the "menu"  icon in the top left corner of your screen, or expand your browser window to display the sidebar menu.



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.



Troubleshooting

In this section, we go over everything you need to know to troubleshoot your Moneris Go portal issues.

Troubleshooting issues


Review the table below to find a solution to your Moneris Go portal issue. If you cannot find a resolution to your issue, please use the Moneris Go portal feedback form to submit a request for assistance (see [Sending feedback/requesting assistance while logged in](#) on page 213).

Issue	Solution
<p>You did not receive your Moneris Go portal activation email.</p>	<ol style="list-style-type: none"> 1. Confirm that your email spam filter is not blocking the activation email. 2. If you still have not received your email, confirm that your Moneris Go portal store administrator added a user account for you and they registered the correct email address. Note: To verify your account setup, your administrator can click on Users in the sidebar menu, locate your user account listing, and review the email registered to your account. 3. If your administrator registered the incorrect email address, have them add a new account for you with the correct email address. Note: To add the new user account, the administrator must follow the Adding a new user account procedure (page 145).
<p>You added a new user account through your Moneris Go portal store, but the user account status indicates "Pending".</p>	<ol style="list-style-type: none"> 1. A user account's status will indicate "Pending" until the intended user receives/opens their activation email, clicks on the link contained in the message, and follows the activation prompts to activate the account. 2. Once the user account is activated, its status as shown on the "Users" page will indicate the account is "Active". Note: To verify the account status, click on Users in the sidebar menu, locate the user account listing, and review its "STATUS" indicator.
<p>You forgot your Moneris Go portal login password.</p>	<ol style="list-style-type: none"> 1. Reset your password (see Forgot your login password? on page 31).

Sending feedback/requesting assistance while logged in

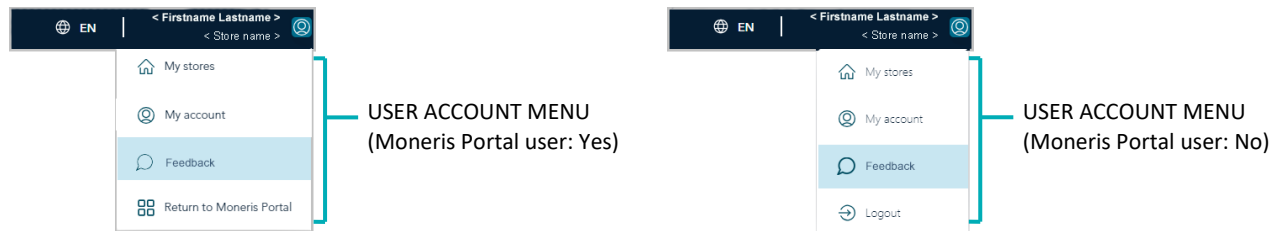
If you are logged into the Moneris Go portal and are already within (accessing) a store,³⁹ follow the steps below to use the Moneris Go portal feedback form to send us your feedback and/or request assistance.

Note: You can also find solutions to issues related to activation emails, user accounts, and password resets. For these solutions and more, please review the [Troubleshooting issues](#) section (page 212).

1. From any page in your store, click on your user account  tile, which displays in the top right corner of the page header (shown below).

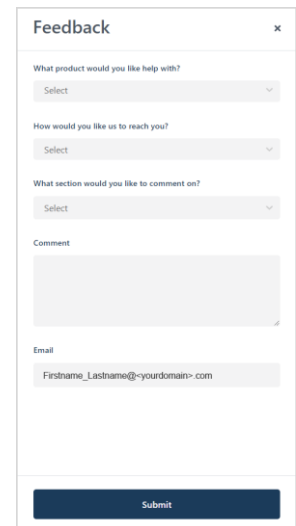


2. When the user account menu displays (shown below), click on **Feedback**.



3. When the "Feedback" window displays (shown here), fill in the information fields to complete the form:

- a. Click on the "What product would you like help with?" drop-down, and select the desired product (**Moneris Go Portal** or **Moneris Go Terminal**).
- b. Click on the "How would you like us to reach you?" drop-down, and select the desired contact method (**Phone**, **Email**, or **No Response Required**).
- c. Click on the "What section would you like to comment on?" drop-down, and select the comment descriptor (**General comment/inquiry**, **Technical issues**, or **Enhancement suggestions**).
- d. In the **Comment** field, enter additional supporting information.
- e. If you selected "Phone" as the contact method (step 3b), enter your contact phone number in the **Phone** field.

A screenshot of the Feedback form. It has a title "Feedback" and a close button "x". The form contains three drop-down menus: "What product would you like help with?", "How would you like us to reach you?", and "What section would you like to comment on?". Below these is a "Comment" text area, an "Email" field with a pre-filled address "Firstname_Lastname@-yourdomain-.com", and a "Submit" button at the bottom.

4. Click on the **Submit** button to send us the completed form.

³⁹ For instructions on how to log in and access a store, see [Logging into the Moneris Go portal](#) (page 27).



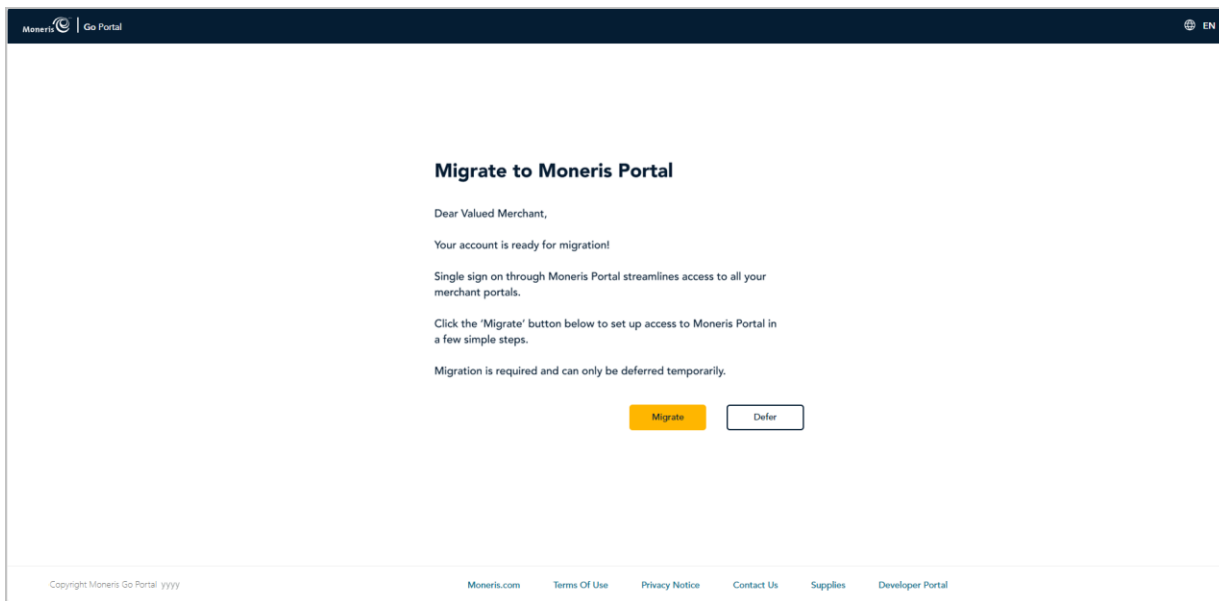
Moneris Portal Migration

In this section, we go over everything you need to know to migrate your user account(s) to Moneris Portal.

Choosing whether to migrate to Moneris Portal

If you log into the Moneris Go portal (see [Logging into the Moneris Go portal](#) on page 27) and the "Migrate to Moneris Portal" page displays (shown below), it means your Moneris Go portal user account is not yet migrated to Moneris Portal, our new single sign-on merchant platform.

Note: *Once you migrate your account to Moneris Portal, you will thereafter access your Moneris Go portal store(s) by signing into Moneris Portal. Through Moneris Portal you will also have access to a variety of other resources.*



Do you want to defer your migration until later?

If you are not ready to migrate your account (e.g., you want to review the migration steps first), you can defer your migration until you are ready. (All Moneris Go portal users will eventually be migrated to Moneris Portal.)

- Continue in [Deferring your migration to Moneris Portal](#) (page 216).

Are you ready to migrate your account to Moneris Portal?

If you have a Merchant Direct.v2 user account that is registered to the same email address as your Moneris Go portal user account (i.e., you have dual accounts), please follow "SCENARIO 2". If you do not have a Merchant Direct.v2 user account, please follow "SCENARIO 1".

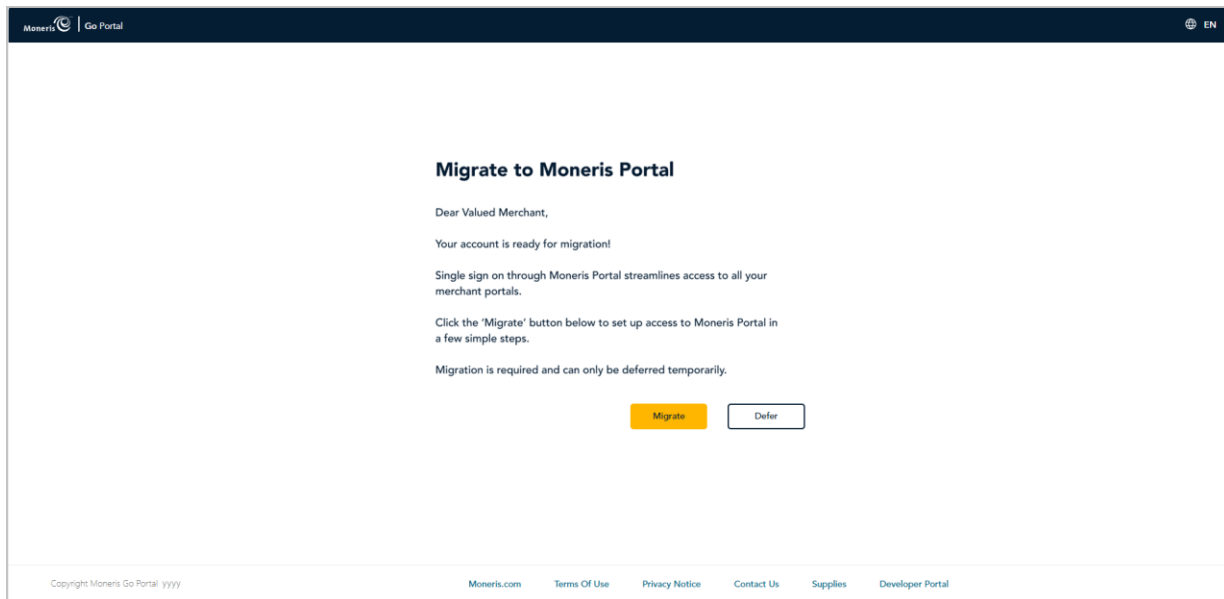
- **SCENARIO 1:** [Migrating your Go portal user account to Moneris Portal](#) (page 217).
- **SCENARIO 2:** [Migrating your Go portal and Merchant Direct.v2 user accounts to Moneris Portal](#) (page 226).

Deferring your migration to Moneris Portal

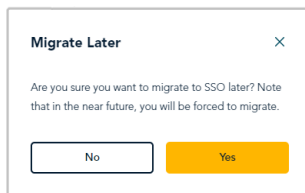
If you reviewed the information in [Choosing whether to migrate to Moneris Portal](#) (page 215), and you still want to defer migrating your account to Moneris Portal, follow the steps below.

Note: *The next time you log into the Moneris Go portal, you can opt to migrate (or defer again). The Moneris Go portal will prompt you to migrate your account each time you log in. (All Moneris Go portal user accounts will be migrated to Moneris Portal eventually.)*

1. When you log into the Moneris Go portal (see [Logging into the Moneris Go portal](#) on page 27), the "Migrate to Moneris Portal" page displays (shown below).



2. On the "Migrate to Moneris Portal" page (shown above), click on the **Defer** button.
3. When the "Migrate Later" dialog displays (shown below), click on its **Yes** button.

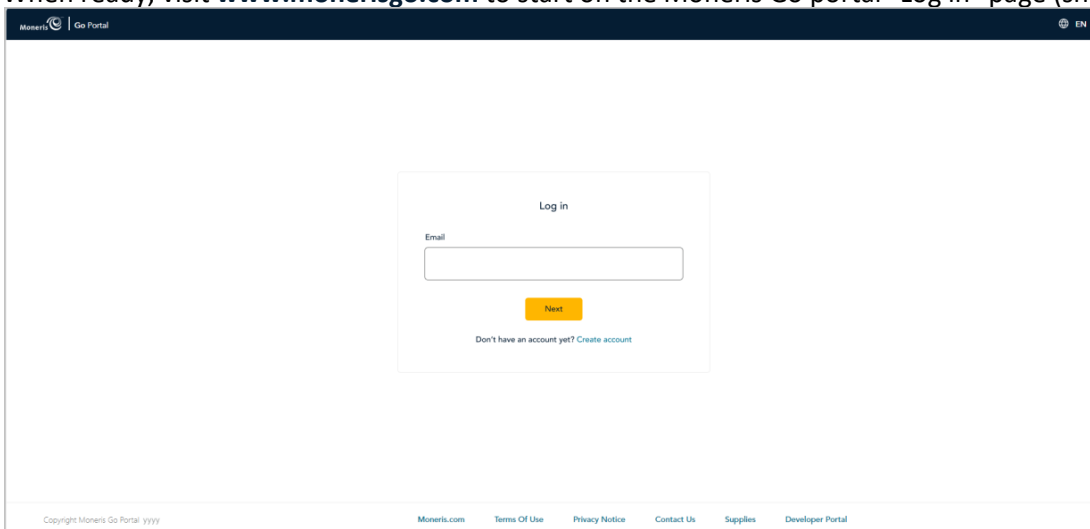


4. Continue in [Accessing a store after logging into Moneris Go portal](#) (page 29).

Migrating your Go portal user account to Moneris Portal

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

1. Review the information in [Choosing whether to migrate to Moneris Portal](#) (page 215) to determine if this migration procedure is applicable to you.
2. Review the information below to ensure that you have prepared for your migration:
 - a. 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
 - b. Be prepared to enter or confirm the account details listed below. During the migration process, you will be prompted to:
 - Confirm your first name and last name information.
 - Create a sign-in 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 signing into Moneris Portal for the first time.)*
3. If you are currently logged into Moneris Go portal, please log out now.
4. When ready, visit www.monerisgo.com to start on the Moneris Go portal "Log in" page (shown below).



5. In the **Email** field (shown above), enter the email address that was registered to your Moneris Go portal user account when you activated it, and click on the **Next** button.

6. 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

Log in

<your_address@domain.com> Edit

Password

Log in

Forgot password?

Copyright Moneris Go Portal yyyy

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

Moneris | Go Portal EN

Migrate to Moneris Portal

Dear Valued Merchant,

Your account is ready for migration!

Single sign on through Moneris Portal streamlines access to all your merchant portals.

Click the 'Migrate' button below to set up access to Moneris Portal in a few simple steps.

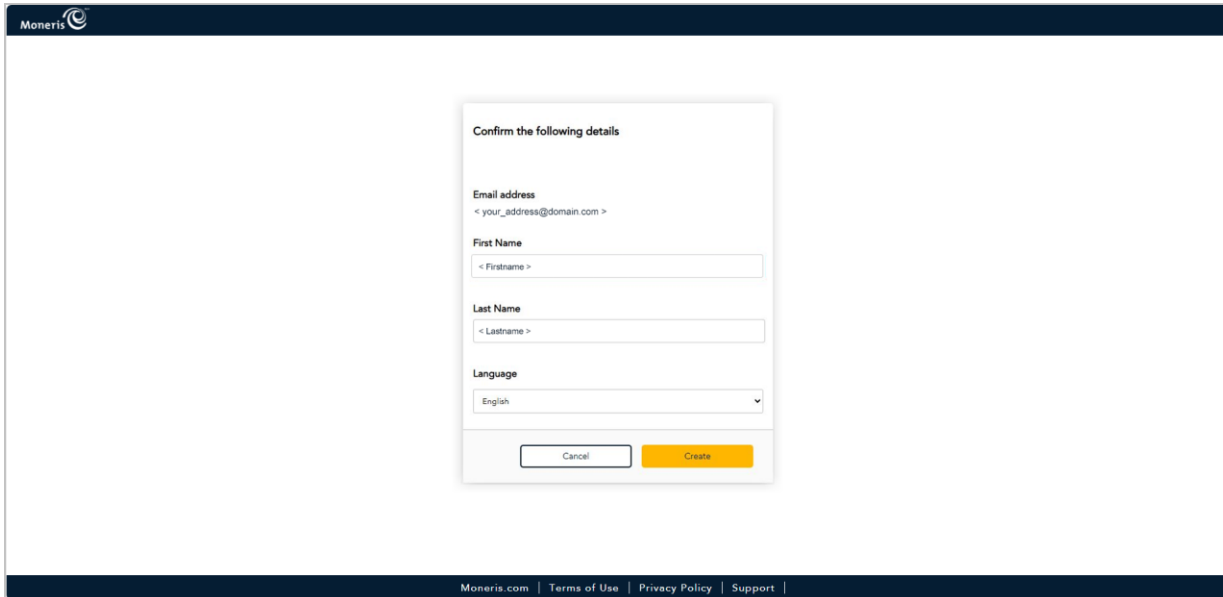
Migration is required and can only be deferred temporarily.

Migrate Defer

Copyright Moneris Go Portal yyyy

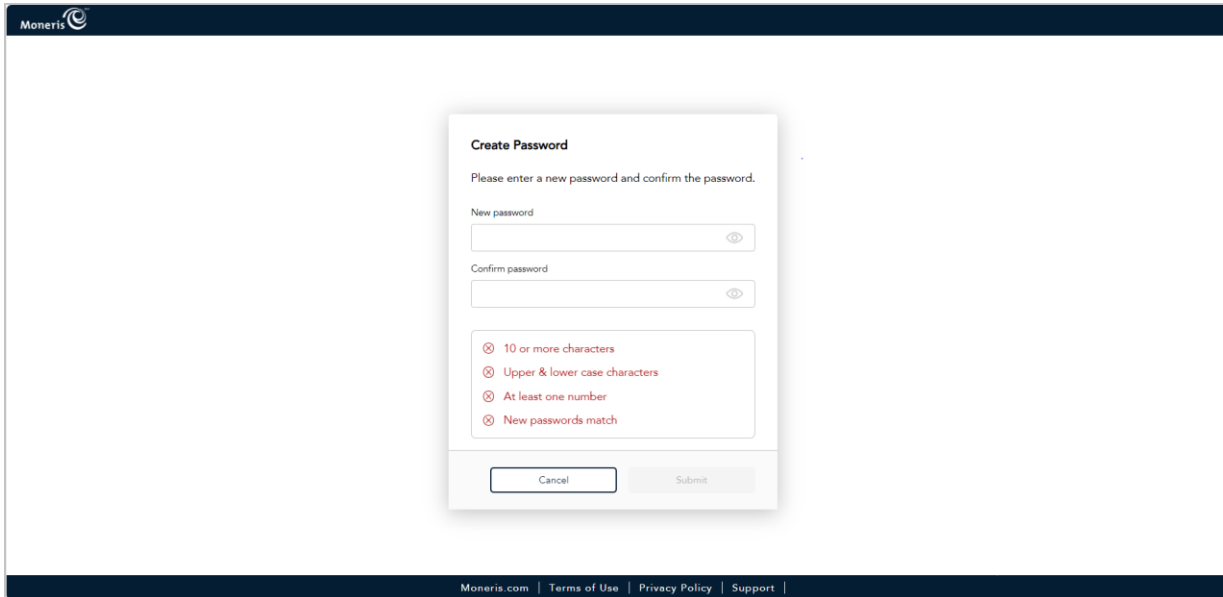
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8. When the "Confirm the following details" dialog displays (shown below), do the following:



- 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.

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



a. In the **New password** field, enter the password that you will use to sign 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.

10. 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: 10:00

Choose a security question that only you can answer.

Security questions

Select question 1 of 3

What was the first professional live performance that you have attended?

Your answer

Select question 2 of 3

What was your first pet's name?

Your answer

Select question 3 of 3

What was the first city that you traveled to by plane?

Your answer

Cancel Submit

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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.

11. When the "Account has been successfully created" dialog displays (shown below), click on its **Sign in** button.

Moneris

New account

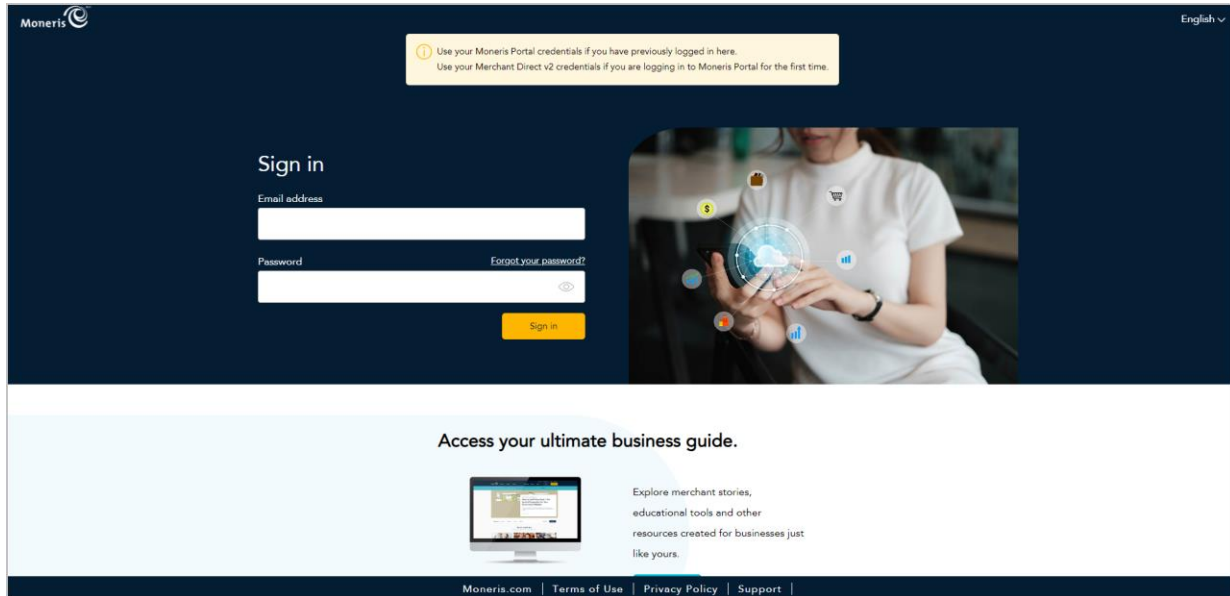
Account has been successfully created.

Sign in

Moneris.com | Terms of Use | Privacy Policy | Support

12. When the Moneris Portal "Sign in" page displays (shown below), enter your sign-in credentials:

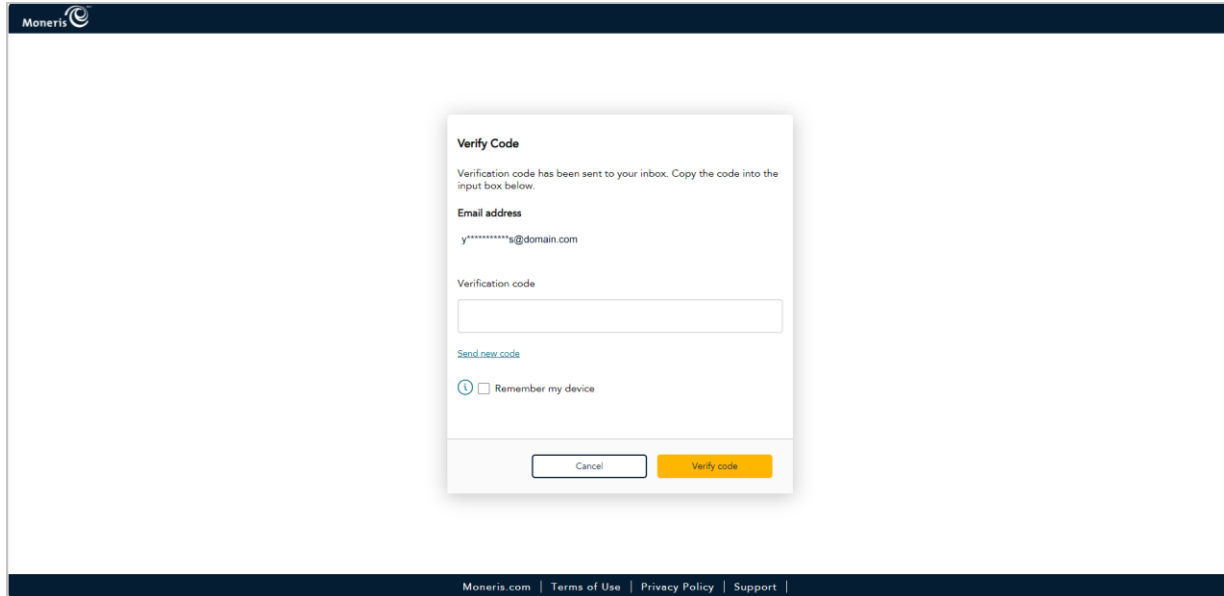
Note: Now that you completed the migration steps, please follow the steps below to confirm that you can successfully sign into Moneris Portal (<https://login.moneris.com/en/login>) and access your Moneris Go portal store(s).



- 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 **Sign in** button, and wait for a response.

- 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 sign-in email address. Do the following:

Note: If you want us to send a new code, click on **Send new code**.



- Open the "Moneris verification code" message in your inbox, and copy the 6-digit code (shown below) to your device's clipboard.

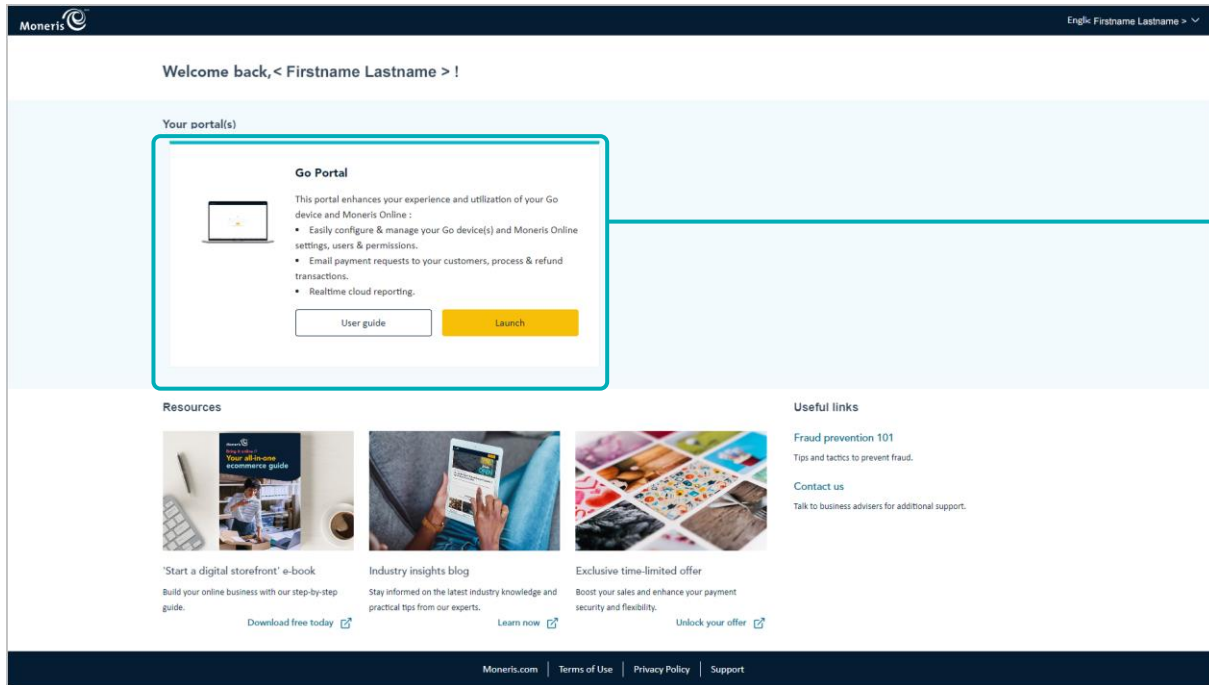
- Paste the code in the "Verify Code" dialog's **Verification code** field.
 - If you do not want to be prompted to enter a verification code each time you sign in from the same device and browser, checkmark the **Remember my device** box in the dialog.

Note: If enabled (checkmarked), this setting is effective up to 30 days so long as you sign 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.

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



14. When the "Your portal(s)" page displays (shown below), it means you have successfully migrated your user account to Moneris Portal.



"GO PORTAL" TILE

15. Click on the "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 (see Accessing a store after logging into Moneris Go portal on page 29).

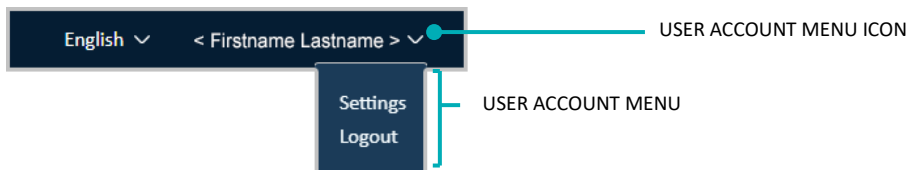
16. Please review Things to note now that your account is migrated (page 225).

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), please review the following bulleted points:

Using Moneris Portal:


- To end your sign-in 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.

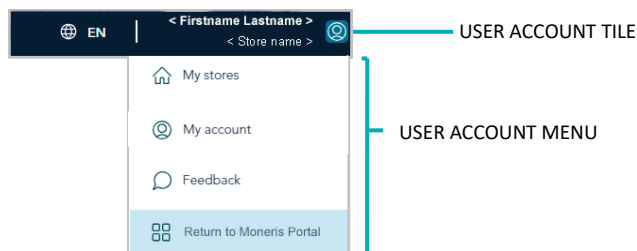


- If you forget your sign-in password, use Moneris Portal's "Forgot password?" function. (You access this function on the Moneris Portal "Sign in" page at <https://login.moneris.com/en/login>.)
- If you need to change your user account preferences (e.g., Moneris Portal sign-in password, etc.), use Moneris Portal.

Note: 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 (see "My account" settings: Moneris Portal user on page 123).

Using the Moneris Go portal:

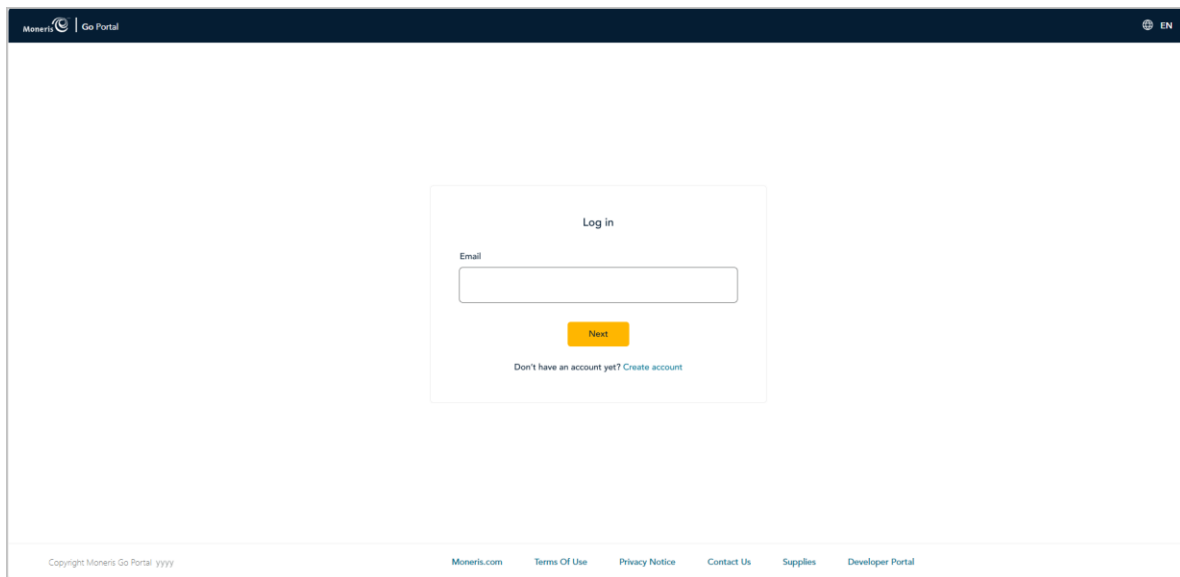
- Whenever you want to access your Moneris Go portal store(s), sign into Moneris Portal (visit <https://login.moneris.com/en/login>). From there, launch the "Go Portal" application.
- Note:** If you attempt to submit your sign-in credentials from the Moneris Go portal "Log in" page (www.monerisgo.com), you will be redirected to the Moneris Portal "Sign in" page.
- If you create/add a new user in Moneris Go portal, that user will activate their account and be prompted to perform their first login from the Moneris Go portal "Log in" page. However, Moneris Go portal will prompt the user to migrate their account to Moneris Portal.
 - 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.



Migrating your Go portal and Merchant Direct.v2 user accounts to Moneris Portal

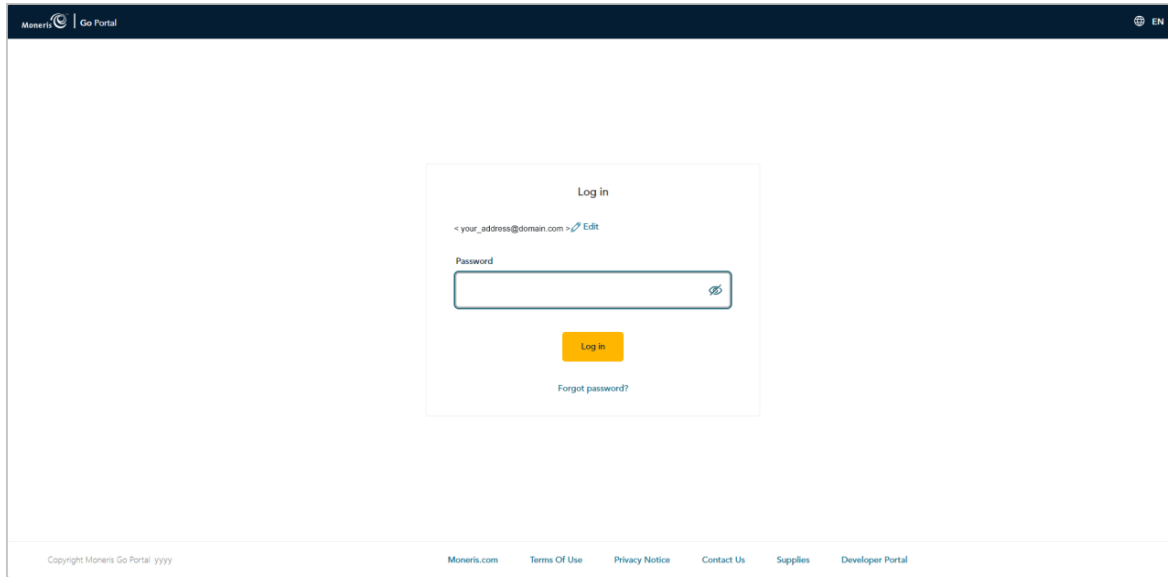
This section provides step-by-step instructions for what you need to do to successfully migrate your Moneris Go portal user account and your Merchant Direct.v2 user account to Moneris Portal.

1. Review the information in [Choosing whether to migrate to Moneris Portal](#) (page 215) to determine if this migration procedure is applicable to you.
2. Review the information below to ensure that you have prepared for your migration:
 - a. 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
 - b. Ensure you can access the inbox for the email address that you use to log into/sign into Moneris Go portal and Merchant Direct.v2:
 - We will send a 6-digit verification code to this inbox during your migration. You will be prompted to enter this code to continue.
3. If you are currently logged into Moneris Go portal and/or Merchant Direct.v2 on any device, please log out of these two applications now.
4. When ready, visit www.monerisgo.com to start on the Moneris Go portal "Log in" page (shown below).

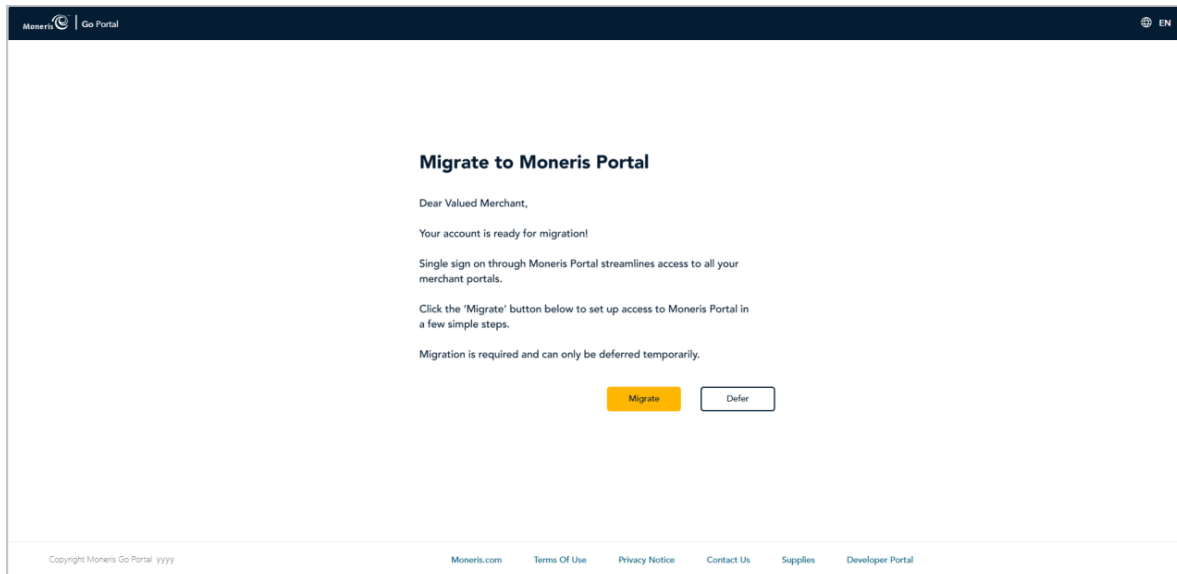


5. In the **Email** field (shown above), enter the email address that was registered to your Moneris Go portal user account when you activated it, and click on the **Next** button.

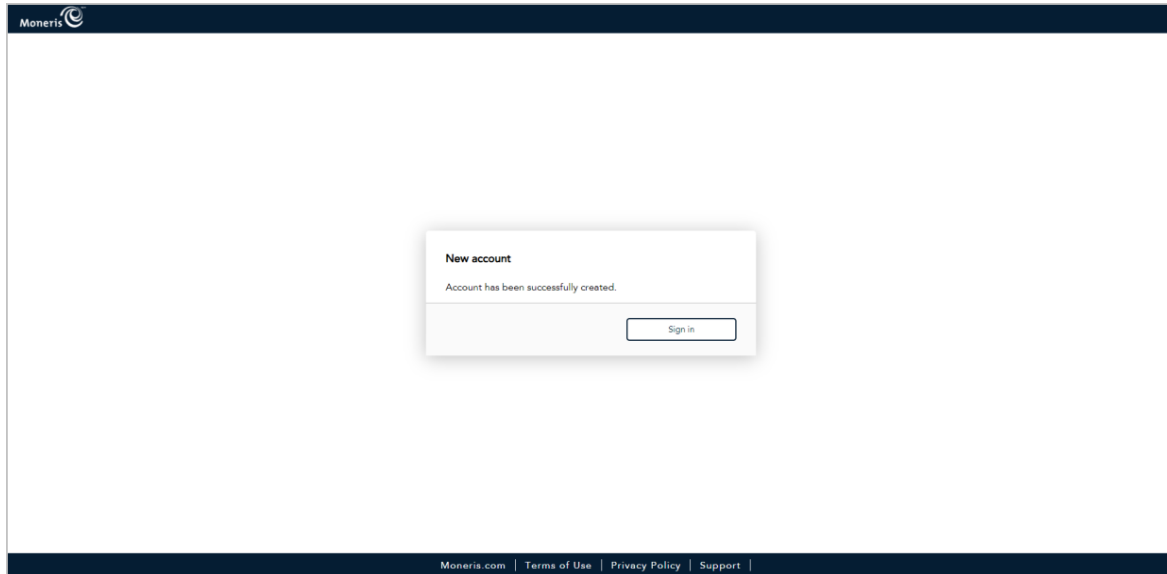
6. When the **Password** field displays (shown below), enter your Moneris Go portal login password, and click on the **Log in** button.



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

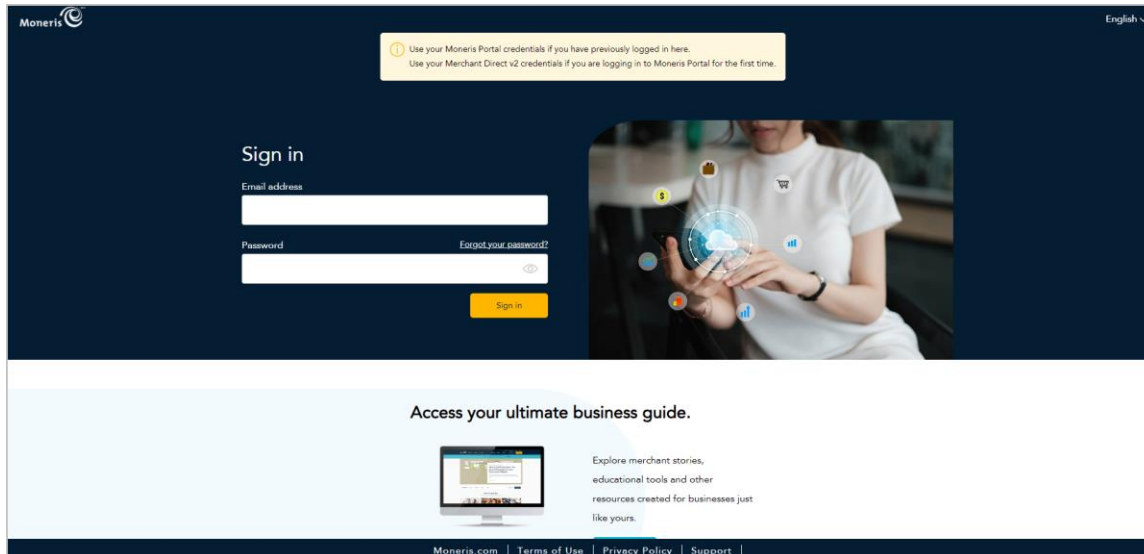


8. When the "New account: Account has been successfully created" dialog displays (shown below), click on the **Sign in** button.



9. When the Moneris Portal "Sign in" page displays (shown below), do the following:

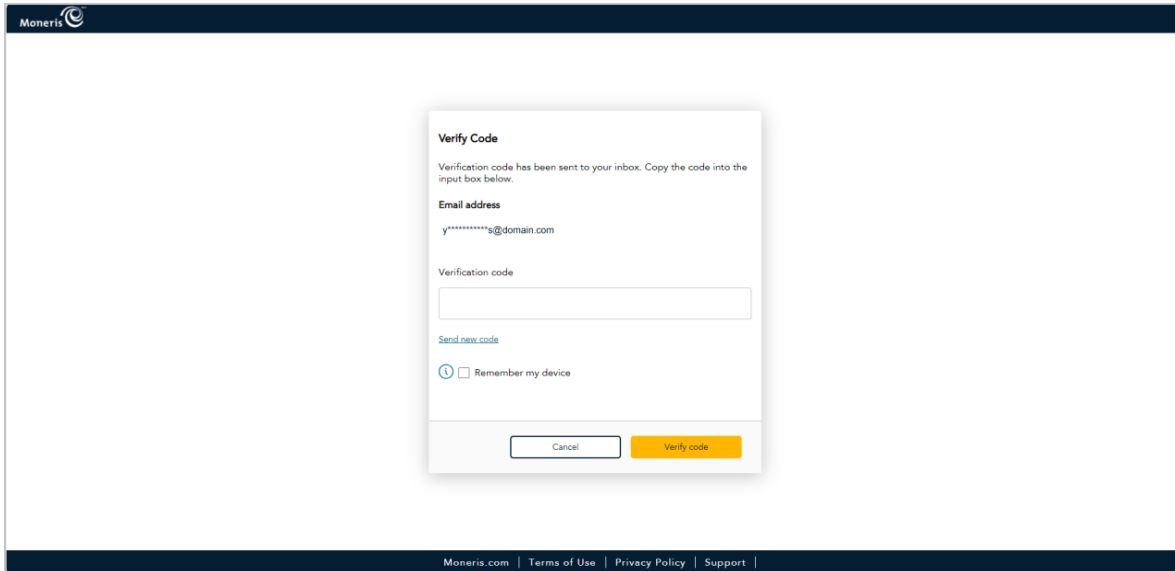
Note: You can also access the sign-in page by visiting <https://login.moneris.com/en/login>.



- In the **Email address** field, enter the email address that you registered when you activated your Merchant Direct.v2 account (i.e., this is the same address that you use to sign into Merchant Direct.v2).
- In the **Password** field, enter the password that you use to sign into Merchant Direct.v2.
- Click on the **Sign in** button, and wait for a response.

10. When the "Verify Code" dialog displays (shown below), it means we have sent a 6-digit authentication code to your inbox. Do the following:

Note: If you want 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 sign in from the same device and browser, checkmark the **Remember my device** box.

Note: If enabled (checkmarked), this setting is effective up to 30 days so long as you sign 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, and wait for a response.

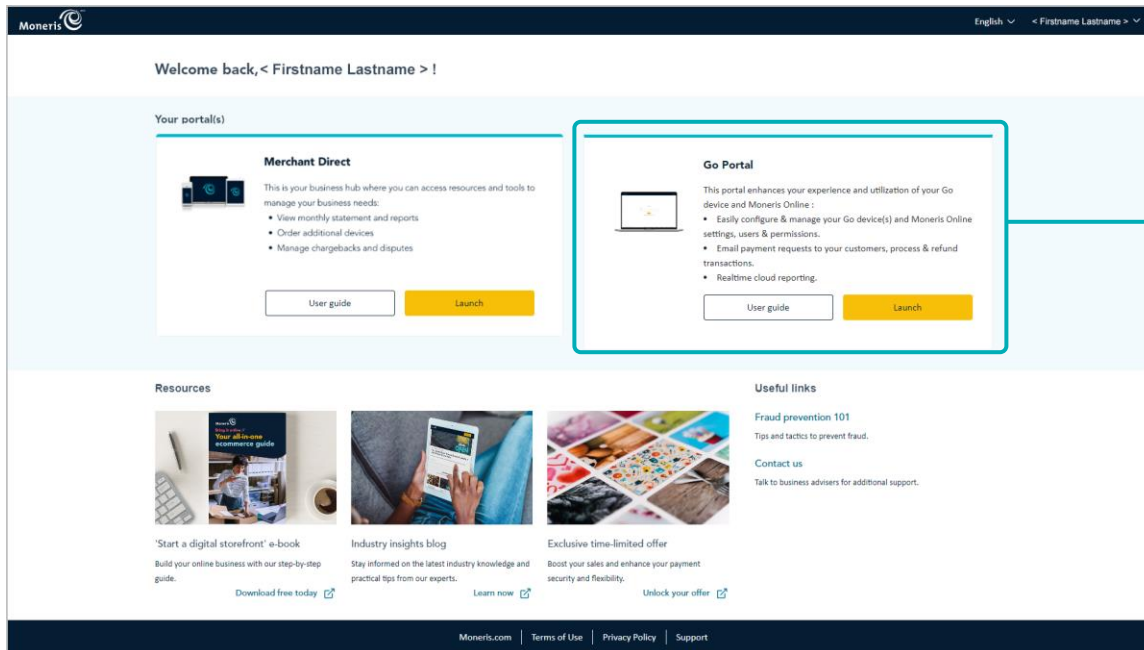


6-DIGIT CODE

11. When the "Your portal(s)" page displays (shown below), click on the "Go Portal" tile's **Launch** button 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 (see Accessing a store after logging into Moneris Go portal on page 29).

Important! You must perform this step to complete the migration of your two accounts.




"GO PORTAL" TILE

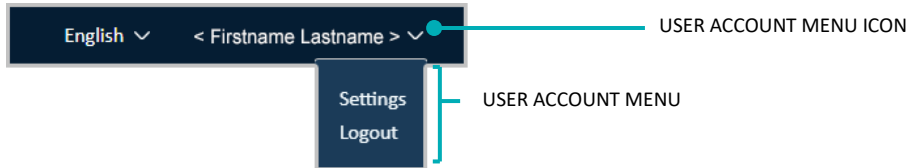
12. Please review Things to note now that your accounts are migrated (page 231).

Things to note now that your accounts are migrated

Now that you have successfully migrated your Moneris Go portal account and your Merchant Direct.v2 account to Moneris Portal, please review the following bulleted points:

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 menu.




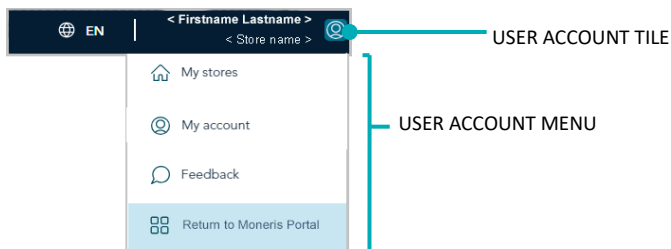
- If you forget your sign-in password, use Moneris Portal's "Forgot password?" function. (You access this function on the Moneris Portal "Sign in" page at <https://login.moneris.com/en/login>.)

Moneris Go portal:

- Whenever you want to access your Moneris Go portal store(s), sign into Moneris Portal (visit <https://login.moneris.com/en/login>). From there, launch the "Go Portal" application.

Note: *If you attempt to submit your sign-in credentials from the Moneris Go portal "Log in" page (www.monerisgo.com), you will be redirected to the Moneris Portal "Sign in" page.*

- If you create/add a new user in Moneris Go portal, that user will activate their account and be prompted to perform their first login from the Moneris Go portal "Log in" page. However, Moneris Go portal will prompt the user to migrate their account to Moneris Portal.
- If you have one or more POS terminals and want to change your terminal login username/password, access your terminal username/password settings from your Moneris Go portal store's "My account" page (see ["My account" settings: Moneris Portal user on page 123](#)).
- If you are logged into Moneris Go portal and want to end your login session there, click on the user account  tile in the Moneris Go portal header (shown below), and then click on **Return to Moneris Portal** in the user account menu.



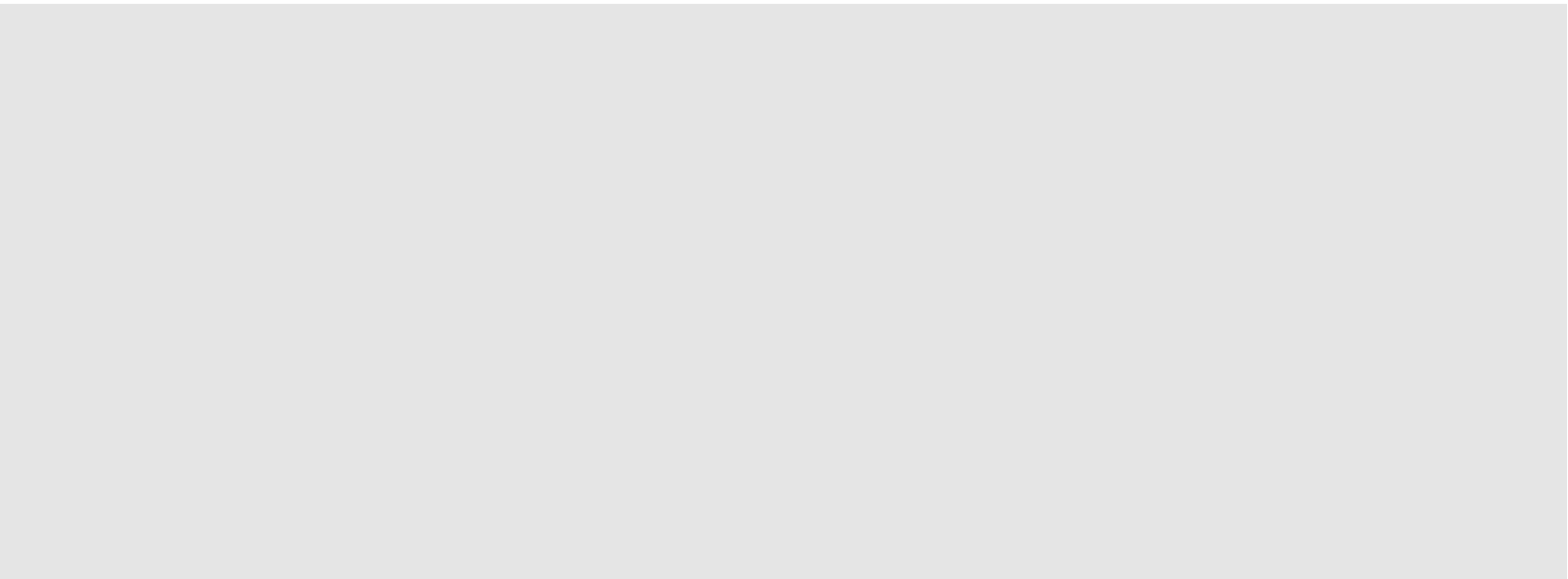
Merchant Direct.v2:

- Whenever you want to access your Merchant Direct.v2 reports, sign into Moneris Portal (visit <https://login.moneris.com/en/login>). From there, launch the "Merchant Direct" application.

Note: *You may continue to sign in directly from the Merchant Direct.v2 "Sign in" page (moneris.com/mymerchantdirect); however, we will permanently disable this option in the near future.*



Appendix



Channel indicator descriptions

The "Channel" is defined as the device, application, or ecommerce integration through which payment data were originally captured prior to being sent to the Moneris host for processing as a transaction. The table below describes the channel indicators supported in Moneris Go portal.

Where to locate the "Channel" indicator in Moneris Go portal

The "Channel" indicator displays as a standard header in the financial transaction report (see [Financial transactions report](#) on page 63) and as line item on the "Transaction details" page of any transaction (see [Transaction details](#) on page 65) and on the "Payment request details" page of a paid payment request (see [Payment request details](#) on page 101).

Channel	Description
Cash	The approved/declined cash transaction (Purchase or Refund) was originally initiated via your Moneris Go portal store's virtual terminal (see Purchase with cash on page 45; and see Refund: manual entry on page 55), or the cash transaction was initiated via a POS device or application that is synchronized to your store.
E-commerce (Moneris Checkout)	The approved/declined transaction (debit, credit, or gift) was initiated via a Moneris Checkout integration with your Moneris Go portal store (see Moneris Checkout on page 208).
E-commerce API	The approved/declined transaction (debit, credit, or gift) was initiated via an ecommerce integration with your Moneris Go portal store using a third-party plug-in or cartridge (e.g., Shopify, SAP Digital Payments, or Salesforce B2C Commerce) to facilitate the integration.
Go Retail POS	The approved/declined transaction (debit, credit, or gift) was initiated via a POS device (Go terminal or Go Plus terminal) that is synchronized to your Moneris Go portal store, and this store is enabled for Go Retail POS.
Payment request	The approved/declined Purchase (credit) was originally initiated via a customer paying a payment request that was issued from your Moneris Go portal store (see Paying a payment request on page 104).
Tap to Pay	The approved/declined transaction (debit/credit) was initiated via the Moneris Go app on a mobile device, and the Moneris Go app is synchronized to your Moneris Go portal store. Any associated follow-on transaction will also show the "Tap to Pay" channel indicator.
Terminal	The approved/declined transaction (debit, credit, or gift) was originally initiated via a POS device (Go terminal or Go Plus terminal) that is synchronized to your Moneris Go portal store, and this store is not enabled for Go Retail POS.
Vault	The approved/declined transaction was initiated using Moneris-tokenized card data that is stored (or in the process of being stored) in a Vault customer profile within your Moneris Go portal store: <ul style="list-style-type: none"> ▪ see Financial transactions associated with a Vault customer profile (page 119) ▪ see Verification transaction: Vault customer profile (page 121)

Channel	Description
Virtual terminal	<p>The approved/declined transaction (credit) was originally initiated from your Moneris Go portal store's virtual terminal:</p> <ul style="list-style-type: none"> ▪ see Purchase with credit card: manual entry (page 43) ▪ see Preauthorization with credit card: manual entry (page 46) ▪ see Completion with credit card: manual entry (page 48) ▪ see Void: manual entry (page 52) ▪ see Refund: manual entry (page 55) ▪ see Independent Refund with credit card: manual entry (page 58)
WIX payment	<p>The approved/declined transaction was originally initiated via a WIX ecommerce integration with your Moneris Go portal store.</p>

Ecommerce indicator descriptions

The ecommerce indicator (ECI) specifies the level of security that was used to obtain the cardholder's payment data. The table below describes the ecommerce indicators supported in Moneris Go portal.

Where to locate the ecommerce indicator in Moneris Go portal

The ecommerce indicator displays as a standard line item on the "Transaction details" page of any transaction (see [Transaction details](#) on page 65) and on the "Payment request details" page of a paid payment request (see [Payment request details](#) on page 101).

ECI	Description
M - Manually Keyed Card Present	-
0 - Not an electronic commerce transaction	-
1 - Mail/Telephone Order - Single	Cardholder provides credit card details via phone or on paper. Authorizes the use of the card for one payment.
2 - Mail/Telephone Order - Recurring	Cardholder provides credit card details via phone or on paper. Authorizes the use of the card for multiple payments processed at predetermined intervals.
3 - Mail/Telephone Order - Instalment	Cardholder provides credit card details via phone or on paper. Authorizes the use of the card for a single payment of goods or services billed to the card in multiple segments over a period of time.
4 - Mail/Telephone Order	Unknown classification: Cardholder provides credit card details via phone or on paper. Transaction type is unknown at time of authorization – may be one time or multiple payments.
5 - Fully Authenticated - 3D Secure	Applicable to ecommerce transactions whereby the cardholder provides their card data over the Internet on a secure site and authenticates their identity via 3-D Secure.
6 - Authentication Attempted - 3D Secure	Applicable to ecommerce transactions whereby the cardholder provides their card data over the Internet on a secure site and attempts to authenticate their identity via 3-D Secure.
7 - SSL Transaction (Not Authenticated)	Applicable to ecommerce transactions whereby the cardholder provides their card data over the Internet on a secure site.

Terminal ID descriptions

The terminal ID is an 8-digit identifier associated with one or more card types and/or the point-of-sale device or application through which a financial transaction was initiated. The terminal ID displays as a line item on the "Transaction details" page of every approved/declined transaction except for cash transactions (see [Transaction details on page 65](#)).

A debit/credit terminal ID can be assigned to only one device/application at a time. Therefore, this ID can also denote the point-of-sale device or application through which the transaction was initiated as described in the table below. Conversely, a gift terminal ID is variable and may be assigned to multiple point-of sale devices/applications.

Note: The "Transaction details" page includes additional information about a transaction that can help you to identify the point-of-sale device or application through which the transaction was initiated.

Prefix	Card type	Description
66	Debit/credit	If the prefix starts with "66" (e.g., 66012345), it indicates the debit/credit transaction was initiated via your store's virtual terminal, a payment request, an ecommerce integration (e.g., Moneris Checkout), or an API.
A1	Debit/credit	If the prefix starts with "A1" (e.g., A1012345), it indicates the debit/credit transaction was initiated via a Moneris Go terminal that is synchronized to your store.
A2	Debit/credit	If the prefix starts with "A2" (e.g., A2012345), it indicates the debit/credit transaction was initiated via a Moneris Go Plus terminal that is synchronized to your store.
AP	Debit/credit	If the prefix starts with "AP" (e.g., AP012345), it indicates the debit/credit transaction was initiated via the Moneris Go app (installed on a mobile device) that is synchronized to your store.
-	Gift	A gift terminal ID is variable and has no defined prefix.

Custom ID: list of transactions and reports

The custom transaction identifier (custom ID) field/header is configurable from your Moneris Go portal "Store settings" page (see [Custom ID: store settings](#) on page 142). The custom ID may be featured in the following Moneris Go portal financial transactions, reports, and receipts as described below:

Virtual terminal transactions

If a custom ID is enabled, you will have the opportunity to enter/append a custom ID during these transactions:

- Purchase (see [Purchase with credit card: manual entry](#) on page 43; see [Purchase with cash](#) on page 45).
- Preauthorization (see [Preauthorization with credit card: manual entry](#) on page 46).
- Independent Refund (see [Independent Refund with credit card: manual entry](#) on page 58).

Follow-on transactions (listed below) inherit the custom ID from their predecessor transaction:

- Void (see [Void: manual entry](#) on page 52).
- Refund (see [Refund: manual entry](#) on page 55).
- Completion (see [Completion with credit card: manual entry](#) on page 48).

Payment requests

If a custom ID is enabled, you will have the opportunity to enter/append a custom ID to a new or draft payment request prior to sending it (see [Sending a payment request](#) on page 92).

Reports/receipts

The custom ID appears as a header or line-item in reports, transaction details, and receipts:

- Transactions report (see [Financial transactions report](#) on page 63).
- "Transaction details" page (see [Transaction details](#) on page 65).
- Debit/credit receipt (see [Receipt example: debit/credit](#) on page 82).



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/moneris-go/moneris-go-portal> to download copies of this reference guide and to access the online help version of this documentation.
- 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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(05/2024)