Manuals+ — User Manuals Simplified.

Moneris Go Portal Software

Moneris Go Portal Software User Guide

Contents

Moneris Go Portal Software

Specifications

- **Platform:** Moneris Portal
- **Support:** Web: **Moneris Portal Support**
- **Email: onlinepayments@moneris.com**
- **Toll-free number:** 1-**866-319-7450**

Product Usage Instructions

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

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

How to get started

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
   - Pop-up blocker disabled
   - Internet access
2. 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 questionBe prepared to enter these account details:**Note:** You must complete this step within 10 minutes of being prompted to do so.
3. Enter a 6-digit verification code that will be sent to the inbox for your Moneris Go portal login email address.
4. Ready to migrate your account to Moneris Portal? Proceed to Migration steps.

Migrating your Go portal account to Moneris Portal
This guide provides step-by-step instructions for what you need to do to successfully migrate your Go portal user account. Please review the information in "How to get started" before proceeding.

Migration Steps
For detailed migration steps, refer to page 8 of the guide.

Accessing your store(s) via Moneris Portal
Learn how to sign into Moneris Portal and access your store(s) effectively. Refer to page 13 for more information.

Things to note now that your account is migrated
Important information and tips post-migration can be found on page 17 of the guide.

Merchant Support
Contact details for merchant support are available on page 18.

FAQ

Q: What if I encounter issues during the migration process?
A: If you encounter any issues during the migration process,please reach out to Moneris Portal Support via email at **onlinepayments@moneris.com** or call the toll-free number 1-**866-319-7450** for immediate assistance.

Q: Can I use any browser for accessing Moneris Portal?
A: It is recommended to use supported browsers like Google Chrome, Microsoft Edge, or Apple Safari for the best experience when accessing Moneris Portal.

Need help?
Web: **https://www.moneris.com/en/support/products/moneris-portal**
Email: **onlinepayments@moneris.com**
Toll-free: 1-**866-319-7450**

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

Getting Started

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

Why you need to migrate to Moneris Portal
We have completed Moneris Go portal's transition to Moneris Portal, a new single sign-on platform for all your merchant needs. Once you migrate your user account to Moneris Portal, you will thereafter access your Moneris Go portal store(s) by signing into Moneris Portal. Through Moneris Portal you will also have access to a variety of other resources.
This guide provides step-by-step instructions for what you need to do to successfully migrate your Go portal user account.

- To begin, please review the information in How to get started (page 6).

How to get started

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

Ensure your mobile device/PC meets the minimum requirements.

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

Be prepared to enter these account details.
During the migration process, you will be prompted to:

- Confirm your first name and last name information.
- Create a 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.)

Ready to migrate your account to Moneris Portal?
Proceed to Migration steps (page 8).

Migrating your Go portal Account to Moneris Portal

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

Migration steps

Important! Please ensure that you have reviewed the information in How to get started (page 6).
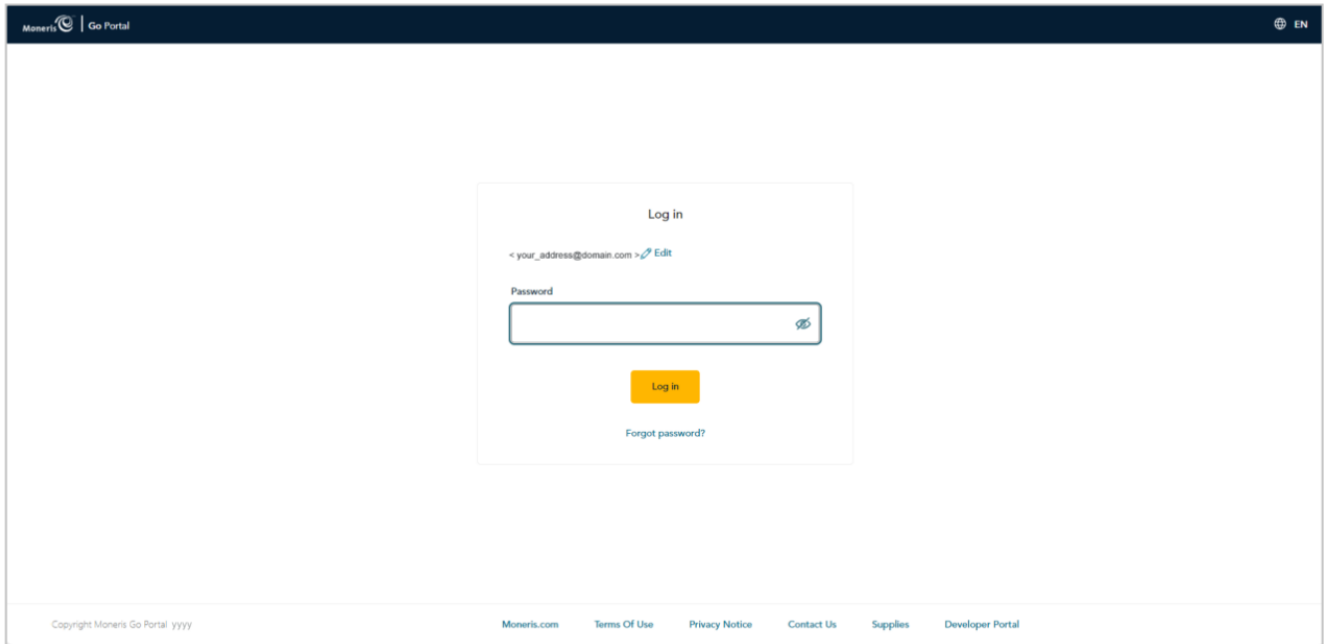
1. Visit **www.monerisgo.com** to start on the Moneris Go portal "Log in" page (shown below).

2. In the Email field, enter the email address that was registered to your Moneris Go portal user account when you
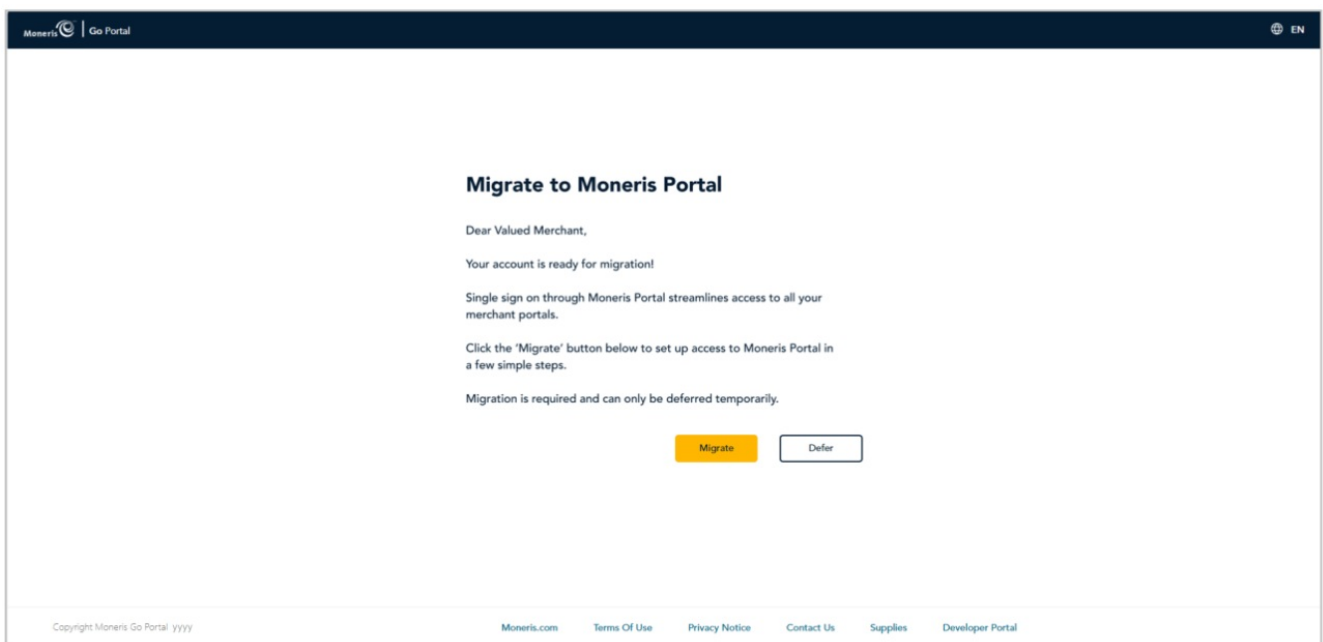
activated it, and click on the Next button.

3. When the Password field displays (shown below), enter your Moneris Go portal login password, and click on the Log in button.

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

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

1. 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.

2. In the "Language" drop-down, select the default display language (English or French) in which to continue the migration.

3. Click on the Create button, and wait for a response.

6. When the "Create Password" dialog displays (shown below), do the following:
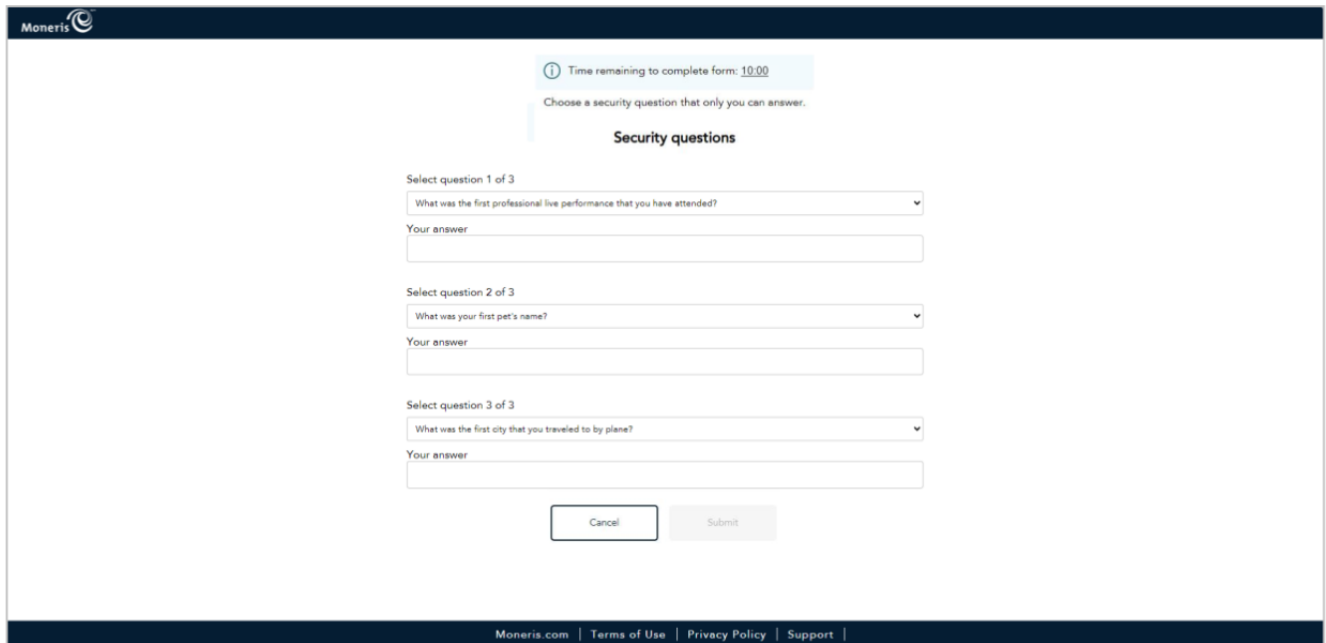
- In the New password field, enter the password that you will use to sign into Moneris Portal.

  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

- 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.

- Click on the Submit button, and wait for a response

7. When the "Security questions" page displays (shown below), configure your security questions and answers:
   Note: You have up to 10:00 minutes to configure your security questions answers. If you cannot configure your security questions before the time elapses, you will be directed to restart the migration process again.
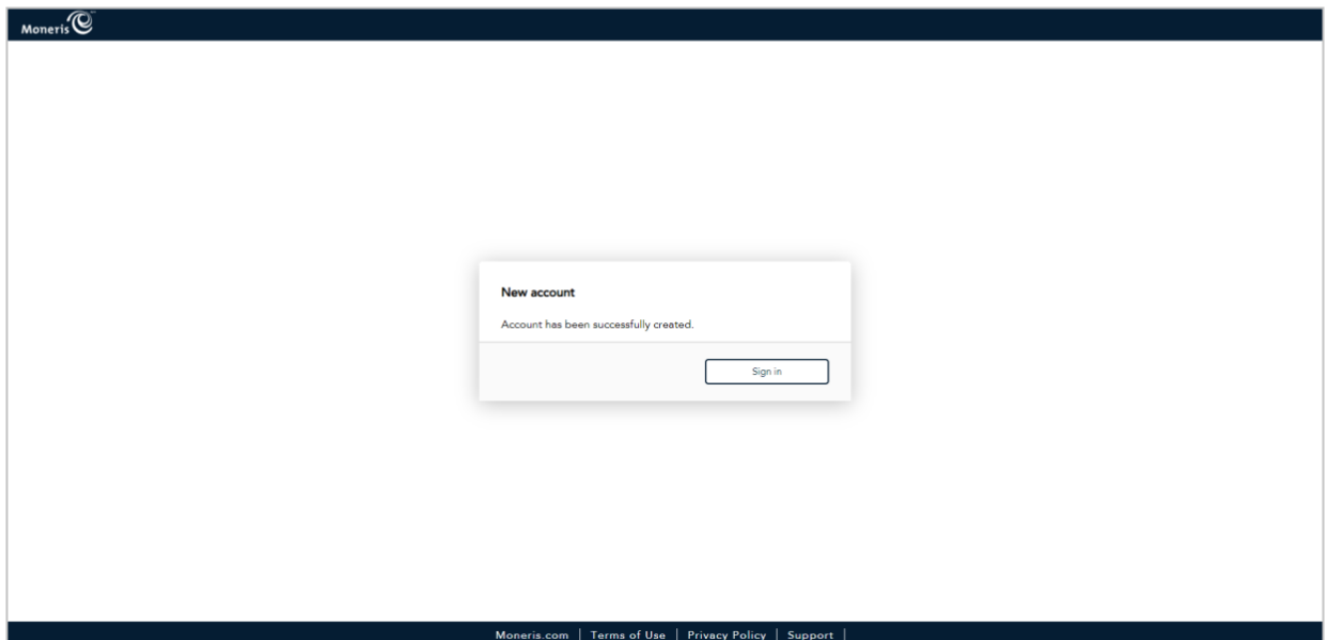

- Click on each of the Security question # of # drop-downs, and select a security question.
- In each Your answer field, enter an answer to the corresponding security question you selected.
  Note: If you need to reset your Moneris Portal password after your account is migrated, Moneris Portal will prompt you to answer one of these security questions as a means of authenticating your identity.
- Click on the Submit button, and wait for a response.

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

9. When the Moneris Portal "Sign in" page displays (shown below), proceed to Signing into Moneris Portal (page 14).
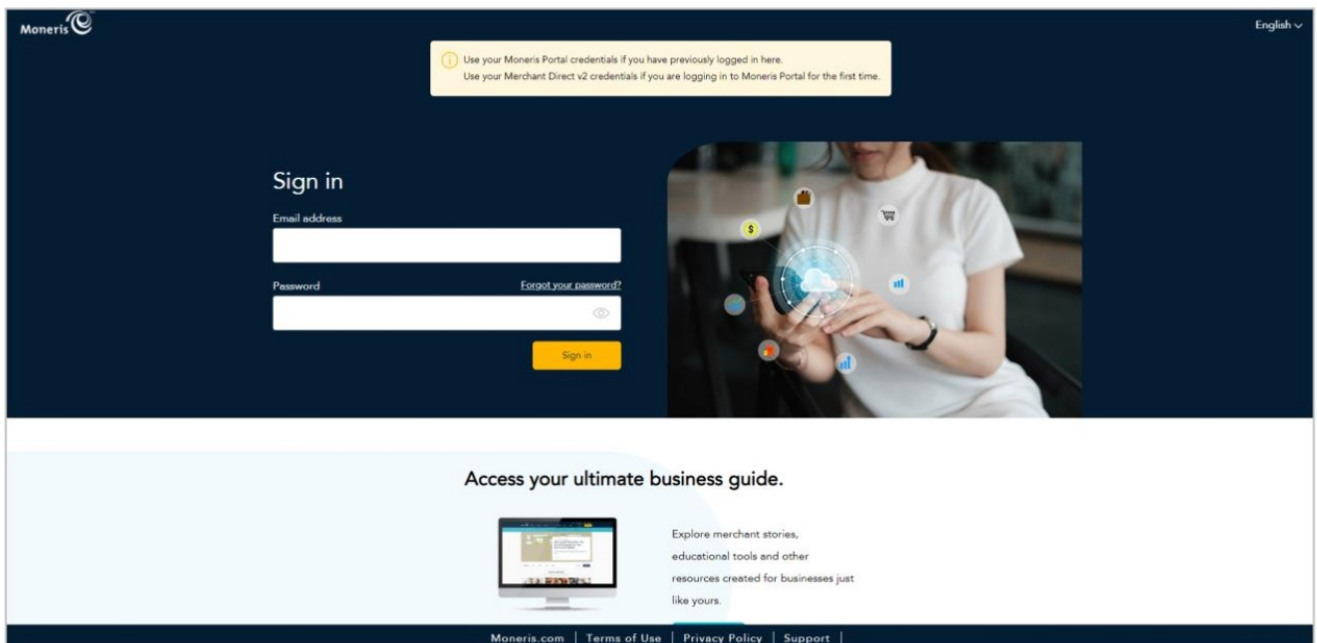
Accessing Your Store(s) via Moneris Portal

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

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

1. Start on the Moneris Portal "Sign in" page (shown below).

   Note: You can access this page by visiting **https://login.moneris.com/en/login**.
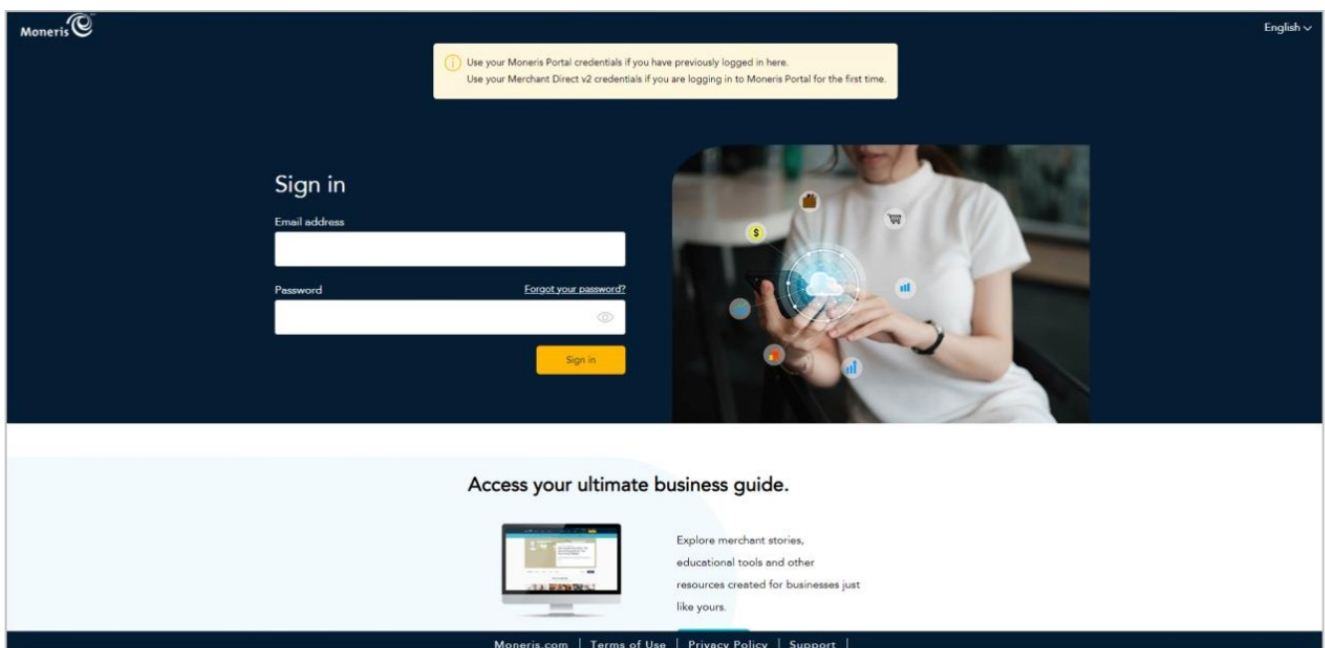
2. Enter your Moneris Portal credentials:
   - In the Email field, enter the email address that you registered when you activated your Moneris Go portal account (i.e., this is the same email address that you used previously when logging into Moneris Go portal).
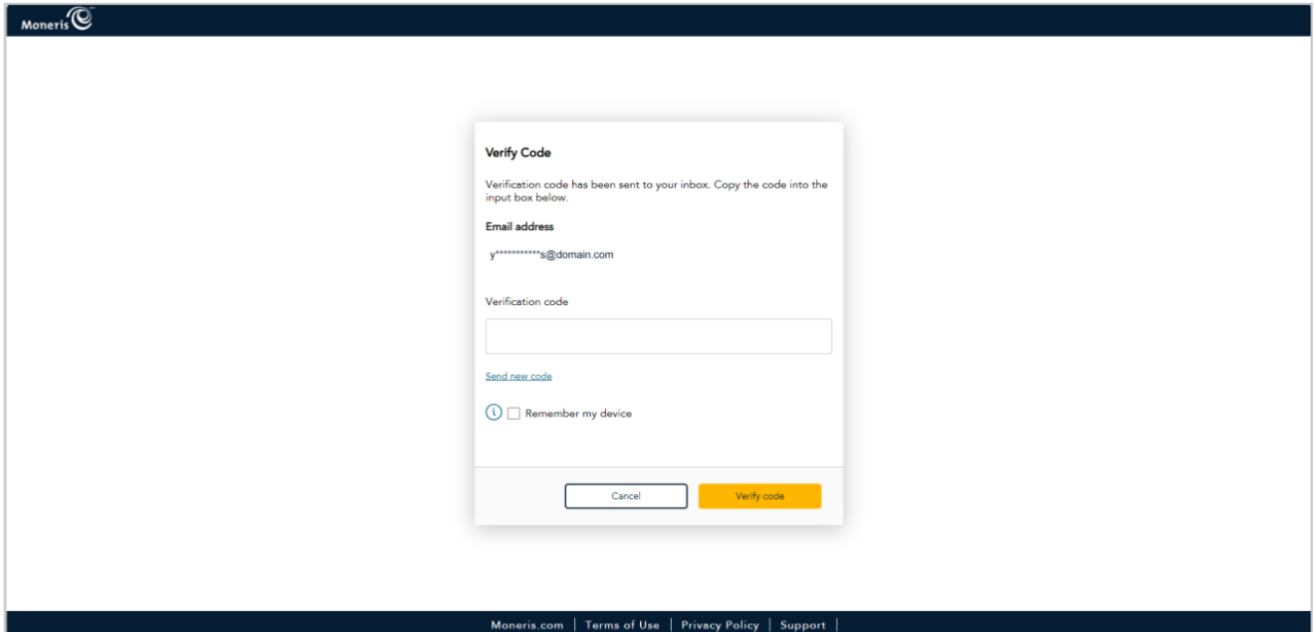   - In the Password field, enter the password that you registered when you performed the migration steps

(described in the previous section).

- Click on the Sign in button, and wait for a response.

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

4. When the "Your portal(s)" page displays (shown below), it means you have successfully migrated your user account to Moneris Portal.
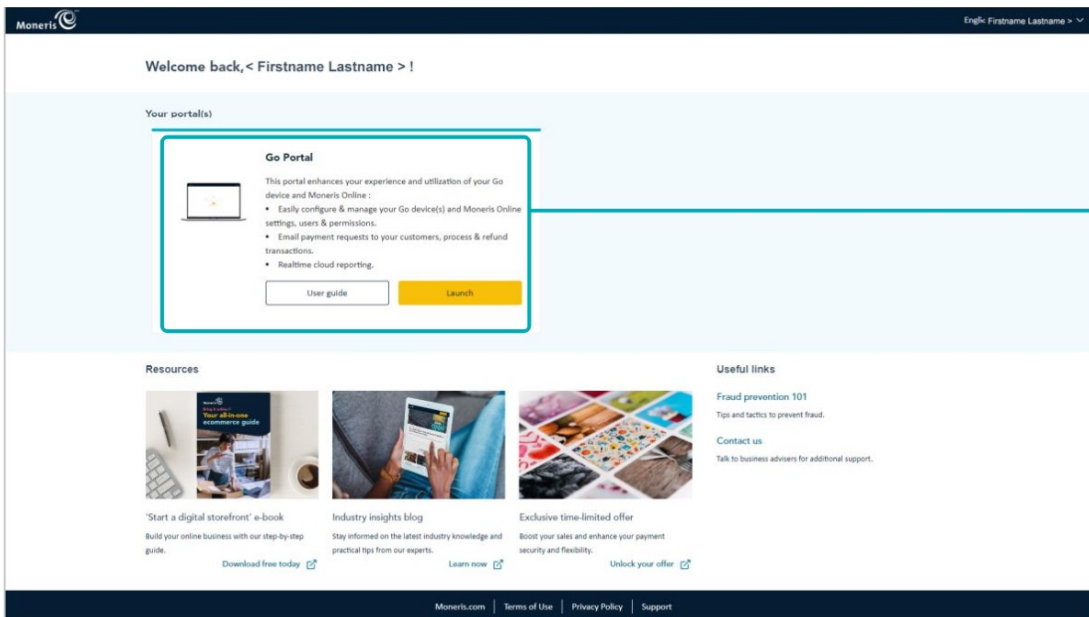
"GO PORTAL" TILE

5. 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.

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

Things to note now that your account is migrated

Now that you have successfully migrated your account to Moneris Portal and confirmed access to your Moneris Go portal store(s) (see Signing into Moneris Portal on page 14), 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.
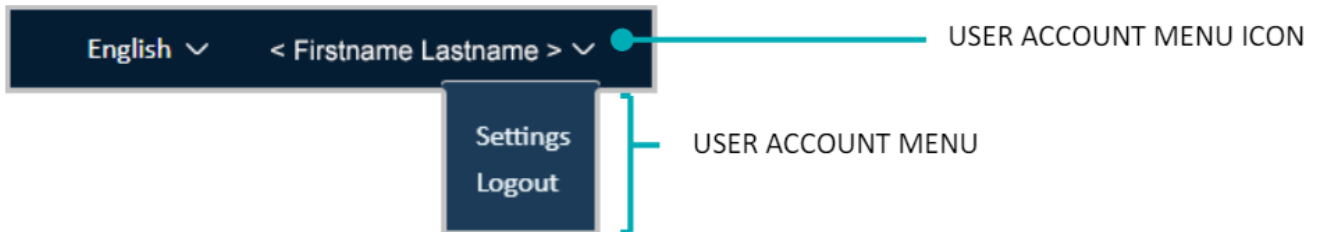
- If you forget your sign-in password, use Moneris Portal's "Forgot password?" function. (You access this function on the Moneris Portal "Sign in" page.)
Using the Moneris Go portal:
- Whenever you want to access your Moneris Go portal store(s), sign into Moneris Portal (see Signing into Moneris Portal (page 14).
- If you need to change your user account preferences (e.g., Moneris Portal sign-in password, etc.), use Moneris Portal.
- If you have one or more POS terminals and want to change your terminal login username/password, access the terminal username/password settings on your Moneris Go portal store's "My account" page. (Ensure that you access the store to which your terminal(s) are synched.)
- If you create/add a new user, they will be prompted 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.
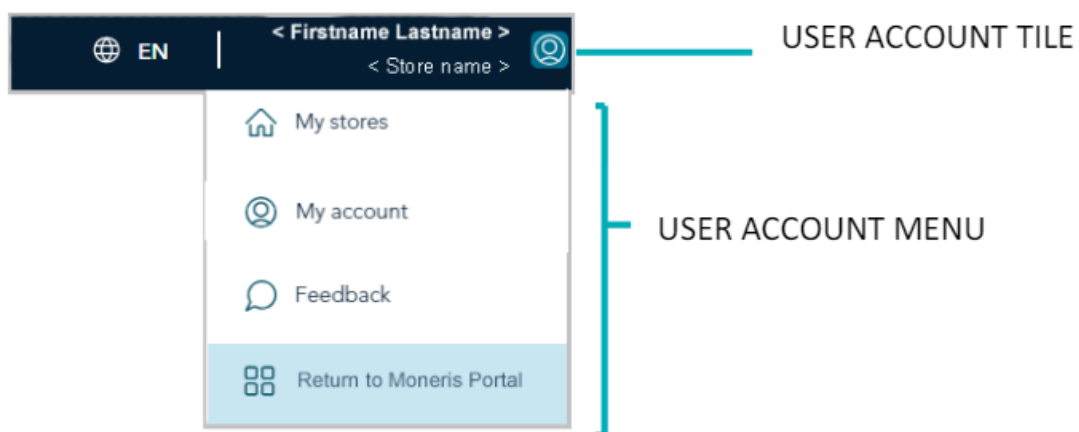
Merchant Support

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

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

We're only one click away.

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

Need us on-site? We'll be there.
One call and a knowledgeable technician can be on the way. Count on minimal disruptions to your business as our Field Services provide assistance with your payment terminals.

Can't find what you are looking for?

- Email **onlinepayments@moneris.com** or 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**.

Documents / Resources

Moneris Go Portal Software [pdf] User Guide
Go Portal Software, Portal Software, Software

References

- 🌀 **Shop.moneris.com**
- 🌀 **Moneris Go Portal - Log in**
- 🌀 **Moneris Go Portal - Log in**
- 🌐 **Moneris Portal**
- 🌀 **Unlock Business Trends with Moneris Blog | Moneris Insights**
- 🌀 **Shop.moneris.com**
- 🌀 **Moneris | Moneris Portal**
- 🌐 **Merchant Direct - Sign In**
- **User Manual**