



# Moneris Portal Seamless Transactions User Guide

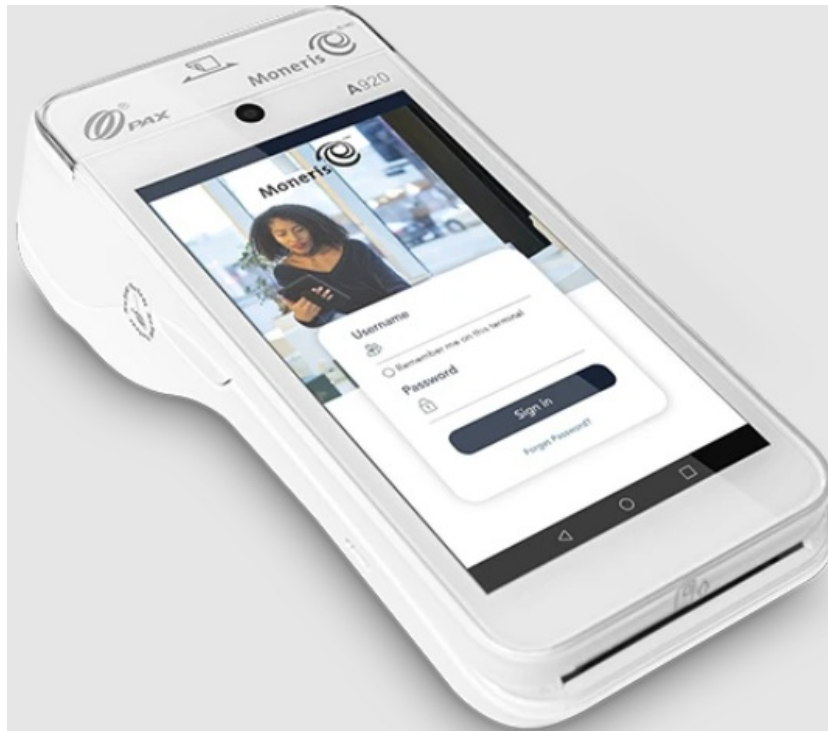
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**Moneris Portal Seamless Transactions**



### **Specifications:**

- Product Name: Moneris Portal
- Platform: Web-based
- Support: Moneris Merchant Support
- Browser Compatibility: Google Chrome, Microsoft Edge, Apple Safari

### **Product Usage Instructions**

#### **Getting Started:**

In this section, you will find everything you need to know before beginning your migration to Moneris Portal.

#### **Why you need to migrate to Moneris Portal:**

Moneris has transitioned from Moneris Go portal to Moneris Portal, a new single sign-on platform for all your merchant needs. By migrating your user accounts to Moneris Portal, you will access your Moneris Go portal store(s) and Merchant Direct reports through a single login. You will also gain access to additional 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, Apple Safari)
  - Cookies enabled
  - Pop-up blocker disabled
  - Internet access
2. Access the inbox for the email address used for Moneris Go portal and Merchant Direct login.
3. Confirm you are not logged into Moneris Go portal or Merchant Direct from any device.
4. Ready to migrate? Proceed to Migration Steps.

#### **Migrating to Moneris Portal:**

This section details the steps required to migrate your Moneris Go portal user account and Merchant Direct

account to Moneris Portal.

**Merchant Support:**

If you encounter any issues during the migration process or need assistance, contact Moneris Merchant Support at the provided toll-free number or visit the support website.

**FAQ:****Q: What should I do if I encounter an error during migration?**

A: If you encounter an error during migration, ensure you have followed all the steps outlined in the How to get started section. If the issue persists, contact Moneris Merchant Support for assistance.

**Need help?**

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

**Toll-free:** 1-[866-319-7450](tel:866-319-7450)

**Getting Started**

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

**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 successfully migrate your user accounts to Moneris Portal, you will thereafter access your Moneris Go portal store(s) and your Merchant Direct reports by logging into Moneris Portal. Through Moneris Portal you will also have access to a variety of other resources. This guide provides step-by-step instructions for what you need to do to successfully migrate and merge your Moneris Go portal user account and your Merchant Direct user account into one Moneris 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 of your two user accounts to Moneris Portal, please review the following steps:**

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. Ensure you can access the inbox for the email address that you use to log into/sign into Moneris Go portal and Merchant Direct.

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. Confirm that you are not currently logged into/signed into Moneris Go portal and Merchant Direct from any device.
4. Ready to migrate your user accounts to Moneris Portal?

Proceed to Migration steps (page 8).

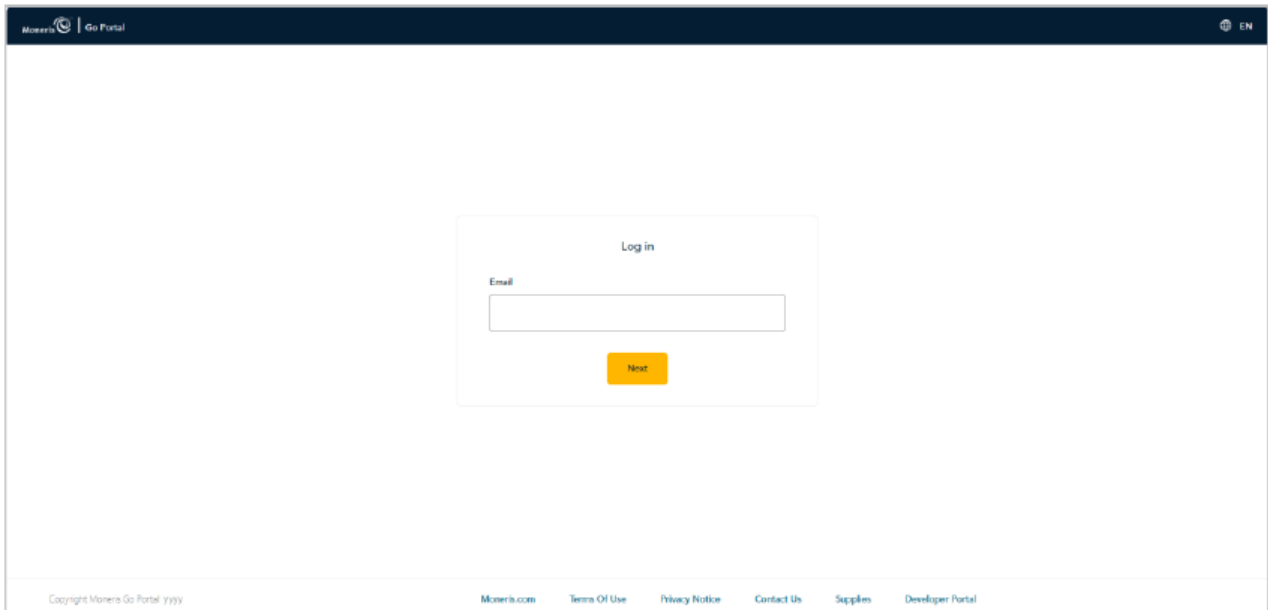
## Migrating to Moneris Portal

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

### Migration steps

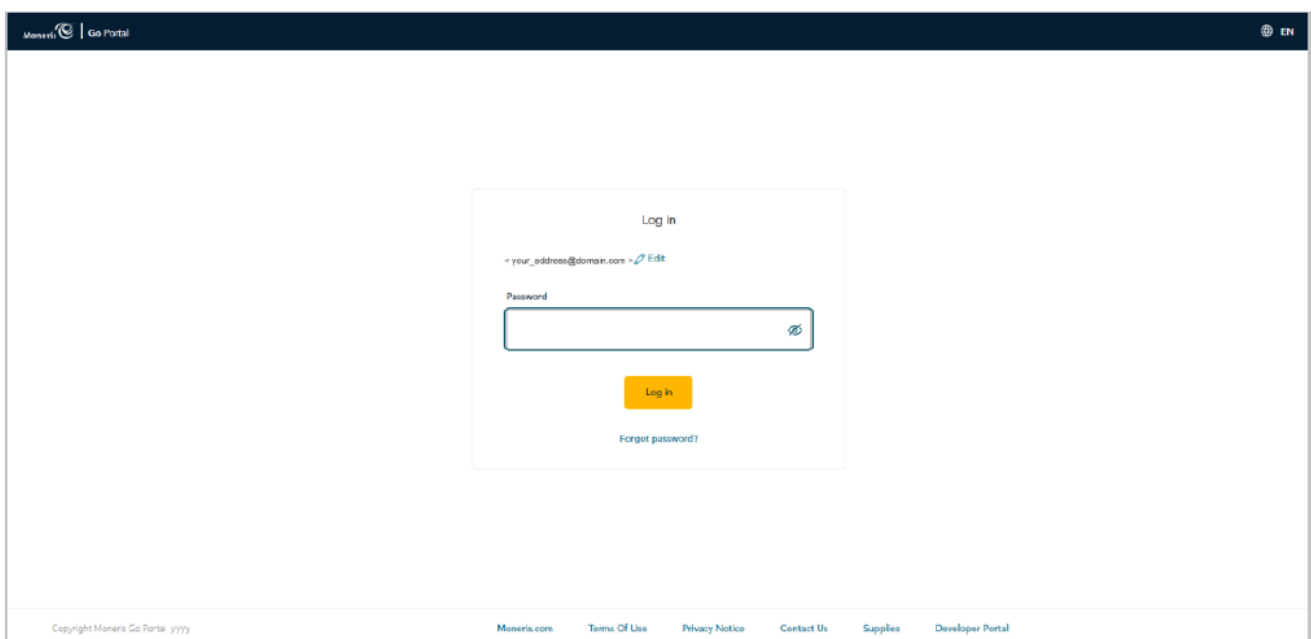
**Important!** Before performing the steps below, please ensure that you have reviewed the information in How to get started (page 6).

1. Visit [www.monerisgo.com](http://www.monerisgo.com) to start on the Moneris Go portal “Log in” page (shown below).
- 2.

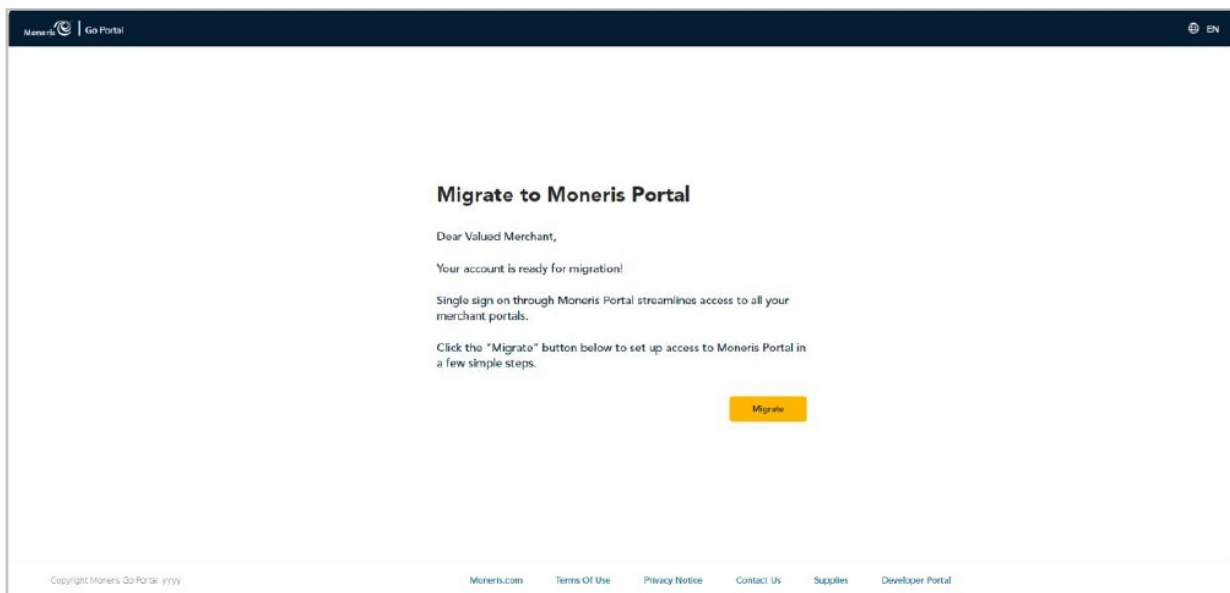


In the Email field (shown above), enter the email address that was registered to your Moneris Go portal user account when you activated it, and click on the Next button.

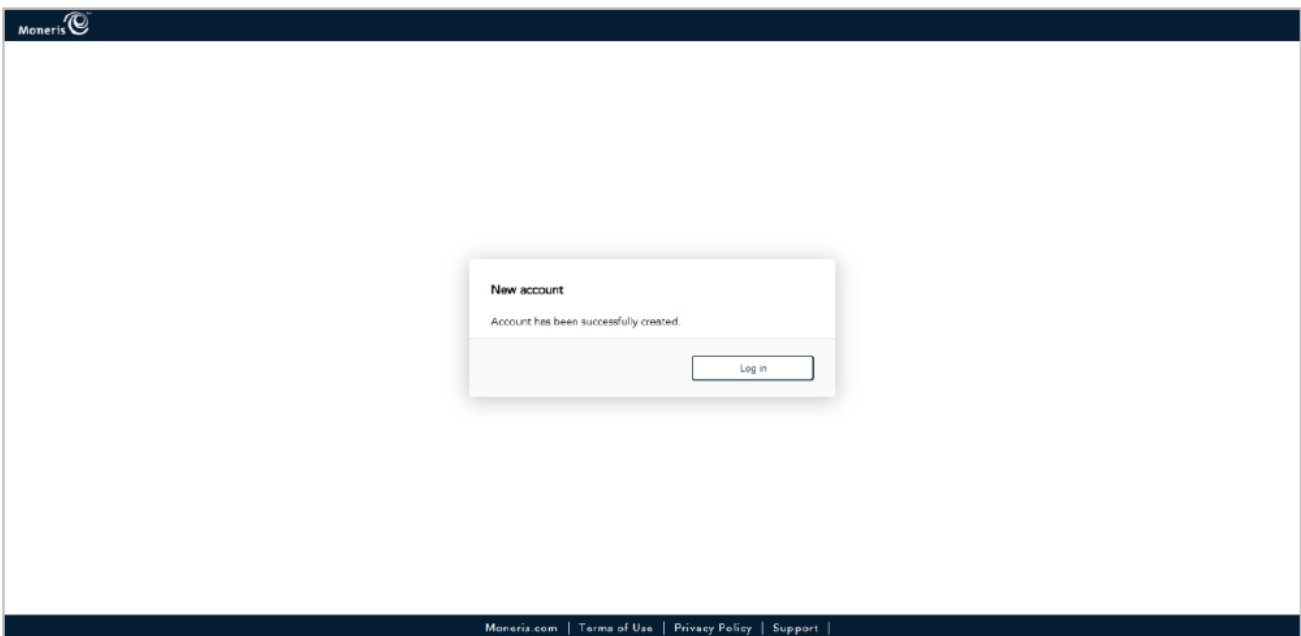
3. When the Password field displays (shown below), enter your Moneris Go portal login password, and click on the Log in button.



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

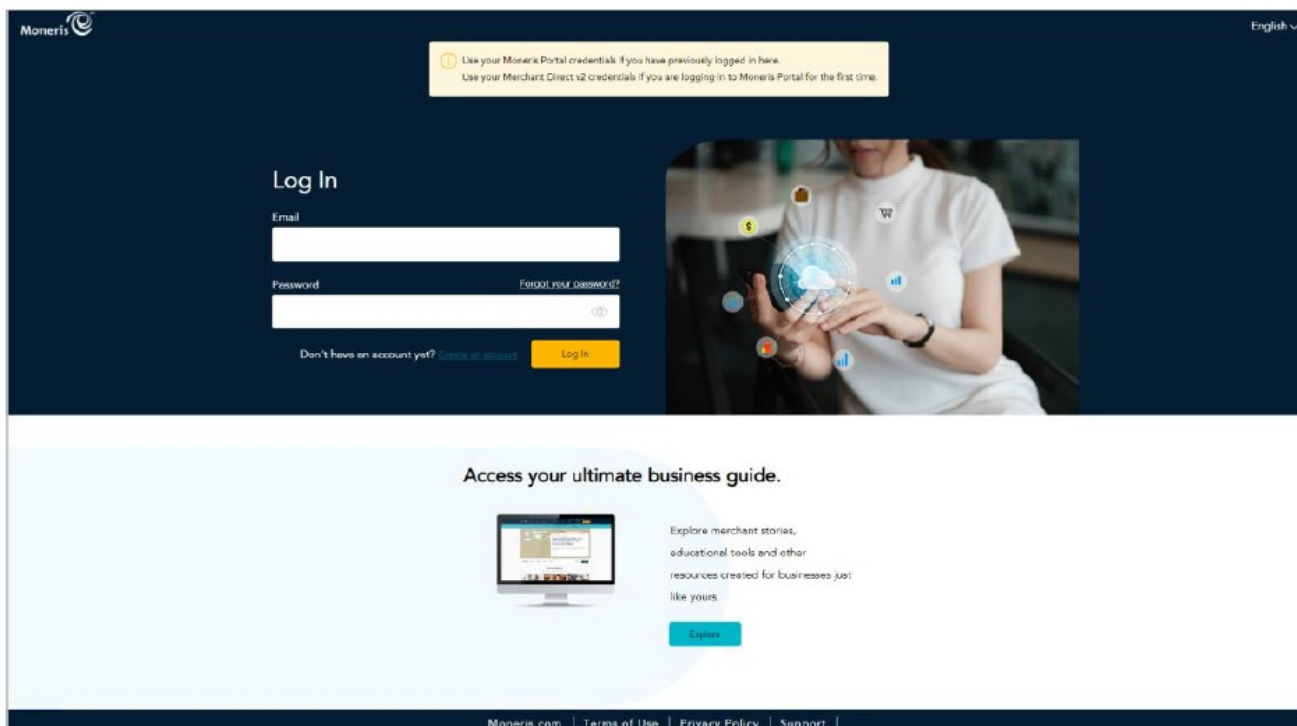


5. When the “New account: Account has been successfully created” dialog displays (shown below), click on the Log in button.



6. When the Moneris Portal “Log In” page displays (shown below), do the following:

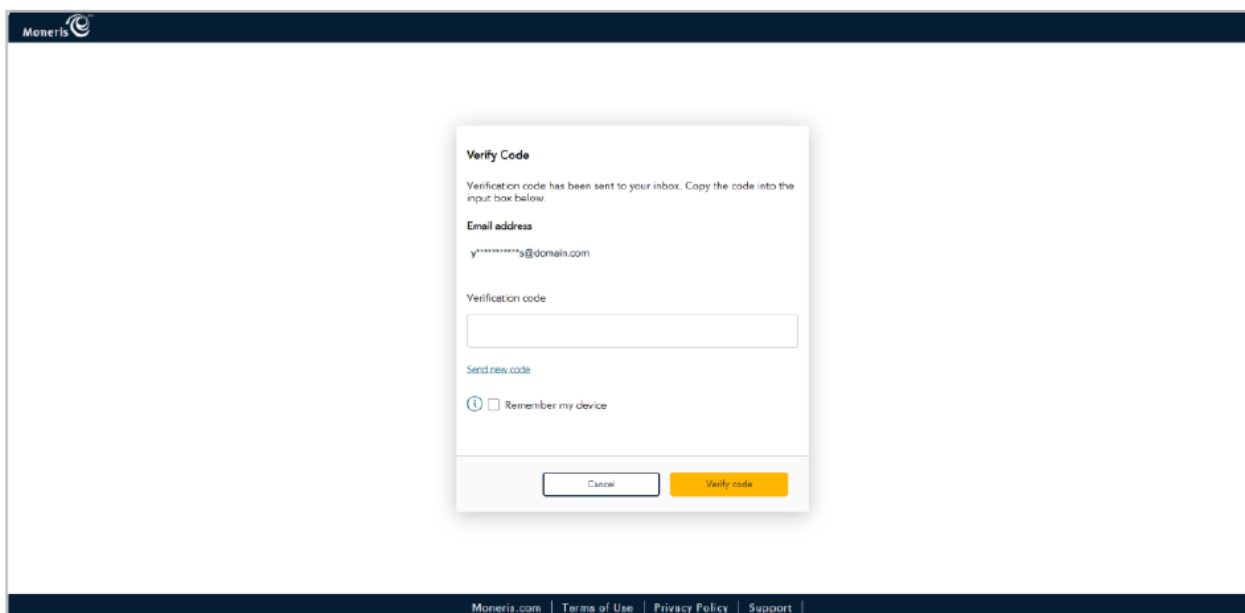
**Note:** You can also access the login page by visiting <https://login.moneris.com/en/login>.



- In the Email field, enter the email address that you registered when you activated your Merchant Direct account (i.e., this is the same address that you use to sign into Merchant Direct).
- In the Password field, enter the password that you use to sign into Merchant Direct.
- Click on the Log In button, and wait for a response.

7. 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.



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

**Note:** If enabled (checkmarked), this setting is effective up to 30 days so long as you log in from the same device and browser.

After 30 days has elapsed, Moneris Portal will again prompt you for 2-factor authentication. When

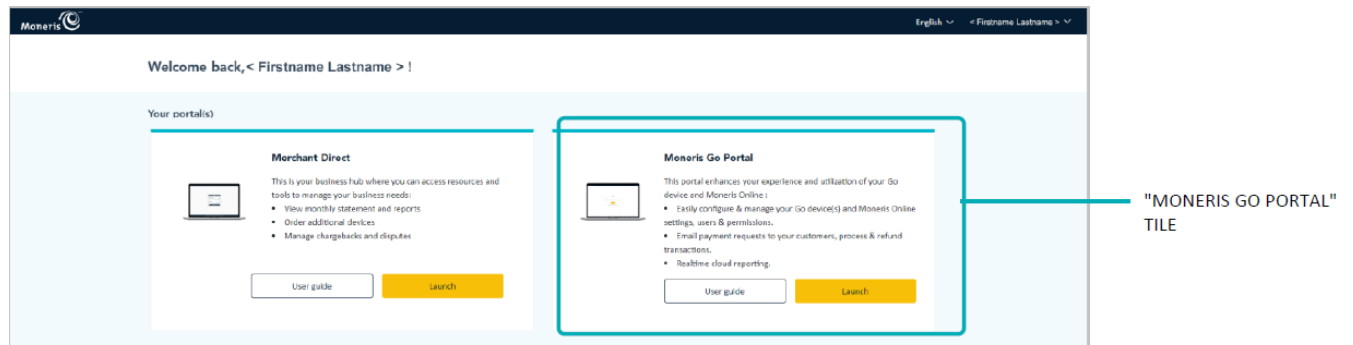
this happens, you may opt to re-enable the “Remember my device” setting.

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

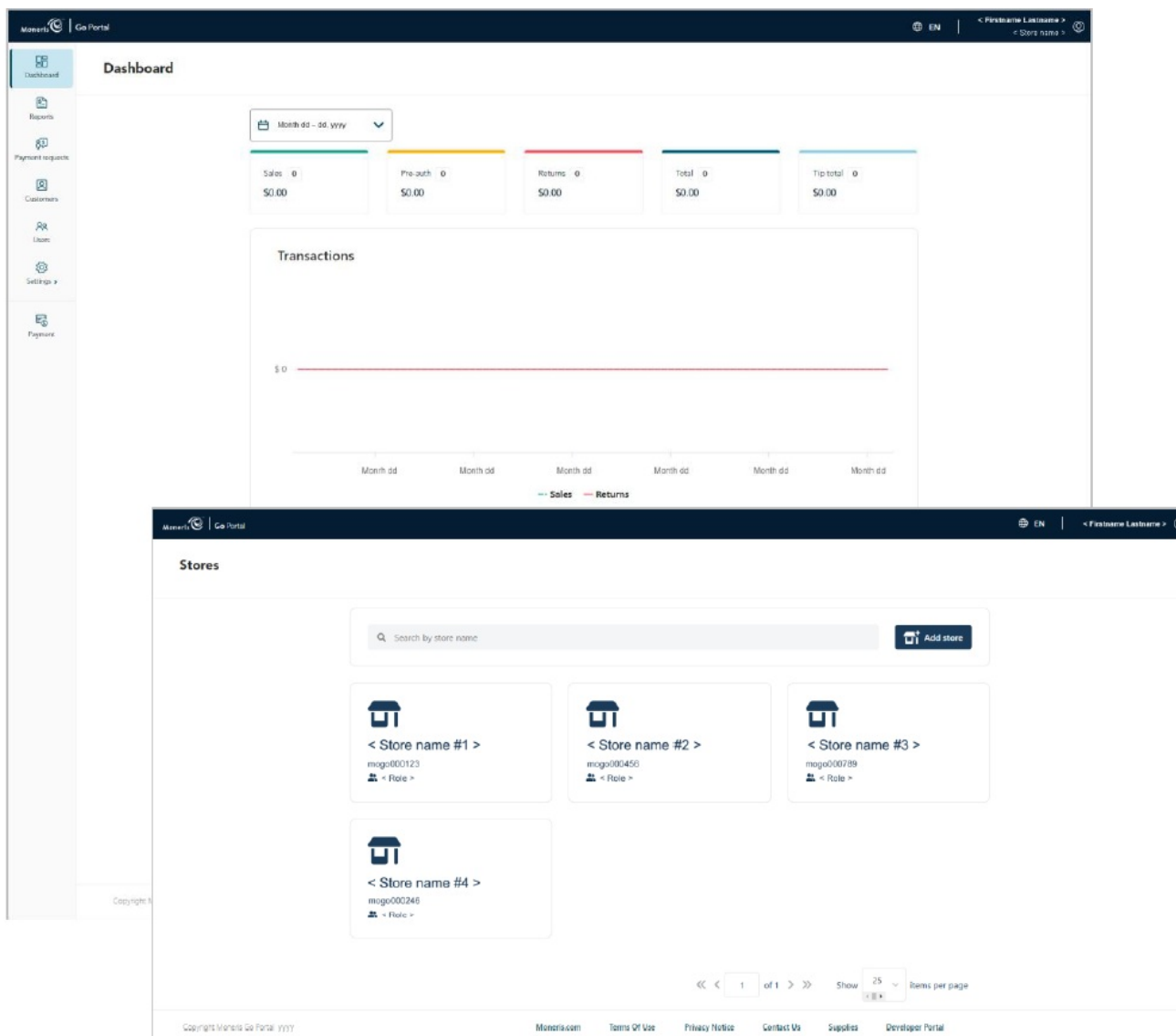


8. When the “Your portal(s)” page displays (shown partially below), click on the “Moneris Go Portal” tile’s Launch button to start a login session in the Moneris Go portal application.

**Important!** You must perform this step to complete the migration of your two accounts.



9. If the “Dashboard” page or the “Stores” page displays (shown below), it means you have successfully migrated your accounts to Moneris Portal.




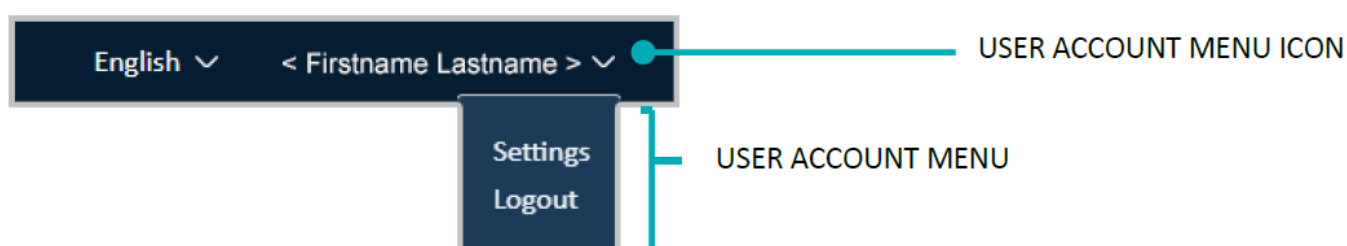
10. Please review Things to note now that your accounts are migrated (page 13).

## Things to note now that your accounts are migrated

Now that you have successfully migrated your Moneris Go portal account and your Merchant Direct account to Moneris Portal (see Migration steps on page 8), 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.

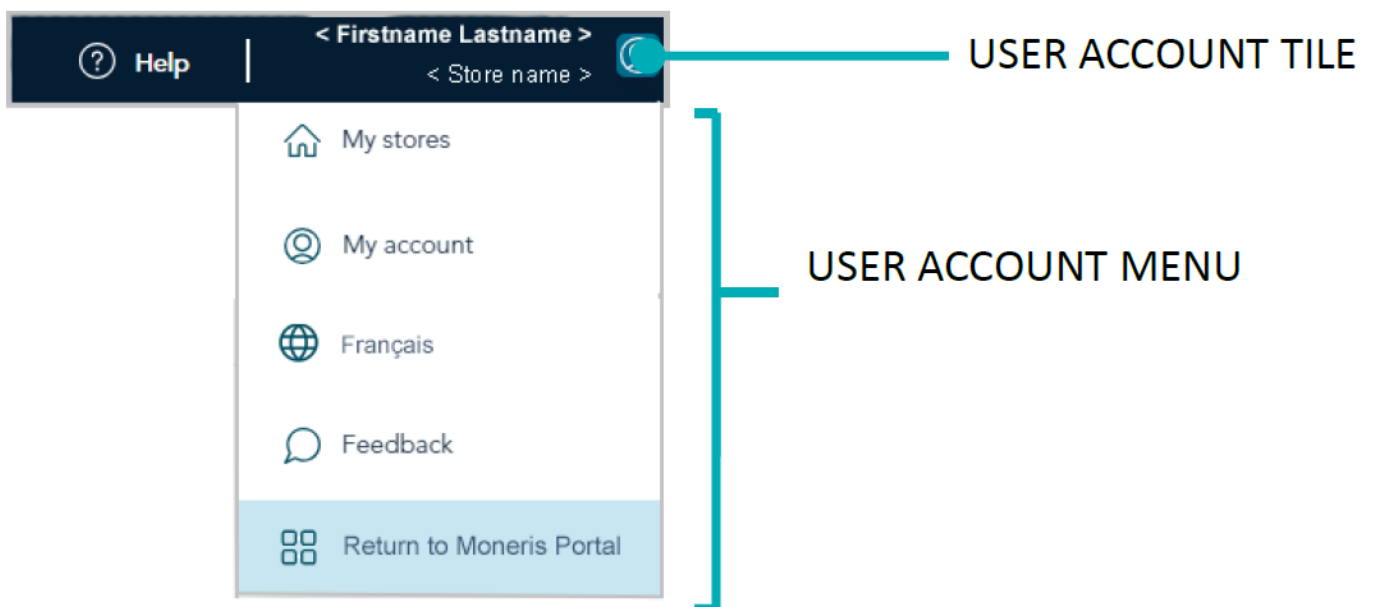


- If you forget your login password, use Moneris Portal's "Forgot password?" function. (You access this function on the Moneris Portal "Log In" page at <https://login.moneris.com/en/login>.)



## Moneris Go portal:

- Whenever you want to access your Moneris Go portal store(s), log into Moneris Portal (visit <https://login.moneris.com/en/login>). From there, launch the “Moneris Go Portal” application.  
Note: If you attempt to submit your login credentials from the Moneris Go portal “Log in” page ([www.monerisgo.com](http://www.monerisgo.com)), you will be redirected to the Moneris Portal “Log In” page.
- If you create/add a new user in Moneris Go portal, the user will be auto-migrated to Moneris Portal when they activate their account.
- 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. (Ensure that you access the store to which your terminal(s) are synced.)
- 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:

- Whenever you want to access your Merchant Direct reports, log 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 “Sign in” page (<https://www2.moneris.com/en/login>); however, we will permanently disable this option in the near future.

## 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](https://shop.moneris.com) to purchase point-of-sale supplies and receipt paper.
- Visit [moneris.com/insights](https://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](tel: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 <https://www2.moneris.com/en/login>.

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(10/2024)

## Documents / Resources

	<p><a href="#">Moneris Portal Seamless Transactions</a> [pdf] User Guide Portal Seamless Transactions, Portal, Seamless Transactions, Transactions</p>
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## References

- [Shop.moneris.com](https://shop.moneris.com)
- [Moneris Go Portal - Log in](#)

- [!\[\]\(7e19807c61da14f515588e95cd49886c\_img.jpg\) Moneris Go Portal - Log in](#)
- [!\[\]\(8ff9e60a4b0560d7ec99179ef4779d9e\_img.jpg\) Moneris Portal](#)
- [!\[\]\(ab9b69bf5753a01c76b30af859454360\_img.jpg\) Shop.moneris.com](#)
- [!\[\]\(c5af66b13c724ca428497900cdbbc9b3\_img.jpg\) Moneris | Moneris Portal](#)
- [!\[\]\(1fde827780c8f912fd3ae9174d52d155\_img.jpg\) Moneris Portal](#)
- [User Manual](#)

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