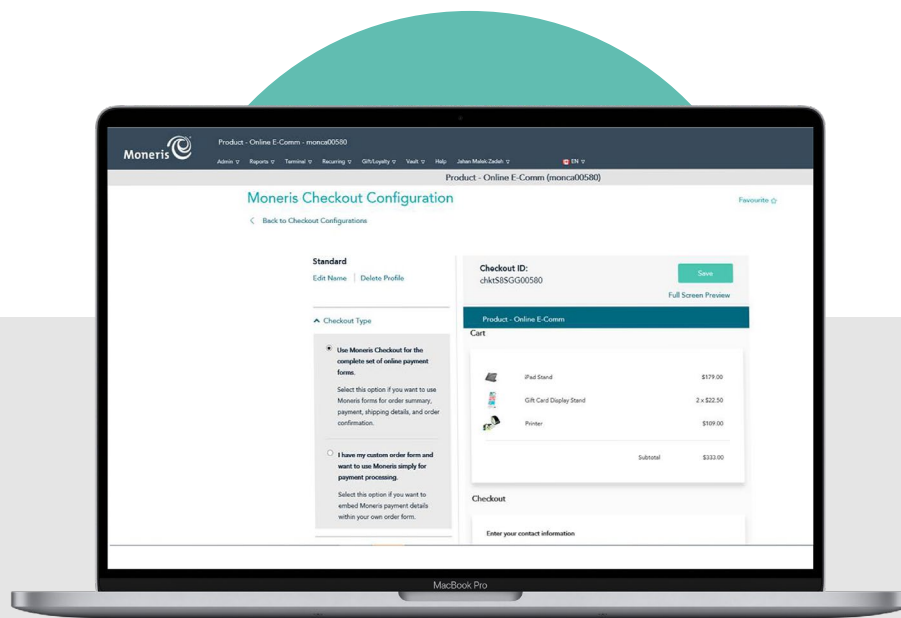




Moneris[®] Checkout and Magento[®] Integration Guide





Record your Moneris merchant ID here:

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Integrating Moneris Checkout into the Magento Plugin

In this section, we go over everything you need to know to integrate Moneris Checkout with the Magento plugin to accept payments on your ecommerce website.

Install the Moneris Checkout module

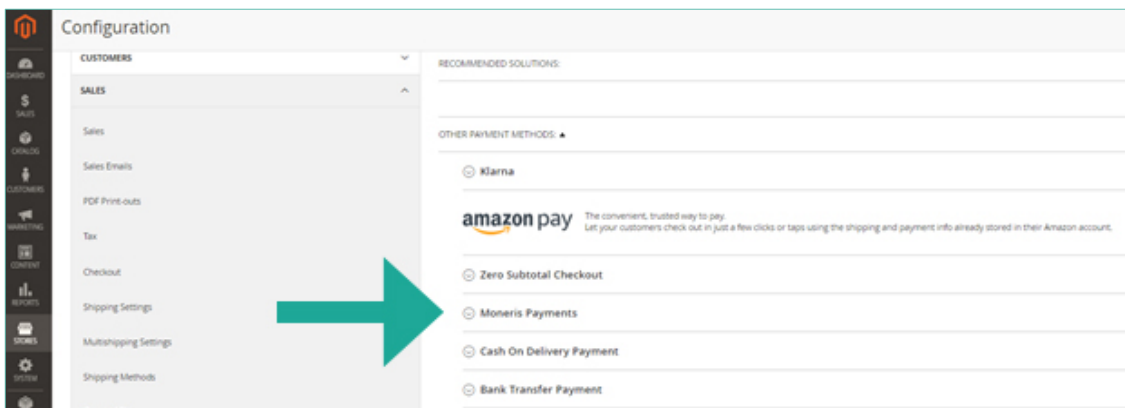
The following steps will guide you through installing and verifying the installation of the Moneris Checkout module.

Note: If you have any difficulty with this process, contact CollinsHarper for support. Refer to the [User help](#) section on page 17 for their contact details.

1. Download and extract the Moneris Checkout module to your Magento 2 Installation folder.
2. Run the following commands in your hosting command line:
 - `bin/magento setup:upgrade`
 - `bin/magento di:compile`
3. Clear the Magento 2 cache using one of the two following methods:
 - a. Run the following command in your hosting command line:
 - `bin/magento cache:flush`

OR

- b. Navigate to **System > Tools > Cache Management**.
 - i. From the drop-down menu in the top left, click **Select All**.
 - ii. Click the **Flush Magento Cache** button in the top right corner.
4. Verify that the module was successfully installed:
 - a. Go to **Stores > Settings > Configuration > Sales > Payment Methods**.
 - b. In the Payment Methods screen, locate **Moneris Payments** option.



Setup and Configuration

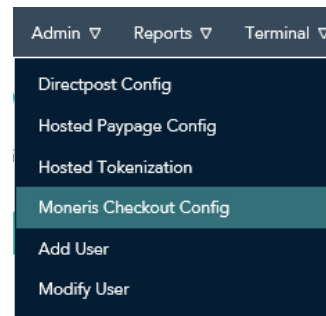
The following steps will guide you through the general setup and configuration of a Moneris Checkout profile, and the integration of that profile into Magento 2.

If additional support is required, including information about other Moneris Checkout settings, please refer to the **Moneris® Merchant Resource Center User Manual**, available on the Merchant Resource Center login page, or contact Moneris Customer Care at **1-866-319-7450**.

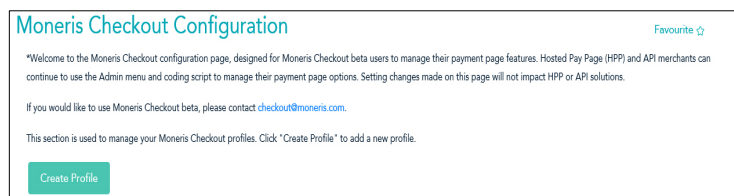
Set up a Moneris Checkout profile

Note: Some of the items and settings described in these steps may not be visible to you based on the services and modules for which you registered when you signed up for Moneris Checkout. You will only see options that are enabled for your store profile.

1. Navigate to one of the two environments in the Merchant Resource Center (MRC):
 - **Testing** environment: <https://esqa.moneris.com/mpg/>
 - **Production** environment: <https://www3.moneris.com/mpg/>
2. Login using your Moneris credentials (**Username**, **Store ID**, and **Password**).
3. Click the **Admin** menu, then click **Moneris Checkout Config**.



4. Click the **Create Profile** button to create a Moneris Checkout profile.
A Saved dialog box appears.
5. Click the **OK** button.



- Under the **Checkout Type** section, ensure that the Use **Moneris Checkout for the complete set of online payment forms** radio button is selected, then click the **Save** button near the top of the screen.

^ Checkout Type

Use Moneris Checkout for the complete set of online payment forms.

Select this option if you want to use Moneris forms for order summary, payment, shipping details, and order confirmation.

I have my custom order form and want to use Moneris simply for payment processing.

Select this option if you want to embed Moneris payment details within your own order form.

- Scroll down and expand the **Order Summary (Cart)** section.
 - Ensure the **Order Summary (Cart) details** and **Product Image** checkboxes are checked.

^ Order Summary (Cart)

Order Summary (Cart) details

Product Image

Product Name

Product Price

Quantity

Subtotal

- Scroll down and expand the **Customer Details** section.
 - In this section, be sure to uncheck all of the checkboxes.

^ Customer Details

Customer's Personal Details

First Name ▾

Last Name ▾

Phone ▾

Email ▾

Billing Address

Shipping Address

9. Scroll down and expand the **Multi-Currency** section:

- Enable/disable **Multi-Currency**.
- Determine if you want to enable geo-location for transactions.

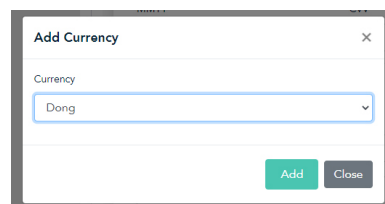
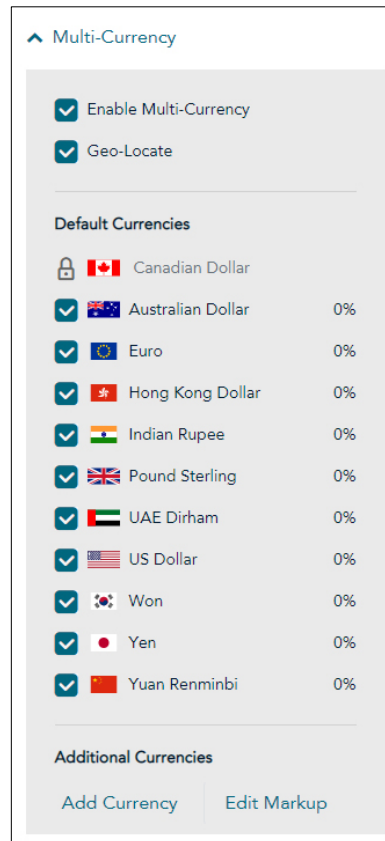
Note: *Geo-location detects the IP address of customers using your checkout and displays product prices and transaction amounts in the currency corresponding to the country/location in which customers are using the checkout subject to the following restrictions: If a customer's IP address does not correspond with a currency that your checkout is configured to support, the checkout will display prices and transaction amounts in United States dollars (USD). If a customer's IP address does not correspond with a supported currency and your checkout is not configured to support USD, the checkout will display prices and transaction amounts in Canadian dollars (CAD).*

10. Enable/disable the default currencies that you want to support in your checkout profile.

Note: *Support for pricing in Canadian dollars is mandatory (i.e., the **Canadian Dollar** option is always enabled).*

11. Add/remove other currencies from your list of supported currencies:

- Go to the **Additional Currencies** section, and click **Add Currency**.
- When the "Add Currency" dialog box displays, click the **Currency** drop-down menu and click on the currency that you want to add.
- Click the **Add** button.
- Repeat steps 11a – 11c to add other currencies as necessary.
- Click the **Close** button when finished.



12. If you want to change a percentage markup of a supported currency, click **Edit Markup**.

- a. When the "Edit Currency Markup" dialog box displays, locate the currency for which you want to edit the markup and enter a whole number in the corresponding field.
- b. Click the **Save** button to close the dialog box.

Currency	Markup
Australian Dollar	1
Euro	1
Hong Kong Dollar	0
Indian Rupee	0
Pound Sterling	0
UAE Dirham	0
US Dollar	1
Won	0
Yen	0
Yuan Renminbi	0
Dong	0

13. Scroll down and expand the **Payment** section.

- Under the **Accepted Digital Wallets** section enable/disable digital wallet support per your integration requirements.
- Under the **Card Logos** section enable/disable the display of debit and credit card logos per your integration requirements.
- Under the **Payment Security** section, select fraud-prevention tools per your integration requirements.
 - Determine whether to allow Moneris to manage auto-decisioning concerning how transaction requests are handled and processed through your checkout:

Note: *Decisions are based on fraud-prevention response codes from supported fraud-prevention tools such as AVS, CVV, 3-D Secure, and Moneris Kount®. Auto-decisioning may or may not be configurable from your settings panel, and may be*

Accepted Digital Wallets

- Google Pay
If you enable Google Pay you agree to the [Google Pay API Terms of Service](#)

Card Logos

- Visa
- Visa Debit
- Mastercard
- Mastercard Debit
- American Express
- Diners Club
- Discover
- JCB
- Union Pay

enabled/disabled by default depending on the fraud-prevention features for which your store is enabled.

- Enable/disable each fraud-prevention tool (**AVS**, **CVV**, **3D Secure**, and **Kount**) if displayed on your settings panel.

Note: *The fraud-prevention tools displayed on your settings panel are dependent on the fraud-prevention features for which your store is enabled. Some fraud-prevention tools may be enabled/disabled by default and may or may not be configurable from your settings panel.*

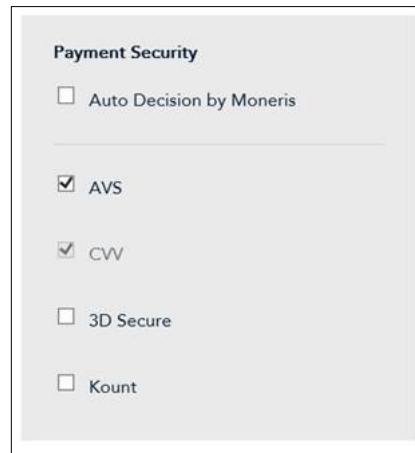
- Scroll down to **Transaction Type** and select the preferred transaction type:
 - To perform purchase transactions, select **Purchase**.
 - To perform pre-authorization transactions, select **Preauthorization**.

Note: *You can select either Purchase or Preauthorization, but not both.*

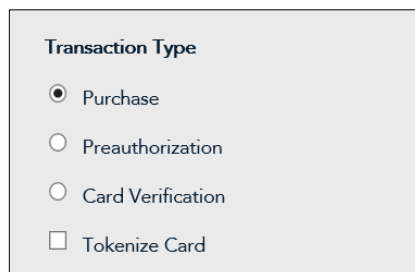
Note: *If you selected **Preauthorization**, a customer's preauthorization can be completed either through the MRC, or through Magento 2. For more information, please refer to section [Capture payments and process refunds](#) on page 12.*

- Under **Transaction Limits** section enable/disable a minimum and maximum transaction dollar limit type.

Note: *Transaction limits control the maximum and minimum dollar amounts that can be charged for any one order submitted by a customer in the checkout. To enable a limit,*



The screenshot shows the 'Payment Security' settings panel. It contains five options, each with a checkbox: 'Auto Decision by Moneris' (unchecked), 'AVS' (checked), 'CVV' (checked), '3D Secure' (unchecked), and 'Kount' (unchecked).



The screenshot shows the 'Transaction Type' settings panel. It contains four options, each with a radio button: 'Purchase' (selected), 'Preauthorization' (unselected), 'Card Verification' (unselected), and 'Tokenize Card' (unselected).



The screenshot shows the 'Transaction Limits' settings panel. It contains two options, each with a checkbox and an input field: 'Transaction Min (\$)' (unchecked) and 'Transaction Max (\$)' (unchecked).

checkmark the box beside the desired limit type (**Transaction Min (\$)** and **Transaction Max (\$)**), and then enter a dollar amount (###) in the corresponding field. To disable a limit, unmark the box beside the undesired limit type.

14. Scroll down and expand the **Order Confirmation** section.

- Under **Order Confirmation Processing**, select the **Use Moneris** option.
- Under the **Confirmation Page Content** section, select the desired information you wish to be displayed on the confirmation page (when the customer is completing their transaction).

The screenshot shows the 'Order Confirmation' settings panel. It is divided into two main sections: 'Order Confirmation Processing' and 'Confirmation Page Content'. In the 'Order Confirmation Processing' section, the 'Use Moneris' radio button is selected, and 'Use Own Page' is unselected. In the 'Confirmation Page Content' section, checkboxes for 'Order ID', 'Customer Info', 'Shipping Info', and 'Billing Info' are all checked. 'Payment Info' and 'Custom Message' are unselected. There is a text input field below the 'Custom Message' checkbox.

15. Scroll down and expand the **Email Communications** section.

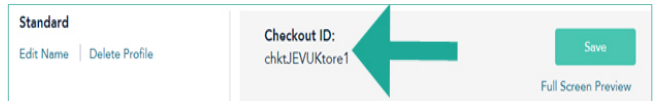
- Under the **Email Contents** section, select the desired contents that will appear in the order confirmation email the customer will receive.
- Under the **Customer Emails** section, place a checkmark in the desired checkbox for what event triggers an email to be sent to a customer.

The screenshot shows the 'Email Communications' settings panel. It is divided into two main sections: 'Email Contents' and 'Customer Emails'. In the 'Email Contents' section, checkboxes for 'Order Info', 'Customer Info', 'Shipping Info', and 'Payment Info' are all checked. In the 'Customer Emails' section, the 'Approved Transactions' checkbox is checked, and the 'Declined Transactions' checkbox is unselected.

16. Click the **Save** button in the upper right corner.

17. Click **OK** in the Success dialogue box.

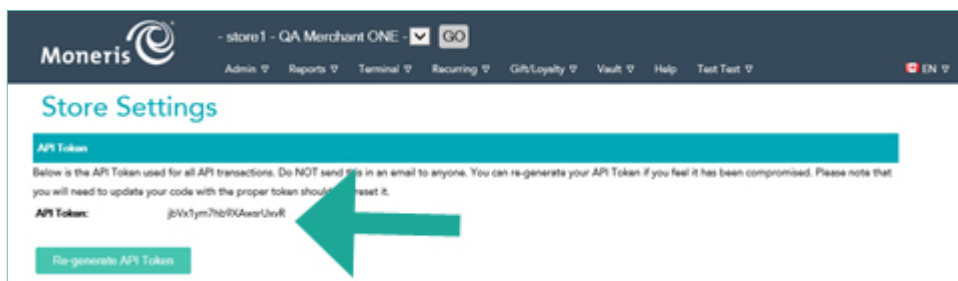
18. Make note of the **Checkout ID** in the Checkout profile. This value will need to be entered later during the integration process.



Retrieve the API token

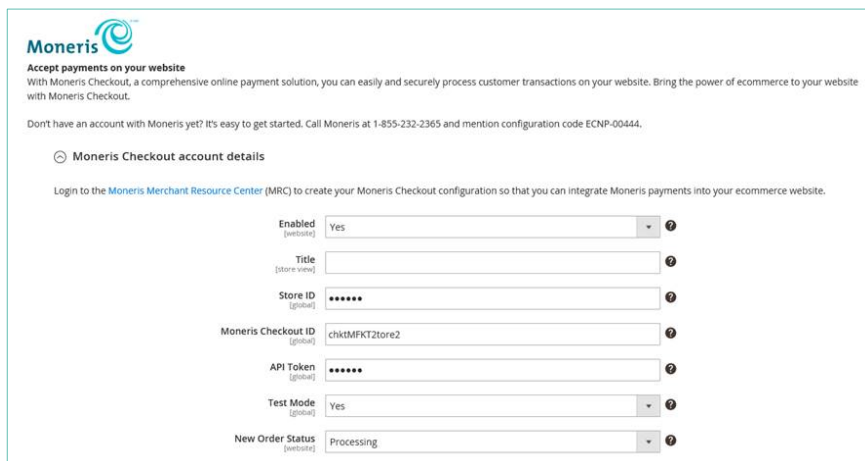
You also require the API token to integrate Moneris Checkout into your Magento configuration. To access the API token, follow the steps below.

1. On the Merchant Resource Center main page, click the **Admin** menu.
2. On the Admin menu, click **Store Settings**.
3. On the Store Settings page, record the **API Token** value.



Add Moneris Checkout profile details to the Magento 2 configuration

1. Login to the Magento 2 Admin Panel.
2. Navigate to **Stores > Settings > Configuration > Sales > Payment Methods > Moneris Payments**.
3. Click inside the **Store ID** field and enter the *Moneris Store ID* value (used to login to the Moneris MRC).
4. Click inside the **Moneris Checkout ID** field and enter the *Checkout ID* you recorded earlier.
5. Click inside the **API Token** field and enter the *API Token* you recorded earlier.



6. Click the **Save Config** button in the top right corner.
7. Navigate to **System > Tools > Cache Management**, select **All** from the top left drop down menu, then click the **Flush Magento Cache** button in the top right corner.

Capture payments and process refunds

The following sections will provide detailed steps for capturing payments and processing refunds (Credit Memos) from the Magento 2 Admin Portal, and to perform administrative transactions in the Moneris Merchant Resource Center.

Note: *If additional support is required beyond the instructions presented in this section, please refer to the [User help](#) section on page 17.*

Capture payments in Magento 2

If Moneris Checkout profile payment transaction type selected is **Purchase**, the payment will automatically be captured. If Moneris Checkout profile payment transaction type selected is **Preauthorization**, an invoice needs to be created in Magento 2. Follow the instructions below to create an invoice for a preauthorized transaction.

1. Login to the Magento 2 Admin Panel.
2. Navigate to **Sales > Orders**.
3. Locate the order for which an invoice is to be created and click the **View** link.
4. Click the **Invoice** button near the top right corner.
5. Validate the invoice details and click **Submit Invoice** in the bottom right corner.

Process Refunds in Magento 2

A credit memo cannot be issued until after an order payment has been captured. As such, if the transaction type for the order was preauthorization and the payment has not yet been captured, the order can be cancelled, and you should perform a \$0 capture through the MRC. If the payment has been captured, the merchant can then issue a credit memo.

1. Login to the Magento 2 Admin Panel.
2. Navigate to **Sales > Orders**.
3. Locate the order for which a credit memo is to be issues and click the **View** link.
4. Click **Invoices** on the left-hand menu.
5. Locate the invoice for which a refund will be issued and click the **View** link.
6. Click **Credit Memo** near the top-right corner.

7. Edit the refund details in the bottom-right corner of the page.

Refund Totals	
Subtotal	\$10.00
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Grand Total	\$15.00
<input type="checkbox"/> Append Comments	
<input type="checkbox"/> Email Copy of Credit Memo	

8. Do one of the following:
 - To process the credit memo with an automatic refund, click **Refund**.
 - To process the credit memo but manage the refund outside of Magento 2 Admin Portal, click **Refund Offline**.

Capture a Preauthorization in the Merchant Resource Center

Follow the steps below to capture a debit/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 a Preauthorization.

1. On the menu bar in the MRC, click on **Terminal > Capture**.
The "Capture/Preauth Completion" page appears.
2. Enter the order ID of the original debit/credit Preauthorization that you want to capture into the **Order ID** field.
Note: *If you only have a partial order ID, select the **begins with** or the **ends with** radio button.*
3. Click the **Locate Transaction** button.
4. In the "Transaction List" area, locate the Preauthorization that you want to capture, and then click on its corresponding **Capture** button.
5. Wait for the "Transaction Details" area to display, and then do the following:
 - a. In the **Statement Descriptor** field, enter a descriptor for the card statement.
 - If the **Customer Code** field displays, optionally enter a customer code.
 - If the **Invoice Number** field displays, optionally enter an invoice number.
 - b. In the **Amount** field, do one of the following:
 - To capture the Preauthorization, enter the amount (e.g. 12.50) that you want to capture.
Note: *If the Preauthorization is captured for an amount that is less than the original Preauthorization amount, the un-captured amount will for a period of time remain available for a subsequent Reauthorization.*
 - To cancel the Preauthorization and release the funds, enter a zero-dollar amount (0.00).

- c. If the **Add Level 2/3 Details** button displays, ignore it and proceed to step 6.
6. Click on the **Process Transaction** button.
7. When the "APPROVED" or "DECLINED" response displays on the "Capture" page, the transaction is complete:
8. Print or e-mail the debit/credit Capture receipt.

For more information on performing transactions within the MRC, refer to the **Moneris® Merchant Resource Center User Manual** for instructions. That manual is available as a PDF on the MRC login page.

Process a Refund in the Merchant Resource Center

Follow the steps below to fully or partially reverse (refund) a Merchant Resource Center-referenced credit card Purchase or Capture in a closed batch. The funds are restored to the cardholder's card. The Refund and the original transaction will be referenced on the cardholder's statement.

Note: To reverse a Merchant Resource Center-referenced debit card transaction, you must do a Void. Refer to the **Moneris® Merchant Resource Center User Manual** for instructions on performing a Void.

Note: Multi-currency pricing (MCP) does not support partial refunds through the Merchant Resource Center. Transactions conducted using MCP will need to be refunded in full.

1. On the menu bar, click on **Terminal > Refund**.
2. On the Refund page, click inside the **Order ID** field and enter the order ID of the original transaction that you want to reverse.

Note: If you only have a partial order ID, select the **begins with** or the **ends with** radio button.

3. Click on the **Locate Transaction** button.
4. In the "Transaction List" area, click on the **Refund** button beside the transaction that you want to reverse.
5. In the "Transaction Details" area, do the following:
 - a. In the **Amount** field, enter the amount to be refunded e.g. 12.50; otherwise, leave the displayed amount as is to refund the full amount of the original transaction.
 - If the **Customer Code** field displays, optionally enter a customer code.
 - If the **Invoice Number** field displays, optionally enter an invoice number.
 - b. If the **Add Level 2/3 Details** button displays, ignore it and proceed to step 6.
6. Click on the **Process Transaction** button.
7. When the "APPROVED" or "DECLINED" response displays on the "Refund" page, the transaction is complete.
8. Print or e-mail the debit/credit Refund receipt.

For more information on performing transactions within the MRC, refer to the **Moneris® Merchant Resource Center User Manual** for instructions. That manual is available as a PDF on the MRC login page.

Process a Void in the Merchant Resource Center

Follow the steps below to reverse (cancel) a Merchant Resource Center-referenced debit/credit card Purchase, Capture, or Voice Authorization-Advice in an open batch. The funds of the original transaction are fully restored to the cardholder's card. The Void transaction and the original transaction will not be referenced on the cardholder's statement.

1. On the menu bar, click on **Terminal > Void**.
 2. Wait for the "Void" page to display.
 3. In the **Order ID** field, enter the order ID of the original transaction that you want to reverse.
*Note: If you only have a partial order ID, select the **begins with** or the **ends with** radio button.*
 4. Click on the **Locate Transaction** button.
 5. Wait for the "Void" page to display.
 6. In the "Transaction List" area, click on the **Void** button beside the transaction that you want to reverse.
 7. In the "Transaction Details" area, do the following:
 - If the **Customer Code** field displays, optionally enter a customer code.
 - If the **Invoice Number** field displays, optionally enter an invoice number.
 8. Click on the **Process Transaction** button.
 9. When the "APPROVED" or "DECLINED" response displays on the "Void" page, the transaction is complete.
- For more information on performing transactions within the MRC, refer to the **Moneris® Merchant Resource Center User Manual** for instructions. That manual is available as a PDF on the MRC login page.



Merchant support

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

User help

Should you find you need assistance beyond this integration guide, please reach out to the appropriate team.

For support with the Magento plugin, contact our integration partner, CollinsHarper:

- moneris@collinsharper.com
- [226-907-0004](tel:226-907-0004) (voicemail only)

For support with the Moneris Merchant Resource Center and Moneris Checkout, contact Moneris Customer Care:

- Web: moneris.com/support-gateway
- Email: onlinepayments@moneris.com
- Toll-free: [1-866-319-7450](tel:1-866-319-7450)
- You can also send us a secure message 24/7 by logging in to Merchant Direct® at moneris.com/mymerchantdirect.



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It is your responsibility to ensure that proper card processing procedures are followed at all times. Please refer to the **Moneris Merchant Operating Manual** (available at: moneris.com/CAFTC) and the terms and conditions of your applicable agreement(s) for credit/debit processing or other services with Moneris Solutions Corporation for details.