


Creating a Payment request

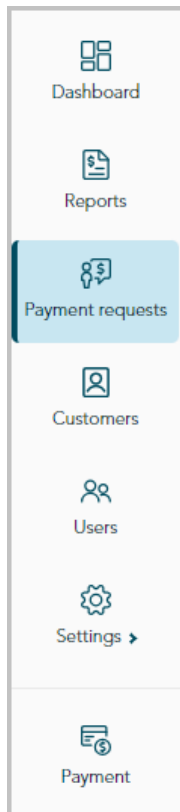
The steps below describe how to create a new credit card payment request through your Moneris Go portal store.

1. Log into the Moneris Go portal, and access the store through which you want to perform this action.

Note - If you have multiple stores linked to your user account, you can use the My Stores function to move between your stores.

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. The left sidebar contains navigation links: Dashboard, Reports, Payment requests (highlighted), Customers, Users, Settings, and Payment. The main content area has a search bar with the placeholder 'Search by payment request ID or customer's email' and a 'Create payment request' button. Below the search bar is a table with the following columns: Status, Date created, Payment request ID, Customer's email, and Total. The table contains six rows with statuses: Draft, Pending, Sent, Overdue, Cancelled, and Paid. Each row has a corresponding icon and a right arrow. At the bottom of the table, there is a pagination control showing '1 of 1' items and a 'Show 25 items per page' dropdown. The footer includes the copyright notice 'Copyright Moneris Go Portal. yyyy' 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.

The screenshot shows the 'Create payment request' page in the Moneris Go Portal. The left sidebar is the same as the previous screenshot, with 'Payment requests' highlighted. The main content area has a form with the following fields: 'Customer's email' and 'Shipper/Registration Number' (text input fields), 'Payment request due date' (calendar icon showing 'Feb 18, 2025'), 'Product description' (text input field), 'Price' (text input field showing '\$ 0'), and 'Notes' (text area with a '3000 characters maximum' warning). At the bottom right, there is a 'Total: \$0.00' label. At the bottom left, there is a red warning icon and text: 'This is not a VAT invoice but a request for payment. Any additional purchase details and applicable taxes should be provided to the customer.' At the bottom right, there is a 'Send' button and a dropdown arrow.

Customer's email

Shipper/Registration Number

Payment request due date

Feb 18, 2025

Product description

Price

\$ 0


Notes

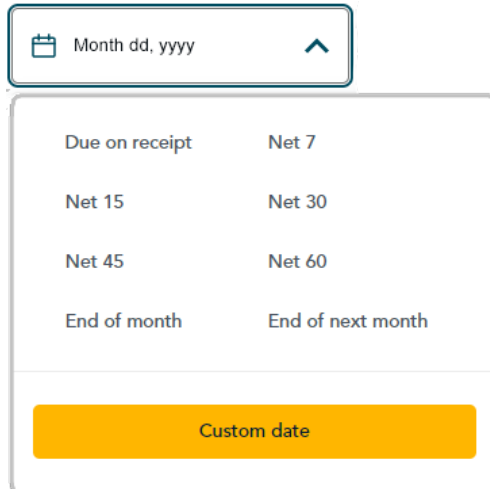
3000 characters maximum

Total: \$0.00

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

Send

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:



Month dd, yyyy	
Due on receipt	Net 7
Net 15	Net 30
Net 45	Net 60
End of month	End of next month
Custom date	




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 above), 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, click on a specific calendar 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 select a specific month/year.

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

Note - To configure the custom transaction identifier field, see [Moneris Go portal - Custom ID: store settings](#).

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

* To send the payment request to the customer now:

1. Click on the payment request's Send button.

a. When the "Payment request sent successfully" response displays, the operation is complete.

* To save the payment request as a draft without sending it:

The screenshot shows the 'Create payment request' form in the Moneris Go Portal. The form is titled 'Create payment request' and is located in the center of the page. On the left side, there is a sidebar with navigation links: Dashboard, Reports, Payment requests (highlighted), Users, Settings, and Payment. The form itself contains several fields: 'Customer's email' with the value 'murribarri@atlasvanlines.ca', 'Reg #' with the value '9998', 'Payment request due date' with a calendar icon and the date 'Feb 18, 2025', 'Product description' with the value 'Moneris', and 'Price' with the value '\$ 2.00'. Below these fields is a 'Notes' section with a text area and the instruction '3000 characters maximum'. At the bottom right of the form, it says 'Total: \$2.00'. At the bottom left, there is a red warning message: 'This is not a VAT invoice but a request for payment. Any additional purchase details and applicable taxes should be provided to the customer.' At the bottom right, there are two buttons: 'Send' and 'Save as draft'.

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.

***Once payment has been processed and completed by the customer – ensure a copy of the payment transaction is uploaded to ATLAS NET