



Making the Transition from original Merchant Direct to Merchant Direct Version 2

Merchant Direct Version 2 features a modernized user interface, including simplified menus and navigation, and a sales dashboard for easy reference. It is also design responsive for tablet devices.

This guide will help you understand which reports you can run in the new Merchant Direct Version 2 interface that are comparable to the reports you would utilize in the original Merchant Direct interface.

You can find detailed information on all Merchant Direct features in the **Online User Manual** available at [Merchant Direct Version 2 Online Help \(moneris.com\)](https://moneris.com/merchant-direct-version-2-online-help).

How to sign into Merchant Direct Version 2

Login to your existing Merchant Direct account and navigate to your Message Centre for steps on how to access the new platform.

Tip 1: Make sure to use one of the supported browsers: Chrome, Edge, Firefox, or Safari.

Tip 2: We recommend bookmarking the [Merchant Direct v2 URL](#) for future access.

What's new in reporting

The reports available in the new interface have features or functionality built to improve or enhance the user experience in real-time on the report screens:

Account selection: Select one or more accounts at a time, including chains and super chains (*applicable to merchants with more than one account*)

Near real-time transaction lookup: Look up transactions in near real-time without waiting for settlement

Column sort and filters: Sort results in ascending/descending order and apply filters to view only data that you want to see

Column resize/show/hide: Resize or show/hide columns on the report

Column visibility: Select specific columns you want to view on the report

Export options: Export and save entire reports or specific sections of reports to a CSV or a PDF file

Reporting updates

We've improved how you navigate to the reports, grouped them into modules, and improved the process for selecting accounts and criteria. The dynamic reporting engine also enables filtering, sorting, and data suppression to enable you to customize the reporting output. This section provides a guide on what is contained in each module. Examples of reports currently enabled:

IF YOU USED THESE REPORTS IN MERCHANT DIRECT...	USE THESE REPORTS/MODULES IN MERCHANT DIRECT VERSION 2...	LENGTH OF TIME INFORMATION IS RETAINED	MAXIMUM TIMEFRAME ALLOWED PER SEARCH
<ul style="list-style-type: none">Monthly Statement	Monthly Statement Report	7 Years	N/A
<ul style="list-style-type: none">Financial DetailsChargebacks & Financial Adjustments	Bank Reconciliation Module	2 Years	366 Days

IF YOU USED THESE REPORTS IN MERCHANT DIRECT...	USE THESE REPORTS/MODULES IN MERCHANT DIRECT VERSION 2...	LENGTH OF TIME INFORMATION IS RETAINED	MAXIMUM TIMEFRAME ALLOWED PER SEARCH
<ul style="list-style-type: none"> ▪ Sales Summary ▪ Sales Summary by Card ▪ Summary by Clerk ID 	Sales Summary Module	2 Years	366 Days
<ul style="list-style-type: none"> ▪ Summary of Chargebacks Received ▪ Summary of Outstanding Chargebacks ▪ Copy Requests Received ▪ Copy Requests Received by Month ▪ Summary of Outstanding Copy Requests ▪ Fulfilled Copy Requests 	Dispute Management Module	18 Months	120 Days
<ul style="list-style-type: none"> ▪ Transaction Details ▪ Declined Transactions ▪ Detailed Transactions 	Find a Transaction Module	2 Years	366 Days

Coming soon: Transaction reporting on Gift, DCC, MCP and other outstanding reports

Other available features

- Account Management
- Dispute Notification Settings
- Live chat, Call me now/Call me later
- Self Serve Banking Information Updates
- Self Serve Refunds
- User Management

Coming soon: View Images & Decline Messages related to Disputes, Self Serve Ordering Products & Supplies, Redesigned Message center and other outstanding features