



General Merchant Direct Help

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This document is designed to assist merchant users of Moneris Solutions Corporation (“Moneris”) with their access to Moneris’ Merchant Direct® online reporting tool. This document is a guide only. Changes may have been made in the sign-on process since the last time this document was updated.

Merchant Direct Help

The main Merchant Direct feature is the access to View Statement and Reports. This includes the ability to download the basic data for most reports to the customer's own computer through the CSV (Comma Separated Value) Download Facility. There are also hyperlinks to the Moneris Privacy policy, Fraud information, and Upcoming Merchant Direct Features.

General Information

General instructions on Signing In and Changing Passwords are on the Help document accessible on the Sign-In screen.

On the home page, the user will have access to various functions: (some functions may not be available depending on the user type and access levels)

1. View Customer Reports/Statements
2. Message Centre
3. Chat or Request a Call with Support
4. Update Your Profile

All the administrative screens and menus have standard Merchant Direct command buttons: (the command buttons displayed may vary depending on the screen the user is on)

1. The “**Home**” button will always return the user to the Home (Main Function) page that the user sees after successful sign-on.
2. The “**Messages**” button will direct the user to the message centre page.
3. The “**Contact Us**” button will direct the user to our customer support page on Moneris.com
4. The “**Sign Out**” – Sign out of Merchant Direct immediately without having to go to Home Page.
5. The “**Update Your Profile**” button will direct the user to the Update Your profile page.



View Customer Reports/Statements

Access

1. Select "View Statements/Reports" on Home Page hyperlink.
2. The main Customer Report Selection screen will appear with the reports or sub-menus available. (Note: if a user is authorized to see more than one customer, all the customers the user is allowed to see will appear on an intermediate screen, and once the user has selected a customer, the main Customer Report Selection screen will appear for that customer.)
3. At the bottom of the Customer Report Selection screen is the "Select Report" button.
4. Once the user has selected the radio button to the left of a report or sub-menu, and the "Select Report" button at the bottom of the screen, a Report Selection or Sub-Menu screen will appear.
5. On this screen, user can select additional filter criteria (such as a date or date range), and display the report using "View Report" button, or display the CSV Download (if available for this report) using "CSV Download" button.
6. On most screens, the user can, after viewing a report for one date or date range, enter a different date(range), and use "View Report" to display with new criteria(or use "CSV Download" to download with the new selection criteria).
7. There are also other buttons on most screens that allow the user to return to the main Menu or sub-menu, or perform other functions.

General view Statements/Report Functionality

CSV Download and Helps

1. CSV (Comma Separated Value) Download for most reports
 - a. Available either once report has been selected **or**;
 - b. Through **CSV Download Selection** screen **or**;
 - c. Available on some sub-menus (e.g., Daily Merchant Menu)
2. CSV Download shows the basic database values for the detailed lines on the reports (with some limited manipulation of the data)
3. **CSV Help** available on Chain Level CSV Download Selection and all Menu Selection or Report Selection screens that have CSV Download.
4. CSV Help lists each CSV Download, the order of the fields, a brief description of each field, and a description of the meaning of each code, for fields that use codes, e.g., POT (Point of Transaction) codes, Card Type codes, etc. CSV Help can be used even when not using CSV Download to explain certain codes, e.g., POT (Point of Transaction) Codes.



Reports

1. Reports can be selected directly from main Customer Report Selection Menu or from sub-menus.
2. Some CSV reports can be selected from the CSV Download Facility link located on the upper right hand side of the Customer Report Selection page.
3. Report data available for 12 months to two years (depending on the report), and a date range of 1 day to two months can be used (depending on the report).
4. See **Report Help** Command Button on most Merchant Direct report screens for availability and date range details, and a brief description of the report. Once the "Report Help" documentation has been displayed, the user can also view information about other related reports.
5. Some report screens have a small grey triangle in the upper right-hand corner of a column heading; if the cursor hovers over the column caption for several seconds, a "Screen Tip" will appear with a brief description of the column content.