

Moneris Portal

Interface Changes

Refence guide



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Introduction

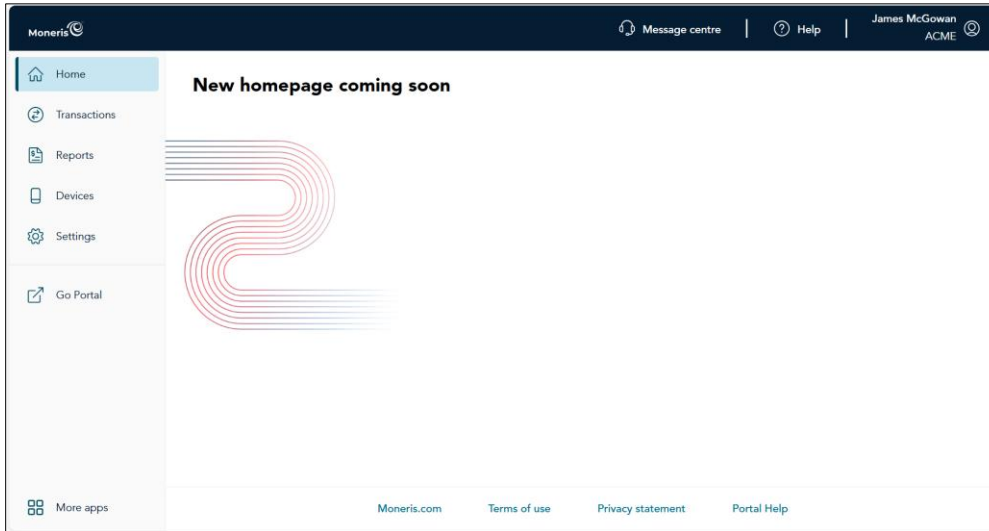
Moneris Merchant Direct is currently undergoing a refresh as Moneris is consolidating its merchant portals under one new, unified Moneris Portal. As a merchant migrating to this new unified portal experience, we've put together this quick guide to help you understand the new interface.

The good news is that you won't need to learn new ways of doing things or how to use new functionality. This release is simply about changing the look and feel of the main menu, without impacting the other functionality of Merchant Direct. So with this in mind, here's what you need to know about Merchant Direct under the new unified portal.

What's new in this version

This section will outline the new interface with which you'll be interacting once you've made the switch.

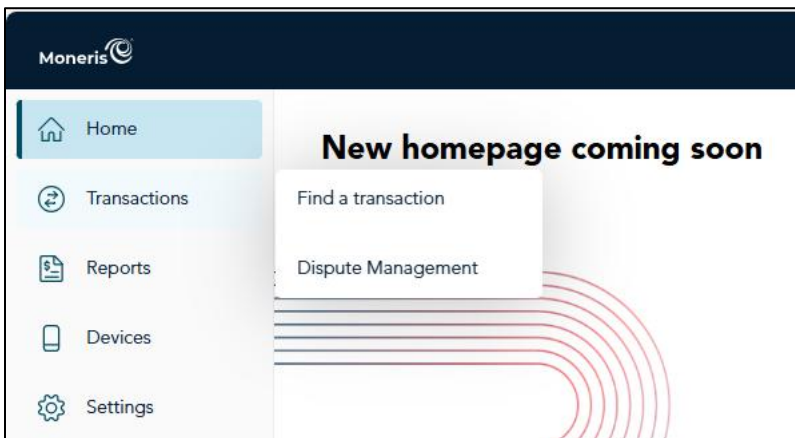
New homepage and menu structure



Moneris has developed a new dashboard for the new Moneris Portal homepage that you see when you logon, but as of right now, this feature is not available. However, the new menu structure for Merchant Direct users is currently in place and that's where the big differences are.

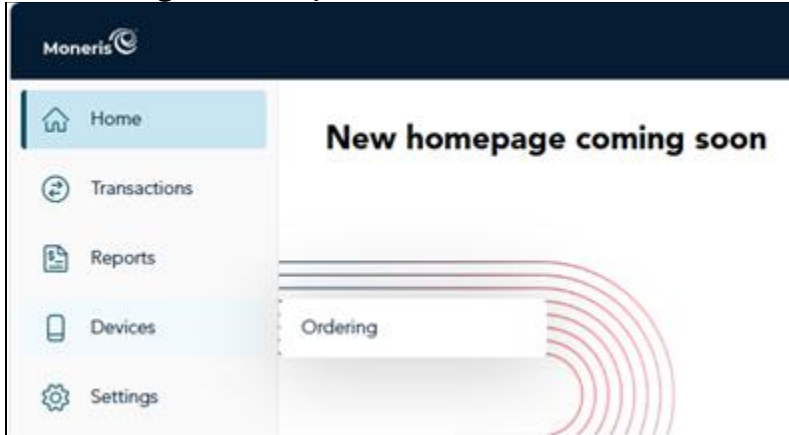
1. New Transactions menu

The **Find a Transaction** and **Dispute Management** modules have moved from the **Reports** menu to the **Transactions** menu.



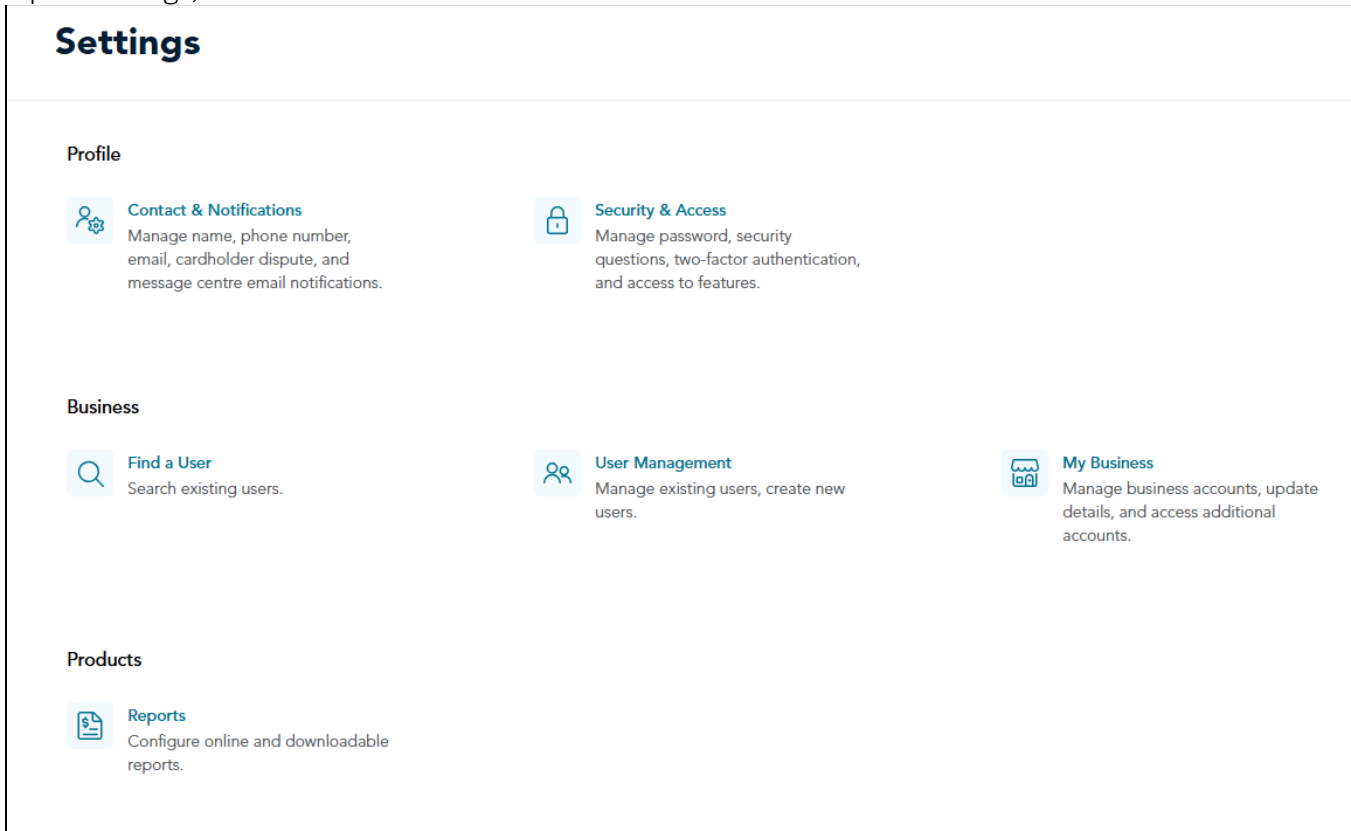
2. New Devices menu

The **Ordering** feature (if you had access to it) has moved from the **Self-serve** menu to the **Devices** menu.

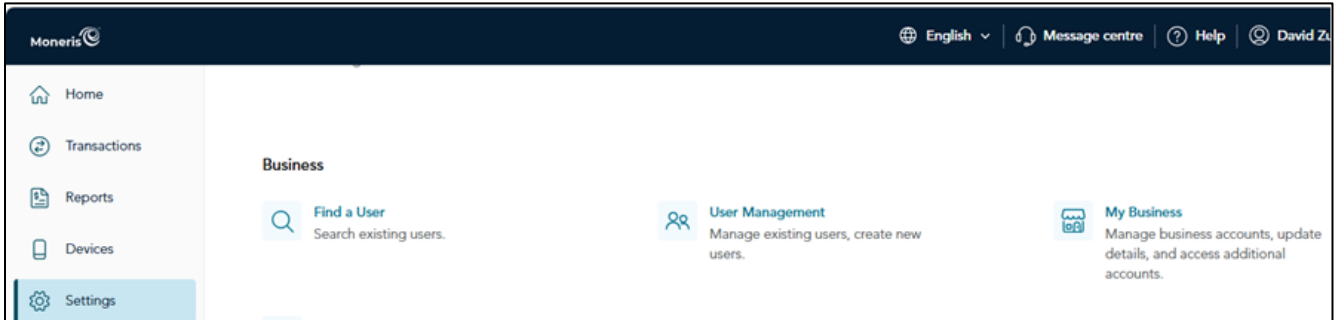


3. New Settings page

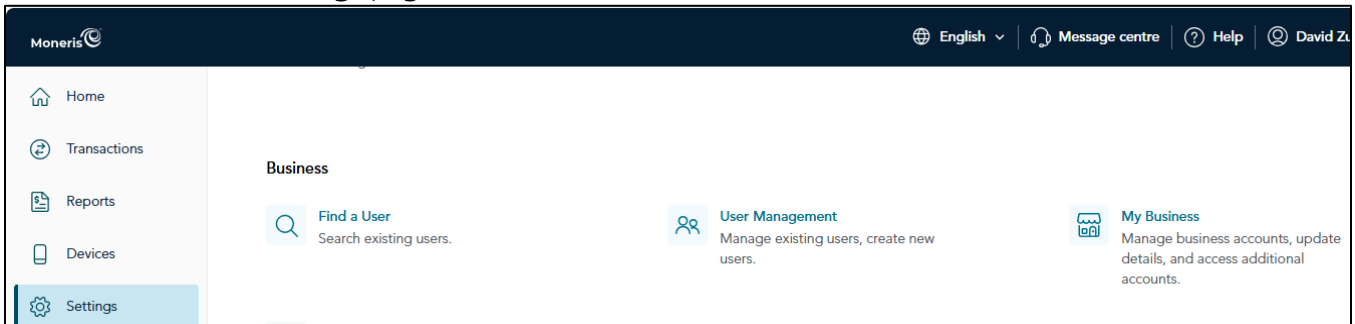
Updated **Settings** page with three main areas: **Profile** (to manage your Merchant Direct and portal user profile), **Business** (to manage profiles of other users and business accounts), and **Products** (to manage report settings).



The **Account Management** feature has moved from the **Self-serve** menu to the **Settings** page and is now called **My Business**.



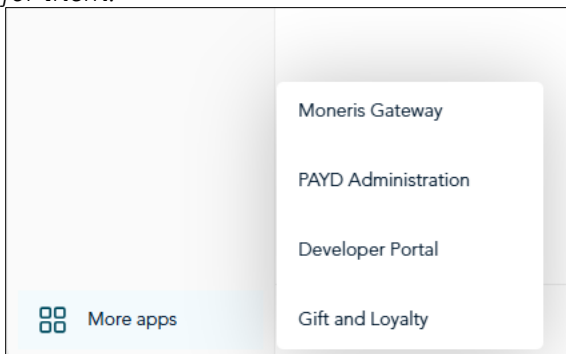
The **User Management** and **Find a User** (if you had access to these) features have moved from the **Admin** menu to the **Settings** page.



4. New More apps section

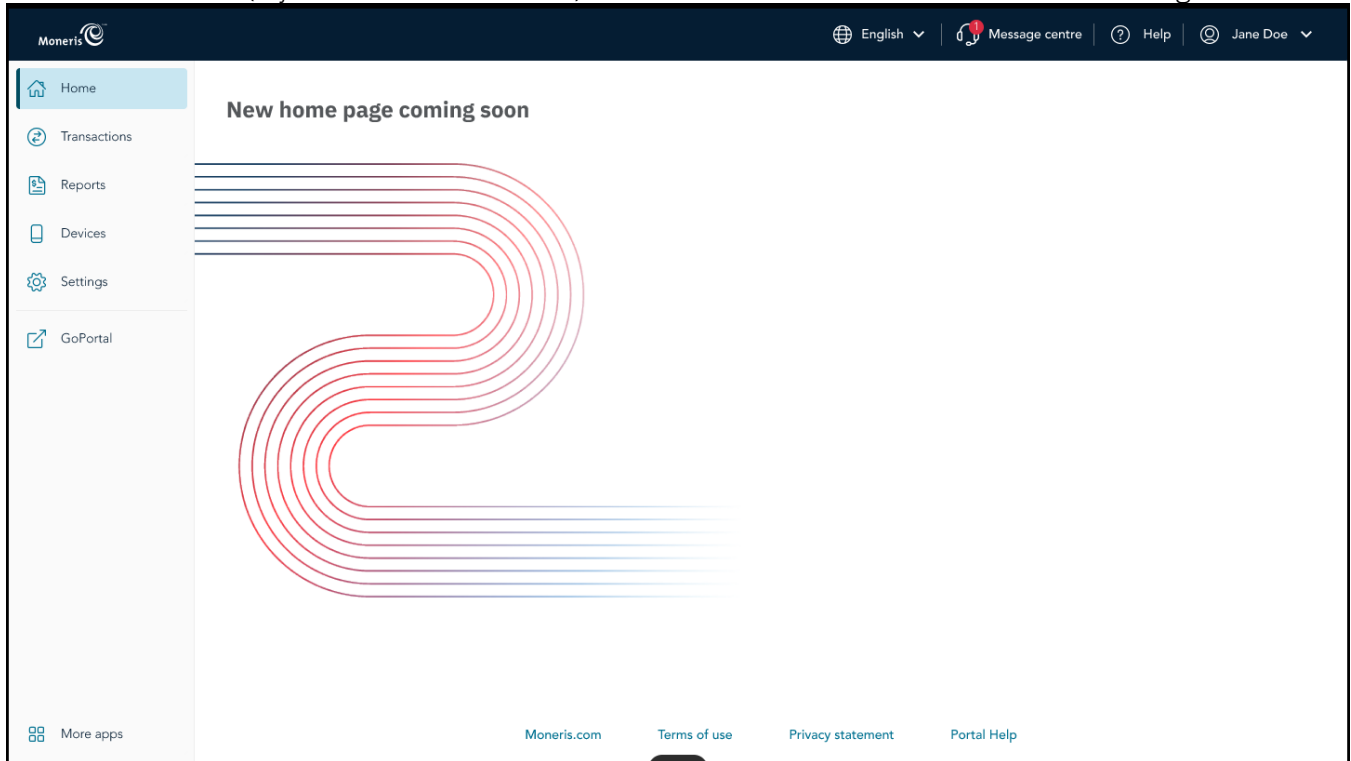
The new **More apps** section on the bottom left provides links to open other Moneris portals such as Moneris Gateway, PAYD Administration, Developer Portal, and the Gift & Loyalty portal.

Note: These additional portals may not be applicable to you if you have not already created an account for them.



5. New Go Portal link

Moneris Go Portal (if you have access to this) can now be launched from the left menu navigation.



Refer to the table below for a further explanation of what's new.

Merchant Direct Menu Option	Explanation	New Moneris Portal Menu Option	Explanation
Home	Accesses the Merchant Direct homepage with the Dashboard.	Home	Accesses the Merchant Direct homepage with the Dashboard (coming soon).
Admin	Contains user management tools to define user permissions (User Management and Find a User). These tools have been moved to the Settings screen in the new Unified Portal.	Transactions	The Find a Transaction and Dispute Management modules have moved off of the Reports menu and are now part of this Transactions menu.

Merchant Direct Menu Option	Explanation	New Moneris Portal Menu Option	Explanation
Reports	<p>Contains the <i>Sales Summary</i>, <i>Fraud Detection</i>, <i>Find a Transaction</i>, and <i>Dispute Management</i> modules. Also contains the <i>Monthly Statement</i>, <i>Bank Reconciliation</i>, <i>Revenue Share</i>, <i>Fees/Adjustments</i>, and <i>Gift Cards</i> reports, as well as the <i>CSV Downloader</i> utility.</p> <p>The Find a Transaction and Dispute Management modules were relocated to the Transactions menu in the new Unified Portal.</p>	Reports	<p>Contains the <i>Sales Summary</i> and <i>Fraud Detection</i> modules, as well as the <i>Bank Reconciliation</i>, <i>Monthly Statement</i>, <i>Fees/Adjustments</i>, <i>Revenue Share</i>, and <i>Gift Card</i> reports. There is also the <i>CSV Downloader</i> utility.</p>
Self-serve	<p>Self-serve features include account management tools, supply reordering, and transaction refund functionality.</p> <p>The Account Management and section has been moved to the Business section in the Settings screen in the new Unified Portal. The Ordering section has been moved to Devices – Ordering in the new Unified Portal.</p>	Devices	<p>Contains supply reordering functionality.</p> <p>The Ordering menu option was relocated from the Self-Serve menu in Merchant Direct.</p>
		Settings	<p>Contains user management and self-serve account management functionality under three main areas: Profile (to manage your user profile), Business (to manage profiles of other users and business accounts), and Products (to reorder supplies).</p> <p>The User Management and Find a User functionality were relocated to the Business section of the Settings screen.</p>

Merchant Direct Menu Option	Explanation	New Moneris Portal Menu Option	Explanation
		Go Portal	<p>Provides a link to open Moneris Go Portal in a separate browser tab.</p> <p>Note: This menu option will only be visible to merchants who have already registered for Go Portal; if you haven't yet, this will not be visible to you.</p>
		More apps	<p>Provides a link to open other Moneris portals such as Gateway, PAYD Administration, Developer Portal, and the Gift & Loyalty portal.</p> <p>Note: These additional portals may not be applicable to you if you have not already created an account for them.</p>

Need help?

Contact Moneris Customer Care: 1-866-319-7450