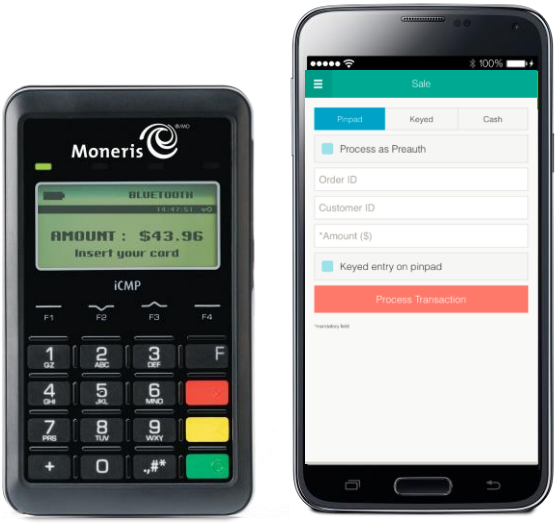
Moneris

BE PAYMENT READY

USING PAYD PRO®



For Android™

(10/17)

Moneris

BE PAYMENT READY

For more information and assistance:

Web: getpayd.com/paydpro/support
Email: info@getpayd.com
Toll-free: 1-855-423-PAYD (7293)

Record your Moneris® merchant ID here:

_____

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Introduction

PAYD Pro allows you to accept *Interac®* Debit and credit payments right on your mobile device, just about anywhere your business takes you.

This guide provides instructions on how to pair a Moneris PAYD® PAYD PIN Pad with an Android mobile device (referred to as "mobile device" or "device"); download and install the PAYD App® to the mobile device; initialize the PAYD PIN Pad; and use the PAYD App to perform transactions.

Note: *For instructions on how to use PAYD Administration to manage your PAYD Pro store and any other registered account users, refer to the* **Using Moneris® PAYD Administration** guide *(visit* getpayd.com/paydpro/support *to download a copy).*

Before you get started

1. Ensure that you have the following components:

   - Bluetooth®-discoverable mobile device.
   - PAYD PIN Pad and USB charging cable (provided in your welcome kit).

     Note: *You will be required to plug this cable into a powered USB port (e.g., on a computer).*

   - The PAYD PIN Pad hardware identifier ("terminal ID") is an 8-digit alpha-numeric code starting with "I6" (e.g., "I6012345").
     This ID (also known as the "PAYD PIN Pad ID") is printed on a white label affixed to the underside of the PAYD PIN Pad (you will be asked to refer to this ID during the setup steps):

2. Ensure that you have the required credentials for your PAYD Pro store:

   - If are activating your store, ensure that you have your merchant ID and store ID (refer to your "Useful Information" Email for these IDs).
   - If your store is already activated, ensure that you have your sign-in credentials (contact your store administrator for these credentials).

3. Do one of the following:

   - If you have all the required components and IDs, go to step 4.
   - If you do not have the required elements, please contact us: call **1-855-423-PAYD (7293)** or email **info@getpayd.com**.

4. Determine your setup requirements:

   - If you need to activate your PAYD Pro store, proceed to *Activating your PAYD Pro store* (page 8).
   - If your PAYD Pro store is already activated, proceed to *Setting up the PAYD App on your mobile device* (page 9).

Activating your PAYD Pro store

1. Visit getpayd.com/activate.
2. In the **Merchant ID** and **Store ID** fields, enter your merchant ID and store ID (refer to your "Useful Information" Email for these IDs).*
3. Tap **Next**.
4. In the **First name** and **Last name** fields, enter your first name and last name.*
5. In the **Email** field, enter your email address.*

   Note: *Once you have successfully completed the activation steps, an "Activation Confirmation" Email will be sent to this address. If you ever need to have your password reset, a password reset link will be sent to this address.*

6. In the **Employee ID**, **Password**, and **Confirm password** fields, enter the username and password under which you want to sign into your store.*

   Note: *The password must be from 8 to 16 characters in length and include at least 1 letter, 1 number, and 1 special character. Accents are not supported. Password fields are case sensitive. You will be prompted to update your password every 90 days (your new password must be different than your last 4 passwords).*

7. In the **Security question** and **Answer** fields, enter a security question and the answer.*

   Note: *Periodically you will be prompted to answer this question when signing in.*

8. Tap **Save**.
9. The statement "Activation completed" displays above the fields on the PAYD Administration sign-in screen.

   Note: *You will shortly receive an "Activation Confirmation" Email containing your store ID and employee ID (the username you created).*

10. Proceed to *Setting up the PAYD App on your mobile device* (page 9).

* The information entered here applies to both the PAYD App and PAYD Administration.

Setting up the PAYD App on your mobile device

The PAYD App must be downloaded and installed on your mobile device before you can start to perform PAYD Pro transactions.

1. Do one of the following:
    - If you need to download/install the PAYD App to your mobile device, proceed to *Downloading and installing the PAYD App from Google Play* (page 10).
    - If you have already downloaded/installed the PAYD App to your mobile device, proceed to *Setting up the PAYD PIN Pad* (page 11).

Downloading and installing the PAYD App from Google Play™

Follow the steps below to download and install the PAYD App to your mobile device.

1. From your mobile device’s home screen, open Google Play.
2. In Google Play, search for "PAYD", and then select the PAYD App.
3. Tap **INSTALL**.
   - If at any time the PAYD App requests permission to access data from your mobile device (e.g., location, microphone, or contacts data), allow the PAYD App to access the data.
4. Once the PAYD App is downloaded and installed on your mobile device, do not open/launch the PAYD App at this time.
5. Return to your mobile device's home screen.
6. Proceed to *Setting up the PAYD PIN Pad* (page 11).

Setting up the PAYD PIN Pad

Your PAYD PIN Pad must be paired with a mobile device before it can be used to perform PAYD Pro transactions.

1. If the PAYD App is open on your mobile device, close the PAYD App now.
2. Determine your setup requirements:
   - If you need to pair a PAYD PIN Pad, go to step 3.
   - If you do not need to pair a PAYD PIN Pad (i.e., your PAYD PIN Pad is already paired with your mobile device), proceed to setup step 6 (page 16).
3. Follow one of the pairing options below:

   Pairing option 1:

   - If you want to pair a new PAYD PIN Pad (that has never been paired and initialized) with an Android mobile device that is not currently paired with a PAYD PIN Pad, proceed to *Pairing a new PAYD PIN Pad with your mobile device* (page 12).

   Pairing option 2:

   - If you want to pair a new PAYD PIN Pad (that has never been paired and initialized) with an Android mobile device that is currently paired with an initialized PAYD PIN Pad, proceed to *Pairing a replacement PAYD PIN Pad with your mobile device* (page 21).

   Pairing option 3:

   - If you want to pair an initialized PAYD PIN Pad with a different Android mobile device, proceed *to Pairing an initialized PAYD PIN Pad with a different mobile device* (page 18).

     Note: *The PAYD PIN Pad can be used to perform transactions with only one mobile device at a time.*

   Pairing option 4:

   - If you want to move an initialized PAYD PIN Pad to an Apple® iPad®, iPhone®, or iPod touch®, refer to the ***Using PAYD Pro for Apple iPad, iPhone, and iPod touch Guide*** (follow *Pairing option 3* on page 11 of that guide).

Pairing a new PAYD PIN Pad with your mobile device

1 Power on the new PAYD PIN Pad

a. Plug the small end of the USB charging cable into the micro-USB port on the new PAYD PIN Pad (see page 49).

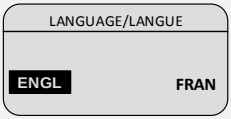
Important! Use the USB charging cable provided with the PAYD PIN Pad. Failure to do so may affect the operability of or cause damage to the PAYD PIN Pad.

b. Plug the other end of the charging cable into a powered USB port (e.g., on a computer).

Note: *Leave the charging cable connected to the PAYD PIN Pad for the remainder of the PAYD PIN Pad setup procedures.*

c. Wait while the PAYD PIN Pad beeps and powers on.

d. When the LANGUAGE/LANGUE screen displays, proceed to step 2 (*Configure the PAYD PIN Pad's default language*) on page 13.



2 Configure the PAYD PIN Pad's default language

a. On the LANGUAGE/LANGUE screen, press **F1** (ENGL). ***Note:*** *If the WELCOME/BONJOUR screen displays instead, press **F1** and **F4** in sequence, and go directly to step 2c of this procedure.*	LANGUAGE/LANGUE ENGL FRAN
b. When the PED SERIAL NUMBER screen displays press the green key to continue. ***Note:*** *The serial number (e.g., "I6012345") also represents the PAYD PIN Pad's terminal ID, which can also be found on a label affixed to the underside of the PAYD PIN Pad (see page 7).*	PED SERIAL NUMBER I6012345
c. When the BLUETOOTH PAIRING screen displays, proceed to step 3 (*Ready your mobile device for Bluetooth pairing*) below.	BLUETOOTH PAIRING PAIR ADMIN

3 Ready your mobile device for Bluetooth pairing

a. Power on the mobile device with which you want to pair the PAYD PIN Pad.
b. Ensure that Bluetooth is turned on, the mobile device is discoverable, and its Bluetooth settings screen is displayed. ***Note:*** *If the mobile device has ever been paired with a different PAYD PIN Pad in the past, ensure that the mobile device does not continue to retain the older PAYD PIN Pad's terminal ID in its Bluetooth memory (i.e., if necessary, unpair the older PAYD PIN Pad from the mobile device so that it forgets the PAYD PIN Pad's terminal ID).*
c. Set the mobile device down beside the PAYD PIN Pad.
d. Proceed to step 4 (*Pair the PAYD PIN Pad with your mobile device*) on page 14.

4 Pair the PAYD PIN Pad with your mobile device

a.	On this BLUETOOTH PAIRING screen, press **F1** (PAIR).	BLUETOOTH PAIRING PAIR ADMIN
b.	When this next BLUETOOTH PAIRING screen displays, press **F2** to scroll to **PAIR ANDROID**, and then press the green key to select it.	BLUETOOTH PAIRING PAIR IOS PAIR ANDROID
c.	When the WAITING FOR PAIRING...NAME: screen displays, go to the next step. ***Note:*** *The "I6012345" portion of the name is the PAYD PIN Pad's terminal ID.*	WAITING FOR PAIRING... NAME: iCMP-I6012345
d.	Make the mobile device search/scan for other devices with which to pair.	
e.	On the mobile device's Bluetooth settings screen, locate the PAYD PIN Pad's terminal ID (displays with prefix "iCMP-" as in "**iCMP -I6012345**"), and tap it.	
f.	Wait for a 6-digit passkey/code to be generated: ▪ On the mobile device, a Bluetooth pairing request with a 6-digit passkey/code will display. ▪ On the PAYD PIN Pad, the COMPARE KEY: screen with a 6-digit passkey will display.	
g.	If the passkey/code is the same on both the PAYD PIN Pad and the mobile device, tap **Pair** on the mobile device's Bluetooth pairing request.	
h.	On the PAYD PIN Pad (COMPARE KEY: screen), press **F1** (YES).	COMPARE KEY: 000000 YES NO

i.	When the TERMINAL WILL BE REBOOTED... screen displays (shown here), go to step 4j of this procedure. ▪ If you cannot complete the pairing, clear any error message displayed on the mobile device (e.g., "Pairing Unsuccessful" may be displayed), then press **F4** (NO) on the PAYD PIN Pad (COMPARE KEY: screen), and then repeat steps 4b to 4h of this procedure. ***Note:*** *If you are unable to pair the PAYD PIN Pad after making several attempts, proceed to* Bluetooth pairing in Legacy mode *(page* 25*).*	TERMINAL WILL BE REBOOTED...
j.	Wait while the PAYD PIN Pad reboots.	
k.	When the WELCOME/BONJOUR screen displays, proceed to step 5 (*Confirm that your mobile device is successfully paired with the PAYD PIN Pad*) below. ***Note:*** *The battery icon in the upper right corner on the screen may appear fuller than is shown here.*	WELCOME/BONJOUR

5 Confirm that your mobile device is successfully paired with the PAYD PIN Pad

a.	Ensure that the PAYD PIN Pad's 8-digit terminal ID (starts with prefix "iCMP" as in "iCMP-I6012345") is shown as "Paired" on your mobile device's Bluetooth settings screen. ***Note:*** *The terminal ID (e.g., "I6012345") can also be found on a label affixed to the underside of the PAYD PIN Pad (see page 7).*
b.	Proceed to step 6 (*Initialize the PAYD PIN Pad*) on page 16.

6 Initialize the PAYD PIN Pad

The PAYD PIN Pad must be successfully initialized from your mobile device before you can use it to perform PAYD Pro transactions. Follow the steps below to initialize the PAYD PIN Pad.

Note: *If the PAYD PIN Pad is already initialized, go to step 6k of this procedure.*

a. From your mobile device's home screen, tap the **PAYD** icon ( ) to launch the PAYD App.

- If the "Terms of Use" screen displays, read the terms, and tap **I Agree**.
- If at any time the PAYD App requests permission to access data from your mobile device (e.g., location, microphone, or contacts data), allow the PAYD App to access the data.
- If at any time the "Pinpad has been successfully connected" message displays, tap **OK**.

b. When the sign-in screen displays, sign into the PAYD App (see page 40).

c. In the PAYD App, start on the "Settings" screen.

Note: *If another screen is displayed, tap , and then tap **Settings**.*

d. Tap **Pinpad**.

- If **Connect Pinpad** displays, tap it.

e. Tap **Bluetooth** if it is not already selected.

f. Tap **Initialize Pinpad**.

Note: *If **Connect Pinpad** continues to display even after you have tapped it, see page 87 for troubleshooting.*

g.	When PLEASE WAIT displays on the PAYD PIN Pad, wait while it initializes. ***Note:*** *During this process, the PAYD App displays the message "Initializing Pinpad. This may take a few minutes".*	PLEASE WAIT
h.	When the PAYD App displays the message "Initialization was successful. Pinpad is ready to use", tap **OK**.	
i.	When the PAYD PIN Pad displays the WELCOME/BONJOUR screen, go to the next step. ***Note:*** *The BT icon displays in the upper right corner on the PAYD PIN Pad screen to indicate that Bluetooth connectivity is established.*	BT WELCOME/BONJOUR
j.	Tap ≡ to return to the main menu, and then tap **Signout**.	
k.	Proceed to step 7 (*Charge the PAYD PIN Pad's battery to full capacity*) below.	

7 Charge the PAYD PIN Pad's battery to full capacity

a. Leave the USB charging cable plugged into the PAYD PIN Pad and the external power source until the PAYD PIN Pad's battery is fully charged. (If the USB charging cable is not connected to the PAYD PIN Pad, connect it now.)

Note: *It may take up to 3 hours to fully charge the battery depending on its current charge status. Once the battery is fully charged, the icon in the upper right corner of the PAYD PIN Pad's screen displays solid black (*[redacted]*).*

Important! Use the USB charging cable provided to work with the PAYD PIN Pad. Failure to do so may affect the operability of or cause damage to the PAYD PIN Pad.

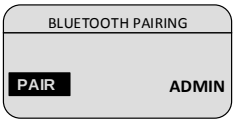
b. Once the battery is fully charged, proceed to *Ready to use the PAYD App?* (page 29).

Pairing an initialized PAYD PIN Pad with a different mobile device

1 Remove the initialized PAYD PIN Pad's terminal ID from your mobile device's Bluetooth memory
a. Open the Bluetooth settings screen on the mobile device with which the initialized PAYD PIN Pad is currently paired.
b. On the Bluetooth settings screen, locate the initialized PAYD PIN Pad's 8-digit terminal ID (displays with prefix "iCMP-" as in "iCMP-I6012345"). ***Note:*** *The terminal ID (e.g., "I6012345") can also be found on a label affixed to the underside of the PAYD PIN Pad (see page 7).*
c. Unpair the PAYD PIN Pad so that the mobile device forgets the PAYD PIN Pad's terminal ID.
d. Power off the mobile device, and set it aside.
e. Proceed to step 2 (*Reset the initialized PAYD PIN Pad to its factory defaults*) on page 19.

2 Reset the initialized PAYD PIN Pad to its factory defaults

a. If the initialized PAYD PIN Pad is not already powered on, press its power button (see page 49), and wait until the PAYD PIN Pad powers on.	
b. When the WELCOME/BONJOUR screen displays, press **F1** and **F4** in sequence.	WELCOME/BONJOUR
c. When this BLUETOOTH PAIRING screen displays, press **F4** (ADMIN).	BLUETOOTH PAIRING PAIR ADMIN
d. When this next BLUETOOTH PAIRING screen displays, press **F2** to scroll to **FACTORY DEFAULTS**, and then press the green key to select it.	BLUETOOTH PAIRING SECURITY MODE FACTORY DEFAULTS
e. When the TERMINAL WILL BE REBOOTED... screen displays, wait while the PAYD PIN Pad reboots.	TERMINAL WILL BE REBOOTED...
f. When the LANGUAGE/LANGUE screen displays, press **F1** (ENGL).	LANGUAGE/LANGUE ENGL FRAN
g. When the TERMINAL ID screen displays, press the green key to continue.	TERMINAL ID I6012345
h. When the PED SERIAL NUMBER screen displays, press the green key to continue.	PED SERIAL NUMBER I6012345

i. When this BLUETOOTH PAIRING screen displays, proceed to step 3 (*Ready your mobile device for Bluetooth pairing*) on page 13.	

Pairing a replacement PAYD PIN Pad with your mobile device

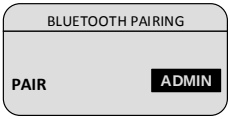
1 Remove the older PAYD PIN Pad's terminal ID from your mobile device's Bluetooth memory	
a.	Open the Bluetooth settings screen on the mobile device with which the older (initialized) PAYD PIN Pad is currently paired.
b.	On the Bluetooth settings screen, locate the older (initialized) PAYD PIN Pad's 8-digit terminal ID (displays with prefix "iCMP-" as in "iCMP-I6012345"). ***Note:*** *The terminal ID (e.g., "I6012345") can also be found on a label affixed to the underside of the PAYD PIN Pad (see page 7).*
c.	Unpair the PAYD PIN Pad so that the mobile device forgets the older PAYD PIN Pad's terminal ID.
d.	If the PAYD App is open and/or you are signed in, close the PAYD App.
e.	Set the mobile device aside.
f.	Proceed to step 2 (*Reset the older PAYD PIN Pad to its factory defaults*) on page 22.

2 Reset the older PAYD PIN Pad to its factory defaults

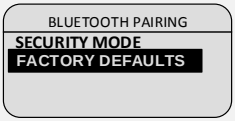
a. If the older PAYD PIN Pad is not already powered on, press its power button (see page 49) and wait until the PAYD PIN Pad powers on.

b. When the WELCOME/BONJOUR screen displays, press **F1** and **F4** in sequence.

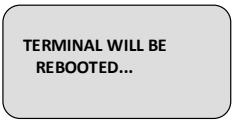
c. When this BLUETOOTH PAIRING screen displays, press **F4** (ADMIN).



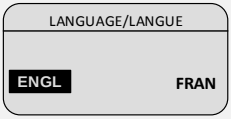
d. When this next BLUETOOTH PAIRING screen displays, press **F2** to scroll to **FACTORY DEFAULTS**, and then press the green key to select it.



e. When the TERMINAL WILL BE REBOOTED... screen displays, wait while the PAYD PIN Pad reboots.



f. When the LANGUAGE/LANGUE screen displays, go to the next step.



g. Simultaneously press and hold down both the yellow key and the key until the PAYD PIN Pad starts to power off.

Important! When this older PAYD PIN Pad is powered off completely, set it aside, and do not attempt to use it again.

h. Pair the new/replacement PAYD PIN Pad with your mobile device (proceed to *Pairing a new PAYD PIN Pad with your mobile device* on page 12).

Other PAYD PIN Pad settings

Changing an initialized PAYD PIN Pad's default language

1 Access the initialized PAYD PIN Pad's LANGUAGE/LANGUE screen

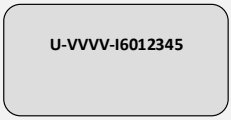
Note: *If the USB charging cable is connected to the PAYD PIN Pad, disconnect the cable before you continue.*

a. Simultaneously press and hold down both the yellow key and the key until the PAYD PIN Pad starts to power off, and then wait while it powers off completely.

b. Once the PAYD PIN Pad is powered off, press the power button (see page 49), and wait while the PAYD PIN Pad powers on.

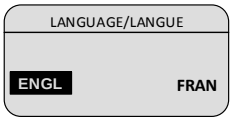
c. As soon as the version screen displays (shown here), press the red key, and then quickly press the green key.

Note: *The version screen displays for 10 seconds.*



d. When the LANGUAGE/LANGUE screen displays (shown here), go to step 1e of this procedure.

- If the WELCOME/BONJOUR screen displays, repeat steps 1a to 1c of this procedure.

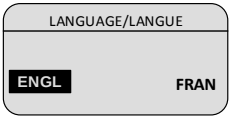


e. Proceed to step 2 (*Select a default display language for the PAYD PIN Pad*) on page 24.

2 Select a default display language for the PAYD PIN Pad

a. On the LANGUAGE/LANGUE screen, select a default display language:

- For English, press **F1** (ENGL).
- For French, press **F4** (FRAN).



b. When the next screen displays, simultaneously press and hold down both the yellow key and the key until the PAYD PIN Pad starts to power off, and then wait while it powers off completely.

c. Power on the PAYD PIN Pad when you are ready to use it to perform transactions.

Note: *The PAYD PIN Pad is now configured to display the new default language (you do not have to re-initialize the PAYD PIN Pad). If you also want to change the language of the PAYD App, see page 39.*

Bluetooth pairing in Legacy mode

If you are following the PAYD PIN Pad setup steps and have been unable to pair a PAYD PIN Pad with your mobile device, follow the steps below to pair the PAYD PIN Pad using Legacy mode.

1 Enable Legacy mode on the PAYD PIN Pad

a. On this BLUETOOTH PAIRING screen, press the red key once.	BLUETOOTH PAIRING PAIR IOS PAIR ANDROID
b. When this next BLUETOOTH PAIRING screen displays, press **F4** (ADMIN).	BLUETOOTH PAIRING PAIR ADMIN
c. When this next BLUETOOTH PAIRING screen displays, press the green key (SECURITY MODE).	BLUETOOTH PAIRING SECURITY MODE FACTORY DEFAULTS
d. When the SECURITY MODE screen displays, press **F1** (LEGACY).	SECURITY MODE LEGACY SSP
e. When the TERMINAL WILL BE REBOOTED... screen displays, wait while the PAYD PIN Pad reboots.	TERMINAL WILL BE REBOOTED...
f. When the LANGUAGE/LANGUE screen displays, press **F1** (ENGL).	LANGUAGE/LANGUE ENGL FRAN
g. If the TERMINAL ID screen displays, press the green key to continue.	TERMINAL ID I6012345

h. When the PED SERIAL NUMBER screen displays, press the green key to continue.	PED SERIAL NUMBER I6012345
i. When this BLUETOOTH PAIRING screen displays, proceed to step 2 (*Pair the PAYD PIN Pad with your mobile device using legacy mode*) on page 27.	BLUETOOTH PAIRING PAIR ADMIN

2 Pair the PAYD PIN Pad with your mobile device using legacy mode

a. On this BLUETOOTH PAIRING screen, press **F1** (PAIR).	BLUETOOTH PAIRING **PAIR** **ADMIN**
b. When this next BLUETOOTH PAIRING screen displays, press **F2** to scroll to **PAIR ANDROID**, and then press the green key to select it.	BLUETOOTH PAIRING PAIR IOS PAIR ANDROID
c. When the WAITING FOR PAIRING...NAME: screen displays, go to the next step. ***Note:*** *The "I6012345" portion of the name is the PAYD PIN Pad's terminal ID (which is also printed on a label affixed to the underside of the PAYD PIN Pad).*	WAITING FOR PAIRING... NAME: iCMP-I6012345
d. Make the mobile device search/scan for other devices with which to pair.	
e. On the mobile device's Bluetooth settings screen, locate the PAYD PIN Pad's terminal ID (displays with prefix "iCMP-" as in "**iCMP -I6012345**"), and tap it.	
f. When the mobile device prompts you to enter a PIN code, enter a 4-digit number of your choosing (e.g., 1234).	
g. On the PAYD PIN Pad, wait for the ENTER PIN CODE:_ screen to display, and then enter the same 4-digit number that you input on the mobile device, and press the green key.	ENTER PIN CODE:_

h. When the TERMINAL WILL BE REBOOTED... screen displays (shown here), go to step 2i of this procedure. ▪ If you cannot complete the pairing, clear any error message displayed on the mobile device (e.g., "Pairing Unsuccessful" may be displayed), and repeat steps 2b to 2g of this procedure.	TERMINAL WILL BE REBOOTED...
i. When the WELCOME/BONJOUR screen displays, proceed directly to step 5 (*Confirm that your mobile device is successfully paired with the PAYD PIN Pad*) on page 15. ***Note:*** *The battery icon in the upper right corner on the screen may appear fuller than is shown here.*	WELCOME/BONJOUR

Ready to use the PAYD App?

To learn about the PAYD App and some of its features, read the sections listed here:

- Configuring optional PAYD App settings, see pages 30 to 39.
- Signing in/signing out of the PAYD App, see pages 40 to 41.
- PAYD PIN Pad power management and card entry options, see pages 47 to 56.
- Performing transactions, see pages 57 to 70.
- Generating reports, see pages 76 to 80.

Optional features

Setting the transaction details level

Sets the optional transaction details (secondary transaction identifiers, customer ID and order ID) that you can enter during a transaction.

Note: *Even if optional transaction details are enabled, you may bypass entering data in the* ***Customer ID*** *and* ***Order ID*** *fields during a transaction. If you enter data in one or both of these fields during a transaction, you can subsequently retrieve the transaction by using one or more of the identifiers as search criteria (e.g., when generating a report and/or doing a Refund, Void, or Capture).*

1. In the PAYD App, start on the "Settings" screen.

   Note: *If another screen is displayed, tap* ≡ *to return to the main menu, and then tap* ***Settings****.*

2. Tap **Interface**.
3. Specify the optional transaction details to include by tapping one of:
   - **Quick Pay**: Excludes the customer ID and order ID.
   - **Minimal**: Includes only the customer ID.
   - **Full**: Includes the customer ID and order ID.
4. Tap ≡ to return to the main menu.

   Note: *To change this setting on a different mobile device, repeat these steps on the other device.*

Setting a default payment device

Sets a default payment device for transactions.

1. In the PAYD App, start on the "Settings" screen.

   Note: *If another screen is displayed, tap* ≡ *to return to the main menu, and then tap* ***Settings****.*

2. Tap **Interface**.

3. Specify the default payment device by tapping one of:

   - **Pinpad**: Sets "Pinpad" as default.
   - **Swipe/Keyed**: If the PAYD card reader is connected to your mobile device, sets "Swipe" as the default. If the PAYD card reader is not connected to your mobile device, sets "Keyed" as the default.
   - **Cash**: Sets "Cash" as the default.

4. Tap ≡ to return to the main menu.

   Note: *To change this setting on a different mobile device, repeat these steps on the other device.*

Enabling Pre-Authorizations

Enables the option to process Pre-Authorizations.

1. In the PAYD App, start on the "Settings" screen.

   Note: *If another screen is displayed, tap* ≡ *to return to the main menu, and then tap* ***Settings****.*

2. Tap **Interface**.

3. Tap (checkmark or unmark the box) **Display Preauth**:

   - With checkmark: Option to "Process as Preauth" always displays on the "Sale" screen (see page 60).
   - Without checkmark: Option to "Process as Preauth" does not display on the "Sale" screen.

4. Tap ≡ to return to the main menu.

   Note: *To enable/disable this feature on a different mobile device, repeat these steps on the other device.*

Enabling tip prompting

If enabled, tip prompts display during every debit/credit Sale transaction.

1. Ensure that the PAYD PIN Pad is powered on and ready (see page 57).
2. In the PAYD App, start on the "Settings" screen.

   Note: *If another screen is displayed, tap ≡ to return to the main menu, and then tap* ***Settings****.*

3. Tap **Tip**, and do one of the following:

   To enable tip prompting:

   a. Tap (checkmark the box) **Tip on Purchase**.

   b. When the "Tip settings have been successfully configured on the Pinpad" message displays, tap **OK**.

   c. Go to step 4.

   To disable tip prompting:

   a. Tap (unmark the box) **Tip on Purchase**.

   b. When the "Tip settings have been successfully configured on the Pinpad" message displays, tap **OK**.

   c. Go to step 5.

4. Configure the three tip percentages:

   Note: *Pre-set tip percentages are not supported when the PAYD PIN Pad is used as the card entry device.*

   To change one or more pre-set tip percentages:

   a. Enter a tip percentage in one or more "Quick Tip" fields.

   b. Tap **Save Tip Values**.

   c. When the "Success" message displays, tap **OK**.

   To bypass changing the pre-set tip percentages:

   a. Go directly to the next step.

5. Tap ≡ to return to the main menu.

   Note: *To enable/disable this feature or change this setting on a different mobile device, repeat these steps on the other device.*

Setting a tax rate

Sets a tax name and a percentage by which the tax will be auto-calculated during any Sale, Pre-Authorization, Refund, or Capture.

Note: *The tax will be calculated based on the original transaction amount excluding any tip (for information about tip prompting, see page 32).*

1. In the PAYD App, start on the "Settings" screen.

   Note: *If another screen is displayed, tap ≡ to return to the main menu, and then tap **Settings**.*

2. Tap **Tax**, and do one of the following:

   To enable a tax rate:

   a. Tap (checkmark the box) **Calculate Tax**.

      Note: *The option to calculate/add tax will display on all transaction screens except "Void". By default the tax box will always be checkmarked (selected) on a transaction screen, but you may unmark (deselect) the box if you do not want to add tax to the transaction.*

   b. In the **Tax Description** and **Tax Rate (%)** fields, enter the tax name and the tax percentage.

      Note: *This name will display on the transaction screen but may be truncated if longer than 12 characters.*

   c. Tap **Save Tax Rate**.

   d. When the "Success" message displays, tap **OK**.

   To disable a tax rate:

   a. Tap (unmark the box) **Calculate Tax**.

3. **Note:** The option to calculate/add tax will not display on any transaction screen.

4. Tap ≡ to return to the main menu.

   Note: *To enable/disable this feature or change this setting on a different mobile device, repeat these steps on the other device.*

Location-mapping transactions

The PAYD App can map the location of PAYD financial transactions performed from your mobile device if:

- The device is configured to use a location service;
- The device is configured to allow the PAYD App to access the device's location data;
- The transaction response is "APPROVED" or "DECLINED".

Note: *Your mobile device may prompt you to allow the PAYD App to access the device's location data. You must grant this access to use the location mapping feature. If you want to enable this feature on a different mobile device, repeat these steps on the other device.*

Viewing a location map

To view the mapped location of a PAYD transaction, you must access the transaction's "Details" screen (see page 78) from any mobile device.

Setting a quick PIN for sign-in

Sign into the PAYD App with a 4-digit PIN.

1. In the PAYD App, start on the "Settings" screen.

   Note: *If another screen is displayed, tap ≡ to return to the main menu, and then tap* ***Settings****.*

2. Tap **Quick Login**.

3. Do one of the following:

   To enable a quick PIN:

   a. Tap (checkmark the box) **PIN Login**.

   b. In the **Please enter PIN** field, enter a 4-digit PIN.

   c. In the **Please confirm PIN** field, re-enter the same 4-digit PIN.

   d. When the "Success" message displays, tap **OK**.

   Note: *You will be prompted to enter a PIN when you next attempt to sign in (see page 42).*

   To change a quick PIN:

   a. Disable the current quick PIN (see *To disable a quick PIN* below).

   b. Enable a new quick PIN (see *To enable a quick PIN* above).

   To disable a quick PIN:

   a. Tap (unmark the box) **PIN Login**.

   b. When the "Success" message displays, tap **OK**.

4. Tap ≡ to return to the main menu.

   Note: *To enable/disable this feature or change this setting on a different mobile device, repeat these steps on the other device.*

Pre-filling the employee ID/store ID at sign-in

Pre-fills the PAYD full sign-in fields with your PAYD employee ID and PAYD store ID credentials whenever you launch the PAYD App (see page 40).

1. In the PAYD App, start on the "Settings" screen.

   Note: *If another screen is displayed, tap ≡ to return to the main menu, and then tap* ***Settings****.*

2. Tap **Login Credentials**.
3. Fill in the field(s) that you want to have pre-filled whenever you launch the PAYD App.

   Note: *To disable this feature, leave the field(s) blank.*

4. Tap **Save Login Credentials**.
5. When the "Success" message displays, tap **OK**.
6. Tap ≡ to return to the main menu.

   Note: *To enable/disable this feature or change this setting on a different mobile device, repeat these steps on the other device.*

Setting an email address to receive exported reports

Sets an email address to which transaction reports will be sent when you export report results to a comma-separated values (CSV) file (see page 76).

Note: *Results include the following transaction data (CSV fields appear in quotations): Store ID ("store id"), Terminal (PAYD PIN Pad) ID ("terminal"), Batch Number ("batch"), Date and Time ("date time"), Transaction Type ("type"), Order ID ("order no"), Customer ID ("cust id"), Amount ("amount"), Card Type ("card type"), Account Number ("card"), Result ("result"), Auth Code ("auth code"), Response Code ("response code"), Clerk ID ("clerk"), and Customer Email ("email").*

1. In the PAYD App, start on the "Settings" screen.

   Note: *If another screen is displayed, tap ≡ to return to the main menu, and then tap* ***Settings****.*

2. Tap **Export to CSV**.
3. In the **Export Email Address** field, enter the email address to which the CSV-format text file will be sent when you export your report results.

   Note: *To disable this feature, leave the field blank.*

4. Tap **Save Export Email**.
5. When the "Success" message displays, tap **OK**.
6. Tap ≡ to return to the main menu.

   Note: *To enable/disable this feature or change this setting on a different mobile device, repeat these steps on the other device.*

Auto-sending transaction receipts to a set merchant address

Sets an email address to which the PAYD App will automatically email PAYD transaction receipts. The PAYD App emails receipts only for "APPROVED" or "DECLINED" responses.

Note: *Receipts will be emailed to the set address in the background (i.e., the PAYD App will give no visual indication that an email has been sent following a transaction).*

1. In the PAYD App, start on the "Settings" screen.

   Note: *If another screen is displayed, tap ≡ to return to the main menu, and then tap **Settings**.*

2. Tap **Merchant Email**.
3. In the **Merchant Email Address** field, enter the email address to which a receipt will automatically be sent following a transaction performed from this mobile device.

   Note: *To disable this feature, leave the field blank.*

4. Tap **Save Merchant Email**.
5. When the "Success" message displays, tap **OK**.
6. Tap ≡ to return to the main menu.

   Note: *To enable/disable this feature or change this setting on a different mobile device, repeat these steps on the other device.*

Setting a default PAYD App screen

Sets a default screen ("Sale", "Reports", "Totals", or "Settings") to open whenever you sign into the PAYD App.

Note: *"Sale" is pre-set as the default screen.*

1. In the PAYD App, start on the main menu.

   Note: *If another screen is displayed, tap ≡ to return to the main menu.*

2. Press and hold down the main menu item (**Sale**, **Reports**, **Totals**, or **Settings**) that you want to set as your default screen.

   Note: *"Help" and "Sign Out" cannot be set as default screens.*

3. Release your hold on the menu item when a confirmation message displays indicating that the default screen has been set.

   Note: *Whenever you sign in with your credentials, the default screen that you have just set will display. To change this setting on a different mobile device, repeat these steps on the other device.*

Setting the default language of the PAYD App

The language of the PAYD App is determined by the language set for your mobile device.

Note: *If your device is configured for a language other than English or French, the PAYD App defaults to English. To change the PAYD PIN Pad's default language, see page 23.*

Determining the PAYD App's version number

1. In the PAYD App, start on the "Settings" screen.

   Note: *If another screen is displayed, tap ≡ and then tap **Settings**.*

2. The version number of the PAYD App displays near the bottom of the "Settings" screen (displays as "PAYD Mobile App v#.##").

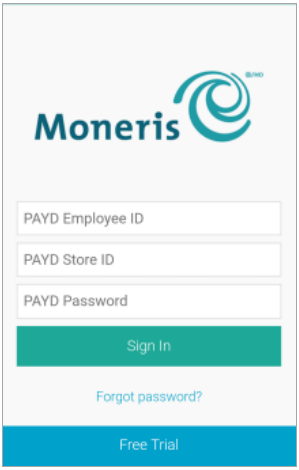
Signing into/Signing out of the PAYD App

Signing in with full credentials

Follow these steps to sign in using full credentials.

Note: *If you have configured a quick PIN, see page 42.*

1. From your mobile device's home screen, tap the **PAYD** icon ( ) to launch the PAYD App.
2. Wait for the PAYD full sign-in screen to display:



3. Enter your credentials in the sign-in fields (**PAYD Employee ID**, **PAYD Store ID**, and **PAYD Password**).

   Note: *Some fields may be pre-filled (see page 36).*

4. Tap **Sign In**.

- If at any time the PAYD App requests permission to access data from your mobile device (e.g., location, microphone, or contacts data), allow the PAYD App to access the data.
- If the PAYD App prompts you to change your password, enter a new password, and tap **Save Password**.

  Note: *The password must be from 8 to 16 characters in length and include at least 1 letter, 1 number, and 1 special character. Accents are not supported. Password fields are case sensitive. You will be prompted to update your password every 90 days (your new password must be different than your last 4 passwords).*

- If the PAYD App prompts you to select and answer one or more security questions, see page 46.
- If the PAYD App prompts you to answer one security question, enter the answer, and tap **Next**.

5. Your default PAYD App screen displays once you are signed in.

   Note: *To change the default screen, see page 39.*

Signing out

To ensure that unauthorized PAYD transactions cannot be performed from your mobile device, sign out of the PAYD App when you are not using it.

1. In the PAYD App, start on the main menu.

   Note: *If another screen is displayed, tap ≡ to return to the main menu.*

2. Tap **Sign Out**.
3. When the PAYD App sign-in screen displays, it means you are signed out.

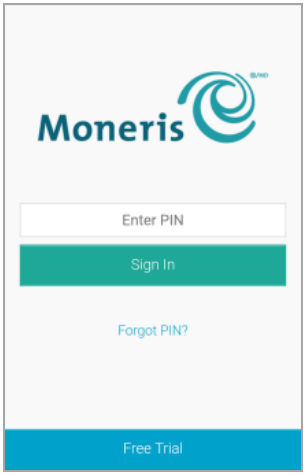
   Note: *Depending on how you have configured the PAYD App, the full sign-in screen may display (see page 40) or the "Enter PIN" sign-in screen may display (see page 42).*

Signing in with a quick PIN

Follow these steps to sign in using a 4-digit quick PIN.

Note: *To enable this method of signing in, see page 35.*

1. From your mobile device's home screen, tap the **PAYD** icon ( ) to launch the PAYD App.
2. Wait for the "Enter PIN" sign-in screen to display:



3. In the **Enter PIN** field, enter your 4-digit quick PIN.

   Note: *You will automatically be signed in once you enter the last digit; otherwise, tap **Sign In**.*

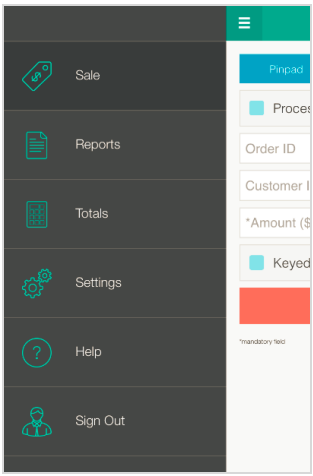
4. Your default PAYD App screen displays once you are signed in.

   Note: *To change the default screen, see page 39.*

The PAYD App main menu

From this menu, you can access any transaction, report, or setting in the PAYD App.

- To return to this menu from any other screen, simply tap ≡ at the top of the screen.



Need to reset your sign-in password?

1. From your mobile device's home screen, tap the **PAYD** icon ( ) to launch the PAYD App.
2. On the PAYD full sign-in screen, tap **Forgot Password?**.
3. On the "Password Reset" screen, enter your employee ID and store ID, and tap **Next**.
4. Answer the security question, and tap **Next**.
5. When the "Success" message displays, tap **OK**.
6. Wait for a "Password reset" email (from getpayd.com) to be sent to the address that is registered to your PAYD user account.
7. Open the email, and tap the **Reset my password** link.
8. Wait for the "New Password" page to display on PAYD Administration.
9. In the **New password** and **Confirm password** fields, enter a new password, and tap **Save**.

   Note: *The password must be from 8 to 16 characters in length and include at least 1 letter, 1 number, and 1 special character. Accents are not supported. Password fields are case sensitive. You will be prompted to update your password every 90 days (your new password must be different than your last 4 passwords).*

10. When the "Password reset successfully" message displays on PAYD Administration's sign-in screen, it means your password has been reset.

    Note: *You must enter the new password when signing into the PAYD App/PAYD Administration.*

Can't remember your quick PIN?

1. From your device's home screen, tap the **PAYD** icon ( ) to launch the PAYD App.
2. When the PAYD "Enter PIN" sign-in screen displays, tap **Forgot PIN?**.
3. When the PAYD full sign-in screen displays, enter your full sign-in credentials (see page 40).

   Note: *If you have also forgotten your sign-in password, see page 44.*

4. Once you are signed in, you may change or disable your quick PIN (see page 35).

Configuring your security question/answer

The question/answer that you configure will be used to identify you in the event that you forget your password. (Periodically you may be prompted to answer the question when signing in.)

Note: *The information that you enter here also applies to PAYD Administration.*

1. Select a question from the **Choose security question** drop-down list, and enter an answer in the **Security Answer** field.

   Note: *If there is more than one drop-down list, select the additional questions, and then enter answers in the corresponding fields.*

2. If the **Email Address** field displays, enter your email address.

   Note: *If you ever need to have your password reset, a password reset link will be sent to this address.*

3. Tap **Save Security Question** (or **Save Security Questions**).

4. When the "Sale" screen displays, do one of the following:

   - If the PAYD PIN Pad with which you have paired your mobile device has not yet been initialized, proceed to setup step 6 (page 16); begin at step c.
   - If the PAYD PIN Pad with which you have paired your mobile device is already initialized, proceed to *Ready to use the PAYD App?* (page 29).

The PAYD PIN Pad

The customer uses the PAYD PIN Pad to input data when prompted to do so during a transaction.

- For names and descriptions of labelled areas on the PAYD PIN Pad (shown below), see pages 48 to 49.

To see the location of the labelled areas on the PAYD PIN Pad, see page 47.

Label	Description
1	**Function keys** ▪ Select the option displayed above the key (**F1**, **F2**, **F3**, and **F4**).
2	**Alpha-Numeric keys**
3	**Cancel key** (red) ▪ Clear message displayed on PAYD PIN Pad. ▪ Cancel transaction.
4	**Correct key** (yellow) ▪ Clear data entered on PAYD PIN Pad.
5	**OK / Enter key** (green) ▪ Submit data, or acknowledge a message on PAYD PIN Pad.
6	**Chip Reader** (slot at the bottom of PAYD PIN Pad) ▪ See page 53.
7	**Contactless Reader Indicator** (green flashing light) ▪ No lights flash: PAYD PIN Pad is in Sleep mode (see page 52) or off. ▪ One light flashes: Reader is fully powered on. ▪ Four lights flash: Reader capturing card data (see page 55).
8	**Display Screen/Contactless Reader** ▪ WELCOME/BONJOUR screen displays when PAYD PIN Pad idle.
9	**Magnetic Stripe Reader** (slot along the top of PAYD PIN Pad) ▪ See page 54.
10	**Micro-USB port** (located on right side) ▪ Plug USB charging cable here.

To see the location of the labelled areas on the PAYD PIN Pad, see page 47.

Label	Description
11	**Power button** (located on right side) ▪ For power functions, see pages 51 to 52. ▪ For reset function, press and hold down until the rebooting starts.

Bluetooth connectivity indicator

The Bluetooth connectivity icon (shown below) displays on the WELCOME/BONJOUR screen in the upper right corner of the screen.

Icon	Description
BT	Displays when your mobile device is paired with the PAYD PIN Pad, and: ▪ Bluetooth is enabled on your mobile device; ▪ The PAYD App is open on your mobile device; ▪ The PAYD PIN Pad is within Bluetooth communication range of your mobile device.

Battery charge indicator

The battery charge icons (shown below) display on WELCOME/BONJOUR screen in the upper right corner of the screen.

Battery charging

Icon	Description
	The battery is charging. Charging occurs when the PAYD PIN Pad is connected to an external power source via the USB charging cable and the battery is not already fully charged.

Battery charge level

Icon	Description
	100% or less.
	75% or less.
	50% or less. (Contactless reader may not read card.)
	25% or less. (PAYD PIN Pad may power off if it is not connected to an external power source.)

Maintaining battery charge

- To maintain battery charge while the PAYD PIN Pad is powered on, connect it to an external power source via the USB charging cable provided with the PAYD PIN Pad.
- Power off the PAYD PIN Pad when it is not in use or being charged (see page 52).

Powering on the PAYD PIN Pad

The WELCOME/BONJOUR screen displays when the PAYD PIN Pad is fully powered on (see also *Sleep mode* on page 52).

1. To power on the PAYD PIN Pad, do one of the following:

   With the USB charging cable:

   a. Plug the small end of the USB charging cable into the micro-USB port on the PAYD PIN Pad (see page 48).

   b. Plug the other end of the cable into a powered USB port.

   Without the USB charging cable:

   a. Press the power button on the PAYD PIN Pad (see page 49).

      Note: *The battery must be sufficiently charged (see page 50).*

2. Wait while the PAYD PIN Pad beeps and powers on to the WELCOME/BONJOUR screen.

Sleep mode

The PAYD PIN Pad will go into Sleep mode (the hardware manufacturer name/logo will display) and then power off after 10 minutes if the PAYD PIN Pad is not connected to an external power source or otherwise being operated under the conditions listed in *Using the PAYD PIN Pad while it is in Sleep mode* below.

Using the PAYD PIN Pad while it is in Sleep mode

If you are ready to perform a debit/credit transaction while the PAYD PIN Pad is in Sleep mode, simply initiate the transaction in the PAYD App, enter the required data, and tap **Process Transaction**. The PAYD PIN Pad will automatically "wake" to the WELCOME/BONJOUR screen and then display the appropriate card entry prompt if:

- The PAYD PIN Pad is within communication (Bluetooth) range of the mobile device with which it is paired.
- The screen saver is not active on the mobile device with which the PAYD PIN Pad is paired.
- The PAYD PIN Pad's battery is sufficiently charged (see page 50).

Exiting Sleep mode

1. To exit Sleep mode, press the power button on the PAYD PIN Pad (see page 49), and then wait for the WELCOME/BONJOUR screen to display.

Powering off the PAYD PIN Pad

1. Disconnect the USB charging cable from the PAYD PIN Pad if it is connected.
2. Ensure the WELCOME/BONJOUR screen is displayed.

   Note: *If the hardware manufacturer name/logo is displayed instead, see* Exiting Sleep *mode above.*

3. Simultaneously press and hold down both the yellow key and the key until the PAYD PIN Pad starts to power off, and then wait while it powers off completely (the screen is blank when the PAYD PIN Pad is powered off).

Card entry options

Insert: chip cards

1. The PAYD PIN Pad displays SWIPE OR INSERT CARD or SWIPE, TAP OR INSERT CARD.
2. The customer inserts their card into the PAYD PIN Pad's chip reader.

   Note: *Unless the PAYD PIN Pad prompts otherwise, the card should not be swiped even if it has a magnetic stripe.*

3. The customer may be prompted to enter data, including a PIN.
4. The customer leaves the chip card inserted until REMOVE CARD displays on the PAYD PIN Pad.

   Tip for proper card insertion:

   Hold the PAYD PIN Pad with one hand, and insert the card in the chip reader with the other hand (this will prevent the PAYD PIN Pad's contactless reader from inadvertently reading the card data as a contactless transaction).

Swipe: magnetic stripe cards

Note: *If the card has a chip, it must be inserted (see page 53).*

1. The PAYD PIN Pad displays SWIPE OR INSERT CARD or SWIPE, TAP OR INSERT CARD.
2. You or the customer swipes their card on the PAYD PIN Pad's magnetic stripe reader.

   Note: *If the card is a credit card, you should swipe the card.*

   - If the card is a debit card, the customer will be prompted to enter a PIN.
3. You may be prompted to capture the customer's signature on your mobile device.

   Tip for proper card swipe:

   Hold the PAYD PIN Pad with one hand, and swipe the card in the magnetic stripe reader with the other hand (this will prevent the PAYD PIN Pad's internal contactless reader from inadvertently reading the card data as a contactless transaction).

Wave/tap: contactless cards *

1. The PAYD PIN Pad to displays SWIPE, TAP OR INSERT CARD.
2. The customer taps/waves their card over the PAYD PIN Pad's display screen:

   - The PAYD PIN Pad's battery charge level should be at least 50% (see page 50) to ensure a successful tap.
   - Only Sales and Refunds can be performed as contactless transactions.
   - The customer will not be prompted for a PIN.
   - The transaction amount must be equal to or less than the card's maximum Contactless Dollar Value (see below).
3. The PAYD PIN Pad beeps and four green lights flash when the contactless reader is reading the card data.
4. You may be prompted to capture the customer's signature.

* In this guide, the term "contactless card" refers to a contactless-enabled card (supported brands include Visa®, Mastercard®, American Express®, Discover®, and Interac®) or other items such as a key fob, mobile tag, or mobile device (e.g., a smartphone, tablet, or smartwatch; the cardholder is responsible for any related software on their mobile device including downloading any required apps and loading their card information into their digital wallet).

Maximum Contactless Dollar Value (CDV)

To determine the maximum CDV for a card type, contact us.

- **Credit cards:** If a credit card is tapped for an amount that exceeds its maximum CDV, the PAYD PIN Pad will display CONTACTLESS TRANSACTION LIMIT EXCEEDED (see message on page 92).
- **Debit cards:** If a debit card is tapped for an amount that exceeds its maximum CDV, the PAYD PIN Pad will display "MUST INSERT CARD" (see message on page 92).

Tips for proper card tap/wave:

- The card must be within 0.5 in. (1.3 cm) of the PAYD PIN Pad's display screen, but it does not have to touch it.
- The card must be tapped or waved by itself. It should not be waved while in a wallet with other cards.

Manual card entry on the PAYD PIN Pad

If all available card entry methods fail, you may manually enter the card number for credit cards and some chip debit cards.

1. In the PAYD App, initiate a Sale (or Pre-Authorization).
2. For detailed transaction steps to a Sale, see page 58 (for a Pre-Authorization, see page 60).
3. On the "Sale" screen, tap (checkmark the box) **Keyed entry on pinpad**.

   Note: *If you are unable to use the PAYD PIN Pad to capture the card data, try using the PAYD card reader (see page 95).*

Transactions

General guidelines for transactions

1. Keep the PAYD PIN Pad and your mobile device in close proximity to each other.
2. Do not attempt to perform transactions near strong sources of electromagnetic interference (see page 97).
3. Before you perform a transaction, confirm the operational status of the PAYD PIN Pad:
   - It must be powered on (see page 51);
   - It must display WELCOME/BONJOUR and BT (see page 49), or it must display the hardware manufacturer name/logo;
   - It must be sufficiently charged (see page 50).
4. If the status of the PAYD PIN Pad's connection with the PAYD App/mobile device changes while the PAYD App is open, the PAYD App will display a notification:
   - If "Pinpad has been successfully connected" displays, tap **OK**, and continue the transaction.
   - If "Pinpad has been disconnected" displays, tap **OK** (see page 83 for troubleshooting).
5. A transaction is complete when the PAYD App displays an "APPROVED" or "DECLINED" response.

Sale with debit/credit card

Debit or credit card sale of goods and services.

1. Ensure that the PAYD PIN Pad is powered on and ready (see page 57).
2. In the PAYD App, start on the "Sale" screen.

   Note: *If another screen is displayed, tap* ≡ *to return to the main menu, and then tap* ***Sale****.*

3. Tap **Pinpad**.
   - If the **Customer ID** and **Order ID** fields display and you want to track the transaction with your own identifier(s), enter the required data in one or both fields; otherwise, leave these fields blank to bypass entering any identifier.

     Note: *If you enter your own order ID, it must be unique. If you don't enter your own order ID, it will be generated automatically.*

4. In the **Amount ($)** field, enter the Sale amount (#.##).
   - If the tax **AA% ($)** field/box displays and is checkmarked, the tax that will be added displays in the field while the total transaction amount (including the tax) displays in the **Total ($)** field.

     Note: *If you do not want to add the tax to this transaction, tap (unmark) the tax* ***AA% ($)*** *box.*

5. Use the PAYD PIN Pad to capture the card data:
   - If you want the card to be inserted, tapped, or swiped on the PAYD PIN Pad, go to step 6.
   - If you need to manually enter the card data on the PAYD PIN Pad, see page 61.

6. Tap **Process Transaction**.
7. When "Follow prompts on pinpad" displays, do one of the following:
   - If tip prompting is disabled, see page 62.
   - If tip prompting is enabled, see page 64.

Sale with cash

Cash sale of goods and services.

1. In the PAYD App, start on the "Sale" screen.

   Note: *If another screen is displayed, tap* ≡ *to return to the main menu, and then tap* ***Sale****.*

2. Tap **Cash.**

   - If the **Customer ID** and **Order ID** fields display and you want to track the transaction with your own identifier(s), enter the required data in one or both fields; otherwise, leave these fields blank to bypass entering any identifier.

     Note: *If you enter your own order ID, it must be unique. If you don't enter your own order ID, it will be generated automatically.*

3. In the **Amount ($)** field, enter the Sale amount (#.##).

   - If the tax **AA% ($)** field/box displays and is checkmarked, the tax that will be added displays in the field while the total transaction amount (including the tax) displays in the **Total ($)** field.

     Note: *If you do not want to add the tax to this transaction, tap (unmark) the tax* ***AA% ($)*** *box.*

4. In the **Amount Tendered ($)** field, enter the amount tendered.

   Note: *The* ***Change Due ($)*** *field will automatically display the amount owed to the customer.*

5. Tap **Process Transaction**.

6. When the PAYD App displays the "APPROVED" response, the transaction is complete:

   - To email a transaction receipt, see page 74.

     Note: *If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).*

   - To send an SMS text message notification, see page 75.

7. Tap ≡ to return to the main menu.

Pre-Authorization with credit card

Authorization of an amount on a credit card if the final transaction amount is unknown.

Important! To receive funds, you must perform a Capture (see page 70).

1. Ensure that the PAYD PIN Pad is powered on and ready (see page 57).
2. In the PAYD App, start on the "Sale" screen.

   Note: *If another screen is displayed, tap* ≡ *to return to the main menu, and then tap* ***Sale****.*

3. Tap (checkmark the box) **Process as Preauth**.
4. Tap **Pinpad**.
5. When "Pinpad has successfully connected" displays, tap **OK**.
   - If the **Customer ID** and **Order ID** fields display and you want to track the transaction with your own identifier(s), enter the required data in one or both fields; otherwise, leave these fields blank to bypass entering any identifier.

     Note: *If you enter your own order ID, it must be unique. If you don't enter your own order ID, it will be generated automatically.*

6. In the **Amount ($)** field, enter the Pre-Authorization amount (#.##).
   - If the tax **AA% ($)** field/box displays and is checkmarked, the tax that will be added displays in the field while the total transaction amount (including the tax) displays in the **Total ($)** field.

     Note: *If you do not want to add the tax to this transaction, tap (unmark) the tax* ***AA% ($)*** *box.*

7. Use the PAYD PIN Pad to capture the card data:
   - If you want the card to be inserted or swiped on the PAYD PIN Pad, go to step 8.
   - If you need to manually enter the card data on the PAYD PIN Pad, see page 61.
8. Tap **Process Transaction**.
9. When "Follow prompts on pinpad" displays, see page 62.

Manually entering card data on the PAYD PIN Pad

In the PAYD App, ensure that you have entered the transaction amount, selected/added the sales tax if enabled, and entered any optional tracking identifiers (customer ID and/or order ID) before you follow the steps below.

1. Tap (checkmark the box) **Keyed entry on pinpad**.
2. Tap **Process Transaction**.
3. When "Follow prompts on pinpad" displays, go to the next step.
   - If PURCHASE $0.00-OK? displays on the PAYD PIN Pad, see page 64.
4. Wait for ENTER CARD # to display on the PAYD PIN Pad.
5. On the PAYD PIN Pad, key in the card number, and press the green key.
6. When EXPIRY DATE MMYY displays on the PAYD PIN Pad, key in the card expiry date (MMYY), and press the green key.
7. Wait while the transaction is processed.
   - If the PAYD App displays the "Customer Signature" screen, capture the customer's signature on your mobile device (see page 73).
8. When the PAYD App displays the "APPROVED" or "DECLINED" response, the transaction is complete:
   - To email a transaction receipt, see page 74.

     Note: *If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).*
   - To send an SMS text message notification, see page 75.
9. Tap to return to the main menu.

Customer prompts on the PAYD PIN Pad

When the PAYD App displays "Follow prompts on pinpad", do the following:

1. Hand the PAYD PIN Pad to the customer.
2. The customer responds to any prompt that displays on the PAYD PIN Pad.

   Note: *Potential prompts (and the actions to take for each) are listed in order of appearance in the table below. Only some of the listed prompts will display for any one transaction.*

Prompt	Customer action
SWIPE, TAP OR INSERT CARD or **SWIPE OR INSERT CARD**	Enters their card on the PAYD PIN Pad (see pages 53 to 55 for options).
SELECT LANGUAGE **ENGL FRAN**	▪ For English prompts, presses **F1** (ENGL). ▪ For French prompts: Presses **F4** (FRAN).
SELECT **<Application name>** **YES NO**	▪ To select the displayed application, presses **F1** (YES). ▪ To view the next available application, presses **F4** (NO).
<Application name> **-OK?** **YES NO**	Presses **F1** (YES) to use the displayed application.
I PRE-AUTHORIZE UP TO **$0.00-OK?**	Presses the green key to confirm the displayed Pre-Authorization amount.
<TRANSACTION NAME> **$0.00-OK?**	Presses the green key to confirm the displayed amount.

This table continues on the next page...

Prompt	Customer action
SELECT ACCOUNT **CHQ SAV**	▪ For chequing account, presses **F1** (CHQ). ▪ For savings account, presses **F4** (SAV).
ENTER PIN & OK	Keys in their Personal Identification Number (PIN) and presses the green key.
PLEASE WAIT	Waits while the transaction is processed.
APPROVED **THANK YOU** **REMOVE CARD**	Removes their card from chip reader. ***Note:*** *The PAYD PIN Pad beeps until the card is removed.*
APPROVED **THANK YOU** **OBTAIN CARD**	Retrieves their card.
WELCOME/BONJOUR	Returns the PAYD PIN Pad to you (go to step 3).

3. Retrieve the PAYD PIN Pad from the customer.

   Note: *If the WELCOME/BONJOUR screen is not already displayed on the PAYD PIN Pad, press the red key until it does.*

   - If the PAYD App displays the "Customer Signature" screen, capture the customer's signature on your mobile device (see page 73).

4. When the PAYD App displays the "APPROVED" or "DECLINED" response, the transaction is complete:

   - To email a transaction receipt, see page 74.

     Note: *If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).*

   - To send an SMS text message notification, see page 75.

5. Tap to return to the main menu.

Customer prompts on the PAYD PIN Pad (tip prompting enabled)

When PURCHASE $0.00-OK? displays on the PAYD PIN Pad during a Sale transaction, do the following:

1. Hand the PAYD PIN Pad to the customer.
2. The customer responds to any prompt that displays on the PAYD PIN Pad.

   Note: *Potential prompts (and the actions to take for each) are listed in order of appearance in the table below.*

Prompt	Customer action
PURCHASE $0.00-OK?	Presses the green key to confirm the displayed amount.
ENTER TIP AMOUNT $0.00	▪ To add a tip, keys in an amount and presses the green key. ▪ To bypass adding a tip, presses the green key without keying in an amount.
PURCHASE $0.00-OK?	Presses the green key to confirm the displayed amount (go to step 3). ***Note:*** *If the customer wants to change the tip amount, they press the yellow key once, and then they rekey the tip amount when prompted.*

3. Do one of the following:
   - If SWIPE, TAP OR INSERT CARD displays on the PAYD PIN Pad, continue on page 62; begin at step 2.
   - If ENTER CARD # displays on the PAYD PIN Pad, the customer returns the PAYD PIN Pad to you (continue on page 61; begin at step 5).

Customer prompts in the PAYD App

When the PAYD App displays "Please specify a tip amount" during a Sale transaction, do the following:

1. Hand your mobile device to the customer.
2. The customer does one of the following:

   To add a default tip percentage:

   a. The customer taps one of the three displayed percentages.

   To add a different tip as an amount or percentage:

   a. The customer taps **Custom Tip**.

   b. The customer chooses a tip type:

      - To add a percentage-based tip, they tap **%**.
      - To add a dollar-amount tip, they tap **$**.

   c. In the **Please specify tip** field, the customer enters a value (percentage or dollar amount) and taps **OK**.

   To bypass adding a tip:

   a. The customer taps **No Tip** (go directly to step 4).

3. When "Please confirm totals" displays, the customer confirms the displayed totals and taps **OK**.

   Note: *If the customer wants to change the tip amount, they tap* ***Back****, and then they re-enter the tip when prompted (see* To add a different tip as an amount or percentage *above; begin at step b).*

4. When "Processing Transaction" or "Please swipe card" displays, retrieve your mobile device from the customer.

   - If "Please swipe card" displays, swipe the card on the connected PAYD card reader.
   - If the "Customer Signature" screen displays, capture the customer's signature on your mobile device (see page 73).

5. When the PAYD App displays the "APPROVED" or "DECLINED" response, the transaction is complete:

- To email a transaction receipt, see page 74.

  Note: *If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).*

- To send an SMS text message notification, see page 75.

6. Tap ≡ to return to the main menu.

Voiding/refunding a transaction

Reverses a debit/credit or cash transaction.

Note: *If you want to reverse a debit/credit transaction on the same day it was originally processed, you must do a Void for the full amount.*

If you want to reverse a debit/credit transaction processed on a different day, you must do a Refund. Debit transactions must be refunded for the full amount. Credit transactions can be refunded for a full or partial amount.

Cash transactions are always reversed (refunded) for the full amount regardless of the date on which the original transaction was processed.

1. Ensure that the PAYD PIN Pad is powered on and ready (see page 57).
2. In the PAYD App, start on the "Reports" screen.

   Note: *If another screen is displayed, tap* ≡ *to return to the main menu, and then tap* ***Reports****.*

3. Do one of the following:

   To display the last 10 transactions processed today:

   a. Leave all search fields blank, and go directly to step 4.

   To narrow the scope of your search:

   a. Select one or more of the following criteria:

      Note: *The original transaction receipt includes the transaction identifiers submitted with the original transaction.*

      - Date: To retrieve transactions processed within a date range other than today: Tap the **Today** drop-down list, and select a date range from the list; otherwise, skip this step to retrieve only transactions processed today.
      - Order ID: Enter the ID in the **Order ID** field (a full or partial ID may be entered).
      - Customer ID: Enter the ID in the **Customer ID** field (a full or partial ID may be entered).
      - Amount: Enter the amount in the **Amount ($)** field.

   b. Tap **Sort by**, and select a sort order (amount, customer ID, date, order ID, card type, or transaction type) from the drop-down list.

4. Tap **Search Transactions**, and wait for a transaction list to display.
   - To display the next 10 transactions if applicable, tap **More** (to maximum of 300).
5. Tap the transaction that you want to reverse.
6. When the transaction "Details" screen displays, confirm this is the transaction that you want to reverse (see page 78), and then:

   Note: *If you do not want to reverse this transaction, tap* ‹ *(repeat step 5).*

   To do a Void:

   a. Tap **Void this transaction**.

   To do a Refund:

   a. Tap **Refund this transaction**.

   b. In the **Refund Amount ($)** field, enter the Refund amount.
      - If the tax **AA% ($)** field/box displays and is checkmarked, the tax that will be added displays in the field while the total transaction amount (with tax) displays in the **Total ($)** field.

        Note: *If you do not want to add the tax to this transaction, tap (unmark) the tax **AA% ($)** box.*
7. Tap **Process Transaction**.
   - If the PAYD App displays "Follow prompts on pinpad", do one of the following:
     - Hand the PAYD PIN Pad to the customer (see page 62).
     - Manually enter the card data on the PIN Pad yourself (continue on page 61, and begin at step 4).
8. When the PAYD App displays the "APPROVED" or "DECLINED" response, the transaction is complete:

- To email a transaction receipt, see page 74.

  Note: *If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).*

- To send an SMS text message notification, see page 75.

9. Tap ≡ to return to the main menu.

Capturing a Pre-Authorization

Completes a Pre-Authorization so that the funds are transferred to your account at settlement.

Note: *If the Pre-Authorization was performed via card swipe or insert on a PAYD PIN Pad, you must perform the Capture with the same PAYD PIN Pad (you will not be prompted to enter card data during the Capture).*

1. Ensure that the PAYD PIN Pad is ready (see page 57).
2. In the PAYD App, start on the "Reports" screen.

   Note: *If another screen is displayed, tap* ≡ *to return to the main menu, and then tap* ***Reports****.*

3. Do one of the following:

   To display the last 10 transactions processed today:

   a. Leave all search fields blank, and go to step 4.

   To narrow the scope of your search:

   a. Select one or more of the following criteria:

      Note: *The original transaction receipt includes the transaction identifiers submitted with the original transaction.*

      - Date: To retrieve transactions processed within a date range other than today: Tap the **Today** drop-down list, and select a date range from the list; otherwise, skip this step to retrieve only transactions processed today.
      - Order ID: Enter the ID in the **Order ID** field (a full or partial ID may be entered).
      - Customer ID: Enter the ID in the **Customer ID** field (a full or partial ID may be entered).
      - Amount: Enter the amount in the **Amount ($)** field.

   b. Tap **Sort by**, and select a sort-by option (amount, customer ID, date, order ID, card type, or transaction type) from the drop-down list.

4. Tap **Search Transactions**, and wait for a transaction list to display.

- To display the next 10 transactions if applicable, tap **More** (to maximum of 300).

5. Tap the "Preauth" transaction that you want to complete.
6. When the transaction "Details" screen displays, confirm this is the transaction that you want to complete (see page 78).

   Note: *If this transaction is not the one that you want to complete, tap* ‹ *(repeat step 5).*

7. Tap **Capture this transaction.**
8. In the **Capture Amount ($)** field, enter the amount to be completed (captured).

   Note: *If the Pre-Authorization is completed for an amount that is less than the original, the hold on the remaining amount will be released.*

   - If the tax **AA% ($)** field/box displays and is checkmarked, the tax that will be added displays in the field while the total transaction amount (with the tax) displays in the **Total ($)** field.

     Note: *If you do not want to add the tax to this transaction, tap (unmark) the tax **AA% ($)** box.*

9. Tap **Process Transaction**.

   Note: *The PAYD App displays the "Follow prompts on pinpad" message, and the PAYD PIN Pad displays PLEASE WAIT. This is part of normal operation. A "Customer Signature" screen will not display on your mobile device.*

10. When the PAYD App displays the "APPROVED" or "DECLINED" response, the transaction is complete:

    - To email a transaction receipt, see page 74.

      Note: *If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).*

    - To send an SMS text message notification, see page 75.

11. Tap ≡ to return to the main menu.

Receipts

When a transaction is completed, a receipt is always generated. If a debit or credit card was used for the transaction, the receipt includes information about the cardholder verification method used for the transaction (see below).

Cardholder verification method (CVM) statement

The CVM statement appearing near the bottom in a receipt is determined by the card type and card entry method used during the transaction for which the receipt was generated.

Note: *The CVM statement is not included in receipts for cash or swiped/contactless debit transactions.*

CVM statement	Card type	Card entry method
NO SIGNATURE TRANSACTION	• credit	• tap (contactless)
SIGNATURE	• credit	• swipe (stripe) • manual entry
VERIFIED BY PIN	• credit • debit	• insert (chip)

Card masking

To reduce the risk of fraudulent card use, masking and truncation are applied to card numbers in receipts. Masking replaces a card's numbers (except for the last 4) with "*"s (e.g., **********1234). Truncation displays only the last 4 digits of a card (e.g., 1234). The expiry date does not appear in any receipt.

Signature capture for receipts

The PAYD App displays the "Customer Signature" screen if you are required to capture the customer's signature.

Note: *If a signature is captured, it will not be included in emailed receipts; however, a receipt with signature will be stored on PAYD Administration and can be viewed or printed from there at any time (see the* **Using Moneris PAYD Administration Guide***). A receipt with signature can also be viewed via the hyperlink included in any SMS text message notification sent for the transaction.*

The captured customer signature can also be viewed in the PAYD App when you retrieve the transaction's details in a Transactions Report (see page 76) or when you are doing a Void or Refund (see page 67) or Capture (see page 70).

When the PAYD App displays the "Customer Signature" screen, do the following:

1. Retrieve the PAYD PIN Pad if it was used to capture the card data.

   Note: *The WELCOME/BONJOUR screen displays on the PAYD PIN Pad.*

2. Have the customer "write" their signature above the Customer Signature line on the screen of your mobile device.

   - If the customer wishes to redo their signature, they tap **Clear** and then sign again.

3. Once the customer approves their signature, they tap **Done**.
4. When the PAYD App displays the "APPROVED" or "DECLINED" response, the transaction is complete:

   - To email a transaction receipt, see page 74.

     Note: *If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).*

   - To send an SMS text message notification, see page 75.

5. Tap ≡ to return to the main menu.

Emailing a transaction receipt

When the PAYD App displays the "APPROVED" or "DECLINED" response, follow these steps to email a transaction receipt.

Note: *If you enabled the PAYD App to auto-send receipts to a set merchant address (see page 38), the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).*

1. Under "Receipt" (bottom of the screen), tap .
2. When the "Send Receipt" screen displays, enter an email address as follows:

   To manually enter an email address:

   a. In the **Email Address** field, enter the address to which you want to send the receipt.

   b. Tap .

   To select an email address from your mobile device's contacts list:

   Note: *To use this feature, your mobile device's privacy settings must be configured to allow the PAYD App to access your device's contacts data. (Your mobile device may prompt you to allow the PAYD App to access the device's contacts data. You must grant this access to use this feature.)*

   a. Tap .

   b. When the "Contacts" screen displays, tap the **Firstname Lastname** of the contact to whom you want to send the receipt.

   c. Tap the **name@domain.nnn** (email address) to which to send the receipt.
3. When the "Receipt successfully sent" message displays, tap **OK**.
4. If you want to email a receipt to additional addresses, repeat steps 1 to 3 as many times as you require.
5. When you are finished, tap to return to the main menu.

Sending an SMS text message transaction notification

When the PAYD App displays the "APPROVED" or "DECLINED" response, follow these steps to send an SMS (short message system) text message notification.

Note: *The text message includes a hyperlink to a transaction receipt. If a customer signature was captured for the transaction, the signature will appear on the displayed receipt's "SIGNATURE" line.*

1. Under "Receipt" (bottom of the screen), tap
2. When the "Send Receipt" screen displays, enter a phone number as follows:

   To manually enter a phone number:

   a. In the **Phone Number** field, enter the phone number to which you want to send the text message.

   b. Tap .

   To select a phone number from your mobile device's contacts list:

   Note: *To use this feature, your mobile device's privacy settings must be configured to allow the PAYD App to access your device's contacts data. (Your mobile device may prompt you to allow the PAYD App to access the device's contacts data. You must grant this access to use this feature.)*

   a. Tap .

   b. When the "Contacts" screen displays, tap the **Firstname Lastname** of the contact to whom you want to send the text message.

   c. Tap the **(123) 456-7890** phone number to which to send the text message.

3. When the "Receipt successfully sent" message displays, tap **OK**.
4. If you want to send an SMS text message notification to additional phone numbers, repeat steps 1 to 3 as many times as you require.
5. When you are finished, tap to return to the main menu.

Reporting

Transactions report

Search for and display transactions by date, order ID, customer ID, or amount. You may also export the search results.

1. In the PAYD App, start on the "Reports" screen.

   Note: *If another screen is displayed, tap ≡ to return to the main menu, and then tap* ***Reports****.*

2. Do one of the following:

   To display the last 10 transactions processed today:

   a. Leave all search fields blank, and go to step 4.

   To narrow the scope of your search:

   a. Select one or more of the following criteria:

      Note: *The original transaction receipt includes the transaction identifiers submitted with the original transaction.*

      - Date: To retrieve transactions processed within a date range other than today: Tap the **Today** drop-down list, and select a date range from the list; otherwise, skip this step to retrieve only transactions processed today.
      - Order ID: Enter the ID in the **Order ID** field (a full or partial ID may be entered).
      - Customer ID: Enter the ID in the **Customer ID** field (a full or partial ID may be entered).
      - Amount: Enter the amount in the **Amount ($)** field.

   b. Tap **Sort by**, and select a sort-by option (amount, customer ID, date, order ID, card type, or transaction type) from the drop-down list.

3. Tap **Search Transactions**, and wait for a transaction list to display.

4. You may do any of the following:

   - To display the next 10 transactions if applicable, tap **More** (to maximum of 300).
   - To export the report results in CSV format in a text file, tap **Export Report** (near the top of the screen).

     Note: *The file will be sent to the email address that you specified in your Export to CSV setting (see page 37).*

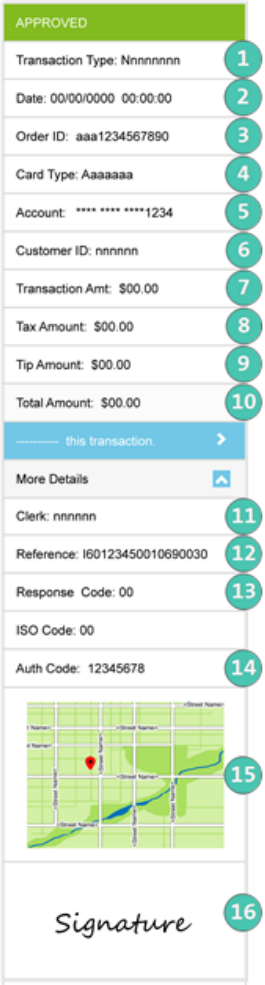
   - To view the details of a listed transaction, tap the desired transaction (see page 78).

5. When you are finished, tap ‹ to return to the transaction list, or tap ≡ to return to main menu.

"Details" screen (transactions)

The "Details" screen (shown below) displays when you tap a transaction record listed in a Transactions Report (e.g., you may be performing a Void, Refund, or Capture, or simply reviewing transactions).

Note: *Line items 1 to 10 and item 16 display by default. To display line items 11 to 15, tap* ***More Details****. (For label descriptions, see page 79).*



1. You may do one or more of the following if applicable:
   - To perform a Refund/Void, continue at step 6 on page 68.
   - To perform a Capture, continue at step 7 on page 71.
   - To email a transaction receipt, see page 74.
   - To send an SMS text message notification, see page 75.
   - Tap ‹ to return to the transaction list, or tap ≡ to return to the main menu.

This table describes the "Details" screen shown on page 78.

Label	Description
1	Transaction name.
2	Transaction date (DD/MM/YYYY) and time (hh:mm:ss).
3	Unique transaction identifier. Auto-generated if no order ID entered for transaction.
4	Card type or "Cash".
5	Card number (masked) or "Cash".
6	Displays if customer ID entered for transaction.
7	Transaction amount excluding tax and tip.
8	Tax amount (see page 33).
9	Tip amount (see page 32).
10	Total amount including tax and/or tip if entered.
11	Transaction performed by user signed in under this employee ID.
12	Moneris Host identifier (e.g., if "I60123450010690030" is the number, then "I6012345" is the terminal ID (i.e., PAYD PIN Pad ID). This number may be requested by Moneris to help track a transaction.
13	Transaction Response code: ▪ < 50: Transaction approved. ▪ >= 50: Transaction declined. ▪ NULL: Transaction was not sent for authorization.
14	Auth code (6-8 digits) from the card-issuing institution.
15	Location of transaction (see page 34).
16	Customer signature (displays if captured for transaction).

Totals (batches) report

Displays open and closed batch totals (sub-totals include transaction totals, tip totals, and terminal ID totals) so that you can determine the amount deposited in your back account for a batch that has been closed.

Note: *Totals for a batch can be viewed from the PAYD App for up to three months from the date a batch is closed.*

1. Start on the "Totals" screen.

   Note: *If another screen is displayed, tap* ≡ *to return to the main menu, and then tap* ***Totals****.*

2. Select a date range from the drop-down list.
3. Tap **Search Batches**.
   - If the "Totals" screen displays listing one or more "Daily Total" records, tap the record that you want to view.
4. When the "Daily Summary" screen displays, you may review one or more of the following sub-reports:

   ### Daily Summary Totals

   For the selected date range, displays transaction types and totals grouped by card type (or "Cash").

   a. To display this sub-report, tap .

   ### Daily Tip Totals

   For the selected date range, displays tip totals grouped by the PAYD employee ID (clerk ID) under which the tip amounts were accrued.

   a. To display this sub-report, tap .

      Note: *If "No tip totals for today" displays, it means no tip amounts were accrued for the specified date range.*

   ### Terminal Totals

   For the selected date range, displays transaction types and totals (excluding cash) grouped by batch number and terminal ID.

a. To display this sub-report, tap .

Note: *Totals grouped under a terminal ID starting with "I6" indicate those transactions were performed on a PAYD PIN Pad with the same ID. Totals grouped under the terminal ID starting with "66" indicate those transactions were performed entirely on the PAYD App (i.e., without the use of a PAYD PIN Pad). A blank screen indicates no debit/credit transactions were performed for the specified date range.*

5. When you are finished, tap to return to the "Totals" list, or tap to return to the main menu.

Re-initializing the PAYD PIN Pad

1. Ensure that the PAYD PIN Pad is powered on and ready (see page 57).
2. In the PAYD App, start on the "Settings" screen.

   Note: *If another screen is displayed, tap* ≡ *to return to the main menu, and then tap* ***Settings****.*

3. Tap **Pinpad**.
4. Tap **Bluetooth** if it is not already selected.
   - Tap **Connect Pinpad** if it displays.
5. Tap **Initialize Pinpad**.

   Note: *If* ***Connect Pinpad*** *continues to display even after you have tapped it, see page 87 for troubleshooting.*

6. When PLEASE WAIT displays on the PAYD PIN Pad, wait while it initializes.

   Note: *During this process, the PAYD App displays the message "Initializing Pinpad. This may take a few minutes".*

7. When the PAYD App displays the message "Initialization was successful. Pinpad is ready to use", tap **OK**.
8. When the PAYD PIN Pad displays the WELCOME/BONJOUR screen, the operation is complete.
9. Tap ≡ to return to the main menu.

Troubleshooting

Error messages in the PAYD App

If an error message is displayed in the PAYD App (i.e., on your mobile device) and is listed in the table below, tap **OK** and then follow the instructions in the table's Solution column. If the problem is still not resolved, call us at **1-855-423-PAYD (7293)**.

Note: *For error messages displayed on the PAYD PIN Pad and/or other PAYD PIN Pad hardware issues, see pages 91 to 94.*

Error message	Solution
An error occurred on the pinpad. Transaction was not processed.	An application or communication error occurred. 1. Retry the transaction. (See also the issues listed on pages 86 to 90).
Application PAYD already exists. Replace version ### with version ###.	You have already installed an earlier version of the PAYD App. 1. Delete the unusable App from your mobile device. 2. Download and install the latest version of the PAYD App (see page 10).
Card Read Error. Please swipe again.	The connected PAYD card reader could not read the card data when the card was swiped on it. 1. Try swiping again (see page 95).
Pinpad has been disconnected.	The PAYD App/your mobile device can no longer detect the PAYD PIN Pad with which it is paired. 1. See "Unable to connect to Pinpad" (page 85).

Error message	Solution
Sign in failed. Please Try Again.	1. Try signing in again. 2. If the text "Quit Demo Mode" displays at the bottom of the sign-in screen, tap **Quit Demo Mode** to return to the "live" sign-in screen, and retry signing in again. 3. If the authentication fails, and you are: ▪ Trying to sign in using your full credentials, use the password reset feature (see page 44). ▪ Trying to sign in using your quick PIN, use the forgot PIN feature (see page 45). 4. If the problem persists, redo the setup procedures starting on page 10.
The Request has timed out. Please ensure your signal is strong and try again.	There may be too much interference in your area and/or your mobile device is too far from its wireless network access point. 1. Move to a location within your wireless network coverage area where there are no sources of interference (see page 97), and retry the operation.
Tip has not been configured on the pinpad. Please connect pinpad to update pinpad settings.	Tip prompting cannot be enabled/disabled on the PAYD PIN Pad because the PAYD App/your mobile device is unable to detect the PAYD PIN Pad with which it is paired. 2. See "Unable to connect to Pinpad" (page 85).

Error message	Solution
Unable to connect to Pinpad.	The PAYD App/your mobile device cannot detect the PAYD PIN Pad with which it is paired. 1. Confirm that the PAYD PIN Pad is powered on (see page 51). 2. Confirm that the PAYD PIN Pad is in range of your mobile device and operating in a suitable environment (see page 97). 3. Confirm that the PAYD PIN Pad's 8-digit terminal ID (e.g., "I6012345") is shown as "paired" on your mobile device's Bluetooth settings screen. 4. If the error message continues to display, simultaneously press and hold down both the yellow key and the key on the PAYD PIN Pad until it starts to power off, and then wait while it powers off completely. 5. When the PAYD PIN Pad is powered off, press its power button (see page 49), and then wait while the PAYD PIN Pad powers on. 6. When the WELCOME/BONJOUR screen displays, retry the transaction.

Other issues (PAYD App)

Issue	Solution
PAYD App and/or PAYD PIN Pad stalls or freezes midway during a transaction.	1. If a card is inserted, remove it from the chip reader. 2. Simultaneously press and hold down both the yellow key and the key on the PAYD PIN Pad until it starts to power off, and then wait while it powers off completely. 3. When the PAYD PIN Pad is powered off, press its power button (see page 49), and wait while the PAYD PIN Pad to powers on to the WELCOME/BONJOUR screen. 4. When the PAYD App resumes operation on your mobile device, retry the transaction. 5. If the issue recurs, close the PAYD App, and reboot the PAYD PIN Pad again. 6. Re-launch the PAYD App, sign in (see page 40), and retry the transaction.

Issue	Solution
"Initialize Pinpad" button does not display.	1. Ensure that the PAYD PIN Pad is powered on. 2. In the PAYD App, tap **Connect Pinpad**. 3. If the **Initialize Pinpad** button still does not display, simultaneously press and hold down both the yellow key and the key on the PAYD PIN Pad until it starts to power off, and then wait while it powers off completely. 4. When the PAYD PIN Pad is powered off, press its power button (see page 49), and then wait while the PAYD PIN Pad powers on to the WELCOME/BONJOUR screen. 5. In the PAYD App, tap **Connect Pinpad**. 6. If the issue recurs, sign out of the PAYD App. 7. Power off your mobile device. 8. Simultaneously press and hold down both the yellow key and the key on the PAYD PIN Pad until it starts to power off, and then wait while it powers off completely. 9. When the PAYD PIN Pad is powered off, press its power button (see page 49), and then wait while the PAYD PIN Pad powers on to the WELCOME/BONJOUR screen. 10. Restart your mobile device, and try initializing the PAYD PIN Pad again: ▪ If you are initializing for the first time, go back to page 16 (begin at setup step 6). ▪ If you are re-initializing, go back to page 82.

Issue	Solution
You get a "DECLINED" response, and the PAYD PIN Pad continues to display WELCOME /BONJOUR.	1. Simultaneously press and hold down both the yellow key and the key on the PAYD PIN Pad until it starts to power off, and then wait while it powers off completely. 2. When the PAYD PIN Pad is powered off, press its power button (see page 49), and then wait while the PAYD PIN Pad powers on to the WELCOME/BONJOUR screen. 3. Retry the transaction. 4. If the issue recurs, re-initialize the PAYD PIN Pad (see page 82).
You cannot remember your sign-in password or quick PIN.	1. Reset your password (see page 44), or reset your quick PIN (see page 45).
The "Export Report" button does not display on the "Reports" screen.	1. Set an email address to receive exported reports (see page 37). 2. Redo the report and try exporting it again (the **Export Report** button should now display near the top of the "Reports" screen).
Nothing happens when you tap .	Your mobile device's privacy settings are configured to deny the PAYD App access your device's contacts list, or you do not have any contact listings stored on your device. 1. Configure your device's privacy settings to allow the PAYD App to access to your device's contacts list, and then retry to access your contacts list from the PAYD App.

Issue	Solution
The "Swipe" option does not display on the transaction page when the PAYD card reader is connected.	Your mobile device was unable to detect the PAYD card reader connection. ***Note:*** *The **Swipe** option will replace the **Keyed** option only if a reader is properly connected to your mobile device.* 1. Ensure the PAYD card reader is securely connected to your mobile device (see page 95). 2. If your mobile device has a protective sleeve, ensure it is not preventing the reader from being completely plugged in. 3. When **Swipe** is displayed as a card entry option, tap it and continue the transaction.
Nothing happens when you swipe the card on the connected PAYD card reader.	You may not have swiped the card correctly and/or the PAYD App does not have access to your mobile device's microphone settings. 1. Try swiping the card again (see page 95 for correct swipe position). 2. If this does not work ensure your mobile device is configured to allow the PAYD App to access the device's microphone, and then retry swiping the card. 3. If you are unable to perform the transaction using the PAYD card reader, you may try manually entering the card data on your mobile device (see page 97).
A location map does not display on a transaction's "Details" screen.	Your mobile device is not configured to use location services and/or the PAYD App does not have access to your device's location data. 1. To enable location mapping, see page 34.

Issue	Solution
You want to determine the version number of the PAYD App.	1. See *Determining the PAYD App's version number* (page 39).

Error messages on the PAYD PIN Pad

If an error message displays on the PAYD PIN Pad, first press the red key once or twice to clear the message, then retry the transaction. If the error message reappears and is listed in the table below, follow the instructions in the table. If the problem is still not resolved, call us at 1-855-423-PAYD (7293).

Note: *For error messages displayed in the PAYD App on your mobile device and/or other PAYD App-related issues on your mobile device, see pages 83 to 90.*

Error message	Solution
BATTERY CHARGING IN PROGRESS	The PAYD PIN Pad battery is recharging from a very low charge level. 1. Wait for the WELCOME/BONJOUR screen to display (may take several minutes) before you attempt to perform a transaction.
CANNOT SWIPE CHIP CARD	1. Insert the chip card into the PAYD PIN Pad's chip card reader.
CARD BLOCKED REMOVE CARD	The chip card cannot be used. 1. Ask for another form of payment.
CARD NOT SUPPORTED PLEASE RETRY	1. Swipe the card again. 2. If this does not work, try using the PAYD card reader (see page 95). 3. If this does not work, request another form of payment.
CARD PROBLEM	1. Retry the transaction. 2. If the message reappears: ▪ If card was inserted: Swipe the card. ▪ If credit card was swiped: Manually enter the card (see page 56).

Error message	Solution
CARD READ ERR	The card data could not be read when the card was swiped or tapped. 1. Retry the transaction.
CONTACTLESS TRANSACTION LIMIT EXCEEDED	1. If the card has a chip, insert it into the chip reader; otherwise, swipe the card.
DECLINED BY CARD	The chip card has declined the transaction. 1. Retrieve the PAYD PIN Pad, and remove the chip card. 2. Request another form of payment.
ERROR CARD REMOVED	The chip card was removed during the transaction. 1. Retrieve the PAYD PIN Pad, and retry the transaction.
MUST INSERT CARD	1. If the card has a chip, insert it into the chip reader; otherwise, swipe the card.
NO CARD	The card was not entered on the PAYD PIN Pad in the required time.
NO SUPPORTED APPLICATIONS REMOVE CARD	▪ If card was inserted: Remove the card from the chip reader, and swipe it when prompted. ▪ If card was tapped: If the card has a chip, insert it into the chip reader; otherwise, swipe the card.
NOT ACCEPTED REMOVE CARD or NOT ACCEPTED USE MAG STRIPE REMOVE CARD	1. Remove the chip card from the chip reader. 2. If prompted, swipe the card on the magnetic stripe reader. 3. Credit only: If swiping does not work, manually enter the card number (see page 56).

Error message	Solution
NOT COMPLETED	The customer took more than 30 seconds to respond to the prompts. 1. Retry the transaction.
PLEASE CHARGE THE TERMINAL	The PAYD PIN Pad's battery charge is low. 1. Connect the PAYD PIN Pad to an external power source via the USB charging cable. 2. When BATTERY CHARGING IN PROGRESS displays, see page 91.
REFUND LIMIT EXCEEDED	The total value of Refunds performed today is greater than your daily Refund Limit. 1. Contact us for a temporary increase in your daily Refund Limit. 2. Ensure that you have the original Purchase receipt available for reference.
TAP NOT ACCEPTED	1. Cancel the transaction. 2. Ensure that the PAYD PIN Pad battery has a charge level of at least 50% (see page 50), and retry the transaction. 3. If the issue recurs, insert the card into the chip reader if the card has a chip; otherwise, swipe the card.
WRONG CARD TYPE	The card that was swiped cannot be used for this transaction. 1. Ask for another card and retry.

Other issues (PAYD PIN Pad)

Issue	Solution
The PAYD PIN Pad and/or PAYD App stalls or freezes midway during a transaction.	1. If the card is inserted, remove it from the chip reader. 2. Close/shutdown the PAYD App. 3. Power off the PAYD PIN Pad, and then power it on again (see page 52 and 51). 4. Re-launch the PAYD App, and sign in (see page 40). 5. Retry the transaction.
The screen displays the hardware manufacturer name/logo instead of WELCOME/ BONJOUR .	The PAYD PIN Pad is in Sleep mode. 1. To use the PAYD PIN Pad while it is in Sleep mode, see page 52.
The PAYD PIN Pad powers off.	The PAYD PIN Pad may have gone into Sleep mode and then shut down to conserve power. 1. To power on the PAYD PIN Pad, press the PAYD PIN Pad's power button (see page 49). 2. If this does not work (the battery charge may be depleted), connect the PAYD PIN Pad to an external power source via the USB charging cable.
The contactless reader does not beep when a card is tapped/waved at the SWIPE, TAP OR INSERT CARD prompt.	The PAYD PIN Pad battery charge level may be too low. 1. See TAP NOT ACCEPTED (page 93).

Using the PAYD card reader

If you are unable to perform a credit card transaction using the PAYD PIN Pad, follow the steps below to use the PAYD card reader as a backup device (to order a PAYD card reader, please contact us at **1-855-423-PAYD (7293)**):

1. Make sure the media speaker on your mobile device is turned off.
2. Ensure that the volume level of your mobile device is maximized.
3. Connect the PAYD card reader:

4. In the PAYD App, initiate the Sale (or Pre-Authorization), and then tap **Swipe**.
   - If the **Customer ID** and **Order ID** fields display and you want to track the transaction with your own identifier(s), enter the required data in one or both of the fields; otherwise, leave the fields blank to bypass the identifiers.

     Note: *If you enter your own order ID, it must be unique. If you don't enter your own order ID, it will be generated automatically.*
5. In the **Amount** field, enter the transaction amount.
   - If the tax **AA% ($)** field/box displays and is checkmarked, the tax that will be added displays in the field while the total transaction amount (including the tax) displays in the **Total ($)** field.

     Note: *If you do not want to add the tax to this transaction, tap (unmark) the tax **AA% ($)** box.*

6. Tap **Process Transaction**.

   - If the PAYD App displays "Please specify a tip amount", see page 65.
   - If the PAYD App displays "Please swipe card", swipe the credit card on the PAYD card reader.
   - If the PAYD App displays the "Customer Signature" screen, capture the customer's signature on your mobile device (see page 73).

7. When the PAYD App displays the "APPROVED" or "DECLINED" response, the transaction is complete:

   - To email a transaction receipt, see page 74.

     Note: *If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).*

   - To send an SMS text message notification, see page 75.

8. Tap ≡ to return to the main menu.

Manual card entry on your mobile device

If you are unable to perform a Sale or Pre-Authorization using the PAYD card reader (see page 95), follow the steps below to manually enter the transaction entirely on you mobile device (i.e., neither the PAYD PIN Pad nor the PAYD card reader will be used).

1. If the PAYD card reader is connected to your mobile device, disconnect the PAYD card reader.
2. In the PAYD App, initiate the Sale (or Pre-Authorization).
3. Tap **Keyed**.
   - If the **Customer ID** and **Order ID** fields display and you want to track the transaction with your own identifier(s), enter the required data in one or both fields; otherwise, leave these fields blank to bypass entering any identifier.

     Note: *If you enter your own order ID, it must be unique. If you don't enter your own order ID, it will be generated automatically.*
4. In the **Amount ($)** field, enter the transaction amount (#.##).
   - If the tax **AA% ($)** field/box displays and is checkmarked, the tax that will be added displays in the field while the total transaction amount (including the tax) displays in the **Total ($)** field.

     Note: *If you do not want to add the tax to this transaction, tap (unmark) the tax **AA% ($)** box.*
5. In the **Card Number** field, enter the card number.
6. In the **Exp (MMYY)** field, enter the card expiry date.
   - If the **CVV** field displays, enter the 3- or 4-digit card verification value (code).
7. Tap **Process Transaction**.
   - If the PAYD App displays "Please specify a tip amount", see page 65.
   - If the PAYD App displays the "Customer Signature" screen, capture the customer's signature on your mobile device (see page 73).
8. When the PAYD App displays the "APPROVED" or "DECLINED" response, the transaction is complete:

- To email a transaction receipt, see page 74.

  Note: *If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).*

- To send an SMS text message notification, see page 75.

9. Tap ≡ to return to the main menu.

Sources of electromagnetic interference

Listed below are some common sources of electromagnetic interference that may impair the operability of the PAYD PIN Pad:

- Motors and compressors
- Computer screens and televisions
- Radio transmitters and other wireless devices operating at 2.4GHz (e.g., Wi-Fi devices, wireless routers, cordless phone bases, etc.) - at least 2 m (6.5 feet) away
- Microwave ovens - at least 3 m (10 feet) away
- Anti-theft barriers, etc.
- Elevator shafts
- Cash registers
- Blenders and food processors
- Air conditioning units, ventilation fans
- Large, metal, horizontal or vertical surfaces (e.g., appliances, metallic blind or countertops, etc.)

Merchant support

If you need assistance with your payment processing solution, we're here to help, 24/7.

We're only one click away.

- Visit **getpayd.com/paydpro/support** to:
  - Consult the FAQs on how to set up and use PAYD Pro.
  - Download PAYD Pro guides to assist with getting started, configuration, and usage instructions.
- Visit **shop.moneris.com** to purchase point-of-sale supplies and accessories.
- Visit **moneris.com/insights** for business and payment news & trends, customer success stories, and quarterly reports & insights.

Can't find what you are looking for?

- Email **info@getpayd.com** or call Moneris Customer Care toll-free (available 24/7) at **1-855-423-PAYD (7293)**. We'll be happy to help.
- You can also send us a secure message 24/7 by logging in to Merchant Direct® at **moneris.com/mymerchantdirect**.

Notes

Important! You must use the USB charging cable provided with the PAYD PIN Pad. Failure to do so may affect the operability of or cause damage to the PAYD PIN Pad.

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The Moneris Merchant Operating Manual is available at getpayd.com/paydpro/support.

PAYDPRO_iCMP_And_YT_E (10/17)