Moneris® Core Countertop

V400c

Setting up Your Software

(December 2020)

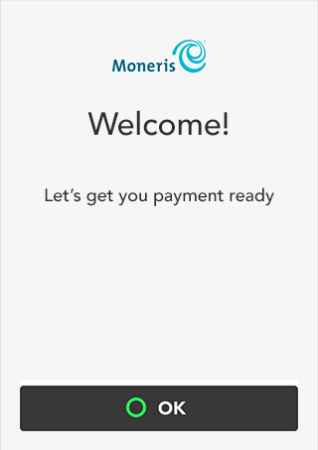
Contents

Software setup (V400c in Standalone Mode) **2**
Connection setup 2
Software setup (V400c with optional external PIN pad) **4**
Securing your terminal **6**
Enroll in Merchant Direct® **7**
Edit your settings using the Quick Setup menu **8**
Tip settings 8
Multi-terminal settings 9
Clerk settings 10
Receipt settings 11
Troubleshooting terminal communication **14**
Merchant assistance **15**

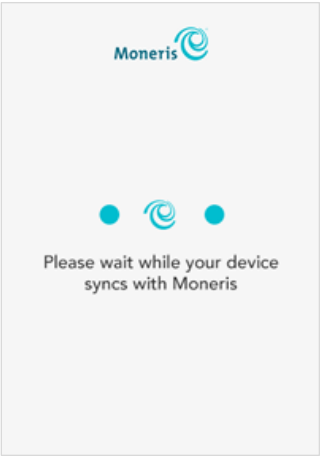
Software setup (V400c in Standalone Mode)

To set up your terminal software quickly, simply respond to the prompts on screen. If you need help, follow these step-by-step instructions.

1. Connect the terminal's power adaptor cable to a power source.
2. Wait while the terminal goes through its boot up sequence.
3. Tap **OK**.



4. Wait while the terminal connects to Moneris to obtain your account settings.
   - The terminal uses dynamic IP addressing by default. If your network uses static IP, the "We're unable to connect" message appears. See Connection setup on page 2.
   - For other connection problems, refer to Troubleshooting terminal communication on page 14.



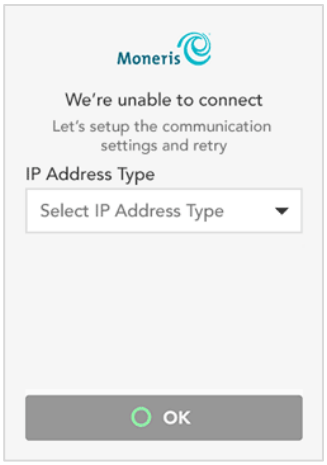
5. The next step is to set up a high security user ID and passcode. Go to the Securing your terminal section on page 6.

Connection setup

The terminal is unable to connect to Moneris and requires information about your network to establish the connection settings. If you are not sure how your network is set up, contact your network administrator.

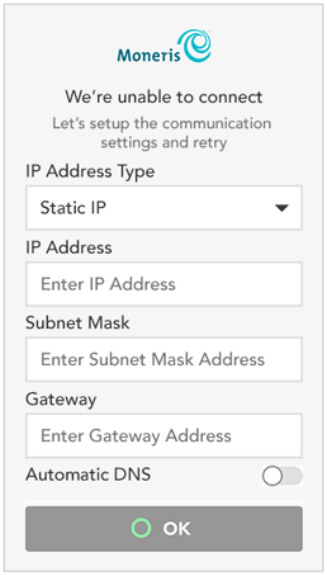
Note: *When entering IP addresses, use the terminal's keypad. To enter a period, press the punctuation key* *once.*

1. Tap the **IP Address Type** field and select the type of IP addressing used by your network.
   - If you selected **Dynamic IP**, the screen shows the Automatic DNS setting with the toggle set to ON. Go to step 2.
   - If you selected **Static IP**, the screen shows the fields required for static IP. Go to step 3.



2. Review the **Automatic DNS** setting.
   - If your network uses automatic DNS, tap **OK** to accept the setting and continue. Go to step 4.
   - If your network does not use automatic DNS, tap the toggle to change it to the OFF position, then tap **OK**.
     i. Tap the **Primary DNS** field and enter the IP address of your primary DNS server.
     ii. Tap the **Secondary DNS** field and enter the IP address of your secondary DNS server.
     iii. Tap **OK** at the bottom of the screen then go to step 4.
3. At the static IP setup screen, tap each field and enter the requested IP address, then tap **OK**.

   Note: *The automatic DNS toggle (set to off) is shown for information only and cannot be changed at this screen.*



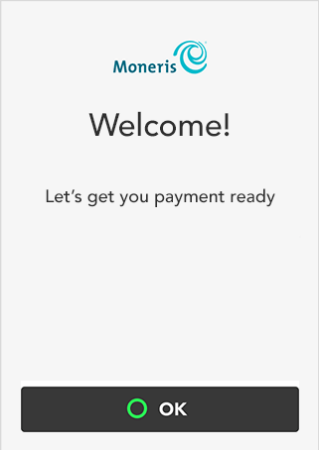
4. The terminal displays: "Please wait while your device syncs with Moneris".
5. Go to the Securing your terminal section on page 6.

Software setup (V400c with optional external PIN pad)

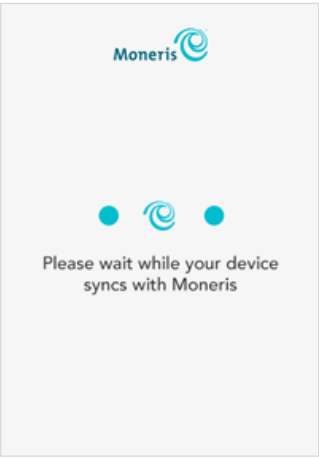
If you ordered your V400c terminal with the optional P400 external PIN pad, follow these step-by-step instructions to configure the terminal and PIN pad.

Note: *This process will only need to be performed once, the first time you boot up the terminal and PIN pad.*

1. Connect the terminal's power adaptor cable to a power source.
2. Wait while the terminal and PIN pad go through their boot up sequences.
3. Tap **OK**.

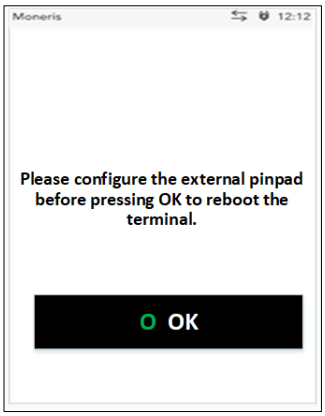


4. Wait while the terminal connects to Moneris to obtain your account settings.
   - The terminal uses dynamic IP addressing by default. If your network uses static IP, the "We're unable to connect" message appears. See Connection setup on page 2.
   - For other connection problems, refer to Troubleshooting terminal communication on page 14.



5. When the terminal displays the message "Please configure the external pinpad before pressing OK to reboot the terminal", tap the **OK** button (or press the green key on the keypad) on the terminal.

   The terminal reboots.

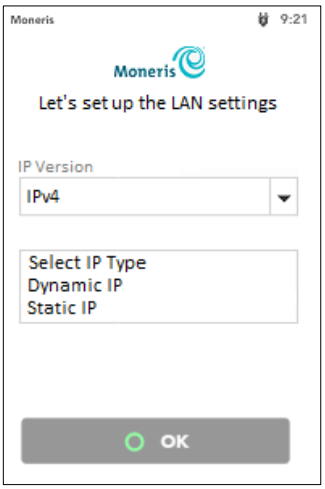


6. Once the terminal and external PIN pad boot up, the “Let’s set up the LAN settings” screen is displayed on the external PIN pad.
7. On the external PIN pad, ensure the **IP version** is set to **IPv4**. If not, tap the drop-down menu and select it.
8. In the **IP Address Type** drop-down menu, tap **Dynamic IP**.
9. Tap the **OK** button (or press the green key on the keypad).

   The PIN pad returns to an idle screen, displaying the PIN pad ID (a string of numbers beginning with “P1”, e.g. P1012345. The terminal displays the “Please wait while the terminal scans for the external pinpad…” message.

   Note: *This may take several minutes.*
10. On the terminal, the “Welcome Let’s get you payment ready” screen appears again.
11. Tap the **OK** button (or press the green key on the terminal keypad).

    The terminal syncs with the Moneris host, the returns to the “Congratulations, you’re now payment ready!” screen. The external PIN pad displays its idle screen.
12. The next step is to set up a high security user ID and passcode. Go to the Securing your terminal section on page 6.

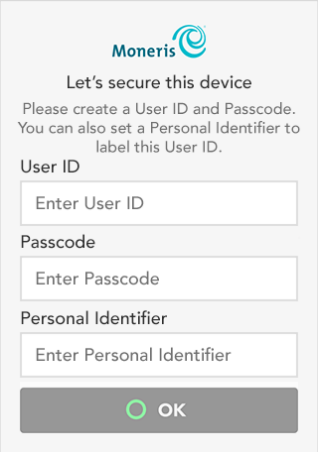


Securing your terminal

A high security user ID and passcode are required to protect the terminal from unauthorized use. Use this user ID/passcode to access protected transactions and edit protected settings on the terminal.

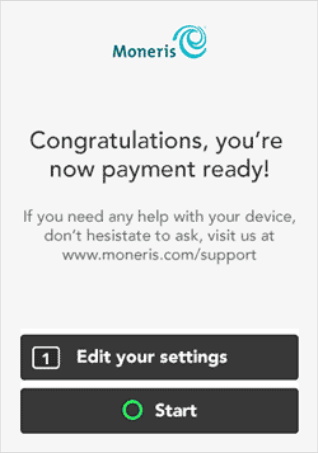
Note: *If this is a replacement terminal, the user ID/passcode setup prompt will not appear. Moneris will download the high security user ID/passcode you created when setting up your previous terminal.*

1. Tap the **User ID** field, enter a user ID consisting of 1 to 4 digits, then tap **OK**.
2. Tap the **Passcode** field, enter a passcode consisting of 4 to 10 digits, then tap **OK**.
   - You cannot use 3 or more consecutive numbers such as **123**6, **654**39, or 3 or more repeating numbers such as **999**6, **111**3.
3. Tap the **Personal Identifier** field, enter a name, then tap **OK**.
   - This field is optional. It can be letters or numbers.
   - It could be your name or employee number, or other descriptor such as Manager or Supervisor.
4. Tap **OK** at the bottom of the screen to create your high security user ID and passcode.



Congratulations, your terminal is payment ready!

5. Choose what to do next:
   - To edit the most common settings to ensure they match the needs of your business, tap **Edit your settings** and go to Edit your settings using the Quick Setup menu on page 8.
   - Enrol in Merchant Direct to access merchant reports. See page 7.
   - To continue without editing your settings, tap **Start**. You can always change terminal settings later. To learn more about your terminal and to start processing transactions, refer to the ***Moneris Core V400c Using Your Terminal*** guide (available at **moneris.com/support-v400c**).



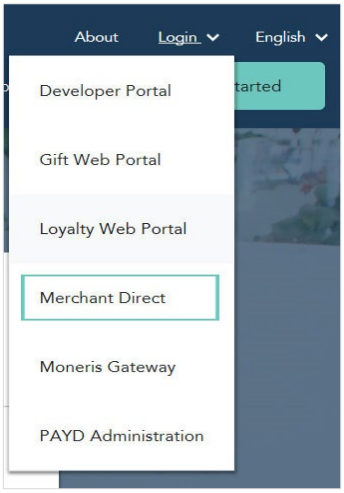
Enroll in Merchant Direct®

Merchant Direct is the Moneris online tool for accessing all of your merchant reports, including end-of-day reports. To sign up for Merchant Direct, follow these steps.

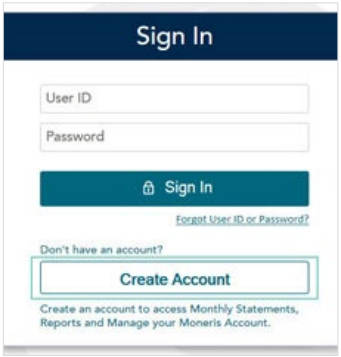
Note: *If you have already enrolled in Merchant Direct, you do not have to enroll again.*

1. Go to **moneris.com**

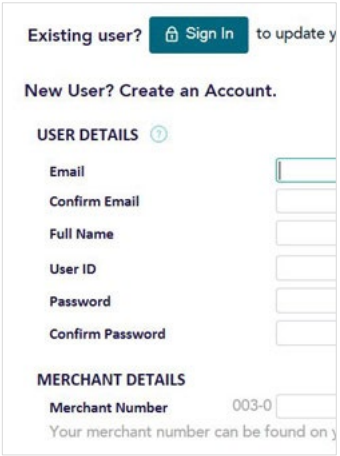
2. In the top, right area of the screen, click **Login** and select **Merchant Direct**.



3. Click **Create Account**.



4. Fill in the fields in the online form to complete your enrolment.



Edit your settings using the Quick Setup menu

The Quick Setup menu appears when you tap **1 Edit your Settings** on the "Congratulations" screen. (After completing your initial setup, you can also access the Quick Setup menu from the Main menu of the terminal.)

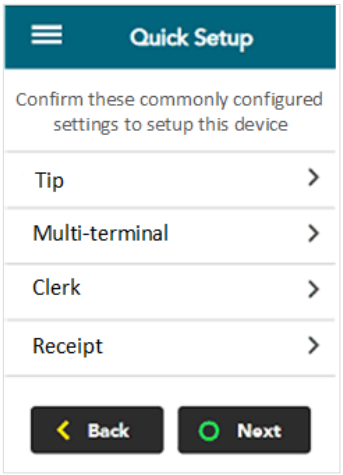
1. Tap **Next** to review the settings and change them if needed.

   Tip: To enable tip and set the tip options, refer to Tip settings below.

   Multi-terminal: To enable support for multiple terminals, refer to Multi-terminal settings on page 9.

   Clerk: To enable and manage clerk IDs, refer to Clerk settings on page 10.

   Receipt: To set options for receipts, refer to Receipt settings on page 11.



Tip settings

2. This screen allows you to enable tip and set the tip options. Tap each toggle to enable or disable the setting.

Tip Support: Enable this setting to prompt customers to leave a tip. Once you enable Tip Support the tip options will appear.

Tip by Dollar: Enable this setting to allow customers to enter a tip as a dollar amount.

Tip by Percent: Enable this setting to allow customers to enter a tip as a percentage of the total amount.

Tip on Subtotal: Enable this setting to allow customers to leave a tip based on the pre-tax amount. This setting will be applied only when the terminal is in restaurant integration mode or semi-integrated mode.

Tip Preset 1: Enable this setting to allow customers to enter a tip as a pre-set percentage. Tap the **Preset Value** field and enter a percentage (for example, 15), then tap **OK**.

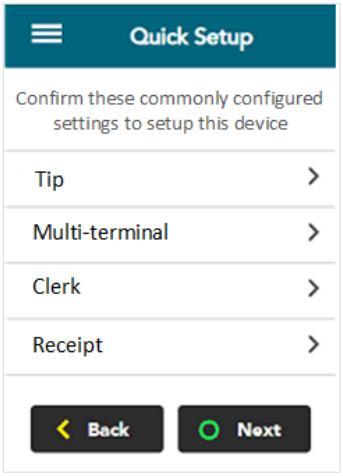
Tip Preset 2: Enable this setting to allow customers to enter a tip as a pre-set percentage. Tap the **Preset Value** field and enter the percentage; for example, 20. It must be higher than Tip Preset 1. Tap **OK**.

Tip Preset 3: Enable this setting to allow customers to enter a tip as a pre-set percentage. Tap the **Preset Value** field and enter the percentage; for example, 25. It must be higher than Tip Preset 2. Tap **OK**.

Tip Warning: Enable this setting to display a notification on screen when customers enter a tip that is *higher* than a specific percentage. It protects customers from data entry errors. Tap the **Preset Value** field and enter the percentage; for example, 25. It must be equal to or higher than Tip Preset 3. Tap **OK**.

3. When you are finished setting all of the tip options, tap **Save**.

4. Tap **Next** to move to the next Quick Setup item.



Multi-terminal settings

This screen allows you to enable multi-terminal batch close.

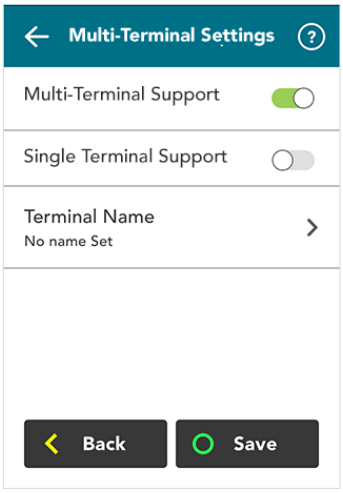
5. Tap each toggle to enable or disable the setting.

   Multi-Terminal Support: Turn this setting on if you want to be able to close the batch for multiple terminals at the same time. Once you enable Multi-Terminal Support the other options will appear.

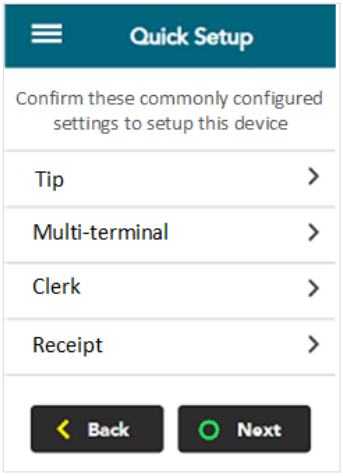
   Single Terminal Support: Turn this setting on if you enabled multi-terminal support and you want the option of closing the batch for just one of your multiple terminals.

   Terminal Name: To assign a name to the terminal, tap **Terminal Name**, enter a descriptive name (for example, Bar1), then tap **OK**.

6. When you are finished with multi-terminal settings, tap **Save**.



7. Tap **Next** to move to the next Quick Setup item.



Clerk settings

Use this screen to enable clerk IDs and create a new clerk ID. Turning on clerk IDs allows you to identify which clerk processed a transaction. You can then generate reports such as transaction totals by clerk and tip totals by clerk.

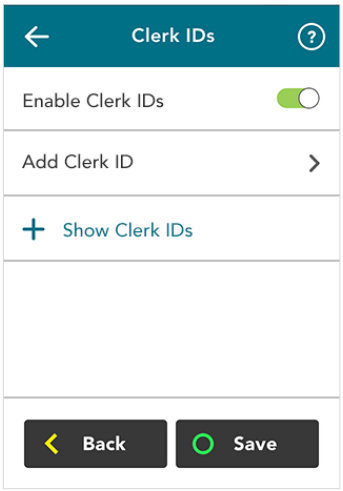
8. Follow these steps.

   Enable Clerk IDs: Tap the toggle to enable clerk IDs. Once you enable clerk IDs the other options will appear.

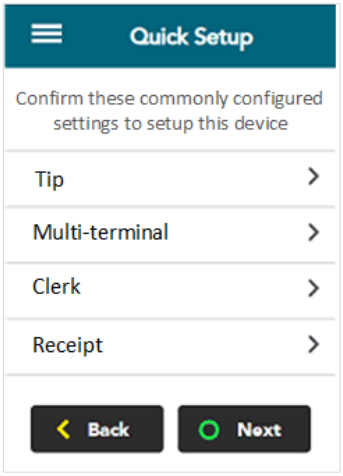
   Add Clerk ID: Tap **Add Clerk ID** to add a new clerk. Key in a new clerk ID using 1 to 6 digits, then tap **Save**.

   + Show Clerk IDs: Tap this item to display the current list of clerk IDs. The terminal connects to Moneris to retrieve the list of clerks. Your terminal must be connected to the Moneris host.

9. When you are finished with multi-terminal settings, tap **Save**.



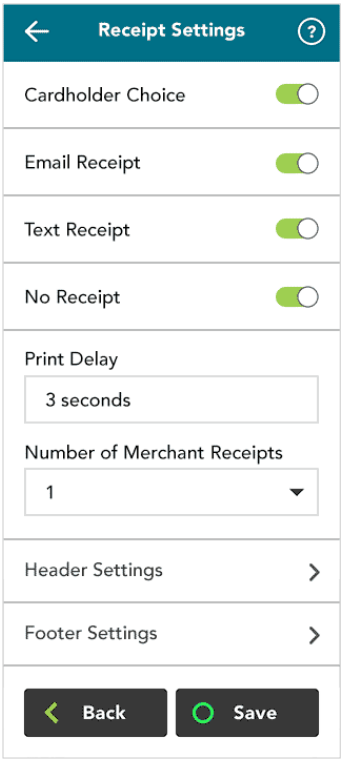
10. Tap **Next** to move to the next Quick Setup item



Receipt settings

This screen allows you to:

- enable the options for how a customer can receive their receipt (email, text, none, in addition to printing which is always available). If Cardholder Choice is turned off, the receipt will be printed by default;
- enable or disable specific options for customer receipts (for example, print and text);
- set the print delay (in seconds) between the customer and merchant copies being printed;
- specify the number of merchant receipt copies;
- set up or modify a header on your receipts;
- set up or modify a footer on your receipts.

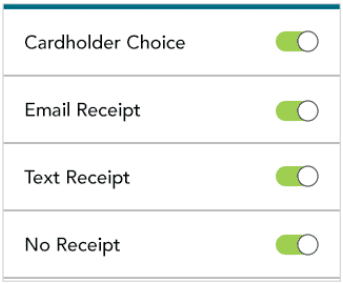


11. To review or change the settings, follow these instructions.

Cardholder Choice: Tap the toggle to allow your customers to choose the format of their receipt or to choose no receipt.

The following options can be set only when Cardholder Choice is turned on. Tap the toggle beside each option to turn the option on or off.

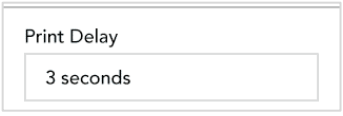
***Note**: A toggle for printing the receipt does not appear on the list since the option to print is always available to the customer.*



- **Email Receipt**: Enable this option to allow your customers to receive their receipt by email.
- **Text Receipt**: Enable this option to allow your customers to receive their receipt by text.
- **No Receipt**: Enable this option to allow your customers to choose not to receive a receipt.

If you disable these three options, the terminal will automatically print the customer receipt without prompting.

Print Delay: The print delay determines how long the terminal pauses between printing the customer receipt and printing the merchant receipt.

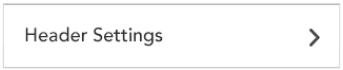


To change the default of 3 seconds, tap the **Print Delay** field, enter a new value (in seconds), then tap **OK**.

Number of Merchant Receipts: This setting determines how many copies of the merchant receipt are printed. To change the default, tap the field, select a new value, then tap **OK**.

Note: *A merchant receipt is always printed for transactions that require a customer signature, even when* ***Number of Merchant Receipts*** *is set to zero.*

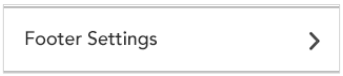
Header Settings: The header settings allow you to print information at the top of your receipts, such as your website address or other social media contacts. You do not need to enter the name of your business or your address in the header. This information will be included automatically on your receipts.



Note*: Information you enter in the header will only appear on the receipt when printed from the terminal. It will not appear on the receipt if it is sent by text or by email to the customer.*

To set up a header for your receipts, tap **Header Settings**, choose a language, tap each field you want to fill out, enter the text you wish, then tap **OK**.

Footer Settings: The footer settings allow you to print information at the end of your receipts, such as a holiday greeting (for example, Happy Mother's Day) or a message of appreciation (for example, Thank you for your business).



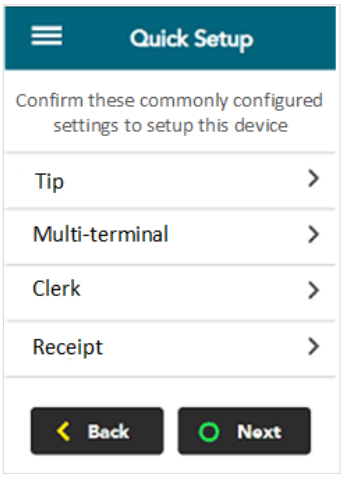
Note: *Information you enter in the header will only appear on the receipt when printed from the terminal. It will not appear on the receipt if it is sent by text or by email to the customer.*

To set up a footer for your receipts, tap **Footer Settings**, choose a language, tap each field you want to fill out, enter the text you wish, and then tap **OK**.

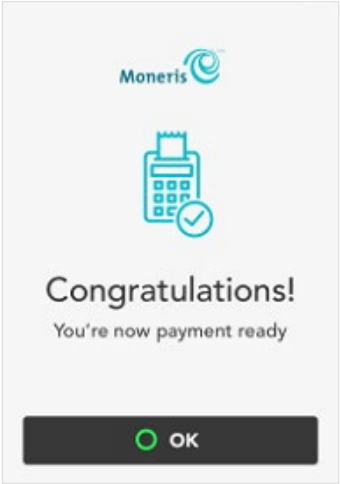
12. When you are finished setting the receipt options, tap **Save.**

13. Tap **Next** to complete the Quick Setup.

    The Congratulations screen appears.



14. Tap **OK** to begin processing transactions.
15. Refer to the ***Moneris Core® V400c Using Your Terminal*** guide (available at **moneris.com/support-v400c**) for:
    - an overview of the terminal hardware, the main menu, and the touch screen;
    - instructions on how to perform transactions, change settings, run reports, check your batch totals, and more.



Troubleshooting terminal communication

A message will appear on the screen if an error occurs. In the table below, find the error message that appears on the terminal and try the solution. If the error message re-appears, contact Moneris Customer Care. Refer to *Merchant assistance* on page 15 for contact information.

Error message	Solution
Unable to sync with Moneris host **Unable to sync with Moneris cloud** **Please make sure your device is connected to the Internet** **We're unable to connect**	The terminal cannot establish a connection to the Moneris host or cloud. 1. Tap **OK** or press the green key to clear the error message. 2. Make sure that the Ethernet cable is securely plugged into the port on the multi-port box labelled with the network symbol ( ). If needed, refer to the ***Moneris Core® Countertop V400c Setting up Your Hardware*** guide available at **moneris.com/support-v400c**. 3. Make sure that the router and hub/switch (if any) are working. Refer to the ***Moneris Ethernet Readiness Checklist*** to confirm that messages from the terminal to the Moneris host can pass through your firewall. 4. Confirm that your network is working: ▪ **Public Internet**: Contact your Internet Service Provider (ISP) for help. ▪ **Corporate network**: Contact your corporate help desk to make sure your terminal can access the Moneris host. 5. Restart your terminal. At the Main menu, swipe left to view the second panel of the Main menu, then tap **Restart**.

Merchant assistance

If you need assistance with your Moneris Core® terminal, we're here to help, 24/7.

We're only one click away.

- Visit **moneris.com/support-v400c** to:
  - download additional copies of this guide and other resources;
  - consult the ***Moneris V400c Online Operating Manual*** in WebHelp format to understand all the options on your terminal and how to use them.
- Visit **shop.moneris.com** to purchase point-of-sale supplies and receipt paper
- Visit **insights.moneris.com** for business and payment news, trends, customer success stories, and quarterly reports & insights

Need us on-site? We'll be there.

One call and a knowledgeable technician can be on the way. Count on minimal disruptions to your business as our Field Services provide assistance with your payment terminals.

Can't find what you are looking for?

Call Moneris Customer Care (available 24/7) toll-free at **1-866-319-7450**. 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**.

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