BE PAYMENT READY

PAYD Pro Plus®
In-Store Solution
Getting Started Guide

Moneris

BE PAYMENT READY

Need help?

Web: moneris.com/support-PAYDProPlus

Toll-free: 1-866-319-7450

Record your Moneris merchant ID here:

_____

Contents

Introduction

In this section, we explain the purpose of the guide, and provide account activation, software installation, and login instructions.

Introduction

PAYD Pro Plus® takes your business to the next level with a POS Payment Solution, with great features that helps you run your business efficiently and effectively.

This guide provides you with instructions on how to set up and use your PAYD Pro Plus In-Store Solution.

Note: *Based upon your PAYD Pro Plus software bundle type and/or your Merchant Agreement with Moneris, certain features described in this guide may not be visible within the PAYD Pro Plus In-Store Solution.*

Before you get started

Before proceeding with the installation steps in this guide, ensure the following:

- You have the following information:
  - Your **Store ID** and **Merchant ID** from the "Your PAYD Order is Ready" email you were sent when you signed up for PAYD Pro Plus. These IDs will be used when activating your account.
  - Optional features e.g. **gift cards**, **Ernex Terminal ID** (found in your Moneris Gift & Loyalty Welcome letter).

- You are able to login to the computer as the Administrator or member of the Administrator's group.

- Perform these tasks while the business is not open to avoid disruption to your business processes.

System requirements

The PAYD Pro Plus In-Store Solution is comprised of two parts: PAYD Pro Plus In-Store POS and PAYD Administration. The PAYD Pro Plus In-Store POS is an application that is installed on your computer. PAYD Administration is optimized to run on a web browser on your laptop or computer e.g., Google Chrome, Mozilla Firefox, or Microsoft Internet Explorer.

Your laptop or computer must be equipped with 7 or more USB ports and a graphics processor and RAM capable of supporting the Windows operating system.

PAYD Pro Plus also operates as a Mobile Solution on Apple® iPads®. For more information on the PAYD Pro Plus Mobile Solution, please visit **moneris.com/paydproplus**.

Note: *The PAYD Pro Plus In-Store Solution is also compatible with Windows 10, however it has not been optimized to run on Edge, the web browser installed by default with Windows 10. You will need to run Internet Explorer 11 or another browser, on Windows 10 in order to operate PAYD Pro Plus.*

Note: *The PAYD Pro Plus In-Store Solution may not function, or may not function properly on systems that do not meet the minimum recommended hardware specifications and the minimum recommended software specifications.*

Getting started with PAYD Pro Plus

Please perform the following tasks:

1. Retrieve your **Store ID** and **Merchant ID** from the "Your PAYD Order is Ready" email you were sent when you signed up for PAYD Pro Plus. These IDs will be used when activating your solution.

2. *Activate* your account.

3. *Login* to PAYD Administration with your login credentials.

4. *Download* and install the PAYD Pro Plus In-Store application.

Activating PAYD Pro Plus

Follow these instructions to activate your PAYD Pro Plus solution.

1. Open a web browser on your laptop or PC.

2. In the address bar, enter **moneris.com/activatePAYD**.

3. At the Activate your account screen, enter your Moneris Merchant ID and Store ID into the provided fields and click/tap **Next**.

4. In the next Activate your account screen, enter your information into the provided fields following these guidelines:

   - **First/Last Name**: The name of the business owner activating the account.
   - **Email**: The email address of the business owner activating the account.
   - **Employee ID**: Enter an alphanumeric ID for the business owner activating the account.

     Note: This employee will be listed as a super administrator in PAYD Pro Plus, and will have full access to make changes to the system. Subsequent employees will be entered with fewer system access privileges. Therefore, it is important that the business owner be the person to enter this information.

   - **Password**: Enter an alphanumeric password consisting of 8-20 characters, including at least one letter, one number, and one special character e.g. $, @, or !.
   - **Confirm password**: Re-enter the password you entered in the field above.
   - **Security question**: Click this drop-down menu and select a security question from the list. This security question will be used for password recovery in the event you forget your password in the future.
   - **Answer**: The answer to the security question selected above.
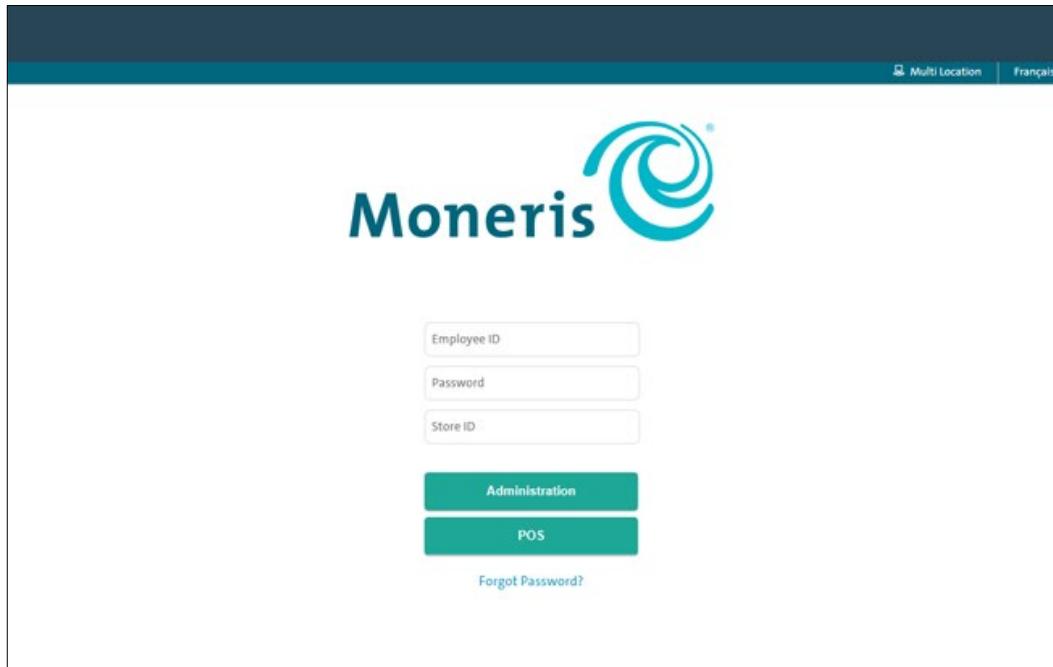
5. Click **Save** at the bottom of the screen.

6. When you see the "Activation complete" message, the account activation was successful.

   The Login page appears.

Log in to Moneris PAYD® Administration

Follow the instructions below to login to the PAYD Administration screen. Use the Administration screen to configure the software, and to enter product and staff data.

1. At the login page, enter your PAYD login credentials (**Employee ID**, **Password** and **Store ID** that you created when you activated your account) into the provided fields.

2. Click the **Administration** button.

   The PAYD Administration main screen appears.
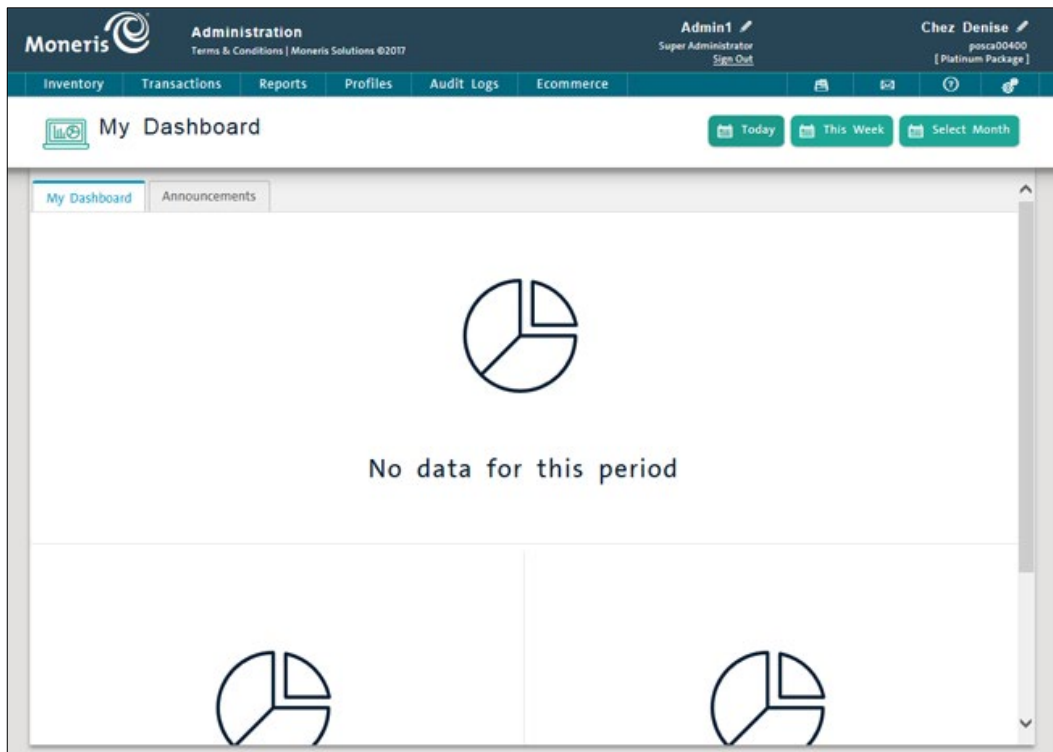
Important: When you need to login to PAYD Administration after your initial login, be sure to bookmark the following page in your browser: my.getpayd.com. This will bring up the login page.

Accessing Online Help

PAYD Administration contains context-sensitive help in each screen. Context-sensitive help offers explanations of the PAYD Pro Plus software and instructions on performing tasks for the particular screen from which it was accessed. Click the **help** button () in the screen to access this help.

Logging out of PAYD Administration

In the header at the top of the PAYD Administration screen, click the **Sign out** link. The Login screen appears.

Downloading and installing the POS application

Downloading the POS installation file

Perform this task on each laptop/computer that you will use to process transactions.

1. Log in to PAYD Administration (see page 5).

2. In the PAYD Administration screen, click the configuration button ( ).

   The Configuration menu appears.

3. On the Configuration menu, click **Download In-store POS**.

4. When prompted to run or save the installation file, click **Save**.

   The file downloads onto your computer's hard drive.

Installing the POS

Once the installation file has been saved onto your computer's hard drive, perform these steps to install the POS.

1. Open the folder to which you saved the installation file.

2. Right-click on the **SetupPPP_en.msi** file and choose **Run As Administrator**.

3. Wait while the Setup Wizard installs the program.

4. When prompted, click the **Finish** button to complete the setup.

   Once the Setup Wizard closes, the program launches to the login screen.

Logging into the PAYD Pro Plus POS view

To log in to the PAYD Pro Plus POS view:

1. On your Windows desktop, double-click the PAYD Pro Plus icon ( ).

   The PAYD Pro Plus login screen appears.
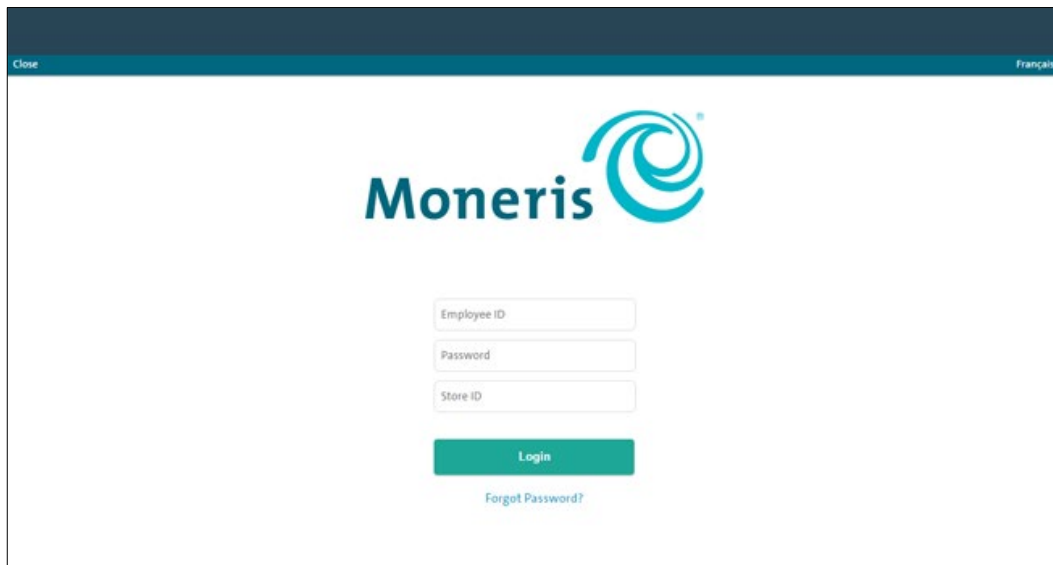
2. Enter your PAYD login credentials (**Employee ID**, **Password** and **Store ID**) into the provided fields.

3. Click the **Login** button.

   The PAYD Pro Plus POS view will appear.

Note: *If the "New POS Detected" popup appears, refer to* <u>Configuring lanes</u> *on page 16 for more information about populating the fields.*

Logging out of the POS view

1. Click the lock button ( ) in the top left corner of the screen.

   The "Authentication" popup appears.

2. Click **Sign Out**.

   The Login screen appears.

Configuring merchant settings

Use the options on the Configuration menu to configure the PAYD Pro Plus software behaviour. These options enable and disable various functions in order to customize the PAYD Pro Plus software.

Configuring business contact information
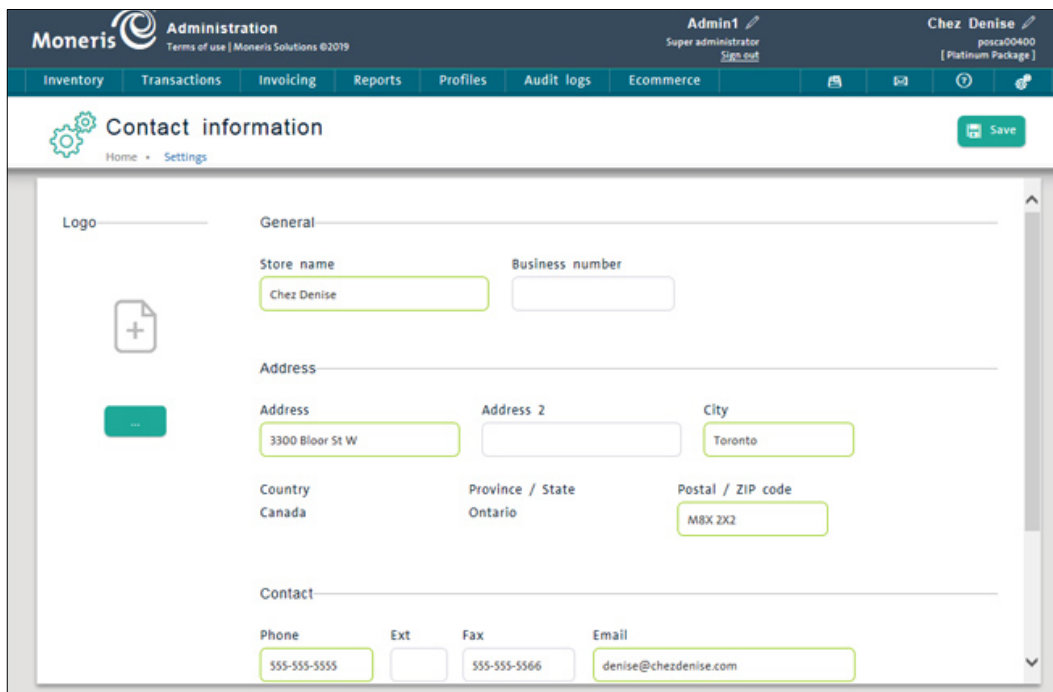
Use the Contact Information screen to enter the contact information for your business. Contact information can be printed on receipts (refer to *Configuring receipt options* on page 13) and on Purchase Orders. Follow the instructions below to configure store contact information.

To configure contact information:

1. In the Moneris PAYD Administration screen, click the configuration button ( ).

2. On the Configuration menu, click **Contact Information**.

3. In the **General**, **Address** and **Contact** sections, enter contact information applicable to your business.

   Note: *Fields outlined in yellow are mandatory.*

4. Click the **Save** button.

Note: *The **Logo** button ( ) is used to generate the business' logo in Purchase Order headers only. The logo added here will not print on receipts. To add a logo to the receipt, refer to "Setting Up the Receipt Printer" in the* **PAYD Pro Plus Online Help***.*

Configuring receipt options
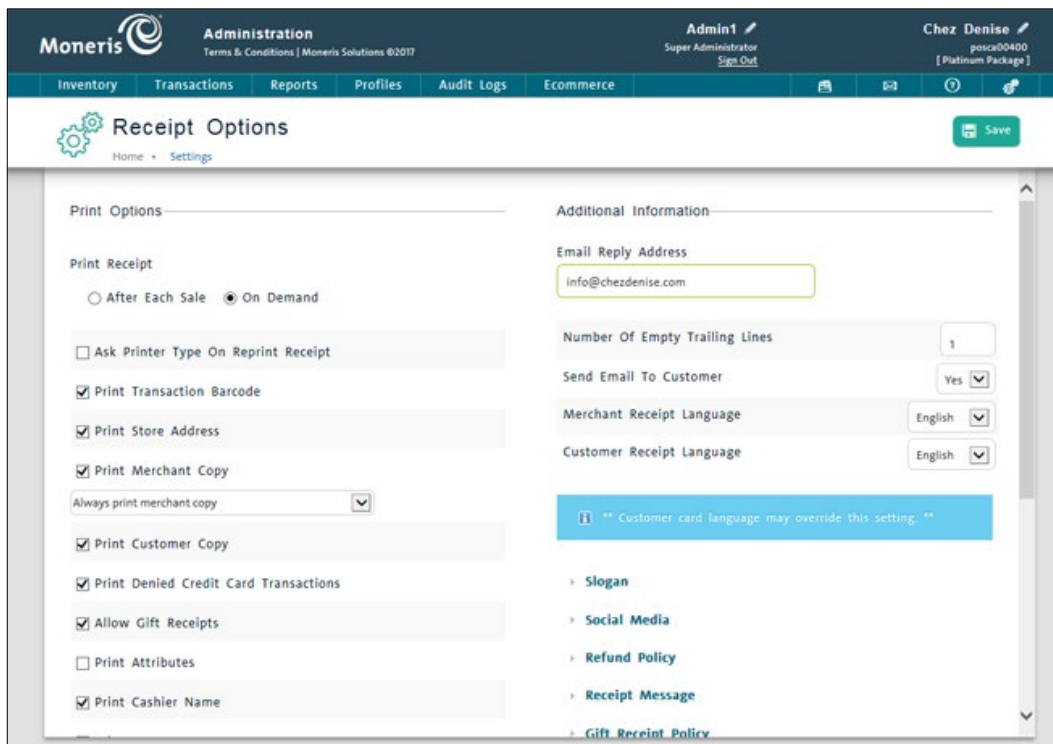
The Receipt Options screen is used to specify print options, including when receipts print and what will appear on your receipts. You can enter several messages as needed for such items as: greetings, business slogans, refunds, gift receipts, warranties, store credits, layaway, and invoice policies. The configured messages will print at the bottom of the customer copy of the receipt. Follow these instructions to configure transaction receipts.

1. In the Moneris PAYD Administration screen, click the configuration button ( ).

   The Configuration menu appears.

2. On the Configuration menu, click **Receipt Options**.

3. Configure the various options in the **Print Options** and **Additional Information** sections (i.e., **Greeting**, **Slogan**, **Social Media**, **Refund Policy**, **Receipt Message**, **Gift Receipt Policy** etc.).

   Note: *For a detailed listing of the various receipt options, refer to "Configuring Receipt Options" in the* **PAYD Pro Plus Online Help**.

4. Click the **Save** button.

Configuring taxes

The Taxes screen stores your business' tax registration numbers for the federal and provincial taxes to which you are subject. Follow the instructions below to configure taxes.

1. In the Moneris PAYD Administration screen, click the configuration button (![config button]).

   The Configuration menu appears.

2. On the Configuration menu, click **Tax**.

3. If your business has a tax registration number, enter the tax registration number into the applicable **Registration Number** field.

4. If your business levies additional taxes other than the default provincial/federal/harmonized sales taxes, proceed to step 5. If not, proceed to step 8.

5. Under the **Additional taxes** section, click the **Add** button.

   An "Additional Tax" popup appears.
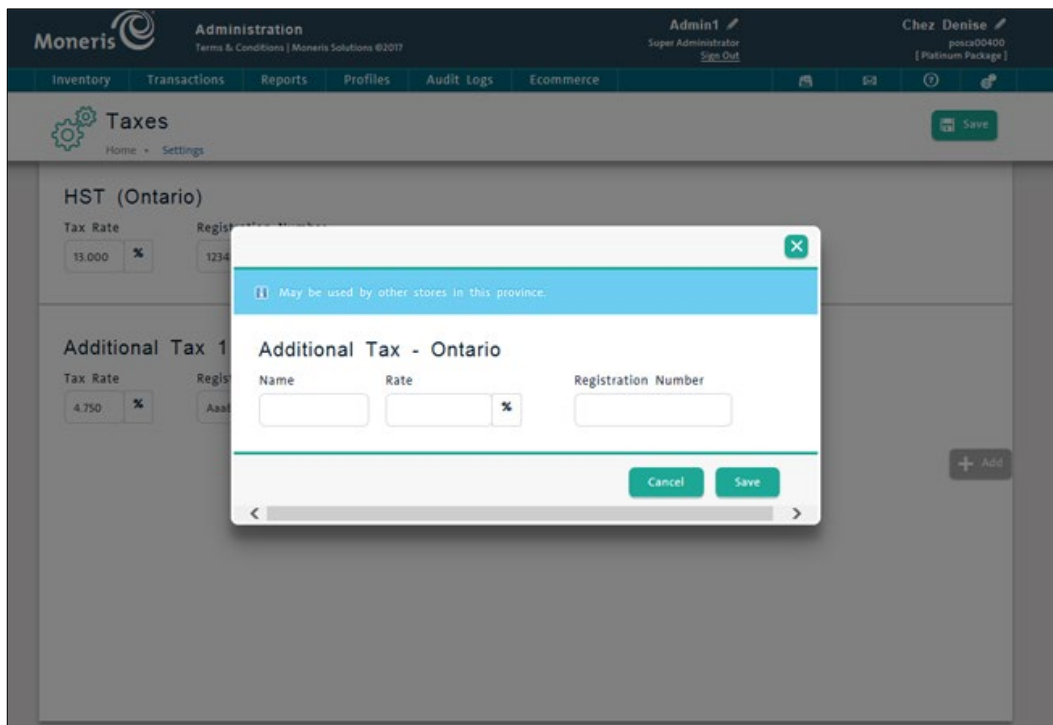
6. Complete the popup fields as follows:

   a. Click inside the **Name** field and enter a tax name.

   b. Click inside the **Rate** field and enter the rate (e.g., "12.00").

   c. Click inside the **Registration Number** field and enter the tax registration number (if applicable).

   d. Click the **Save** button.

7. Repeat steps 4 to 6 as necessary to add other taxes.

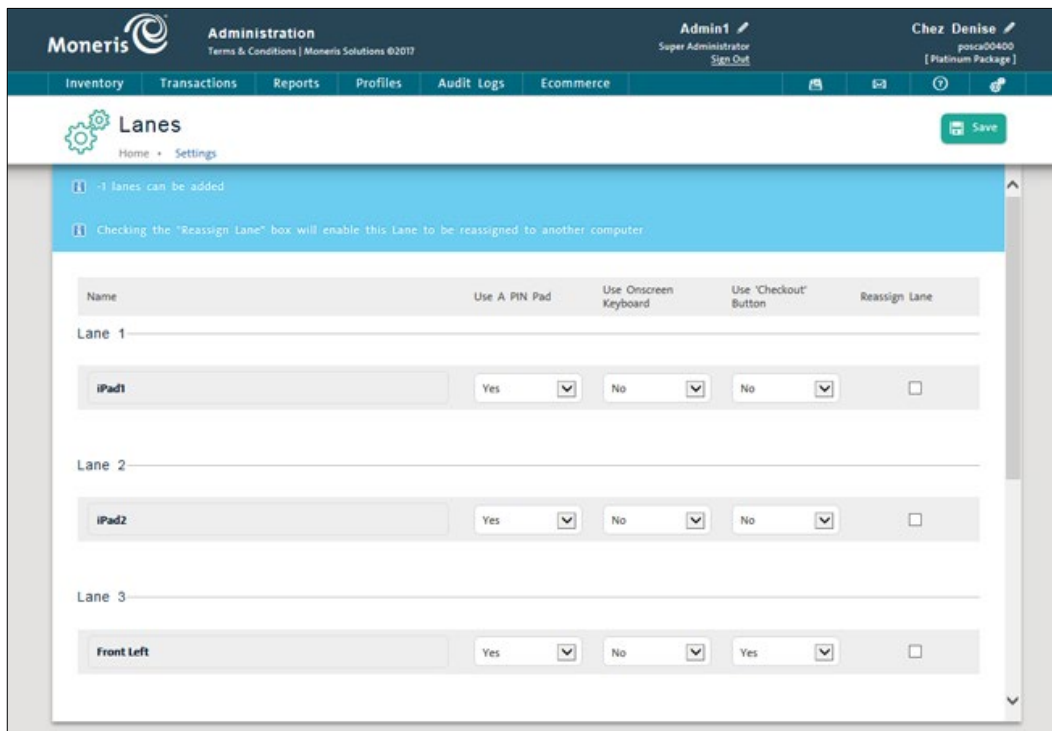8. Click the **Save** button at the top of the Taxes screen.

Configuring lanes

Some businesses have more than one POS station to handle customer checkouts. It is possible to configure the PAYD Pro Plus software to work in this type of multi-lane environment using the Lanes screen. Merchants can add up to 99 lanes.

Each laptop or computer using the PAYD Pro Plus software to accommodate customer checkouts at the POS is required to be a separate lane. Follow the steps below to create lanes.

Note: This feature depends on your Merchant Agreement with Moneris. Merchants enabled to run a single lane only will not be able to configure multiple lanes. If you want to add one or more lanes to your business, visit us at moneris.com/paydproplus or call us at 1-855-423-PAYD (7293).

1. In the Moneris PAYD Administration screen, click the configuration button (   ).

    The Configuration menu appears.

2. On the Configuration menu, click **Lanes**.

3. In the Lanes screen, enter a lane name into the **Name** field.

4. If your store is set up to accept integrated payments, and you have a Moneris iPP320 PIN Pad for this lane, select **Use a Pinpad**. If your store does have payment processing integrated with Moneris, this option will not be visible.

5. From the **Use Onscreen Keyboard** drop-down menu, select **Yes** to enable the onscreen keyboard, or select **No** to prevent it from becoming visible.

6. From the **Use 'Checkout' button** drop-down menu, select **Yes** to enable a Checkout button in the POS view, or select **No** to prevent the button from being visible.
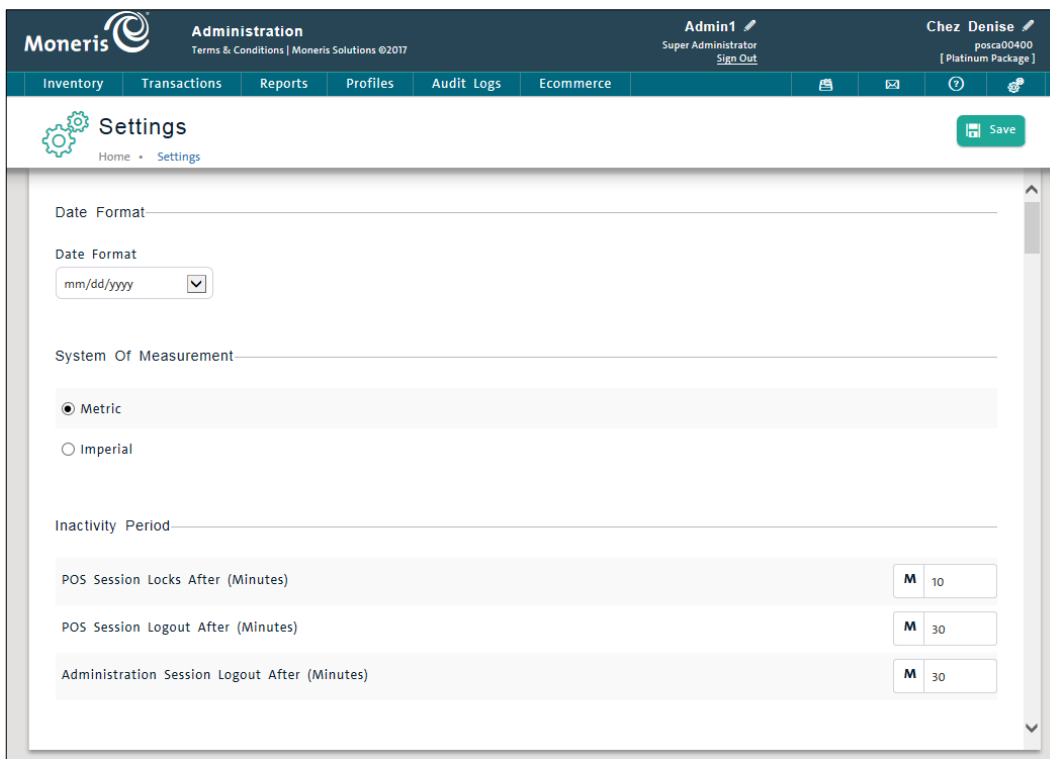
7. Click the **Save** button.

8. If applicable, repeat steps 3 – 7 to configure additional lanes.

Configuring miscellaneous system settings

The Settings screen enables you to define system behaviour within the PAYD Pro Plus software, including what features may be enabled in the POS and Administration sections.

To configure system settings:

1. In the Moneris PAYD Administration screen, click the configuration button (   ).

   The Configuration menu appears.

2. On the Configuration menu, click **Settings**.

3. Select the various setting options to tailor the system's behaviour.

4. Click the **Save** button.

Follow the guidelines below to define system behaviours:

- **Date format** - select **mm/dd/yyyy**, **dd/mm/yy** etc.

- **System of measurement** - select either **Metric** or **Imperial**.

- **Inactivity Period** - sets a lock timer for periods of inactivity.

- **Search Settings** - define the way search results are displayed.

- **Email Low Stock Notification** - configure when and where low stock notifications are sent via email.

- **Purchase Orders** - enter email addresses to use for reordering inventory (e.g., the person at your business who is responsible for communicating with suppliers for ordering).

- **Batch Close** - configure the type of batch close and the time to perform it (if applicable).

- **Open Cash Drawer** - define when to open the cash drawer after transactions (only applicable if you have a receipt printer and cash drawer).

- **Payment Types** - select which payment types your business will accept (including user-defined custom payment methods).

- **Cash Penny Rounding** - determine when to round up or down when a customer pays with cash.

- **US Dollar Exchange Rate** - enter the current exchange rate in the provided field.

- **Payout Reasons** - define the reasons to open the drawer and remove cash from the till (including a user-defined name for the **Quick Payout** button).

- **Non-Inventory Product** - select whether or not to add non-inventory items to the product database when they are being sold.

- **Numberpad** - select whether or not to use the on-screen number pad during checkout.

- **Service Required** - define when the system will deploy an automated email for service follow up.

- **Suspended Sales** - define the number of days you want to keep suspended sales in memory before they are deleted (if not resumed beforehand).

- **Tipping** - for merchants using integrated credit/debit card payments with Moneris, select whether or not you want to allow customers to leave tips for employees when the transaction is being paid by *Interac®* Debit or credit card.

- **Debit Cashback** - for merchants using integrated credit/debit card payments with Moneris, select whether or not you want to allow customers to receive cashback when the transaction is being paid by *Interac* Debit card, and define the cashback parameters.

- **Debit Surcharge** - for merchants using integrated credit/debit card payments with Moneris, select whether or not you want to enable a surcharge when the transaction is being paid by *Interac* Debit, and define the surcharge parameters.

- **Commission** - select whether or not you want to allow commission for employees, and when commission is assigned.

- **Store Credits** - select whether or not you want to allow customers to purchase and refund items using store credit and the amount of time to keep the store credit on file.

- **Layaways** - select whether or not you want to allow customers to place items on layaway and the length of time for a layaway to remain active.

- **Invoices** - select whether or not you want to issue invoices from the system, and define the parameters about how they behave.

- **Sales Quotes** - determine whether or not you want to use the Sales Quotes feature in the POS view, and define the parameters about how they behave.

Note: *The settings in this screen are explained in detail within the* **PAYD Pro Plus Online Help***.*

Employee setup

Defining staff permission roles

PAYD Pro Plus comes pre-defined with four permission roles: **Super Administrator**, **Administrator**, **Cashier** and **Manager**. Most of these roles have a set of default permissions that can be further configured to suit the needs of your business.

Note: *The Super Administrator role cannot be edited or changed, so it is not listed in the Permission Roles screen.*

Follow the instructions below to define staff permission roles and configure these roles to determine which features staff can and cannot access in the PAYD Pro Plus In-Store solution.

1. In the Moneris PAYD Administration screen, click **Profiles**.

2. On the Profiles menu, under the **Employees** section, click **Permission Roles**.

3. Choose one of the following options:

    ▪ To add a new permission role:

        a. Click the **Add** button.

        b. In the Add/Edit Permission Roles screen, enter a name for the role and click **Save**.

        c. Proceed to step 4.

    OR

    ▪ To modify an existing permission role:

        a. Click on the role name in the list.

        b. Make your modifications to the settings following the instructions in step 4.

4. Modify permissions within both the **POS** and **Administration** tabs pertaining to the POS and Administration sections of the In-Store Solution software following these guidelines:

    ▪ **Has Permission = Yes** - This indicates that a staff member assigned to this role has permission to interact with the object (i.e., click a button, open a screen, save changes etc.).
    ▪ **Has Permission = No** - This indicates that a staff member assigned to this role does not have permission to interact with the object and will be informed by a popup that they cannot perform that action.
    ▪ **Has Permission = Override** – This indicates that if an employee attempts to perform a task that you deem to be sensitive (i.e. refunding transactions over a certain dollar amount), the system will prompt for someone with more authority to sign in to proceed.

5. When finished, click the **Save** button.
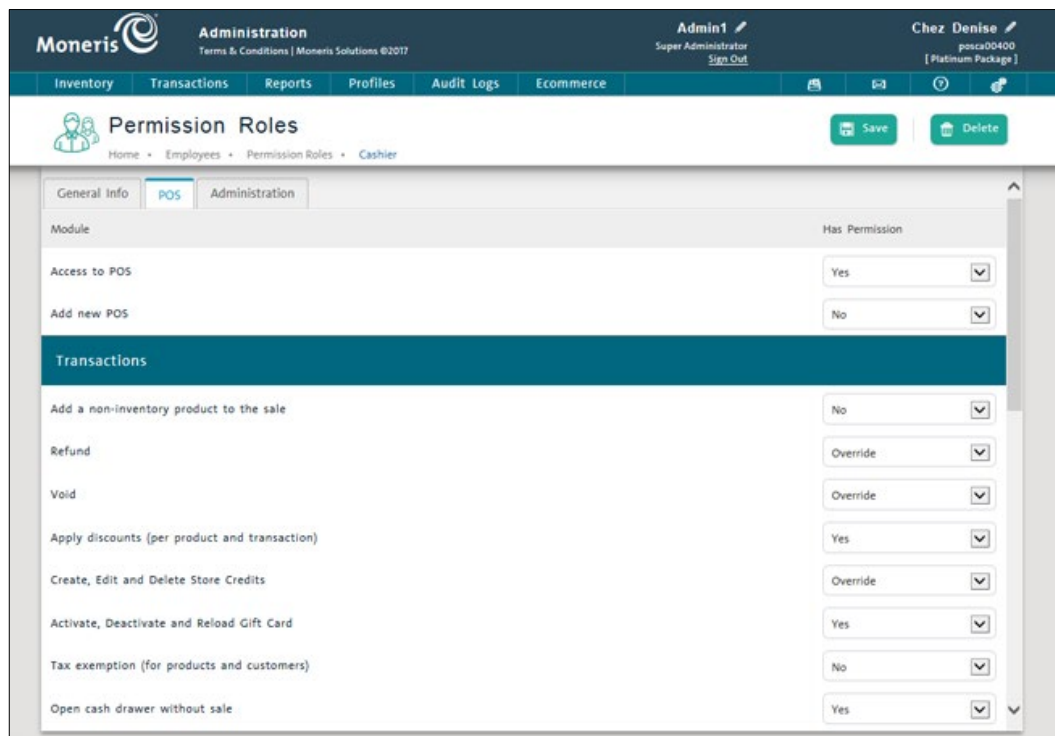
Creating staff profiles

Each employee that will be using the PAYD Pro Plus In-Store Solution requires a staff profile. The staff profile is used to contain contact information about the employee and configure other settings. The staff profile is also where you assign the employee to their permission role. Follow the steps below to create profiles for your employees.

Note: PAYD Pro Plus comes with a single staff member pre-defined. This staff member is the person to whom the software is registered (preferably the business owner).

1. In the Moneris PAYD Administration screen, click **Profiles**.

2. On the Profiles menu, under the **Employees** section, click **Add Employee**.

    The Details screen appears.

3. Complete required information within the **General Info** tab.

   Note: *Fields highlighted in yellow are mandatory.*

4. Click the **Save** button.

5. Repeat steps 2 - 4 for additional employees.

   Note: *Newly-created staff will be prompted to change their temporary password and provide an answer to a security question when they first sign in.*

Inventory set-up

One of the benefits to using PAYD Pro Plus in your store is its inventory management functionality. To access inventory management features, in the Moneris PAYD Administration screen, click the **Inventory** menu.

Before you begin adding products, consider how you want to organize your inventory (refer to the *Preparation work* section below). Ensuring that your inventory is set up correctly will help you manage it more efficiently. PAYD Pro Plus uses categories, brand names and attributes to organize and structure your inventory, making it easier for you to add and search for products, reorder stock, set up sales and promotions, and report on inventory movement.

Preparation work:

Take a few moments to organize your products into categories. Write down the types of products you sell, the suppliers who supply them to you, the brand names etc. This will help you as you begin your data entry. Once you are ready, go through the following three sections for guidance on how to set up and use categories, brand names and attributes in your inventory.

Note: *Categories, brand names, and attributes must be added through the Categories, Brand Names, and Attributes screens, respectively before you can assign them to individual products.*

Note: *If you are importing your inventory, you can skip these steps and proceed directly to* Importing products *on page 30.*

Creating categories

PAYD Pro Plus uses categories to help you organize and search products. Think of categories as the sections you would have in a product catalogue. For example, if you run an apparel store, you may want to have different categories for men's, ladies' and children's wear. Follow the steps below to create categories.

1. In the Moneris PAYD Administration screen, click the **Inventory** menu.

2. On the Inventory menu, under the **Product** section, click **Categories**.

3. Select which type of category to add:

   ▪ To add a top level category:

       ▪ Click the **Add** button.

   OR

   ▪ To add a sub-category to one of the existing top-level categories:

       ▪ Click any category in the hierarchy chart on the left, then click the **Add** button.

           The "Add a sub-category" popup appears.
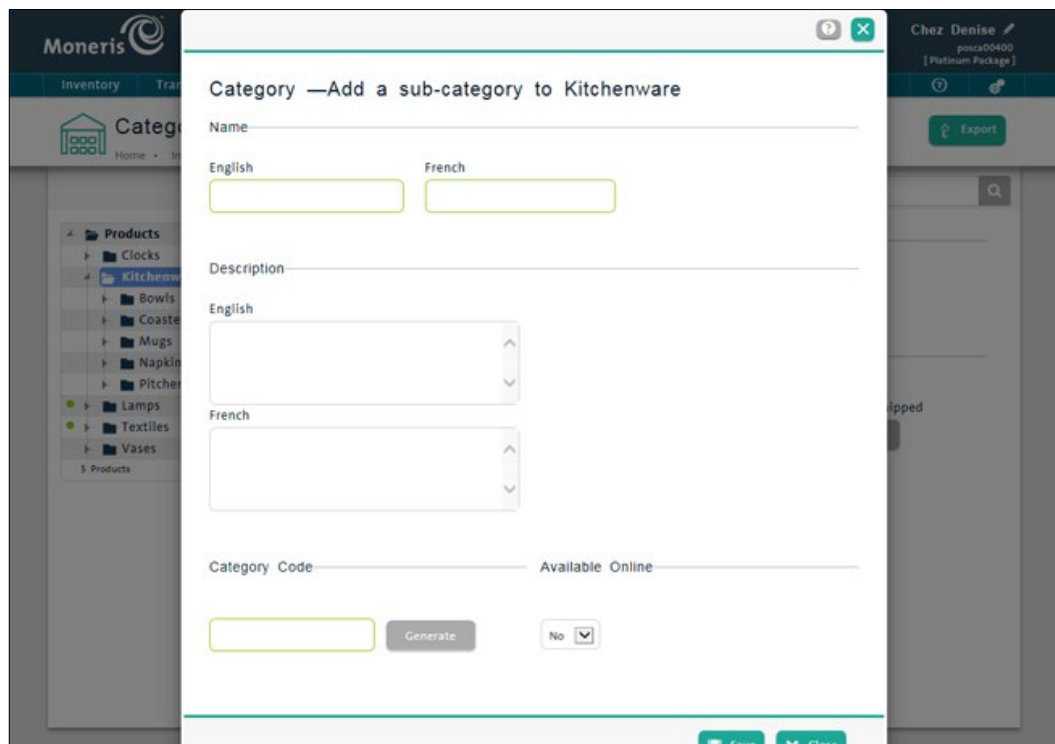
4. Under **Name**, enter a name for the category (**English** is required, **French** is optional).

5. Under **Description**, enter a description for the category (both **English** and **French** are optional).

6. Under **Category Code**, click the **Generate** button to have PAYD Pro Plus automatically generate a unique code number.

7. If you are using the PAYD Pro Plus ecommerce module, proceed to step 8. If not, proceed to step 9.

8. Set online availability:

   ▪ To enable items from this category to be sold online, select **Yes** from the **Available Online** drop-down menu.

   OR

   ▪ To prevent items that belong to this category from being sold online, leave the default setting as **No** from the **Available Online** drop-down menu.

9. Click the **Save** button.

   The "Add a sub-category" popup closes and the Categories screen reappears.

10. If you selected **Yes** to **Available Online** in step 8, proceed to step 11. If you left **Available Online** set to **No**, proceed to step 12.

11. Set online shipping options:

    a. In the Categories screen, the category you created is still highlighted in the list on the left. Select the shipping options:

       ▪ To enable the products that belong to the category to be shipped to customers who order online, click **Yes** to **Set As Can Be Shipped**. A popup appears. Proceed to step b.
       ▪ To prevent items that belong to this category from being shipped to customers who order online, click **No** to **Set As Can Be Shipped**. Proceed to step 12.

    b. Click **OK** to continue.

12. Repeat steps 3 - 11 to create additional product categories.

Note: *You can create a product hierarchy with categories and sub-categories with up to 5 layers (e.g., Products > Toys > Toddler > Plush Toys > Non-licensed).*

Creating brand profiles

Creating brand names profiles in PAYD Pro Plus enables you to track the products you are selling by brand. It also assists with the product searches during checkout and the way products are listed on your ecommerce website. Follow the steps below to create brand profiles.

1. In the Moneris PAYD Administration screen, click the **Inventory** menu.

2. On the Inventory menu, under the **Product** section, click **Brand Names**.

3. In the Brand Names screen, click the **New Brand Name** button.

4. In the **Brand Name** section, enter a name for the brand (**English** is required, **French** is optional).

5. If you are using the PAYD Pro Plus ecommerce module, proceed to step 6. If not, proceed to step 8.

6. Set online availability:

   ▪ To enable a brand (and the products assigned to it) to be visible online, select **Yes** for **Set Available Online**.

   OR

   ▪ If you do not want this brand (and the products assigned to it) to be visible online, select **No** for **Set Available Online**.

7. Set shipping availability:

   ▪ To enable this brand (and the products assigned to it) to be shipped to your online customers, select **Yes** for **Set As Can Be Shipped**.

   OR

   ▪ If you do not want this brand (and the products assigned to it) to be shipped to your online customers, select **No** for **Set As Can Be Shipped**.

8. Click the **Save** button.

9. Repeat steps 3 to 8 until you have added all the desired brand names.

Creating attributes

Attributes enable you to further define and group products that are similar by specifying product variations. For example, if you sell a certain product that comes in red, blue and green, you can add an attribute "Colour" to the system, and then assign values "red," "blue," and/or "green".

By using attributes you can reduce the amount of information you need to enter for each item, making inventory management more efficient because attributes work in tandem with Product IDs. Attributes are also helpful for quickly displaying similar items in one screen so you can easily see the quantity of a particular product variation you have in stock.

Make note of the different attributes that apply to your inventory (e.g., size). For each of the attributes, list the values that are associated with it (e.g., "Small," "Medium" and "Large"). Follow the steps below to create attributes and assign attribute values.

1. In the Moneris PAYD Administration screen, click the **Inventory** menu.

2. On the Inventory menu, under the **Product** section, click **Attributes**.

3. In the Attributes screen, click the **New Attribute** button.

   Note: *Keep in mind that you are entering an attribute name at this stage, and not a value. For example, you should be entering "Colour" instead of entering "Blue".*

4. Enter an **English** name for the attribute (required). A **French** name is optional.

5. Click the **Save** button.

6. Click the **Attribute Values** tab.

7. Click the **Add Value** button.

   The "Enter a new attribute value" popup appears.
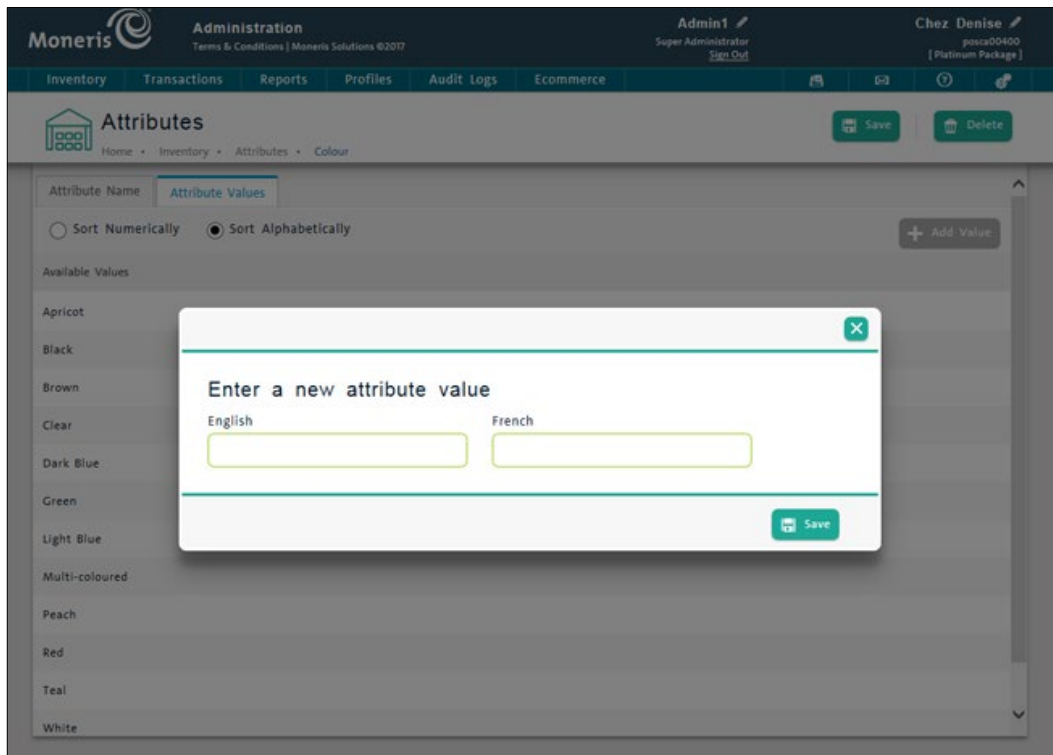
8. In the **English** and **French** attribute value text fields, enter a value for the attribute (e.g., if the attribute is Colour, this is where you enter "Black").

9. Click the **Save** button.

   The popup will close.

10. Repeat steps 7 - 9 to add additional attribute values as needed.

11. Click the **Save** button at the top of the Attributes screen.

12. Repeat steps 3 – 11 to create additional attributes as needed.

Note: Inventory management also supports fees, pricing groups, and promotions. For instructions on using these features, please refer to the **PAYD Pro Plus Online Help***.*

Creating supplier profiles

A supplier's profile enables you to link products to that supplier so that they can be reordered using the system's Purchase Order functionality. Follow these steps to create profiles for the business' product suppliers.

1. In the Moneris PAYD Administration screen, click **Profiles**.

2. On the Profiles menu, under the **Suppliers** section, click **Add New Supplier**.

3. Enter a supplier name and fill out the remaining fields on the **Details** tab.

4. Click the **Save** button.

5. Repeat steps 2 to 4 to create profiles for additional suppliers.

Adding products to inventory

There are two methods of adding products to inventory: manually creating product profiles or importing inventory.

Note: *Inventory can also be added on the go at the POS. This section of the guide explains initial product setup only. For more information on adding products at the POS, see* <u>Adding a non-inventory item</u> *on page 42.*

Manually creating product profiles

There are different methods for manually creating product profiles. This guide will demonstrate the most common way of performing this task with the least amount of effort, while gathering the most product information. Follow the instructions below to manually add a new product to inventory.

Note: *Fields highlighted in yellow are mandatory.*

1. In the Moneris PAYD Administration screen, click the **Inventory** menu.

2. On the Inventory menu, under the **Product** section, click **Add Product**.

    The Create A New Product screen appears.

3. In the **General Info** tab, do the following:

    a. In the **Product Name – English** field, enter the product name. A French name is optional.

    b. Click the **Generate** button beside the **Product ID** field to have the system generate a unique product ID for the item.

    c. Click the **Select Category** button.

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d. In the "Select category" popup, expand the category hierarchy to locate the category to which the product belongs, then click on the category and click the **OK** button.

   Note: *Click on the expansion triangle (   ) to expand the category hierarchy, or the collapse triangle (   ) to collapse category hierarchy.*

e. Within the **General Info** tab, enter the product's additional information related to pricing, applicable taxes, and inventory on-hand and replenishment quantities.

f. Click the **Save** button.

4. Click the **Details** tab.

5. From the **Brand Name** drop-down menu, select the brand to which the product belongs. If you need to assign attributes to the item proceed to step 6, if not, proceed to step 8.

6. Click the **Attributes** tab.

7. Select an attribute name in the **Available** list on the left and drag-and-drop it in the **Assigned** list on the right (or use the grey arrow button ⌞   ›   ⌟).

   Note: *A maximum of 5 attributes can be assigned to a product at any time.*

8. Click the **Save** button.

9. If you selected attributes in step 7, an "Attribute Value" popup appears. Assign values to the attributes and click the **Save** button. If you did not select attributes in step 7, the popup will not appear. Proceed to step 10.

   Note: *The attribute value you are selecting applies to the product you are currently creating.*

10. Click the **IDs** tab.

11. On the IDs tab, complete the following steps:

    a. Click the product ID in the list.

       The "ID's" popup appears.

    b. From the **Supplier** drop-down menu, select the product's supplier.

    c. If you are using a barcode scanner to scan products at checkout, click inside the **Supplier UPC** field and scan the item's barcode.

       Note: *If you are not using a scanner, or the item does not have its own barcode on its packaging, skip this step and proceed to step 12.*

    d. Click **Save** at the bottom of the popup, then click **Close**.

12. Click the **Save** button at the top of the screen.

13. Repeat steps 2 - 12 to create other product profiles.

    Note: *A default product variation, or Product ID, is automatically created for a new product when you add it to PAYD Pro Plus. You can add other Product IDs to the product in order to represent each of its variations. For more information on adding product IDs, please refer to* Creating additional product IDs *on page 31.*

To enter additional product information:

- Enter additional product information in the remaining tabs. For further instructions, please refer to the **PAYD Pro Plus Online Help**.

Importing products

To save time on inputting product information, you can import product files into PAYD Pro Plus from other sources. Follow these instructions below to import an inventory file.

Note: *The file that you are importing must be a text file (*.txt), a comma separated (*.csv) file, or an Excel file (*.xls), and must be saved on your hard drive.*

Note: *PAYD Pro Plus includes an inventory import template, which can be used to assist the import process. Click the link at the top of the Inventory Import screen to download a copy of the template. For instructions on using this template, refer to the topic called "Downloading the Inventory Import Template" in the* **PAYD Pro Plus Online Help***.*

1. In the Moneris PAYD Administration screen, click **Inventory**.

2. On the Inventory menu, under the **Inventory** section, click **Import**.

3. In the Inventory Import screen, click the ellipsis button () to browse the computer's hard drive to select the text file containing the inventory data. Once the file is located, click **Next**.

4. If the first row in the import file contains field names, check the **First row contains field names** checkbox.

   Note: *If you do not select the checkbox and the first row in the file contains field names, PAYD Pro Plus will attempt to import the first row as a product record, which will produce errors upon validation.*

5. In the **Field Mapping** section, drag and drop the **Fields that can be imported** from the left side of the screen to the **Order of fields in my file** on the right. Click **Next** once the field mapping is complete.

   Note: *The* **Fields that can be imported** *contain all of the possible field names that can be accepted by the system. Only select the ones that your text file contains.*
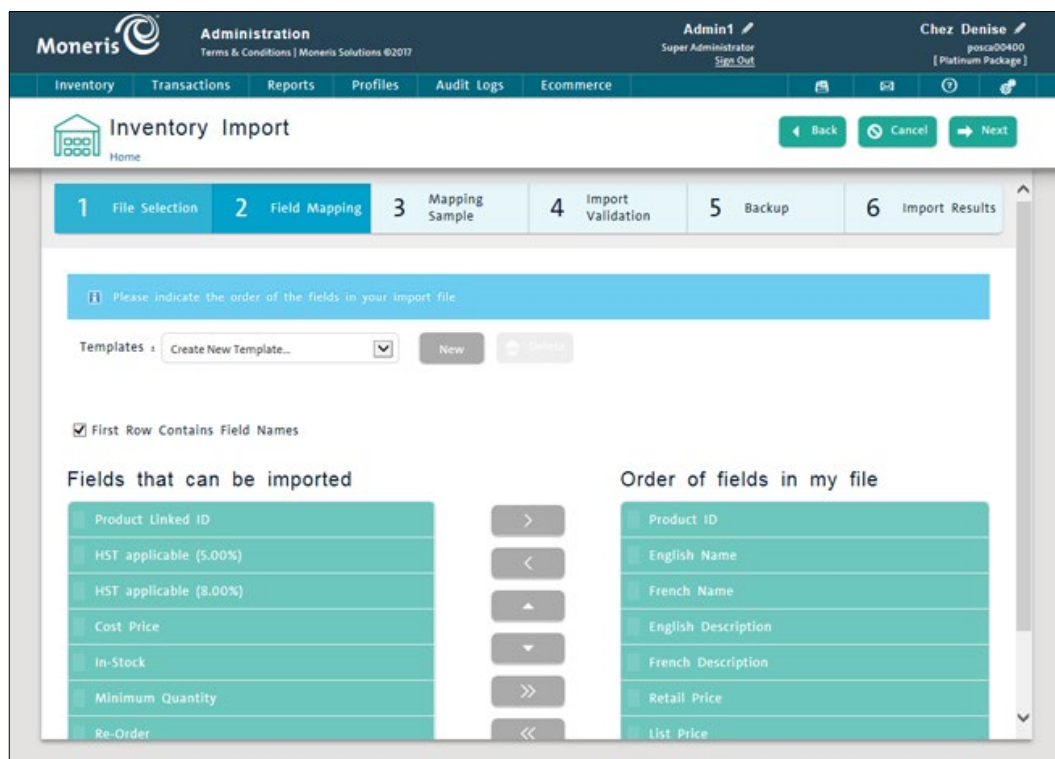
6. At the "In-stock quantities" popup, click **No**.

7. Review the mapping sample to ensure items will be correctly imported. If necessary, click **Back** and repeat steps 4 and 5. Once satisfied, click **Next**.

8. Use the information displayed in **Import Validation** to ensure that the import will be processed successfully. If there are errors identified on the screen, click **Back** to correct them.

9. Click **Next** to proceed.

10. At the **Backup** section, click **Download** and select a location to save your backup file. Once complete, click **Import Now**.

11. Once the import is complete, view the Import Results to verify items were added to inventory successfully.

For more information on importing inventory, please refer to "Importing Inventory" in the *PAYD Pro Plus Online Help*.

Creating additional product IDs

Some products have multiple variations: while the details are the same (e.g., price, cost, supplier, brand etc.), the variations are enough to warrant different SKUs. An example might be a tricycle that comes in three different colours. Use the Product IDs in PAYD Pro Plus to keep track of variants.

Note: Product IDs work in tandem with Attributes, which you created earlier.
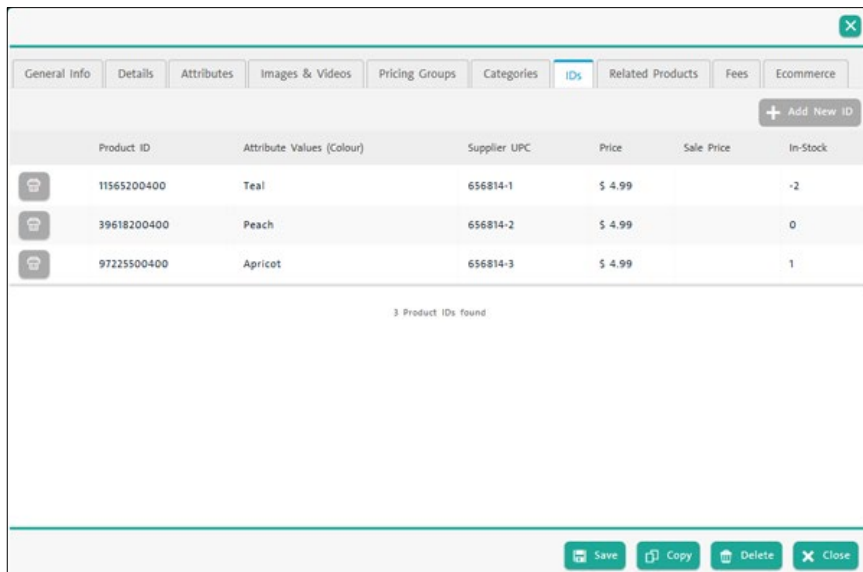
1. In the Moneris PAYD Administration screen, click the **Inventory** menu.

2. On the Inventory menu, under the **Product** section, click **Search**.

3. In the Product Search Results screen, search for a product by name, ID, attribute, supplier UPC or status. Once the item is displayed, click its name in the **Product Name** column.

    The Product Details screen appears.

4. Click the **IDs** tab.

    The IDs tab displays the default product ID which was assigned when the product was first created.

5. Click the **Add New ID** button.

    The "Create a New Product" popup appears.

6. In the "Create a New Product" popup, complete the following:

    a. Click **Generate** to create a unique ID for the product variant.

    b. From the **Supplier** drop-down menu, select a supplier.

    c. If you are using a scanner to scan products, click inside the **Supplier UPC** field and scan the item's barcode.

        Note: If you are not using a scanner, or the item does not have its own barcode on its packaging, skip this step and proceed to step d.

    d. Click the **Attribute Values** tab and select the attribute values for this product.

        Note: At least one of the attributes must be unique to this item. For example, if the default product ID was set to "Colour = Brown", the new ID cannot also be Colour = Brown. It needs to be a different value.

    e. Click the **Inventory** tab. Enter the various stock values for this new ID e.g., **In-Stock** in the provided fields.

    f. Click **Save**, then click **Close**.

7. Repeat steps 5 and 6 to add additional product variants.

8. Click **Save** in the Product Details screen, then click **Close**.

9. Repeat steps 2 – 8 to create additional IDs for other products in your inventory.

There are many other items to set up within PAYD Pro Plus, including customer profiles, discounts, pricing groups, fees etc. Information on proper setup and use of these features can be accessed in the *PAYD Pro Plus Online Help*.

POS functionality

Now that you have configured your basic store settings and set up the inventory through the Moneris PAYD Administration screens, it's time to discover the powerful point-of-sale tool that lies within the PAYD Pro Plus In-Store Solution.

The PAYD Pro Plus POS view

The PAYD Pro Plus POS view is where you process transactions. All of the configuration and data entry that you performed in the Administration screens comes into use in the POS view. The image below displays some of the features and functionalities used during a transaction within the PAYD Pro Plus POS view.
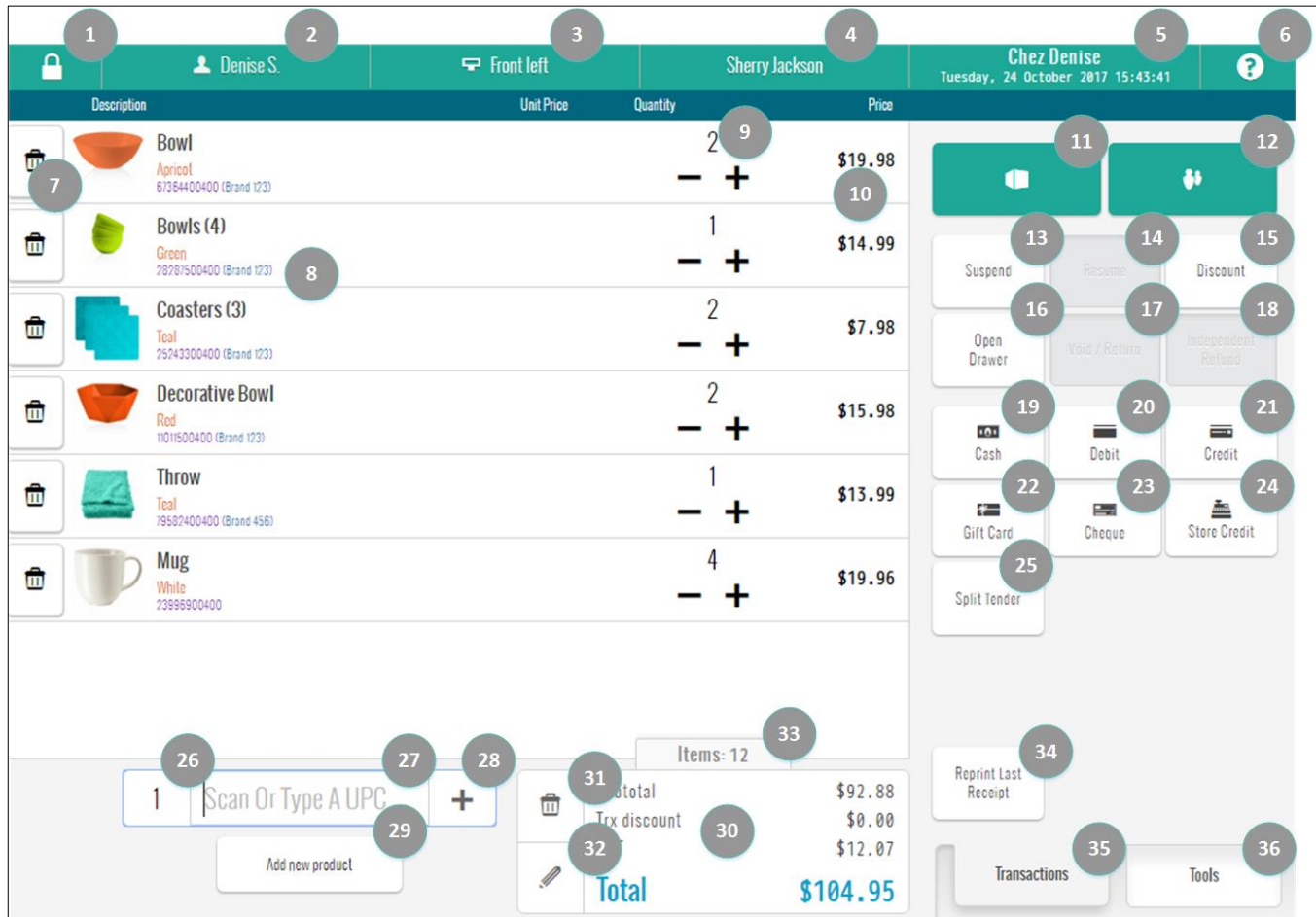
*Note: The POS view shown in this example features a basic setup. Click the **Tools** menu at the bottom of the screen, then click **Help** to access the **PAYD Pro Plus Online Help** for a complete description on how to configure the PAYD Pro Plus POS view with different functionality.*

NUMBER	DESCRIPTION
1	**Lock** button – Clicking this button reveals the "Authentication" popup. Use this popup to lock the POS session, switch users, or to sign out.
2	Displays the current user/cashier name.
3	**Lane name** – If you have multiple lanes configured, the lane name is displayed here. Refer to *Configuring lanes* on page 16 for more information.
4	The customer currently assigned to the transaction. It displays the caption "Select Customer" or "Anonymous" if no customer is assigned to the transaction.
5	Displays the store name, current date and time.

NUMBER	DESCRIPTION
6	**Help** button - Accesses the context-sensitive help function for this screen.
7	**Remove Item** button - Click this button to remove this line item from the transaction.
8	**Sale Items list** - Product(s) to be purchased in this transaction. If configured, products can display information such as item description, supplier UPC, attributes, brand name, an image, and a serial number.
9	**Quantity indicator** - Will allow you increase or decrease the quantity of an individual product to be purchased using the increment (**+**) and decrement (**-**) buttons.
10	**Item price** (after discount and before taxes if applicable).
11	**Products** button - Click this button to search for products to add to the transaction, or to create new products. Refer to _Adding products to the sale_ on page 40 for more information.
12	**Customers** button - Click this button to search for an existing customer to assign to the transaction, or to create new customer profiles. Refer to _Assigning a customer (optional)_ on page 39 for more information.
13	**Suspend** button - Click this button to suspend the current transaction. Once suspended, you will be able to begin a new transaction while preserving all of the information on the suspended transaction.
14	**Resume** button - Click this button to search for and resume suspended transactions.
15	**Discount** button - Click this button to apply a discount to the entire transaction.
16	**Open Drawer** button - Click this button to open the cash drawer.
17	**Void / Return** button - Click this button to search for, then process, a Void or Return transaction.
18	**Independent Refund** button - Click this button to process an Independent Refund transaction.
19	**Cash** button - Click this button to process cash payment for the transaction.
20	**Debit** button - Click this button to process a payment using _Interac_ Debit. If using a Moneris integrated PIN Pad, have the cardholder follow the prompts provided directly on the PIN Pad.
21	**Credit** button - Click this button to process a payment using a credit card. If using a Moneris integrated PIN Pad, have the cardholder follow the prompts provided directly on the PIN Pad.
22	**Gift Card** button - Click this button to process a payment using a Moneris gift card. Follow the on-screen prompts to redeem the gift card.
23	**Cheque** button - Click this button to process a payment using a cheque.
24	**Store Credit** button - Click this button to process a payment using store credit.
25	**Split Tender** button - Click this button to process a payment using multiple tender types (i.e., cash _and_ credit card).
26	**Quantity** field - Click inside this field and manually enter a quantity of products if applicable. The default value is 1.
27	**Data entry** field - Manually enter a value into this field, or click inside this field and scan a barcode with a barcode scanner.
28	**Add** button – Click this button to add the item entered into the Data entry field (27) to the transaction.

NUMBER	DESCRIPTION
29	**Add new product** button – Click this button to begin the process of adding a new, non-inventory product to the transaction (refer to *Adding a non-inventory item* on page 42 for more information).
30	**Transaction totals** – This area will display transaction information such as: Subtotal, Discounts (applied to the entire transaction and not the individual items), Taxes and Total.
31	**Cancel** button - Click this button to cancel the current transaction and restore a blank POS view.
32	**Note** button - Click this button to add notes regarding the current transaction being processed.
33	**Total item count** – A running tally of the quantity of products added to the sale. This value will increment each time a product is scanned or manually added.
34	**Reprint Last Receipt** button - Click this button to reprint a receipt of the last transaction. Choose to reprint the Merchant copy, Customer copy or to email a copy.
35	The **Transactions** tab contains all features & functions to process transactions.
36	The **Tools** tab contains features & functions to access the PAYD Administration screens, Gift Card and Store Credit administration functions, POS reports and hardware setup functions.

Adding a new lane

PAYD Pro Plus offers the ability to expand into additional lanes. This will allow your business to gain extra registers in order to checkout customers in a fast-paced environment. If you want to add one or more lanes to your business, visit us at **moneris.com/paydproplus** or call us at **1-855- 423-PAYD (7293)**.

When you login to the PAYD Pro Plus POS view, the "New POS Detected" popup can appear for a couple reasons:

- You have installed and launched the PAYD Pro Plus POS on a laptop or computer that has never accessed PAYD Pro Plus before.

- You have chosen to reassign a lane. Reassigning a lane is the act of replacing one station accessing the POS with another station (i.e., you move the physical location of your computers, or you replace an older computer with a newer one). For more information on reassigning lanes and the POS lanes settings, see "Configuring Lanes" in the *PAYD Pro Plus Online Help*.

If the "New POS detected" popup appears, follow these steps to create a new POS lane:

1. The **Name** field is populated with the computer name by default. If required, you can click inside the field and rename the lane accordingly.

2. Select the appropriate scenario from the **Add or Reassign** drop-down menu:

    - If you are adding this computer as a new POS lane, select **Add as a new POS**.
    - If you are replacing another POS lane, select **Reassign to**, then select the name of the POS lane you are removing.

3. If you are enrolled in integrated payment processing with Moneris, place a checkmark in the **Use a Pinpad** checkbox. If you do not have integrated payment processing with Moneris, or will not be using a PIN Pad on this lane, leave the box unchecked.

4. If you wish to use an onscreen keyboard for alphanumeric entry on this computer, place a checkmark in the **Use Onscreen Keyboard** checkbox, otherwise leave the box unchecked.

    Note: This can be useful for touchscreen laptops or computers; it is not necessary for laptops and computers with keyboards and mice.

5. If you wish to enable and use the "Checkout" button, place a checkmark in the **Use 'Checkout' button** box, otherwise leave the box unchecked.

6. Click **OK** to save your work and proceed to the PAYD Pro Plus POS view.

Transacting a Sale

The PAYD Pro Plus POS view provides access to all functions for transacting sales in PAYD Pro Plus. Follow these simple procedures to process a sale:

1. Assign a customer to the sale (optional).

2. Add items to the sale.

3. Check out (process payment).

4. Process receipts.

Assigning a customer (optional)

When processing a transaction, you can assign a (pre-registered) customer in the customer database to the sale. If you choose to assign a customer to the sale, you can do so at any point before checkout.

Note: *If you choose to not assign a customer, you can skip this step and begin adding items to the sale.*

To assign an existing customer to the transaction:

1. On the PAYD Pro Plus POS view, click the **Select Customer** button at the top of the screen, or click the customers button ( ).

   The "Customer Search" popup appears.

2. Search for the customer:

   - To find a specific customer, enter the customer's ID, name, phone number, or email and click the search button ( ).

   OR

   - To pick from a list of customers instead, leave the search field blank and click the search button ( ).

3. To assign the customer to the sale, click the corresponding **Assign** button (beside the customer name).
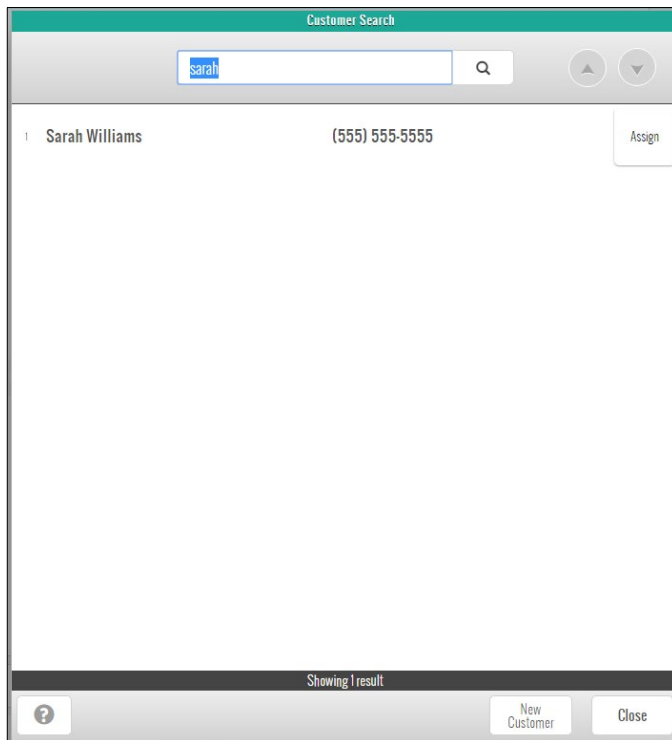
The customer is assigned to the sale and the Customer Search screen closes. The assigned customer's name is displayed on the PAYD Pro Plus POS view header in place of the **Select Customer** button.

If the customer is not in your customer database:

1. On the PAYD Pro Plus POS view, click the **Select Customer** button at the top of the screen, or click the

   Customers button ( ).

   The "Customer Search" popup appears.

2. In the "Customer Search" popup, click the **New Customer** button.

   A blank Customer Details popup appears.

3. Complete the fields as needed (required fields are highlighted in yellow).

4. Click the **Save** button (in the popup).

5. To add the new customer to the sale, click the **Assign** button.

Adding products to the sale

There are several options for adding products to a sale.

Add a product by scanning:

1. Click inside the **Data entry field** and scan the product's barcode to populate the field with the Product ID.

2. Click inside the **Quantity** field and change quantity if needed (the default is 1).

3. Click the **+** button.

The product will be added to the sale and displayed in the Sale Items list.

### Add an item by typing in the Product ID:

1. Click inside the **Data entry field** and type in the item's UPC (barcode) to populate the field.

2. Click inside the **Quantity** field and change quantity if needed (the default is 1).

3. Click the **+** button.

The product will be added to the sale and displayed in the Sale Items list.

Add an item by searching inventory:

1. On the PAYD Pro Plus POS view, click the product button (   ).

2. In the "Product Search" popup, enter Product Name, Product ID, supplier UPC, or keywords, and click the

   Search button (   ).

   Search results appear on the popup.
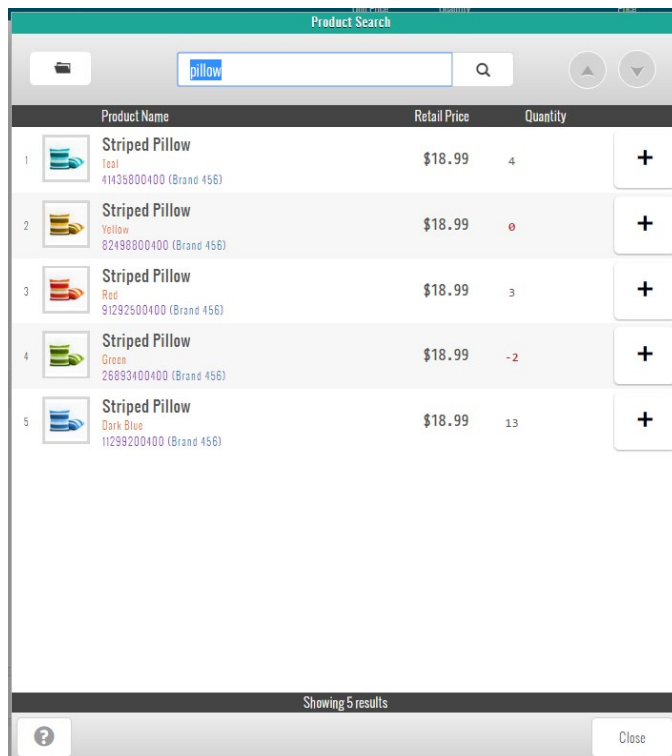
3. On the search results list, click the product's **+** button.

The "Product Search" popup will close, and the item will be added to the sale and displayed in the Sale Items list.

Add a non-inventory item:

1. At the bottom of the PAYD Pro Plus POS view, click the **Add New Product** button.

    The "Non-Inventory Product" popup appears.

Non-Inventory Product	
Product ID	
Product Name	
Retail Price	
Taxes	○ Exempted
	○ HST 5 %
	○ HST 8 %
	● HST 13 %
Quantity	1
	☑ Add to inventory
❓	OK Cancel

2. Enter a **Product ID**, **Retail Price**, and **Quantity** in the provided fields. If applicable, set the tax rules for the item in the **Taxes** section and ensure that the **Add to inventory** checkbox is checked, then click **OK**.

    Note: Fields highlighted in yellow are mandatory.

    The popup closes, and the item is added to the sale and displayed in the Sale Items List. Once the transaction has been completed, you can edit the product's profile to capture other product information like name, category, supplier etc. Refer to the *PAYD Pro Plus Online Help* for more information on editing product profiles.

Processing payment (Checking out)

Once you have populated a sale with products being purchased, you can proceed with processing payment.

Note: The instructions below are based on the default configuration of the PAYD Pro Plus POS view.

*Note: Merchants who do not have Integrated Payment Processing with Moneris (referred to as "non-integrated merchants"), only have the ability to process payment by **Cash, Cheque**, or **Store Credit** (if configured). For more information on integrated payment processing with Moneris, please visit us at **moneris.com/paydproplus** or call us at **1-855-423-PAYD (7293)** to get started today.*

Cash payment

To process a cash payment:

1. On the PAYD Pro Plus POS view, click the **Cash** button.

2. If you are prompted to select an employee for the sale commission, select the employee from the list.

    The system will proceed to the "Purchase" popup.

3. Enter the amount tendered and click **OK**.

    *Note: If the customer is paying with US currency, place a checkmark in the **US Dollars** checkbox. The system calculates the US equivalent of the amount due based on the exchange rate you entered in the Configuration – Settings screen, and displays the amount of change that should be given back in Canadian currency. For more help on configuring payment types (and US currency conversion rates), refer to the **PAYD Pro Plus Online Help**.*

4. Provide change to the customer as indicated.

5. Process receipt(s).

Interac Debit payment

Note: *Interac Debit processing requires a debit and credit card processing and terminal rental agreement with Moneris. Moneris is under no obligation to approve a merchant for card processing.*

To process an Interac Debit payment:

1. On the PAYD Pro Plus POS view, click the **Debit** button.

2. If you are prompted to select an employee for the sale commission, select the employee from the list. The system will proceed to the "Purchase" popup.

3. Do one of the following:

   - Integrated payments option:

     a. Click the **Insert/Swipe** button.

     b. Swipe, tap or insert the card into the PIN Pad and follow the prompts to complete the transaction.

   - Non-integrated payments option:

     - If you are not enrolled in Integrated Payment Processing with Moneris, when you select Debit you will receive a prompt to visit **moneris.com/paydproplus** for more information on integrated payments with Moneris.

4. Process receipt(s).

Credit payment

Note: *Requires Interac Debit and credit card processing and terminal rental agreements with Moneris. Moneris is under no obligation to approve a merchant for card processing.*

To process a credit card payment:

1. On the PAYD Pro Plus POS view, click the **Credit** button.

2. If you are prompted to select an employee for the sale commission, select the employee from the list. The system will proceed to the "Purchase" popup.

3. Do one of the following:

   ▪ Integrated payments option:

     i. Click the **Insert/Swipe** button.

     ii. Swipe, tap or insert on the PIN Pad and follow the prompts on the PIN Pad to complete the transaction. If you experience problems, click the **Swipe** button and re-swipe the card. If swipe is still unsuccessful, click the **Manual** button, manually enter the credit card number and expiry date, and then click **OK**.

   ▪ Non-integrated payments option:

     ▪ if you are not enrolled in Integrated Payment Processing with Moneris, when you select Credit, you will receive a prompt to visit **moneris.com/paydproplus** for more information on integrating payments with Moneris.

4. Process receipt(s).

Additional payment processing types include Gift Card, Cheque, Store Credit, and Split Tender. For more information on processing these forms of payment, refer to the ***PAYD Pro Plus Online Help***.

Processing receipts

Once you have processed the payment, complete the transaction by processing the receipts. Based on your system configuration, PAYD Pro Plus can generate the following receipts:

▪ **Customer copy** – printed from a receipt printer, generated as a PDF (i.e., print to file), or emailed to a customer.

- **Merchant copy** – printed from a receipt printer or generated as a PDF (i.e., print to file).

- **Gift receipt** - printed from a receipt printer, generated as a PDF (i.e., print to file), or emailed to a customer.

Reprinting receipts

1. On the PAYD Pro Plus POS view, click the **Reprint Last Receipt** button.

   The "Reprint Last Receipt" popup appears.

Reprint Last Receipt		
Print Customer copy	Print Merchant copy	Both
		Close
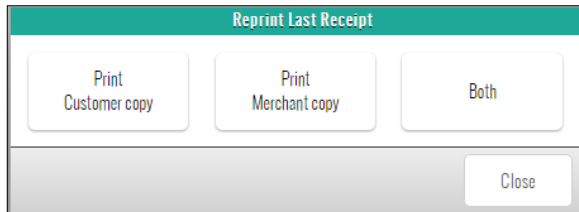
2. Select the receipt you would like to reprint; **Print Customer copy**, **Print Merchant copy**, or **Both**.

   The selected receipt copy is generated.

For more information on reprinting other receipts, refer to the *PAYD Pro Plus Online Help*.

Merchant support

At Moneris, help is always here for you 24/7.

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

We're only one click away.

- Visit **moneris.com/support-PAYDProPlus** to download additional copies of this guide and other resources
- Visit **shop.moneris.com** to purchase point-of-sale supplies and receipt paper
- Visit **moneris.com/insights** 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**.

BE PAYMENT READY

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