PAYD PRO PLUS™ MOBILE SOLUTION

Hardware Install Guide

Moneris
Payd

BE PAYMENT READY

Moneris Payd™

BE PAYMENT READY

For more information and assistance:

Web: getpayd.com/paydproplus/support

Toll-free: 1-855-423-PAYD (7293)

Record your Moneris® merchant ID here:

_____

Contents

Introduction

PAYD Pro Plus™ lets you turn your Apple® iPad® into a mobile POS Payment Solution, with great features that let you run your business from just about anywhere.

This guide provides you with instructions on how to set up and install the hardware associated with your PAYD Pro Plus Mobile 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 App.*

Signing in and out

Signing into the PAYD Pro Plus App

Depending on how the PAYD Pro Plus App has been configured, you may be required to sign in with your Moneris PAYD™ login credentials: Username, Password and Store ID, or you may need to enter a Quick PIN.
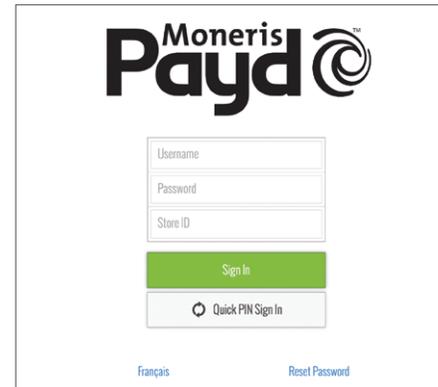
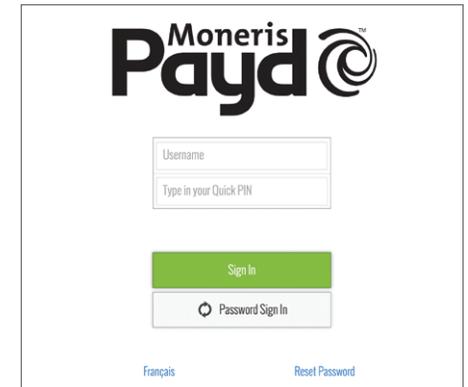Figure 1: The standard login screen   Figure 2: The PIN login screen

To sign in using the standard login screen:

1. Enter your user name (Employee ID) into the **Username** field.

2. Enter your password into the **Password** field.

   Note: *Passwords are case-sensitive.*

3. Enter your store's ID into the **Store ID** field.

4. Tap **Sign In**.

To sign in using a Quick PIN:

1. Tap the **Username** drop-down menu and tap the checkmark next to your name.

2. Enter your PIN into the **Type in your Quick PIN** field, then tap **OK**.

Navigating the interface

Note: *The PAYD Pro Plus App will always appear in "landscape" orientation, even if the Apple iPad is tilted into a "portrait" orientation.*

Accessing the main menu

- To access the main menu from any screen, tap the **Main Menu** button (☰). The main menu appears on the left side of the screen (shown below). OR
- From the left side of the screen, swipe right to reveal the main menu.
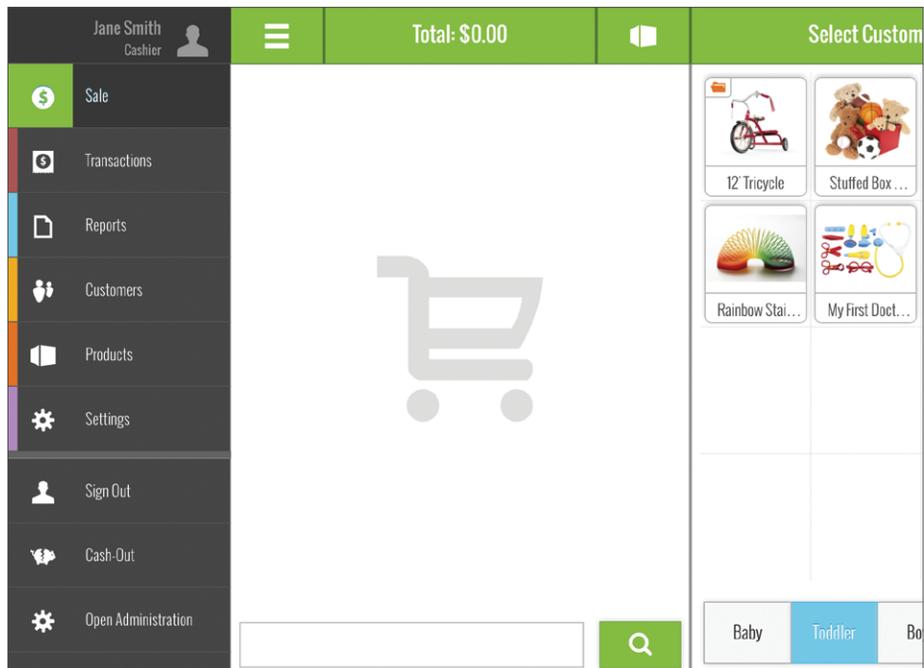
- **To hide the main menu:**
  - Tap the **Main Menu** button (☰) again. OR
  - Tap one of the menu options (e.g., **Customers**).

The panes

The PAYD Pro Plus App is generally divided into two panes (referred to in this guide as the "left pane" and the "right pane"). Menus and popups slide in from the left or right side of the screen, but generally the two panes remain visible (one pane becomes smaller depending upon which side of the screen displays a menu or popup).

The on-screen keyboard and number pad

The PAYD Pro Plus App makes use of the Apple iPad's on-screen keyboard for data entry (i.e., customer or product names). Use this on-screen keyboard in the PAYD Pro Plus App just like you would in any other Apple iPad app. The PAYD Pro Plus App can use its own number pad, or use the Apple iPad's on-screen keyboard for numeric data entry too. When your data entry is finished, tap **OK** or **Return** to finalize your input. The keyboard is hidden again.

Signing out

When you are finished using the PAYD Pro Plus App, follow the instructions below to sign out.

1. Tap the **Main Menu** button (☰).

2. On the main menu, tap **Sign Out**. A confirmation popup appears.

3. Tap **Yes** to sign out. The Login screen appears.

Device configuration

PAYD Pro Plus offers the ability to use POS peripheral devices such as Bluetooth® barcode scanners, Bluetooth receipt printers, and cash drawers. All device configuration settings are accessed in the Settings – Devices screen.
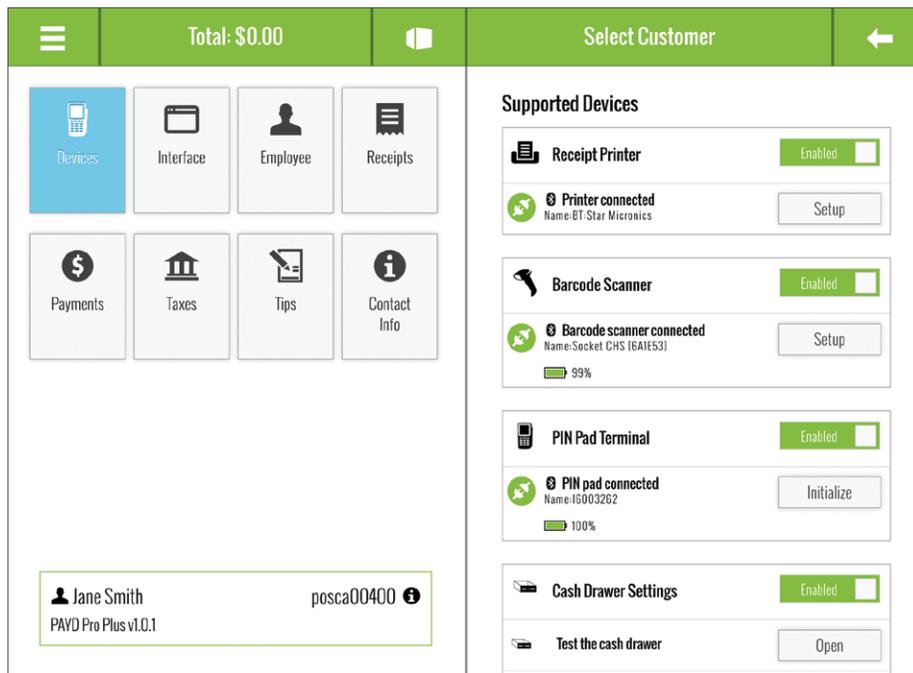
Setting up the Bluetooth barcode scanner

Use the Bluetooth barcode scanner to scan barcodes when processing transactions, searching for products, or searching for receipts. Follow the instructions below to set up the Bluetooth barcode scanner to use with the PAYD Pro Plus App.

IMPORTANT: Keep the scanner's documentation for future use. It contains special barcodes that are used for scanner programming.

Note: A Bluetooth barcode scanner can only be paired with one Apple iPad at a time. If you need to pair the barcode scanner with another Apple iPad, first unpair the scanner from the Apple iPad to which it is currently paired. Refer to the Unpairing devices *instructions on page 13 for more information.*

1. Unpack the barcode scanner from its packaging.

2. Locate the barcode scanner's documentation included in its box.

3. Follow the applicable manufacturer's instructions to insert the batteries, attach the lanyard, and charge the barcode scanner.

4. Log in to the PAYD Pro Plus App. Tap [icon] (the app's icon) on the Apple iPad's main screen.

5. Tap the **Main Menu** button ([≡]).

6. On the main menu, tap **Settings**.

7. On the Settings screen, tap **Devices**.

8. On the right pane, in the **Barcode Scanner** section, slide the **Barcode Scanner** slider to the right to enable it.

9. Tap the **Setup** button.
   A Scanner Configuration popup appears.

10. Configure the barcode scanner:

   a. Scan the barcode labelled **Step 1 Reset to Factory Default**. The scanner beeps and powers off.

   b. Power the barcode scanner on again.

   c. Scan the barcode labelled **Step 2 Set to iOS Mode**.

   d. Close the PAYD Pro Plus App and proceed to step 11.

11. Pair the barcode scanner with your Apple iPad:

   a. Access the Apple iPad's Settings screen.

   b. Ensure that your Apple iPad's Bluetooth menu is open, that Bluetooth is enabled, and that the Apple iPad is configured to be "discoverable" by another Bluetooth-ready device.

   c. On your Apple iPad's Bluetooth menu, tap the scanner's name (e.g., "Socket CHS") in the OTHER DEVICES list.

   d. Wait while the tablet pairs with the scanner. When the scanner appears in the MY DEVICES list and its status is showing as "Connected", the scanner has been paired successfully.

   e. Proceed to step 12.

12. Log in to the PAYD Pro Plus App again. Tap [icon] (the app's icon) on the Apple iPad's main screen.

13. Tap the **Main Menu** button ([icon]).

14. On the main menu, tap **Settings**.

15. On the Settings screen, tap **Devices**.

16. In the right pane of the Devices screen, the barcode scanner will be automatically detected and the status will change from "No barcode scanner connected" to "Barcode scanner connected".

17. Tap the **Main Menu** button ([icon]). The system will save the configuration.

The Bluetooth barcode scanner is ready to use with the PAYD Pro Plus App. If you encounter any problems, refer to the *Troubleshooting* section on pages 14 to 17.

Setting up the Bluetooth receipt printer

Use the Bluetooth receipt printer to print receipts when transactions are completed. Follow the instructions on page 10 to set up the Bluetooth receipt printer with your Apple iPad.

IMPORTANT: Keep the receipt printer's documentation for future use. It contains instructions for installation and auto-connection that may be required in the future.

Note: A Bluetooth receipt printer can only be paired with one Apple iPad at a time. If you need to pair the receipt printer with another Apple iPad, first unpair the printer from the Apple iPad to which it is currently paired. Refer to the Unpairing devices *instructions on page 13 for more information.*

1. Unpack the receipt printer from its packaging.

2. Connect the receipt printer's power cable(s) and insert the paper roll following the manufacturer's instructions as applicable.

3. Pair the receipt printer with your Apple iPad:

   a. Power on your receipt printer.

   b. Power on your Apple iPad.

   c. Go into the Apple iPad's Settings screen.

   d. Ensure that your Apple iPad's Bluetooth menu is open, that Bluetooth is enabled, and that the Apple iPad is configured to be "discoverable" by another Bluetooth-ready device.

   e. On the rear of the receipt printer, hold down the red **PAIR** button for 5 seconds until the LED flashes green. You have 60 seconds to pair the receipt printer to the Apple iPad.
      i. On your Apple iPad's Bluetooth menu, tap the receipt printer's name (e.g., "Star Micronics") in the OTHER DEVICES list.
      ii. Wait while the Apple iPad pairs with the receipt printer. When the receipt printer appears in the MY DEVICES list and its status is showing as "Connected", the receipt printer has been paired successfully.

   f. Proceed to step 4.

4. After pairing, power off the receipt printer and turn it back on to complete the connection.

5. Log in to the PAYD Pro Plus App. Tap ⊚ (the app's icon) on the Apple iPad's main screen.

6. Tap the **Main Menu** button (☰).

7. On the main menu, tap **Settings**.

8. On the Settings screen, tap **Devices**.

9. On the right pane, under the **Receipt Printer** section, slide the **Receipt Printer** slider to the right to enable it.

10. Tap the **Setup** button. The Printer Configuration popup appears.

11. Tap the name of your Bluetooth receipt printer in the list. The popup closes and the status changes from "No receipt printer connected" to "Printer connected".

    Note: *If you have multiple receipt printers from which to choose, select the receipt printer that is closest to you for the best results.*

12. If you have a cash drawer connected, refer to *Connecting the cash drawer* below for more information. If you are not using a cash drawer with your receipt printer, proceed to step 13.

13. Tap an area in the left pane to save your changes.

The Bluetooth receipt printer is ready to work with the PAYD Pro Plus App. If you encounter any problems, refer to the *Troubleshooting* section on pages 14 to 17.

Connecting the cash drawer

The cash drawer connects to the back of the receipt printer (via the cable provided with the cash drawer). When a receipt is printed, the cash drawer receives a command to open from the receipt printer. Follow the instructions on page 12 to connect the cash drawer to the printer.

Note: *The cash drawer does not need to be paired with the Apple iPad or with the PAYD Pro Plus App. The cash drawer only connects to the receipt printer, therefore it does not require Bluetooth pairing.*

1. Unpack the cash drawer from its packaging. Store the keys somewhere safe.

2. Ensure you situate the cash drawer on a flat, stable surface.

3. Connect the cable to the cash drawer following the manufacturer's instruction.

4. Connect the other end of the cable to the appropriate port on the back of the receipt printer.

5. Log in to the PAYD Pro Plus App. Tap ⬡ (the app's icon) on the Apple iPad's main screen.

6. Tap the **Main Menu** button (☰).

7. On the main menu, tap **Settings**.

8. On the Settings screen, tap **Devices**.

9. On the right pane, under the **Cash Drawer Settings** section, slide the **Cash Drawer Settings** slider to the right to enable it.

10. To configure the settings to control when the cash drawer opens, select one of the following options:
    • **Open on demand** – select this option to open the cash drawer only on demand. This is the default setting.
    • **Open on any sale** – select this option to open the cash drawer for every sale.
    • **Open on cash sale** – select this option to open the cash drawer only when cash is used for payment.
    • **Open on cash sale and on demand** – select this option to open the cash drawer only when cash is used for payment, or on demand.
    • **Open on any sale and on demand** – select this option to open the cash drawer for every sale, or on demand.

11. To test the cash drawer's connectivity, tap the **Open** button.
    • If the cash drawer opens, proceed to step 12.
    • If you encounter problems, please refer to the *Troubleshooting* section on pages 14 to 17.

12. Tap an area in the left pane to save your changes.

Unpairing devices

It may become necessary to unpair a device from your Apple iPad in order to pair it to another Apple iPad. Use the steps below as a guide for performing this task.

1. Close out of the PAYD Pro Plus App.

2. Tap the **Settings** icon on the Apple iPad's main screen.

3. In the Settings screen, tap **Bluetooth**.

4. In the Bluetooth menu, in the MY DEVICES list, tap the ⓘ icon next to the device name.

5. Tap **Forget This Device**. A confirmation popup appears.

6. Tap **OK**.

Troubleshooting

If a problem occurs, try restarting the Bluetooth device and closing and reopening the PAYD Pro Plus App. If the problem continues to occur, and the scenario appears in the table below, follow the instructions in the table's Resolution column. If the problem is still not resolved, call Moneris Customer Care toll-free at **1-855-423-PAYD (7293)**.

Scenario	Resolution
The Bluetooth receipt printer is not powered on.	1. Ensure that the power cable is connected to the back of the receipt printer and is plugged into a working power source. 2. Turn the receipt printer on using the power switch on the side of the printer. 3. Consult the receipt printer's documentation for further information.
The Bluetooth receipt printer is not showing up in the list of devices in my Bluetooth menu.	1. Ensure the receipt printer is powered on. 2. Turn off and turn on Bluetooth on your Apple iPad to see if the list of Bluetooth devices refreshes and displays the receipt printer. 3. Hold down the red **PAIR** button on the back of the receipt printer. Check the device list to see if the printer name appears.

Scenario	Resolution
I tested my cash drawer but it didn't open.	Check the following items to ensure your cash drawer is working: 1. Is the cable that connects the cash drawer to the receipt printer securely plugged into the port at the rear of the printer as per the manufacturer's instructions? 2. Is the cable that connects the cash drawer to the receipt printer securely plugged into the port at the rear of the cash drawer? 3. Is the cash drawer locked? 4. Is the Bluetooth receipt printer paired to the Apple iPad? 5. Is the Bluetooth receipt printer showing "Connected" in the Settings – Devices screen?
My Bluetooth barcode scanner is not showing up in the list of devices in my Bluetooth menu.	1. Ensure that the scanner battery is installed correctly and that the battery has been charged according to the manufacturer's instructions. 2. Follow the instructions in the *Setting up the Bluetooth barcode scanner* section on page 7 in this guide. 3. If it is still not working, try to reset the scanner back to factory defaults and try configuring it again. Scan the **Reset to Factory Default** barcode in the **Scanner Configuration** section of the Settings – Devices screen. 4. Refer to the *Setting up the Bluetooth barcode scanner* section on page 7 in this guide for more help.

Scenario	Resolution
The Bluetooth barcode scanner is not producing a red beam.	1. Ensure that the scanner battery is installed correctly and that the battery has been charged according to the manufacturer's instructions. 2. Press the smaller round button on the top of the scanner. The scanner should beep twice. 3. Press the large ovular trigger button on the top of the scanner to see if a red light appears. 4. If that doesn't work, refer to the manufacturer's instructions.
I connected my cash drawer to my receipt printer, but the drawer is not opening.	The cash drawer only opens when transactions are performed and receipts are printed. If you are not doing a transaction at the moment, the cash drawer will remain closed.
I completed a transaction, but the cash drawer did not open.	1. Ensure the cash drawer is properly connected to the receipt printer. 2. Ensure the receipt printer is powered on. 3. Ensure the cash drawer is not locked. 4. Ensure the cash drawer has been enabled in the Settings – Devices screen. For more information on enabling the cash drawer, refer to the *Connecting the cash drawer* section on page 11.
My Bluetooth barcode scanner is paired to the Apple iPad in its Bluetooth menu, however the device status symbol shows Not Connected ( ) within the PAYD Pro Plus App.	1. Tap the **Main Menu** button (☰). 2. On the main menu, tap **Settings**. 3. On the Settings screen, tap **Devices**. 4. Ensure the **Barcode Scanner** is set to **Enabled**. 5. Tap the **Setup** button, and in the Scanner Configuration popup, scan the two barcodes. 6. Tap outside of the Scanner Configuration popup. The symbol should change to **Connected** ( ).

Scenario	Resolution
My Bluetooth receipt printer is paired to the Apple iPad in the Bluetooth menu, however the device status symbol shows Not Connected ( ) within the PAYD Pro Plus App.	1. Tap the **Main Menu** button (☰). 2. On the main menu, tap **Settings**. 3. On the Settings screen, tap **Devices**. 4. Ensure the **Receipt Printer** is set to **Enabled**. 5. Tap the **Setup** button. 6. In the Printer Configuration popup, tap the name of your receipt printer. The symbol should change to **Connected** ( ).

Other resources

Visit **getpayd.com/paydproplus/support** to:

- Download additional copies of the *PAYD Pro Plus™ Mobile Solution – Configuration Guide* and the *PAYD Pro Plus™ Mobile Solution – Using PAYD Pro Plus for Apple® iPad* guide.

- Consult the *Moneris PAYD™ PIN pad Setup Guide* for instructions on setting up and pairing the Moneris PAYD PIN pad with your Apple iPad.

- Visit the Knowledgebase for a list of FAQs pertaining to setting up and operating both the PAYD Pro Plus Mobile Solution and PAYD Pro Plus In-Store Solution

- For technical support:

  - **Email:** getpaydsupport@getpayd.com

  - **Web:** getpayd.com/paydproplus/support

  - **Toll-free:** 1-855-423-PAYD (7293)

Notes

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Moneris Payd

BE PAYMENT READY