



BE PAYMENT READY

PAYD PRO PLUS[®] MOBILE SOLUTION



Using PAYD Pro Plus[®] for
Apple[®] iPad[®]

POSPAD version 1111



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:

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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 use the PAYD Pro Plus App to manage inventory, gain insights into customer buying trends and process transactions.

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® credentials: **Username**, **Password** and **Store ID**, or you may need to enter a **Quick PIN**.

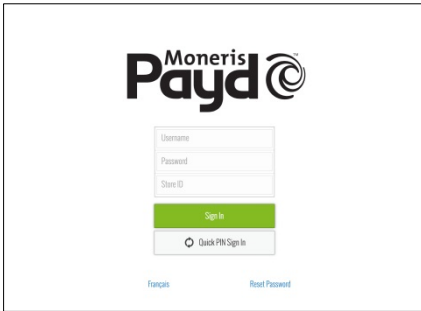


Figure 1: The standard login screen

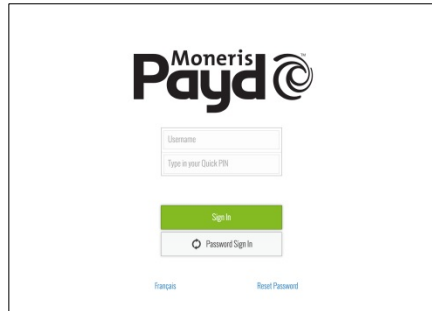


Figure 2: The PIN login screen

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

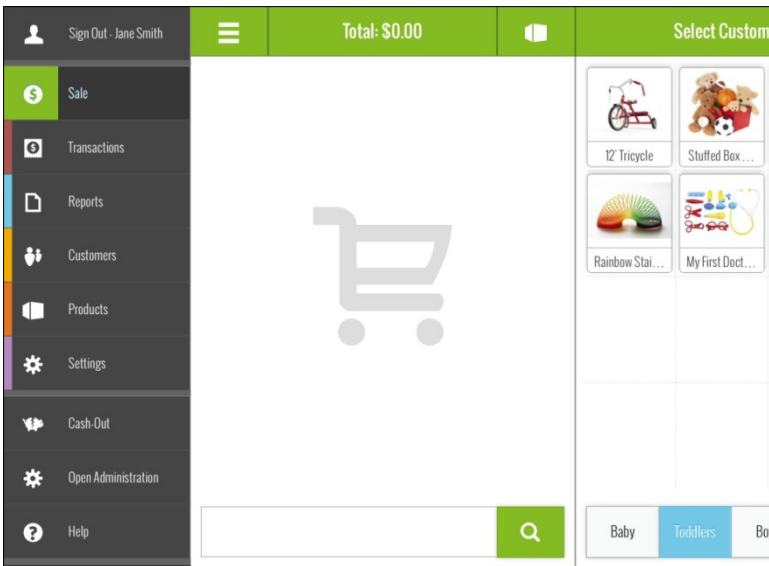
Note: The PAYD Pro Plus App will always appear in “landscape” orientation, even if the Apple iPad is tilted into a “portrait” orientation.


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 numberpad

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 numberpad, or use the Apple iPad 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.

Cashing in

Use the Cash-In popup to count your opening till float (to account for the cash with which you are starting the business day). The popup will appear when you sign into the PAYD Pro Plus App after a cash-out has been processed (see *Cashing out* on page 115 for more information), or if you are logging into the PAYD Pro Plus App for the first time. Follow the directions below to cash in your till.

Note: *If you do not see the Cash-In popup when you start the PAYD Pro Plus App, it means that the cash out process was not completed for the previous business day. Refer to Cashing out on page 115 for more information.*

To cash in your till:

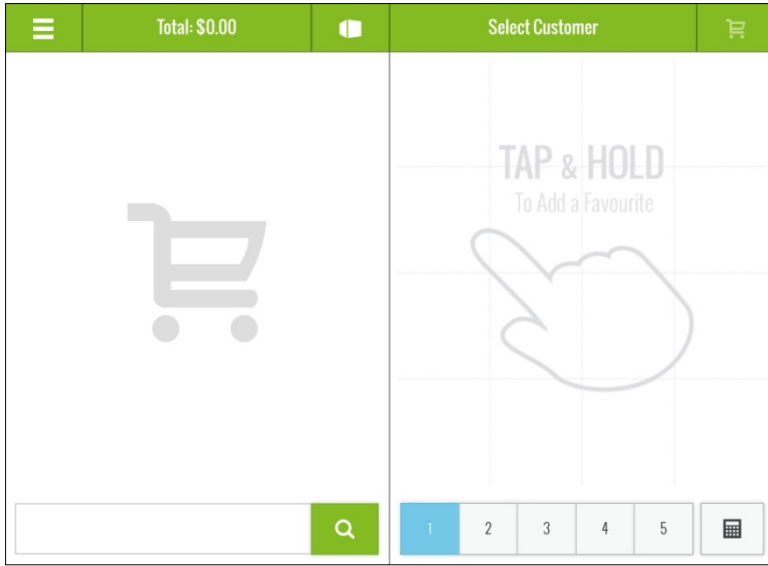
1. In the Cash-In popup, tap inside the various denomination fields (e.g., \$20, \$10, \$2 etc.) and enter the quantity of those denominations you have. For coins, if you have rolls of coins and loose coins, enter the quantity of rolls in the **Rolls** column on the right, and enter the loose change in the left column directly beside the denomination.
2. Enter the amount of cheques into the **Cheque** field that your till is opening with (if applicable).

Denomination	Quantity	Rolls	Loose Change
\$100			
\$50			
\$20	3		
\$10	4		
\$5	3		
\$2	2	Rolls	1
\$1	4	Rolls	1
25c	11	Rolls	1
10c	8	Rolls	1
5c	3	Rolls	1

Cash	218.70
Cheque	
Total	\$218.70

Sign Out ✓

3. Tap the **checkmark** button (✓) at the bottom of the popup. The Sale screen appears.



Inventory management



You can use the Products screen to manage the business' inventory. Management functions include adding new inventory, editing product profiles, and deleting products.

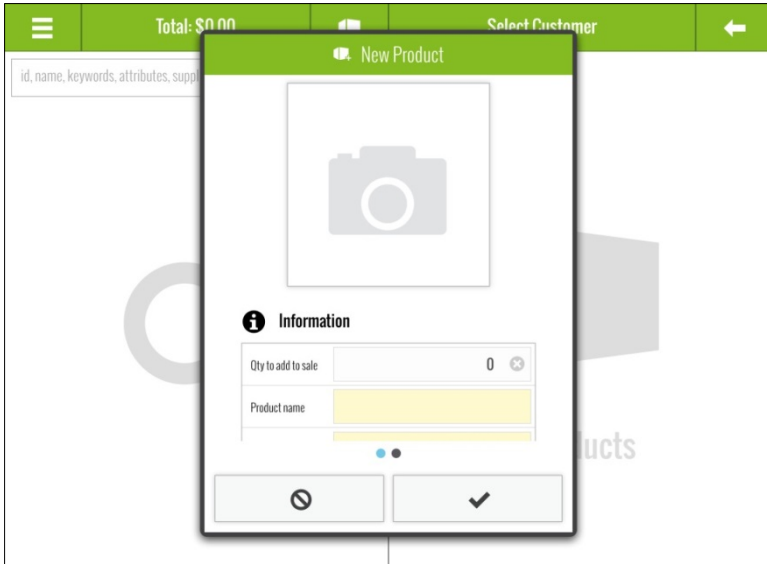
Adding new products


You can use the New Product screen (accessed via the Products screen) or the Add Non-Inventory Product popup (accessed via the Sale screen) to add products to the business' inventory. This section explains how to add new products using the New Product screen. For instructions on adding products through the Add Non-Inventory Product popup, refer to the PAYD Pro Plus Online Help.

Note: Based upon the PAYD Pro Plus software bundle and/or your Merchant Agreement with Moneris, you may encounter a limit to the number of product profiles that can be added to the product database. For more information on how to increase this limit, please visit us at getpayd.com/paydproplus or call us at **1-855-423-PAYD (7293)** to upgrade today.

Note: Fields highlighted in yellow are mandatory.

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Products**.
The Products screen appears in the left pane.
3. Tap the **Add Product** button ().
The New Product popup appears.



4. If you wish to use the Apple iPad's camera to take a picture of the product, or use an image stored on the Apple iPad's internal memory, follow the steps below. If you do not want to take a picture of the product, proceed to step 5.
 - a. Tap the **camera** button ().
A popup appears.
 - b. Select the method by which you would like to add an image to the product profile:
 - To use an image that is already stored on the Apple iPad's internal memory:
 - i. Tap **Library**.
Note:** If prompted to allow the PAYD Pro Plus App to access your Apple iPad's photo library, tap **Yes
 - ii. Browse the images stored on the Apple iPad, and tap the image once you locate it. Proceed to step 5.
 - To take a picture of the product:

- i. Tap **Camera**.

Note:** If prompted to allow the PAYD Pro Plus App to access your Apple iPad's camera, tap **Yes

- ii. Take the photo.
- iii. Tap **Use Photo** to use the image. Proceed to step 5.

OR

Tap **Retake** to retake the image. Repeat step ii.

5. Enter the product's name into the **Product name** field.
6. Tap inside the **Product UPC** field and use the Bluetooth® barcode scanner to scan the product's barcode.

OR


Tap inside the **Product UPC** field and use the on-screen keyboard to manually key in the digits from the product's barcode.



***Note:** If the product does not have a barcode, you may key in your own unique UPC code for this item.*

7. Tap inside the **Supplier UPC** field and manually key in the supplier's UPC code for the product.
8. If you have brand names defined, tap the **Brand name** drop-down arrow and select the brand to which this item belongs. If you do not have brands defined, skip this step.
9. Use the on-screen numberpad to enter prices for the product:
 - a. Tap inside the **Retail price** field and enter the item's retail price in dollars and cents. Tap **OK** when finished.
 - b. Tap inside the **List price** field and enter the item's list price in dollars and cents. Tap **OK** when finished.
 - c. Tap inside the **Cost price** field and enter the item's cost (what you pay your supplier for the item) in dollars and cents. Tap **OK** when finished.
10. Tap inside the **In-stock** field and enter the item's current on-hand value. Tap **OK** when finished.

11. If the item comes with a manufacturer's warranty, tap inside the **Warranty period** field and enter the item's warranty period in months. Tap **OK** when finished. If the item does not come with a warranty, skip this step.
12. Tap inside the **Product description** field and enter the product's description.
13. Swipe from right to left to reveal additional options.
14. In the **Taxes** section, tap the taxation option that applies to the product:
 - To exempt the product from any taxes in your jurisdiction, tap **Exempted**.
 - To apply a tax to the product, tap the applicable tax.

***Note:** The taxes that appear are based on your business location as provided by you to Moneris. Please note that it is your responsibility to determine all taxes required.*
15. In the **Additional Taxes** section, tap the additional taxation options that apply to the product.


***Note:** The taxes that appear in the Additional Taxes section are defined by you in the Settings – Taxes screen in PAYD Administration. This feature may be used if additional taxes apply to the product in addition to any standard, applicable federal or provincial taxes. Please note that it is your responsibility to determine all taxes required. If no additional taxes are configured, this section will not appear. Click the  icon in PAYD Administration for more help on tax configuration.*
16. In the **Options** section, set the product options following the guidelines below:
 - To make the product part of your inventory, slide **Track this product's stock qty** to the right (Default = Enabled).
 - If the product will require any type of service by your business, slide **This product requires service** to the right (Default = Disabled).
 - If a customer needs to be added to your customer database in order to purchase the product, slide **Requires a registered customer** to the right (Default = Disabled).
 - If an employee is able to earn commission when selling this product, slide **Use commission** to the right (Default = Disabled).


- If you are recording this product's serial number at the time of purchase, slide **Prompt for serial number when sold** to the right (Default = Disabled).
 - If the product is capable of being returned for a refund or exchange, slide **This product is returnable** to the right (Default = Enabled).
17. Tap the **checkmark** button () at the bottom of the popup to save the product.
- Note:* If you do not wish to add the product, tap the **Cancel** button ().
18. Repeat steps 3 – 17 to create other product profiles as necessary.

Searching inventory



It is possible to search your inventory to locate products.

Searching for a product









1. Tap the **Main Menu** button ().
2. On the main menu, tap **Products**.
3. In the search text field on the left pane, enter any of the following as your search criteria:
 - **Product ID** e.g., “12345678”
 - **Product Name** e.g., “Building Bricks – 300 pcs”
 - **Product Keywords** e.g., “bricks”
 - **Product Attributes** e.g., “Multi-coloured”
 - **Supplier's UPC code** e.g., “0123456789000”

Note: You can enter all or part of the search criteria (e.g., “brick”). Tap the **Return** key on the on-screen keyboard when finished entering the search criteria.
4. Tap the **Search** button ().
The search results appear in the left pane.

Searching for all products

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Products**.
3. At the top of the left pane, tap the **Search** button ().

The search results (every item entered in inventory) appear in the left pane listed by name in alphabetical order.


Total: \$0.00		Select Customer	
id, name, keywords, attributes, supplier upc			
	12' Tricycle Red In stock : 2		Basketball Small In stock : 1
	Beach Bucket Sand Toys Plastic In stock : 21		Building Bricks - 500 Pcs Multi coloured In stock : 2
	Classic Puzzle Games Cardboard - Multi Pack In stock : 3		My First Doctor Bag Plastic In stock : 0
13 found			



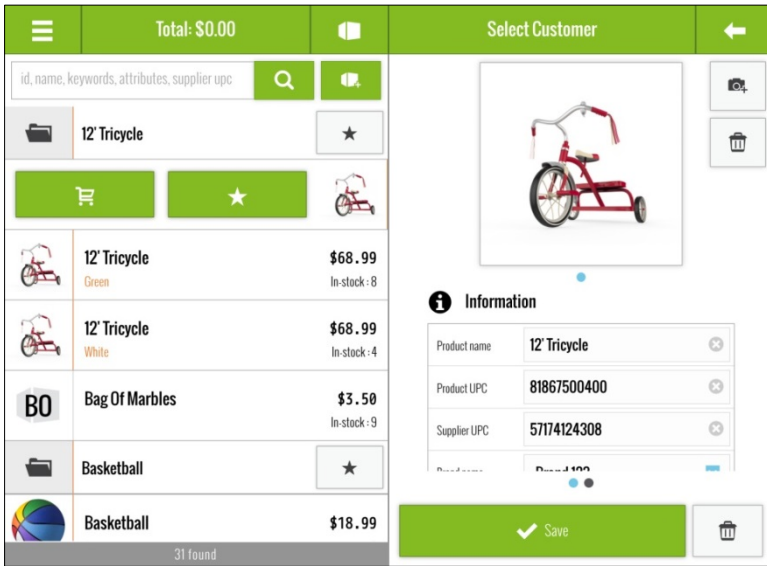
Products


Editing products

Once a product has been created and saved, you are able to edit its profile at any point.

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Products**.
3. On the Products screen, in the left pane, search for the item you wish to edit.

- Once you locate it, tap its name. The right pane populates with the product's details.






- Make any changes as necessary.
- Tap the **Save** button at the bottom of the right pane.
- Repeat steps 3 – 6 to edit other products as necessary.
- Tap the **Main Menu** button () when finished.

Note: Use PAYD Administration to capture even more information about products (e.g., Pricing Groups, Categories and Attributes).

Deleting products

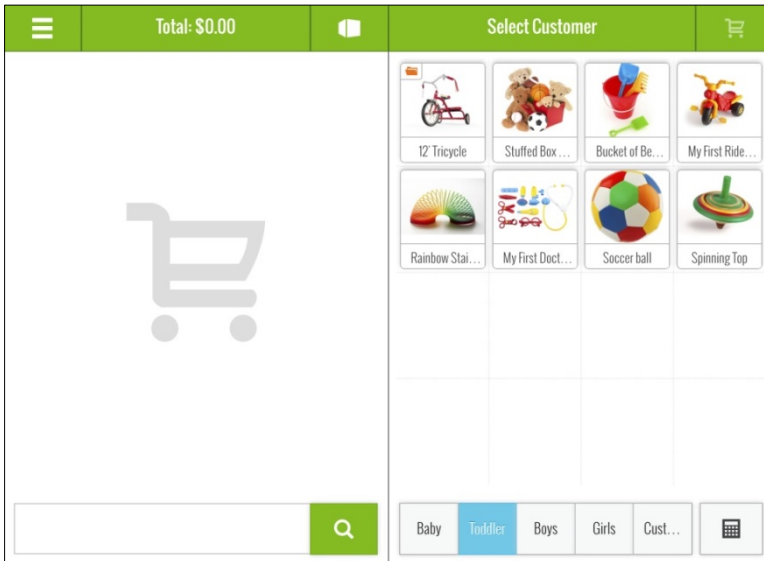
It is possible to delete products that you no longer sell, or products that were created in error.

Note: If a product profile is deleted, its information cannot be restored. If you want to re-add this product later on, its information will need to be re-entered.

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Products**.
3. On the Products screen, in the left pane, search for the item you wish to delete.
4. Once you locate it, tap its name. The right pane populates with the product's details.
5. Tap the **Delete** button ().
A confirmation prompt appears.
6. Tap **Yes** to delete the product.
Another popup appears confirming the product has been deleted.
7. Tap **OK**.
8. Repeat steps 3 – 7 to delete other products as necessary.
9. Tap the **Main Menu** button () when finished.

The Favourites Group

The Favourites Group is a configurable display of items that occupies the right pane in the Sale screen. The Favourites Group provides quick access to your most frequently used inventory or to your most frequent customers, so you can add them quickly to a sale by a simple tap (rather than having to search for it). You can see an example of a populated Favourites Group in the screenshot below.




For more information on configuring the tabs on the Favourites Group, refer to the *PAYD Pro Plus Mobile Solution - Configuration Guide*, available at getpayd.com/paydproplus/support.


Adding products to the Favourites Group

The Favourites Group is split into 5 tabs. Each tab is capable of holding up to 16 products, so you can add a maximum of 80 products to the Favourites Group.

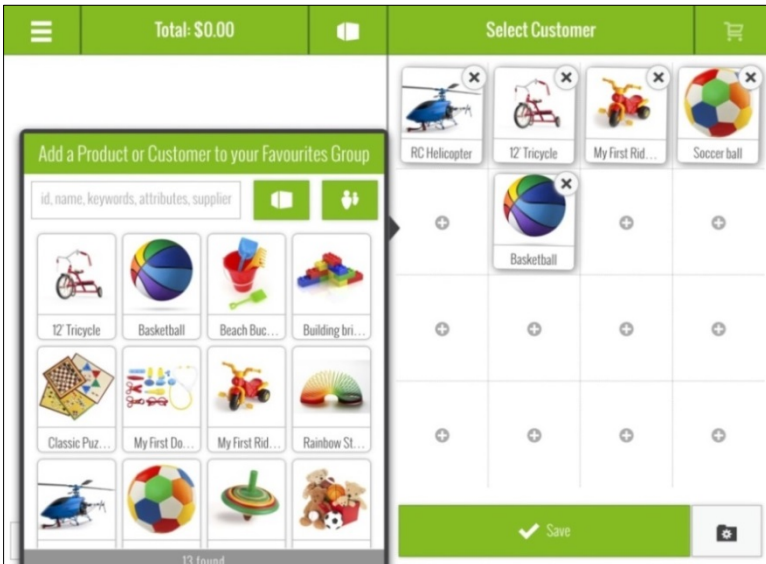
To add products to the Favourites Group from the Sale screen:

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Sale**.
3. In the Sale screen, tap on the favourites tab at the bottom right pane to which you want to add the product.
4. Tap and hold a blank area of the screen. A grid with 16 rectangles appears.


Note: The grid lines appear faint initially. As you tap and hold, the grid lines darken.

5. Tap one of the blank rectangles with the  symbol.

The Add a Product or Customer to your Favourites Group popup appears.





6. To add items to this tab in the Favourites Group, do one of the following:
 - **Search:**
 - a. Tap inside the **Search** field at the top of the popup.

- b. Enter the product's ID (barcode), **name**, **keywords**, **attributes**, or the **supplier UPC** into the field.
 - c. Tap the **Products** button () to the right.
The search results appear below.
 - d. Tap the item in the search results.
 - e. Repeat steps a – d as necessary to add other items to this tab.
 - f. Tap an area in the left pane to close the popup. Proceed to step 7.
- **Scan:**
 - a. Tap inside the **Search** field at the top of the popup.
 - b. Scan the product's barcode with the Bluetooth scanner.
The product appears in the search results below.
 - c. Tap the item in the search results.
 - d. Repeat steps a – c as necessary to add other items to this tab.
 - e. Tap an area in the left pane to close the popup. Proceed to step 7.

7. Tap the **Save** button.

8. Repeat steps 4 – 7 to populate the other four tabs as necessary.

To add products to the Favourites Group from the menu:

1. Tap the **Main Menu** button (.
2. On the main menu, tap **Products**.
3. Search for the product in the left pane (see *Searching for a specific product* on page 17 for more information).
4. Tap the product's name in the search results on the left pane.
5. As the product name slides to the right, it reveals the star button. Tap the **star** button (.

The Select the Favourites Group popup appears.


6. Tap the Favourites Group tab name to which you are assigning the item.

7. Tap the **Save** button.
8. Repeat steps 2 - 7 to add additional items as necessary.

Removing products from the Favourites Group

Follow the steps below to remove products from the Favourites Group.

Note: *Removing products from the group does not remove them from the inventory database.*

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Sale**.
3. In the Sale screen, tap on the favourites tab at the bottom of the right pane from where you want to remove the product.
4. Tap and hold on the item you wish to remove from the tab.

The items in the tab start to wiggle and an X symbol appears in the top right corner of the items.



5. Tap the **X** symbol on the top right corner of the item you wish to remove. The item disappears from the Favourites Group.
6. Repeat step 5 to remove additional items as necessary.
7. Tap the **Save** button.
8. Repeat steps 3 – 7 to remove other items from other tabs as necessary.

Editing the contents of the Favourites Group

Take the following steps if you are replacing older items in the Favourite Groups, or if an item has been added to the wrong tab:

1. Remove items from the group that are no longer needed. Follow the instructions on *Removing products from the Favourites Group* on page 24.
2. Add items to the group. Follow the instructions on *Adding products to the Favourites Group* on page 21.
3. If you want to edit the tab names, refer to the ***PAYD Pro Plus Mobile Solution - Configuration Guide***, available at getpayd.com/paydproplus/support.
4. You can also reposition items in the Favourites Group by tapping and holding down on the item you wish to move, until the item starts wiggling. Then you can drag-and-drop it to another spot within the tab.

Customer management



You can use the Customers screen to add, edit and remove customers from the database.

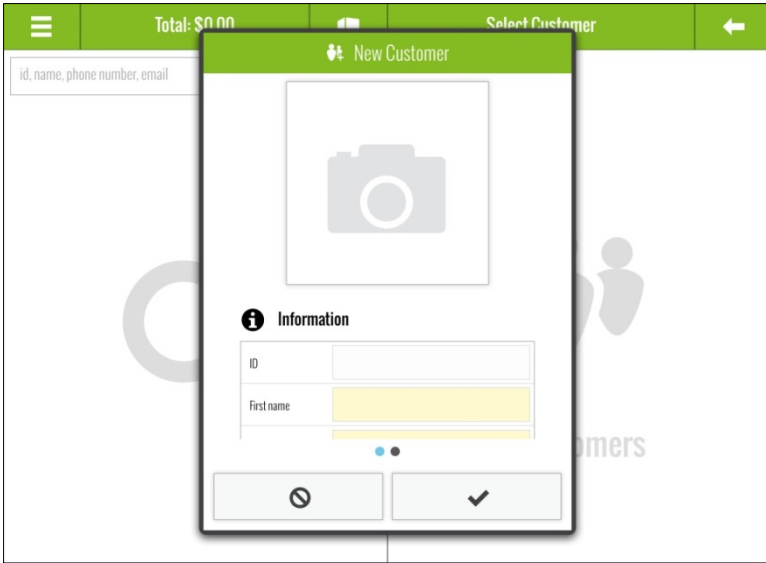
Adding new customers

Follow the instructions below to add a new customer profile to the database.

Note: Based upon PAYD Pro Plus software bundle and/or your Merchant Agreement with Moneris, you may encounter a limit to the number of customer profiles that can be added to the customer database. For more information on how to increase this limit, please visit us at getpayd.com/paydproplus or call us at 1-855-423-PAYD (7293) to upgrade today.

Note: Fields highlighted in yellow are mandatory.

1. Tap the **Main Menu** button ()
2. On the main menu, tap **Customers**.
3. In the Customers screen, tap the **Add New Customer** button ().
The New Customer popup appears.




4. In the New Customer popup, fill out the fields following the guidelines below:
- **First/Last name** – Enter the customer’s first and last name into these fields.
 - **Mobile** – Enter the customer’s mobile or secondary contact phone number into this field if available.
Note: Dashes or spaces are not necessary.
Note: A mobile phone number is necessary if you will be sending transaction receipts to this customer via SMS text. See Generating SMS Text receipts on page 81 for more information.
 - **Phone** – Enter the customer’s primary contact phone number into this field.
Note: A phone number or an email address (or both) are mandatory fields. However, the PAYD Pro Plus App will accept either just a phone number, or just an email address, without prompting that required fields are incomplete.

- **Email** – Enter the customer’s email address into this field.

Note: This is necessary if you will be emailing transaction receipts to this customer. The **Email a receipt copy** setting below needs to be enabled as well.
 - **Birthday** - Tap the drop-down arrow and select the month, day, and year in which your customer was born. Tap the green checkmark when finished.
 - **Notes** – Tap inside this field and use the on-screen keyboard to enter a note about the customer.
5. Once the Notes field has been populated, you can swipe from right to left to reveal the following additional fields.
- **Company** – Enter the customer’s business name into this field.
 - **Address** – Enter the customer’s primary street address into this field.
 - **Address 2** – Enter the customer’s unit number (if applicable) into this field.
 - **City** – Enter the customer’s city into this field.
 - **Postal code** – Enter the customer’s postal code into this field.
 - **Country** – Tap the drop-down arrow and select the customer’s country. By default, the merchant’s country will be selected.
 - **Province** – Tap the drop-down arrow and select the customer’s province. By default, the merchant’s province will be selected.
 - **Language** – Tap the drop-down arrow and select the customer’s preferred language of correspondence. By default, the merchant’s default language will be selected.
 - **Pricing group** – Tap the drop-down arrow and select the pricing group to which this client belongs (if applicable).
 - **Email a receipt copy** – Slide to the right (Enabled) to allow this client to receive emailed copies of their transaction receipts.


Note: You must enter an email address in the **Email** field above.
 - **Part of mailing list** – Slide to the right (Enabled) to allow this client to receive promotional emails from your business.
 - **Tax Exemptions** – If this client is eligible for tax exemptions in your jurisdiction, tap the checkmark (so that it turns blue) to exempt them from the tax. Be sure to record their **Tax exemption registration** number and **Band number** in the appropriate fields.

- When you are finished entering information about the customer, tap the **checkmark** button () to save your work.
- Repeat steps 3 – 5 to add other customers as necessary.


Searching customers

It is possible to search your database for customers that have been added.



Searching for a customer

- Tap the **Main Menu** button ().
- On the main menu, tap **Customers**.
- In the Customers screen, tap inside the search field at the top of the left pane and enter any of the following as your search criteria:
 - Customer ID** e.g., “JSMI001”
 - Customer name** e.g., “John Smith”
 - Customer phone number** e.g., “555-555-5555”
 - Customer email address** e.g., “john.smith@johnsmithemail.com”

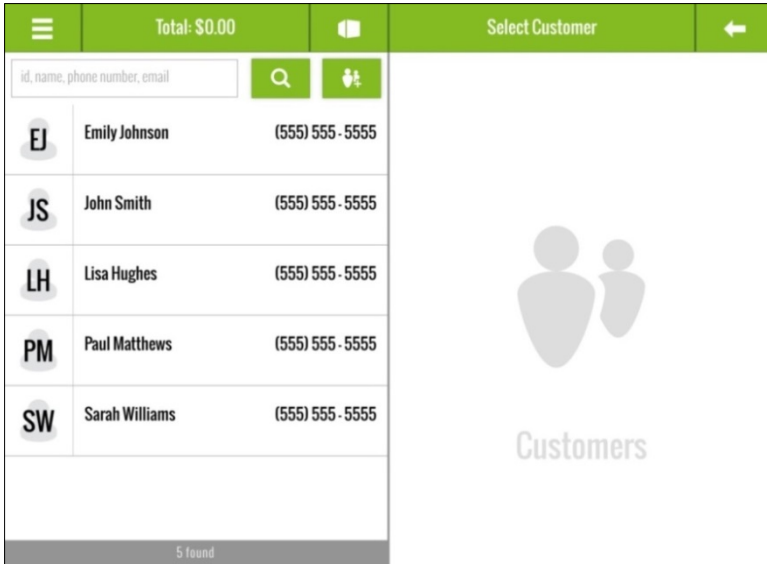
***Note:** You can enter all or part of the search criteria (e.g., “john”). Tap the **Return** key on the on-screen keyboard when finished entering the search criteria.*

- Tap the **Search** button ().
The search results appear below.

Searching all customers


- Tap the **Main Menu** button ().
- On the main menu, tap **Customers**.
- In the Customers screen, tap the **Search** button () at the top of the left pane.

The search results (all customers defined in the customer database) appear below, listed alphabetically by first name.



Editing a customer profile

It is possible to edit a customer's profile after it has been saved.

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Customers**.
3. In the Customers screen, search for the customer you wish to edit. For more information, see the *Searching customers* section on page 29.
4. Once you locate the customer, tap their name in the search results on the left pane.

The customer's profile loads into the right pane.


5. Edit the customer's profile as necessary. For an explanation of the various fields, refer to step 4 of the *Adding new customers* section on page 26.
6. Once you have finished making changes, tap the **Save** button at the bottom to save your work.

7. Repeat steps 3 – 6 to edit other customer profiles as necessary.


Deleting customers

It is possible to delete customers who no longer patronize your business, or whose profiles were created in error.

Note: *If a customer profile is deleted, their information cannot be restored. If you want to re-add this customer later on, the information will need to be re-entered.*

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Customers**.
3. In the Customers screen, search for the customer you wish to delete. For more information, see the *Searching customers* section on page 29.
4. Once you locate the customer, tap their name in the search results on the left pane.



The customer's profile loads into the right pane.

5. Tap the **Delete** button ().
A confirmation prompt appears.
6. Tap **Yes** to delete the customer.
Another popup appears confirming the customer has been deleted.
7. Tap **OK**.
8. Repeat steps 3 – 7 to delete other customers as necessary.


Adding a customer to the Favourites Group

It is possible to add customers to the Favourites Group that appears in the Sale screen.

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Sale**.

3. Select the favourites tab at the bottom of the right pane to which you want to add the customer.
4. On the right pane, tap and hold a blank area of the screen.
A grid with 16 rectangles will appear.
5. Tap one of the blank rectangles with the  symbol.
The Add a Product or Customer to your Favourites Group popup appears.
6. Tap the **Customers** button () to the right.
7. Tap the **Search** field at the top of the popup.
8. Use the on-screen keyboard to enter the customer's **ID, name, phone number** or **email** into the search field.

The system searches the customer database and search results appear below.

***Hint:** You can also tap the **Customers** button () to see a complete list of customers that you can add to the Favourites Group.*

9. Tap a customer's name in the search results.
They are added to the Favourites Group.
10. Repeat steps 6 - 9 as necessary to add other customers to the tab.
11. Tap outside of the popup.
12. Tap the **Save** button.

Processing transactions

This section explains how to perform the following tasks:

- Starting a sale
- Assigning a customer to a sale
- Adding products to a sale
- Manipulating quantities and prices
- Applying discounts
- The Custom Amounts function
- Suspending and resuming transactions
- Cancelling transactions
- Processing payments:
 - cash
 - cheque
 - entering payment cards
 - debit cards
 - credit cards
 - store credit
 - split tender
- Processing layaway transactions
- Receipt options
- Optional POS devices
 - iPP320 PIN Pad
 - PAYD PIN Pad
- Customer prompts on the PIN Pads

General guidelines for performing a transaction

Generally speaking, purchase transactions occur in the following sequence:

1. Start the sale.
2. If applicable, assign a customer.
3. Select the product(s) the customer is buying.
4. If applicable, edit the prices and/or quantities and/or apply discounts.

5. Process payment.
6. Process receipt(s).

Before you begin

Please note the following information before you begin processing transactions:

- Integrated versus non-integrated merchants:
 - All **integrated merchants** have their *Interac*® Debit and credit payments processed by Moneris, and are able to use the Moneris PAYD PIN Pad or the iPP320 PIN Pad to accept credit and *Interac* Debit payments from their customers.
 - **Non-integrated merchants** do not use Moneris' *Interac* Debit and credit processing. They will need to process debit and credit cards outside of the PAYD Pro Plus App.
- **The bill** – This term refers to the left pane of the Sale screen where the customer's items for purchase are displayed.
- **Continue the sale** – This instruction refers to adding products to the bill and manipulating quantities and prices, and applying discounts.
- **Complete the transaction** – This instruction refers to selecting a payment method, processing the payment method, and finally processing the receipt.
- **Receipts** - The PAYD Pro Plus App has the ability to **print paper receipts** from a Bluetooth receipt printer, send a receipt via **SMS text message**, and the ability to **email** a receipt copy to a customer. For the purposes of this guide, the term "process receipts" at the end of instructions refers to these output types. You can select your receipt output type in the Settings – Receipts screen. To learn more about configuring your receipts and the output type, refer to the *PAYD Pro Plus Mobile Solution Configuration Guide* available at getpayd.com/paydproplus/support.

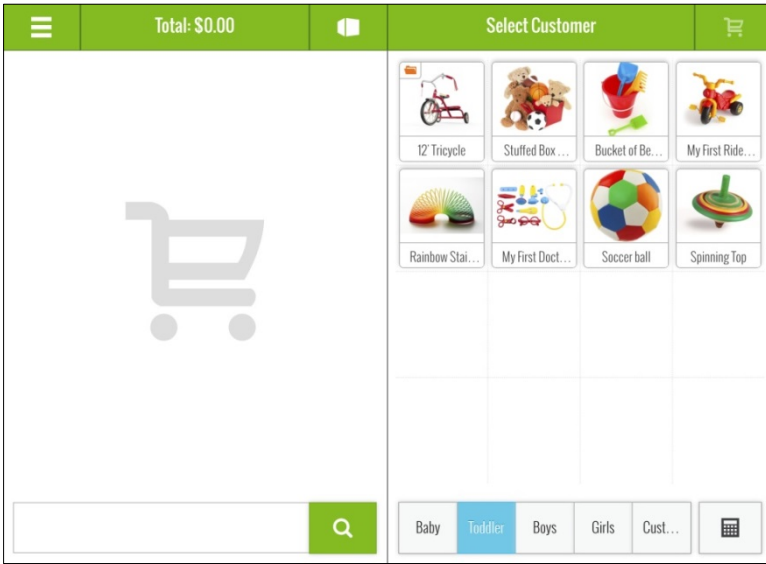
All the instructions pertaining to processing sale transactions in this guide make the assumption that you have started the sale. Please refer to *Starting a sale* on page 35 for instructions on how to begin a sale transaction.

Starting a sale

To start a sale, follow the instructions below.

1. Tap the **Main Menu** button (☰).
2. On the main menu, tap **Sale**.

The Sale screen appears.



Processing a sale without assigning a customer

It is possible to process a sale without assigning a customer. Simply start the sale and add products to the bill. Proceed to the *Adding products to a sale* section on page 38 for instructions.

Assigning a customer to a sale

There are three methods for assigning a customer to a sale:

- Search
- Create new
- Tap to add from the Favourites Group

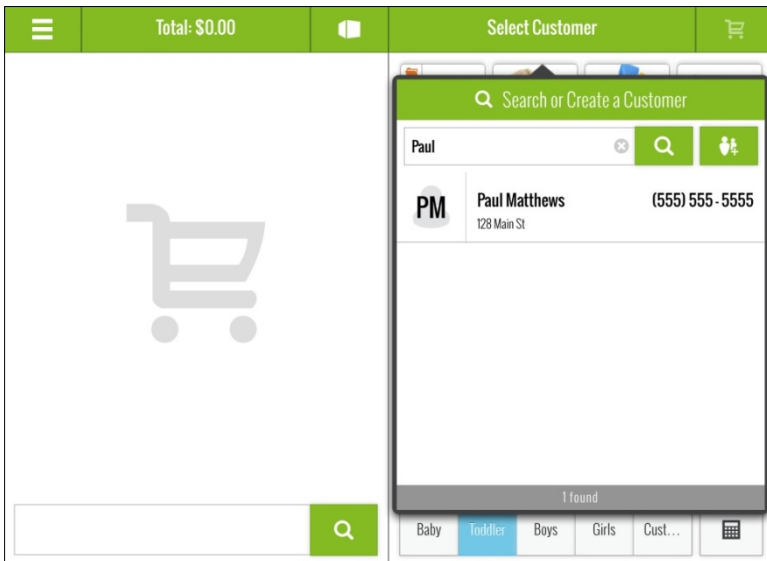
Searching for customers

Follow the instructions below to search for a customer to add to the sale.

1. Start the sale. See *Starting a sale* on page 35 for more information.
2. Tap **Select Customer**.
The Search or Create a Customer popup appears.
3. Search for a specific customer.

OR

Search your entire list of customers. See *Searching customers* on page 29 for more information on how to search your customer database.




4. Once you locate the customer in the search results, tap their name.
The customer's name appears at the top of the right pane.
5. Continue the sale.

Creating a new customer profile

Follow the instructions below to create a profile for the customer and attach them to the sale.

Note: Based upon PAYD Pro Plus software bundle and/or your Merchant Agreement with Moneris, you may encounter a limit to the number of customer profiles that can be added to the customer database. For more information on how to increase this limit, please visit us at getpayd.com/paydproplus or call us at **1-855-423-PAYD (7293)** to upgrade today.

1. Start the sale. See *Starting a sale* on page 35 for more information.
2. Tap **Select Customer**.
The Search or Create a Customer popup appears.
3. Tap the **New Customer** button ()
The New Customer popup appears.
4. Create a profile for the new customer. For more information, refer to the *Adding new customers* section on page 26.
The customer is added to your database, and their name appears at the top of the right pane.
5. Continue the sale.

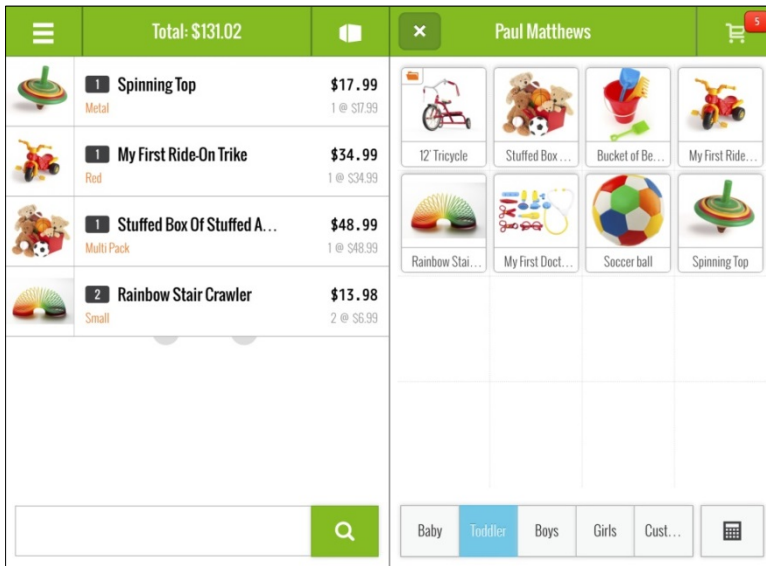
Adding a customer from the Favourites Group

1. Start the sale. See *Starting a sale* on page 35 for more information.
2. Tap the tab in your Favourites Group that contains your customers.
3. Tap the customer's name.
The customer's name appears at the top of the right pane.
4. Continue the sale.


Adding products to a sale

There are 3 methods of adding products to a sale:

- Scan
- Search
- Tap to add from the Favourites Group




Scanning products

1. Start the sale. See *Starting a sale* on page 35 for more information.
2. Do one of the following:
 - Tap the **Products** button () in the top of the left pane. The Search or Create a Product popup appears. Proceed to step 3.OR
 - Tap the search field in the left pane. Proceed to step 3.
3. Scan the product's barcode.
The product is added to the bill.

4. Repeat steps 2 and 3 to scan additional products to add to the bill.
5. Complete the transaction.

Note: If the message “Product ID not found in inventory” appears, the barcode you scanned is not associated with the product. Tap **OK** and cancel the sale (see Canceling transactions on page 48 for more information). Edit the product to associate the barcode with the item. See Editing products on page 18 for more information.


Searching for products

1. Start the sale. See *Starting a sale* on page 35 for more information.
2. Do one of the following:
 - Tap the **Products** button () in the top of the left pane. The Search or Create a Product popup appears. Proceed to step 3.

OR

- Tap the search field in the left pane. Proceed to step 3.
3. In the search field, enter any of the following as your search criteria:
 - **Product ID** e.g., “12345678”
 - **Product Name** e.g., “Building Bricks – 300 pcs”
 - **Product Keywords** e.g., “bricks”
 - **Product Attributes** e.g., “multi-coloured”
 - **Supplier’s UPC code** e.g., “0123456789000”

Note: You can enter all or part of the search criteria (e.g., “brick”). Tap the **Return** key on the on-screen keyboard when finished entering the search criteria.

4. Tap the **Search** button ()
5. The search results appear below.
6. Tap the product to add it to the transaction.
7. Repeat steps 2 – 5 as necessary to populate the bill with other items the customer wants to purchase.
8. Complete the transaction.

Note: It is also possible to tap the **Search** button () without entering any search criteria to generate a full list of available products.

Adding products from the Favourites Group



If the Favourites Group is enabled, and populated with products, follow the instructions below.

1. Start the sale. See *Starting a sale* on page 35 for more information.
2. On the right pane, tap the tab at the bottom of the Favourite Groups that contains the customer's desired item.
3. Tap the product's name/image.
The product is added to the bill.
4. Repeat step 3 for any other products in the current tab.
5. Repeat steps 2 – 4 for products that reside on other tabs in the Favourites Group.
6. Complete the transaction.

Adding non-inventory items to a sale

It is possible to add a product that is not yet in your inventory database to a sale.

Note: Based upon PAYD Pro Plus software bundle and/or your Merchant Agreement with Moneris, you may encounter a limit to the number of product profiles that can be added to the product database. For more information on how to increase this limit, please visit us at getpayd.com/paydproplus or call us at **1-855-423-PAYD (7293)** to upgrade today.

1. Start the sale. See *Starting a sale* on page 35 for more information.
2. Tap the **Products** button () in the left pane.
The Search or Create a Product popup appears.
3. In the popup, tap the **Add Product** button ().
The Add Non-Inventory Product popup appears.

4. If this product is something you wish to store in your inventory (to be a regular item to sell to customers), tap the **Add this product to inventory** checkmark (ensure it turns blue). If not, leave it unchecked.
5. Tap the **Qty to add to sale** field and use the on-screen numberpad to enter the quantity of items the customer is buying, then tap **OK**.
6. Follow the instructions in the *Adding new products* section on page 13 (starting at step 5) to capture the rest of the product's information.

Editing quantities and prices

Once products are on the bill, it is possible to edit the quantity of items being sold, as well as the product's price.

Adjusting item quantity

There are two ways to adjust a product's quantity once it is on the bill: scanning the item again or tapping the quantity adjustment buttons.

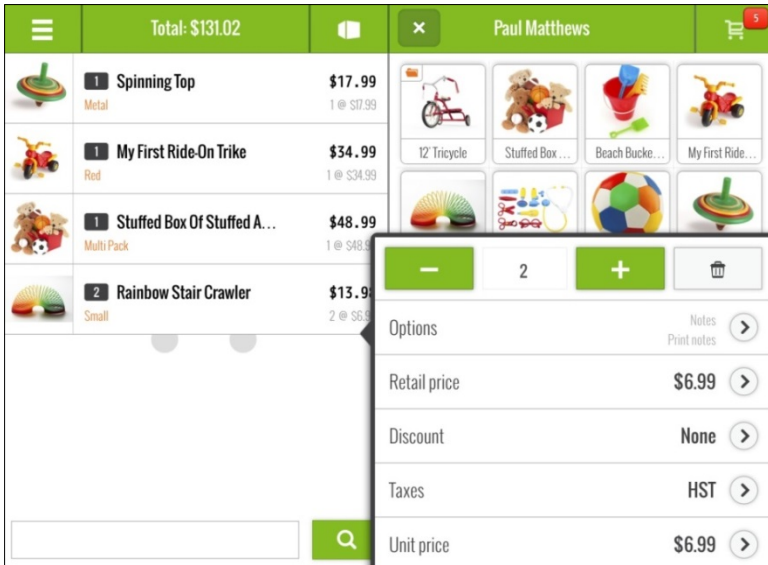
Scanning

- To adjust the quantity of an item by scanning, simply scan the item's barcode multiple times as necessary. The quantity indicator to the left of the product's name on the bill will increase each time the item is scanned. There is also an overall item count at the top of the right pane on the checkout button that increments as well.




Using the quantity adjustment buttons


1. Tap the product's name on the bill.
A popup appears to the right.



2. Change the quantity:

- To increase the item quantity, tap the + button ().

OR

- To decrease the item quantity, tap the – button ().

3. Tap outside of the pop-up to close it.

The item's quantity is adjusted.

4. Repeat steps 1 – 3 to adjust other item quantities as needed.

5. Complete the transaction.

Adjusting product price

Adjusting a product's price on the bill affects only the transaction on which the price is being changed. It does not affect the product's price outside the current transaction. Follow the instructions below to change the retail price of a product for one transaction only.

Note: If you wish to change the item's overall price (applicable for any transaction), refer to the Editing products section on page 18.


1. Tap the product's name on the bill.

A popup appears to the right.

2. In the popup, tap the  symbol to the right of **Retail price**.

The Retail price popup appears.

3. Tap inside the **New retail price** field and use the on-screen numberpad to enter a new price in dollars and cents. Tap the **OK** or **Return** button when finished.

4. Tap the left arrow () at the top of the Retail price popup.

5. Tap outside of the popup to close it.

The item's price is adjusted.

6. Repeat steps 1 – 5 to adjust other item prices as needed.
7. Complete the transaction.


Removing products from the bill

If a product has been added to the bill by mistake, or if the customer changes their mind about something before paying, follow the instructions below to remove the product(s) from the bill.


1. Tap the product's name on the bill.

A popup appears to the right.

2. Change the product quantity:

- To decrease the item's quantity, tap the – button (.

OR


- To remove the product from the bill, tap the **Delete** button (.

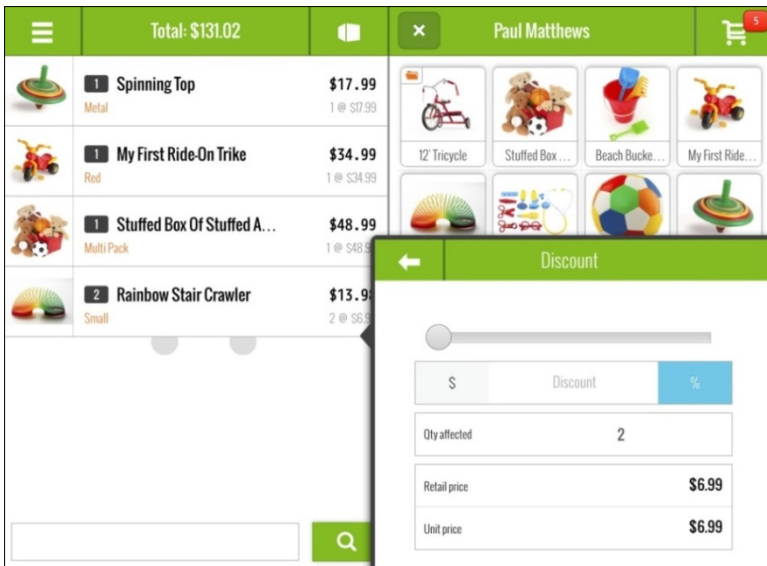
3. Repeat steps 1 and 2 as necessary to remove other products from the bill.
4. Complete the transaction.

Applying discounts

Discounts can be applied to products once they have been added to the bill. It is also possible to apply a discount to the overall transaction.

To apply discounts to specific items on the bill:

1. Tap the product's name on the bill.
A popup appears to the right.
2. In the popup, tap the  symbol to the right of **Discount**.
The Discount popup appears.



3. In the Discount popup, take the following action:
 - **To apply a percent discount:**
 - a. Tap the % button (ensure it is coloured blue).
 - b. Use the horizontal slider to select the discount amount. Sliding to the right increases the amount; sliding to the left decreases the amount.

OR

Key in a percentage amount in the **Discount** field (located between the **\$** and **%** buttons). Tap the **OK** button when finished.

- c. Select whether you want the discount applied to individual items or all items. For example, if 5 of the same item are being sold, will the discount apply to all 5 items, or only to 3 of 5?
 - To apply the discount to a limited number of items, tap inside the **Qty affected** field and use the on-screen numberpad to key in the quantity to which the discount applies. Tap the **OK** or **Return** button when finished.

OR

- To apply the discount to the total quantity of that one product, do not change the value in the **Qty affected** field.
- d. Proceed to step 4.
- **To apply a dollar discount:**
 - a. Tap the **\$** button (ensure it is coloured blue).
 - b. Use the horizontal slider to select the discount amount. Sliding to the right increases the amount; sliding to the left decreases the amount.

OR


Key in a dollar amount, in the **Discount** field (located between the **\$** and **%** buttons). Tap the **OK** button when finished.

- c. Select whether you want the discount applied to individual items or all items. For example, if 5 of the same item are being sold, will the discount apply to all 5 items, or only to 3 of 5?
 - To apply the discount only to limited number of items, tap inside the **Qty affected** field and use the on-screen numberpad to key in the quantity to which the discount applies. Tap the **OK** button when finished.

OR

- To apply the discount to the total quantity of that one product, do not change the value in the **Qty affected** field.

d. Proceed to step 4.

4. Tap the **left arrow** button () at the top of the Discount popup.
5. Tap outside of the popup to close it.


The discount is applied to the item.

6. Repeat steps 1 – 5 to discount other items on the bill as necessary.
7. Complete the transaction.

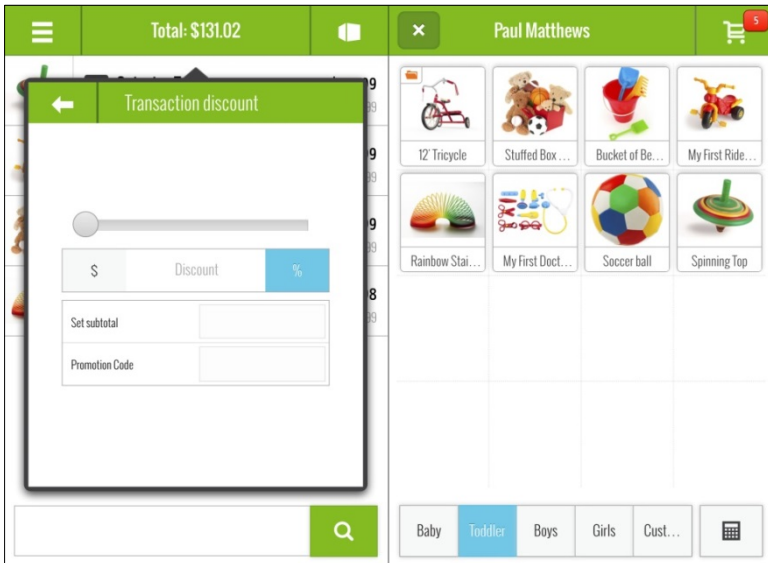
To apply a discount to the entire transaction:



1. Tap the total amount at the top of the left pane.

A popup appears below.

2. Tap the  symbol to the right of the TRX DISCOUNT line.

The Transaction discount popup appears.



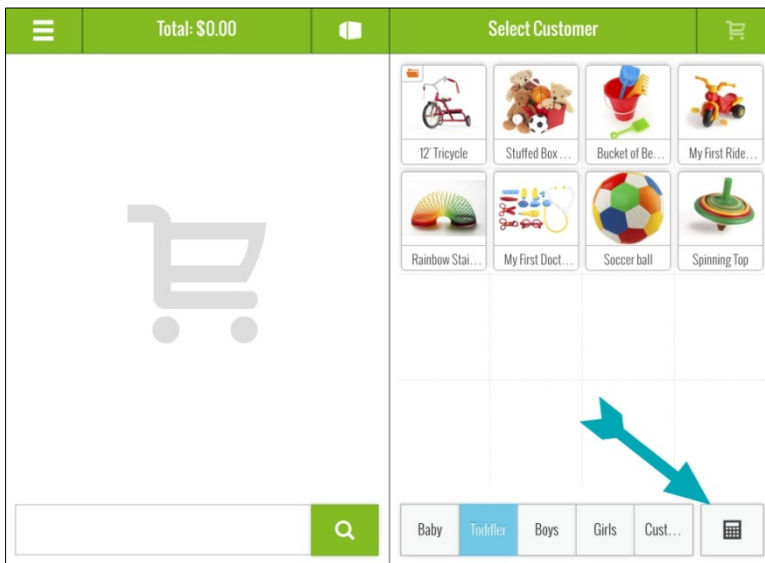
3. Choose the following discount type:
 - **To apply a percent discount:**
 - a. Tap the % button (ensure it is coloured blue).
 - b. Use the horizontal slider to select the discount amount. Sliding to the right increases the amount; sliding to the left decreases the amount.
OR
Key in a percentage amount, in the **Discount** field (located between the \$ and % buttons). Tap the **OK** button when finished.
 - c. Proceed to step 5.
 - **To apply a dollar discount:**
 - a. Tap the \$ button (ensure it is coloured blue).
 - b. Use the horizontal slider to select the discount amount. Sliding to the right increases the amount; sliding to the left decreases the amount.
OR
Key in a dollar amount, in the **Discount** field (located between the \$ and % buttons). Tap the **OK** button when finished.
 - c. Proceed to step 5.
 - **To apply a defined discount code:**
 - a. Tap inside the **Promotion Code** field and enter the discount code.
***Note:** Promotion codes are defined and managed using PAYD Administration. Click the  icon in PAYD Administration for more help on creating promotion codes.*
 - b. Proceed to step 5.
 4. Tap the left arrow button () to return to the transaction.
You will see the discount applied to every item on the bill.
 5. Complete the transaction.
-

The Custom Amounts function

The Custom Amounts function enables PAYD Pro Plus Mobile merchants to process transactions that include non-inventory products even more rapidly. Instead of adding the product profile or adding a non-inventory item to the sale, simply enter the price you are charging for the product using the Custom Amounts numeric keypad.

Note: *The Custom Amounts function simply provides merchants with the ability to quickly add a non-inventory product to the sale. This function does not add the item to inventory, therefore the product sales are not tracked.*

The Custom Amounts function is enabled by default in the Configuration – Interface screen. It appears as a tab in the bottom right corner of the Favourites Group.




Using the Custom Amounts function

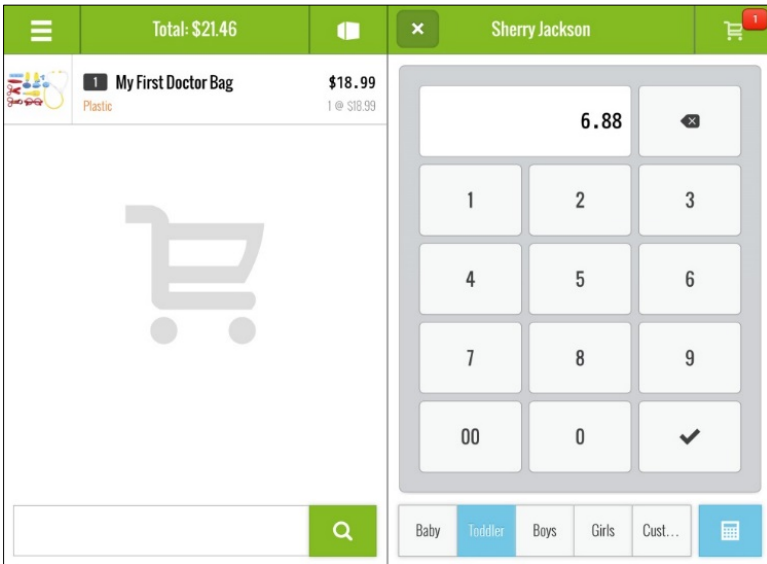
Follow the instructions below to use the Custom Amounts function.


IMPORTANT: Do not use the Custom Amounts function for products that are already defined in inventory. Add those products to the sale following the

instructions in the *Adding products to a sale* section on pages 38 to 40. Use this function **ONLY** when selling items that are not yet defined in inventory.


To use the Custom Amounts function:

1. At any point during a sale, tap the **Custom Amounts** button ().
The button turns blue and the numeric keypad appears in place of the Favourites Group.
2. Use the numeric keypad to enter a price for the product.

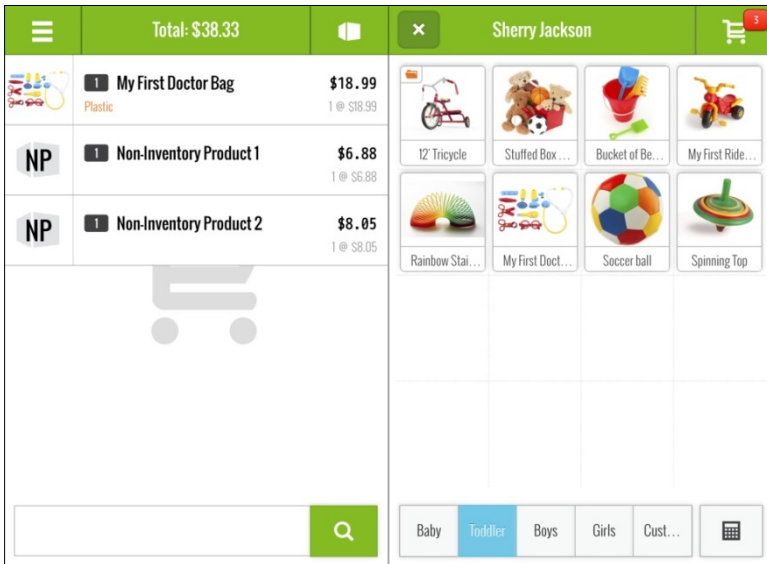


3. Tap the **checkmark** button () to add the product to the sale.
The non-inventory product is added to the transaction.
4. Repeat steps 2 and 3 for additional non-inventory products being added to this sale.

Note: You can add multiple non-inventory products to any sale. You can also adjust their quantity or prices, and apply discounts just like you would with any other product.

5. When finished, close the Custom Amounts numeric keypad, tap the blue Custom Amounts button ().

The keypad disappears and the Favourites Group becomes visible once more.



6. Complete the transaction.

Suspending and resuming transactions

Once a sale transaction has been started, it is possible to suspend it. When the customer is ready to pay, their suspended transaction can be resumed. Transactions can be suspended and resumed as often as needed.

Note: It is also possible to suspend a Return transaction before payment is processed. The steps presented here are applicable to both Sales and Returns.

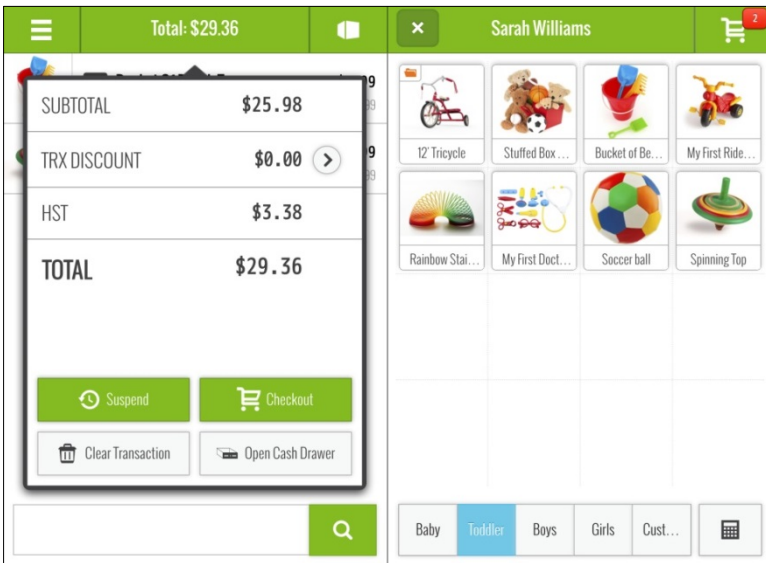
Note: It is possible to suspend a transaction in the PAYD Pro Plus App and resume it in the POS view of the PAYD Pro Plus In-Store Solution, and vice-versa.

Suspending a transaction

A transaction can be suspended up to any point before payment is ready to be processed. Suspending a transaction preserves all of its details (e.g., customer, products, prices, discounts). Follow the instructions below to suspend a transaction.

1. If applicable, assign a customer to the sale.
2. Add product(s) to the sale.
3. Adjust quantities and/or prices and apply discounts as necessary.
4. Tap the total at the top of the left pane.


A popup appears.



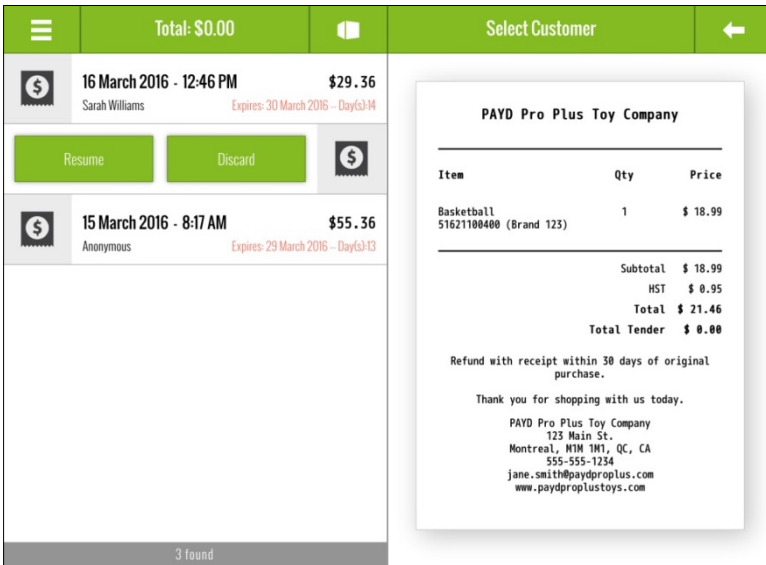
5. In the popup, tap the **Suspend** button.
6. The transaction is suspended and a blank Sale screen appears, ready to take the next transaction.

Resuming suspended transactions

Follow the instructions below to resume suspended transactions.

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Sale**.
A blank Sale screen appears.
3. Tap the total (\$0.00) at the top of the left pane.
4. On the popup menu that appears, tap **Suspended Sales**.
5. Scroll through the list to locate the transaction you wish to resume (the transactions appear with the date & time stamp of when the transaction was suspended, along with the customer's name and the transaction's projected expiry date).
6. Tap the transaction on the left pane.


The transaction profile slides to the right revealing **Resume** and **Discard** buttons. The transaction details appear on the right pane.



7. Tap the **Resume** button.
The populated Sale screen appears.
8. Complete the transaction as necessary.

Discarding suspended transactions

If a suspended transaction needs to be eliminated without needing to process payment, follow the instructions below.

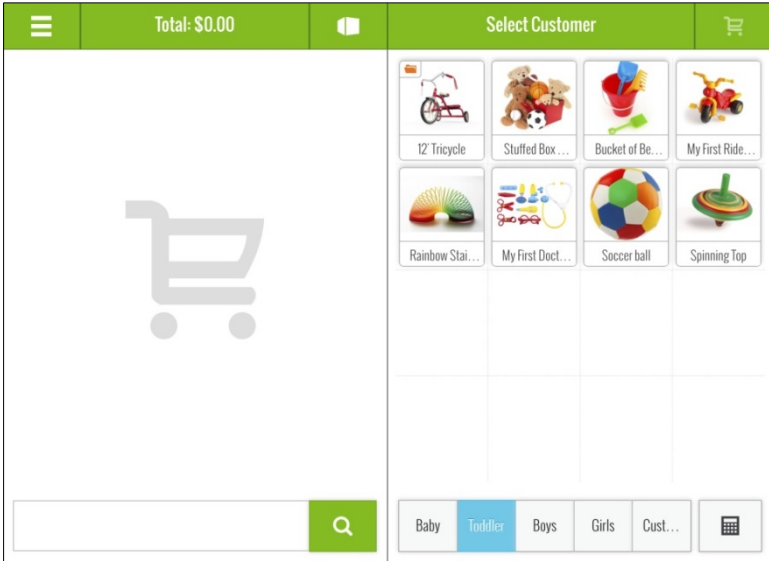
1. Tap the **Main Menu** button ().
2. On the main menu, tap **Sale**.
A blank sale screen appears.
3. Tap the total (**Total: \$0.00**) at the top of the left pane.
4. In the popup menu that appears, tap **Suspended Sales**.
5. Scroll through the list to locate the transaction you wish to resume (the transactions appear with the date & time stamp of when the transaction was suspended, along with the customer's name and the transaction's projected expiry date).
6. Tap the transaction on the left pane.
The transaction profile slides to the right revealing **Resume** and **Discard** buttons. The transaction details appear on the right pane.
7. Tap the **Discard** button.
The transaction disappears from the list and a blank Sale screen appears.

Canceling transactions

It is possible to cancel a transaction before payment has been processed.

1. Tap the total amount at the top of the left pane.
A popup appears below.
2. Tap the **Clear Transaction** button.
A confirmation popup appears.
3. Tap **Yes** to cancel the transaction.

The Sale screen reappears awaiting the start of a new transaction.



Processing payment

This section explains how to process payments to complete a transaction. Each of the instructions in this section assume that you have finalized the transaction (e.g., selected the customer, added the items and applied any discounts/price adjustments as necessary).

The screenshot shows a payment processing screen with a green header. The header contains a menu icon, the total amount 'Total: \$131.02', a camera icon, the customer name 'Paul Matthews', and a back arrow. The main area is divided into two columns. The left column contains a transaction summary table. The right column contains five payment method buttons: Cash, Debit, Credit Card, Cheque, and Store Credit. At the bottom of the right column are two additional buttons: Commission and Layaway.


REMAINING AMOUNT	
TENDERED	\$0.00
SUBTOTAL	\$115.95
TRX DISCOUNT	\$0.00
HST	\$15.07
TOTAL	\$131.02


Payment Options:

- Cash
- Debit
- Credit Card
- Cheque
- Store Credit
- Commission
- Layaway


Selecting a staff for commission

When processing a payment, it is possible to select a staff member to receive commission on the sale. Follow the steps below to assign commission to an employee.

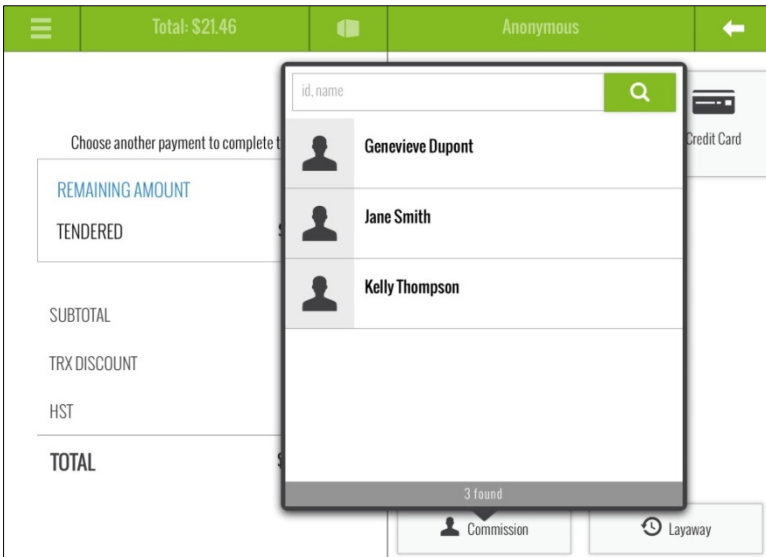
Note: The **Use Commission** setting must be set to **Yes** in the Configuration – Settings screen in PAYD Administration. Staff commission rates must be defined in the employee’s Details screen accessed through PAYD Administration. Click the  icon in PAYD Administration for more help on configuring commission.

1. Start the sale.
 - If applicable, assign a customer to the sale, adjust quantities and/or prices and apply discounts as necessary.
2. Tap the **Shopping Cart** button () at the top of the right pane to checkout.


The Payments screen appears with the payment types on the right pane.
3. Tap the **Commission** button at the bottom of the right pane.

A search screen appears.
4. Enter the employee name or ID into the search field, then tap the search button ().

Note: To search all employees, leave the field blank and tap the search button.



5. Tap the employee's name in the search results that appear below.
6. Proceed with the transaction by processing payment.

Note: If you selected the wrong employee from the list by accident, tap the trashcan icon () that appears beside their name, then repeat steps 3 – 6.

Processing cash payment

Follow the instructions below to process a cash payment for a transaction.

Note: Merchants with a Cash Account will only be able to process cash transactions.

1. Tap the **Shopping Cart** button () at the top of the right pane to checkout.

The Payments screen appears with the payment types on the right pane.

2. Tap **Cash**. The total amount due appears on the left pane.
3. Do one of the following:

- **If the customer is providing cash greater than the amount due:**

- a. Tap inside the amount field on the right (where the total amount due is showing). The on-screen numberpad appears.
- b. Enter the amount the customer has given to you and tap **OK**.

OR

Tap one of the “nearest rounded” amounts on the right side of the numberpad.

- c. Proceed to step 4.

- **If the customer has exact change:**

- a. Tap the **OK** button.
- b. Proceed to step 4.

- **If the customer is paying with cash and another tender type:**

- Refer to *Processing split tender payments* on page 67 for more information.

4. Process the receipts. If change is to be given, the change amount will be displayed on the right pane.
5. Tap **Done** to complete the transaction.

Processing cheque payment

Follow the instructions below to accept a cheque as payment for a transaction.

1. Tap the **Shopping Cart** button () at the top of the right pane to checkout.

The Payments screen appears with the payment types on the right pane.

2. Tap **Cheque**. The total amount due appears on the right pane.
3. Tap the **OK** button.
4. Process the receipts.
5. Tap **Done** to complete the transaction.

Card entry options

Insert: chip cards

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

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

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



Tip for proper card insertion:

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

Swipe: magnetic stripe cards

Note: If the card has a chip, it must be inserted (see Insert: Chip cards on page 58).

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

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

- If the card is a debit card, the customer will be prompted to enter a PIN.

Tip for proper card swipe:

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

Wave/tap: Contactless cards

1. The PIN Pad displays SWIPE, TAP OR INSERT CARD.
2. The customer taps/waves their card over the PIN Pad's display screen.
3. Note the following :
 - For the Moneris PAYD PIN Pad, the PIN Pad's battery charge level should be at least 50% (see page 89) to ensure a successful tap. For the iPP320 PIN Pad, there are no battery



- concerns as the iPP320 doesn't have an internal battery.
 - Only Sales and Refunds can be performed as contactless transactions.
 - The customer will not be prompted for a PIN.
 - The transaction amount must be equal to or less than the maximum Contactless Dollar Value set for the card (see *Maximum Contactless Dollar Value* on page 60).
4. The PIN Pad beeps and four green lights flash when the contactless reader is reading the card data.

Tips for proper card tap/wave:

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

Maximum Contactless Dollar Value (CDV)

To determine the maximum CDV for a card type, contact us at **1-855-423-PAYD (7293)**.


- **Credit cards:** If a credit card is tapped for an amount that exceeds its maximum CDV, the PIN Pad will display CONTACTLESS TRANSACTION LIMIT EXCEEDED. Insert the chip credit card (see *Insert: chip cards* on page 58 for more information).
- **Debit cards:** If an *Interac* Debit card is tapped for an amount that exceeds its maximum CDV, the PIN Pad will display MUST INSERT CARD. Insert the chip credit card (see *Insert: chip cards* on page 58 for more information).

Swipe: magnetic stripe cards on the PAYD card reader

If something has prevented communication between the PIN Pad and the Apple iPad, you can use the Moneris PAYD card reader as a backup method to process credit card transactions.

Note: *The PAYD card reader cannot be used for Interac Debit transactions.*

1. Insert the PAYD card reader into the audio port on the Apple iPad. Turn the Apple iPad volume up to its maximum.
2. Process the transaction.
3. At the Payments screen, tap **Credit card**.

4. On the right pane, tap **Process Transaction** (the button displays a card reader icon ).
5. When prompted by the app, swipe the magnetic stripe slowly through the reader from left to right.
6. Follow the prompts on the screen to complete the transaction.


Manual card entry

If all available card entry methods fail, you may manually enter the card number for credit cards and some chip debit cards on the PIN Pad. If that also fails, or you don't have a PIN Pad, you may manually enter the card number for credit cards on the screen of the PAYD Pro Plus App. A manual imprint of the credit card and the cardholder's signature are required, or the merchant will be liable for fraud-related chargebacks if the transaction is disputed.

Note: *If the PIN Pad is enabled in Settings – Devices, you will be prompted to manually key in the card information on the PIN Pad. If it is disabled, you will be prompted to enter the card data on the screen of the PAYD Pro Plus App.*

1. On the right pane of the Payments screen, tap **Credit Card**.
2. On the right pane, tap the **Manual** button.
3. Enter the credit card number:
 - **On the PAYD PIN Pad:**
 - a. At the SWIPE, TAP OR INSERT CARD prompt, key in the credit card number. Press the green key when finished.
 - b. At the EXPIRY DATE prompt, enter the card's 4-digit expiry date in MM/YY format. Press the green key when finished.
 - c. Proceed to step 4.
 - **On the PAYD Pro Plus App screen:**
 - a. In the **Card Number** field, enter the card number.
 - b. Enter the card's 3-digit CVC code in the **CVD** field.

Note: *The Card Validation Code (CVC) is a 3-digit code located on the back of the card.*

- c. Tap the drop-down arrow for **Expiration Date** and use the calendar selector to select the month and year of the card's expiry date. Tap the **checkmark** () button when finished.
 - d. Tap **Process Transaction**.
 - e. Wait while the transaction processes.
4. Follow the prompts on the screen to complete the transaction.


Processing *Interac* Debit payments


Integrated merchants can use a Moneris PIN Pad to accept and process *Interac* Debit cards. Non-integrated merchants must use a different method to process payment for *Interac* debit cards.

Note: *If you are a non-integrated merchant, and you select **Debit** as payment, the following message appears: "Please visit www.getpayd.com/paydproplus to sign up for credit and debit payment processing." You will not be able to complete the transaction.*

Integrated debit payments

Follow the instructions below to process payment using *Interac* Debit and a Moneris PIN Pad. Before proceeding, ensure the following conditions are met:

- For the PAYD PIN Pad:
 - Ensure the PAYD PIN Pad is powered on and at the WELCOME/BONJOUR screen. See *Powering on the PAYD PIN Pad* on page 91 for more information.
 - Ensure that the PAYD PIN Pad is paired to the Apple iPad and is showing connected () on the main menu. See *Checking Bluetooth device status* on page 100 for more information.
- For the iPP320 PIN Pad:
 - Ensure the PIN Pad is powered on and is at the WELCOME/BONJOUR screen.
 - Ensure the PIN Pad is selected in the Settings – Devices screen, and has been initialized.

1. Tap the **Shopping Cart** button () at the top of the right pane to checkout.
The Payments screen appears with the payment types on the right pane.
2. Tap **Debit**. The total amount due appears on the right pane.
3. Tap **Process Transaction**. The screen displays “Transaction in progress...”.
Note: If you see the message “PIN Pad is not connected or paired”, tap **OK** and refer to the Troubleshooting section on page 118.
4. Hand the PIN Pad to the customer.
5. The customer enters their card on the PIN Pad. See *Card entry options* on page 58 for more information.
6. The customer follows the prompts on the PIN Pad. See *Customer prompts on the PIN Pad* on page 112 for more information.
7. When the payment is successfully processed, the PIN Pad returns to the WELCOME/BONJOUR screen.
8. Retrieve the PIN Pad from the customer.
9. Process the receipts.
10. Tap **Done** to complete the transaction.


Processing credit card payments

Integrated merchants can use a Moneris PIN Pad or the PAYD card reader to accept and process credit cards. Non-integrated merchants must use a different method to process payment from credit cards.

Note: If you are a non-integrated merchant, and you select **Credit** as payment, the following message appears: “Please visit www.getpayd.com/paydproplus to sign up for credit and debit payment processing.” You will not be able to complete the transaction.

Integrated credit payments

Follow the instructions below to process payment using *Interac* Debit and a Moneris PIN Pad. Before proceeding, ensure the following conditions are met:

- For the PAYD PIN Pad:
 - Ensure the PAYD PIN Pad is powered on and at the WELCOME/BONJOUR screen. See *Powering on the PAYD PIN Pad* on page 91 for more information.
 - Ensure that the PAYD PIN Pad is paired to the Apple iPad and is showing connected () on the main menu. See *Checking Bluetooth device status* on page 100 for more information.
 - If using the PAYD card reader, refer to *Swipe: magnetic stripe cards on the PAYD card reader* on page 60 for more information.
- For the iPP320 PIN Pad:
 - Ensure the PIN Pad is powered on and is at the WELCOME/BONJOUR screen.
 - Ensure the PIN Pad is selected in the Settings – Devices screen, and has been initialized.

1. Tap the **Shopping Cart** button () at the top of the right pane to checkout.

The Payments screen appears with the payment types on the left pane.

2. Tap **Credit Card**. The total amount due appears on the right pane.
3. Tap **Process Transaction**. The screen displays “Transaction in progress...”.

Note: *If you see the message “PIN Pad is not connected or paired”, tap **OK** and refer to the Troubleshooting section on page 118.*

4. Hand the PIN Pad to the customer.
5. The customer enters their card on the PIN Pad. See *Card entry options* on page 58 for more information.
6. The customer follows the prompts on the PIN Pad. See *Customer prompts on the PIN Pad* on page 112 for more information.
7. When the payment is successfully processed, the PIN Pad returns to the WELCOME/BONJOUR screen.

8. Retrieve the PIN Pad from the customer.
9. Process the receipts.
10. Tap **Done** to complete the transaction.

Processing Store Credit payments


Processing a Store Credit belonging to a registered customer


If a customer has received store credit, he or she can redeem it to pay for all or part of a subsequent purchase.

1. Tap the **Shopping Cart** button () at the top of the right pane to checkout.

The Payments screen appears with the payment types on the right pane.

2. Tap **Store Credit**. The total amount due appears on the right pane.

Note: *If a customer has been assigned to the transaction, the customer's current store credit balance will appear on the **Store Credit** button ().*

If the balance is not visible (), it means the customer does not have any store credit to spend.

3. Tap **Process Transaction**.
4. Process the receipts.
5. Tap **Done** to complete the transaction.

Note: *If there was not enough store credit to cover the cost of the transaction, you can use the store credit and another tender type to process the transaction as a split-tender transaction. See Processing split-tender payments on page 67 for more information.*

Processing a Store Credit that belongs to an unregistered customer

If a customer has a store credit, but they have not been registered in the system, you can use the **Store Credit ID**, or search the list of outstanding credits, so that the customer can redeem it to pay for all or part of a subsequent purchase.

1. Tap the **Shopping Cart** button () at the top of the right pane to checkout.

The Payments screen appears with the payment types on the right pane.

2. Tap **Store Credit**. The total amount due appears on the right pane.

3. On the right pane, do one of the following:

- Use the Store Credit ID:

- a. If you know the Store Credit ID, tap inside the **Store Credit ID** field and enter the ID.

- b. Tap the **Search** button ().

A popup with the search results appears.

- c. Tap the store credit you wish to use.


The customer's name and the credit amount appears.

- d. Proceed to step 4.

- Search for a store credit:

- a. Tap the **Search** button ().

A blank search results popup appears.

- b. Tap the **Search** button () again.

All outstanding store credits appear.

- c. Scroll through the list and tap the store credit you wish to use.

The customer's name and the credit amount appears.

- d. Proceed to step 4.
4. Tap **Process Transaction**.
5. Process the receipts.
6. Tap **Done** to complete the transaction.

Note: *If there was not enough store credit to cover the cost of the transaction, you can use the store credit and another tender type and process the transaction as a split-tender transaction. See Processing split-tender payments below for more information.*

Processing split-tender payments

It is possible to use **up to two tender types** to process a transaction (e.g., Cash and Debit, Cheque and Store Credit etc.). Follow the steps below to use two payment types for one transaction.

1. Tap the **Shopping Cart** button () at the top of the right pane to checkout.

The Payments screen appears with the payment types on the right pane.

2. Tap the first payment type in the right pane.
3. On the right pane, tap inside the amount field.

The on-screen numberpad appears with the amount due.

4. Change the amount due to the amount the customer is paying with the first tender type, then tap **OK**.
5. Tap **Process Transaction**.

Note: *If the transaction involves a debit or credit card, and you see the message “PIN Pad is not connected or paired”, tap **OK** and refer to the Troubleshooting section on page 118.*

6. Process the first payment type following the appropriate instructions in this guide.
7. Once complete, the Payments screen reappears. On the left pane, the remaining amount due is shown.
8. Tap the second payment type in the right pane.

9. Process the second payment type following the appropriate instructions in this guide.
10. Process the receipts.
11. Tap **Done** to complete the transaction.


Processing Moneris gift cards

Moneris gift cards can be processed in the PAYD Pro Plus App using an iPP320 PIN Pad or a PAYD PIN Pad using POSPAD version 1111. Refer to *Determining the PAYD PIN Pad software version* on page 92 for more information.

Moneris gift cards can be used as payment. For complete instructions on using Moneris gift cards with the PAYD Pro Plus App, refer to the **PAYD Pro Plus Mobile Solution: Using PAYD Pro Plus for Gift Cards** guide, available at getpayd.com/paydproplus/support.

Processing layaways

PAYD Pro Plus contains a layaway feature, and layaways can be created, cancelled, completed, or refunded on either the PAYD Pro Plus App, or PAYD Administration. The instructions in this guide pertain to the PAYD Pro Plus App.


Note: *The layaway feature must be enabled in Configuration – Settings screen in PAYD Administration before it can be used in the PAYD Pro Plus App. Click the  icon in the Configuration – Settings screen for more help on layaway configuration.*

Putting items on layaway

Follow the instructions below to create a layaway.

1. Start the sale. See *Starting a sale* on page 35 for more information.
2. Assign a customer to the sale. See *Assigning a customer to a sale* on page 36 for more information.

Note: *A customer must be assigned to the sale in order to process it as a layaway. If the customer is not currently in your customer database, they will need to be added before the layaway can be processed. See Adding new customers on page 26 for more information.*

3. Add products to the sale. See *Adding products to a sale* on page 38 for more information.
4. Adjust quantities and prices (see page 41) and apply discounts (see page 44) as applicable.
5. Tap the **Shopping Cart** button () at the top of the right pane to checkout.

The Payments screen appears with the payment types on the right pane.

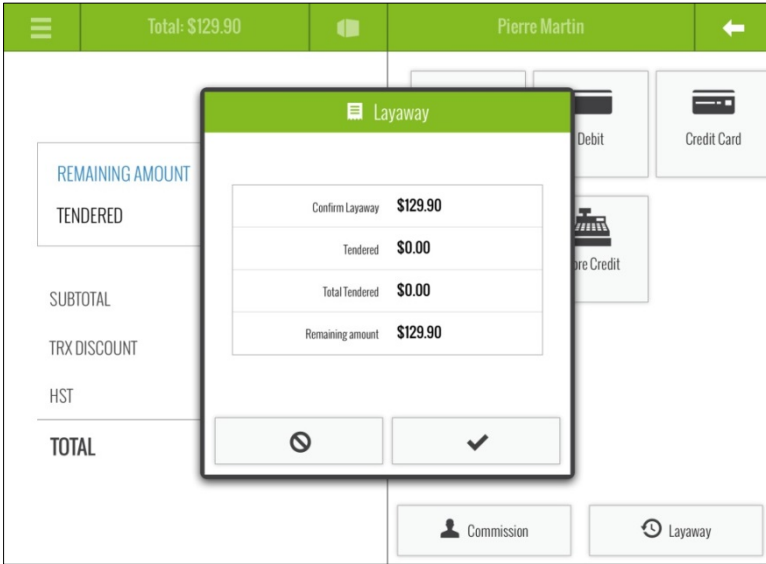
6. Determine if the customer is putting down a deposit on their item:
 - If the customer is leaving a deposit:
 - Tap the payment method the customer wishes to use to leave a deposit. See *Taking layaway deposits* on page 70 for more information.

OR

- If the customer is not leaving a deposit:
 - Proceed to step 7.

7. Tap the **Layaway** button at the bottom of the right pane.

The Layaway popup appears.



8. Review the information in the popup.
 - If the information in the Layaway popup is accurate, tap the checkmark button () and proceed to step 9.
 - If the information in the Layaway popup is inaccurate, tap the cancel button () and return to step 6.
9. Process the receipts.
10. Tap **Done** to complete the transaction.

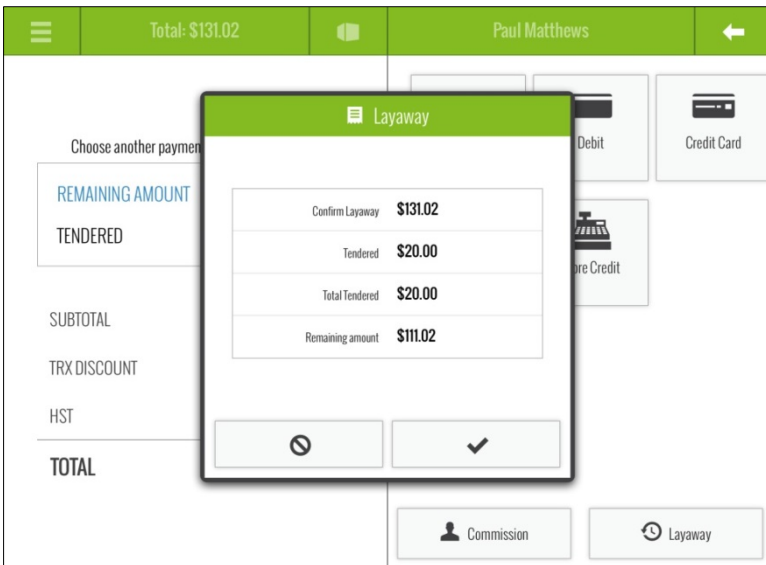
Note: Once a layaway is created, it cannot be modified to change items, pricing, quantities or commissioned staff. The layaway will need to be refunded or cancelled (see page 75 or page 77) and then recreated again following the steps above.

Taking layaway deposits



Deposits can be paid by any payment type that your store accepts, including any store credits the customer possesses. Follow the instructions below to capture a deposit on a layaway.

1. Begin the transaction; follow steps 1 – 5 of *Putting items on layaway* on page 68.
2. On the right pane of the Payments screen, tap the payment method the customer is using (e.g., **Credit Card**).
3. In the \$ field on the right pane, enter the amount the customer is putting down as a deposit, then tap **Process Transaction**.
4. Process the payment. If a credit or debit card is used, hand the PIN Pad to the customer and have them follow the prompts.
5. Once the deposit payment is processed, the Payments screen reappears.
6. Tap the **Layaway** button at the bottom of the right pane.

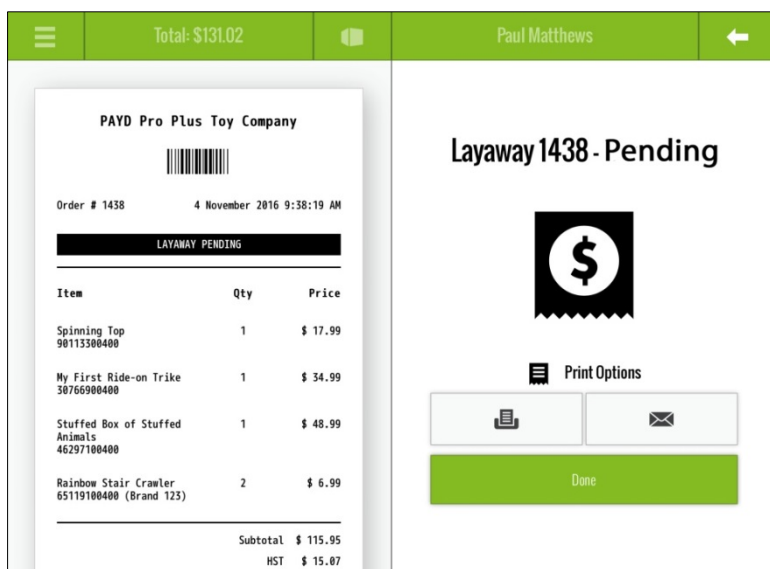
The Layaway popup appears.



7. Review the information in the popup.


- If the information in the Layaway popup is accurate, tap the checkmark button () and proceed to step 8.
- If the information in the Layaway popup is inaccurate, tap the cancel button () and return to step 6.

8. Process the receipts.
9. Tap **Done** to complete the transaction.



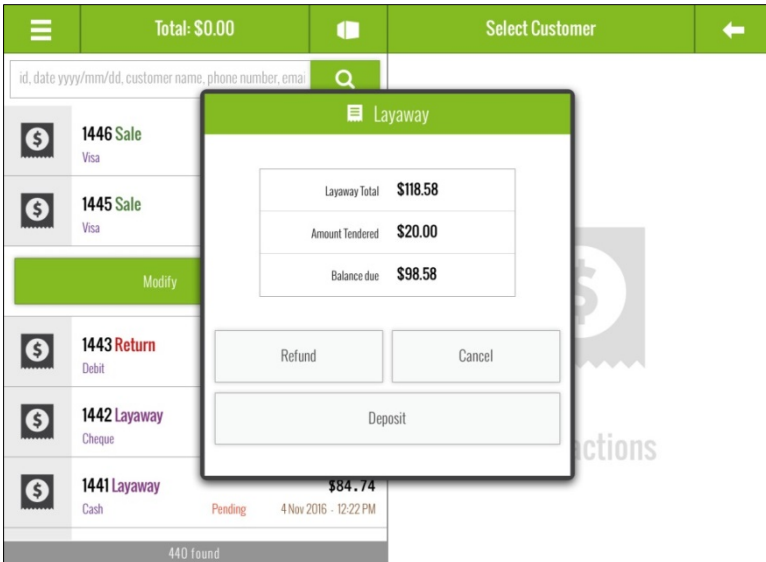
Making layaway payments

Once a layaway has been started (see *Putting items on layaway* on page 68), the customer can make payments towards the outstanding balance. Follow the steps below as necessary to accept payments.

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Transactions**.
3. In the Transactions screen, search for the customer's transaction. See *Searching transactions* on page 99 for more information.

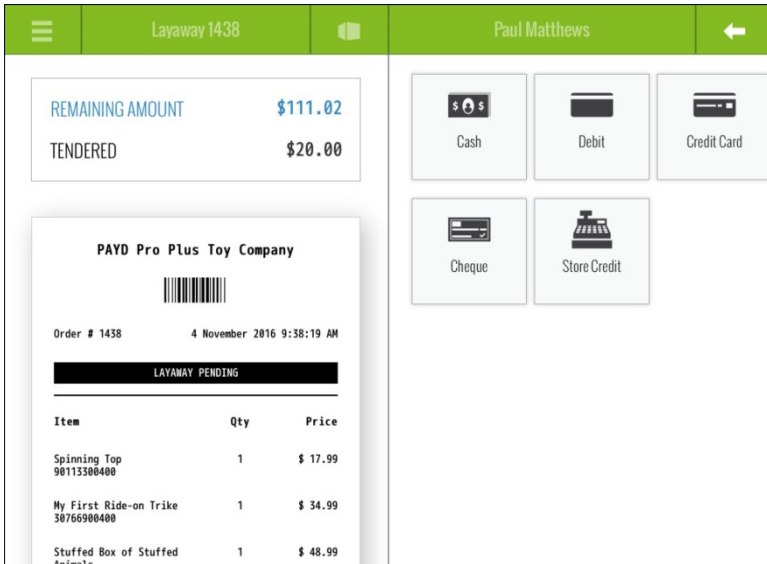
- Once you locate the transaction, tap it. The transaction information will slide to the right revealing the **Modify** button.
- Tap the **Modify** button.

The Layaway popup appears.



- Tap the **Deposit** button.

The Payments screen appears. The transaction receipt appears in the left pane, displaying the outstanding balance and the amount already paid.



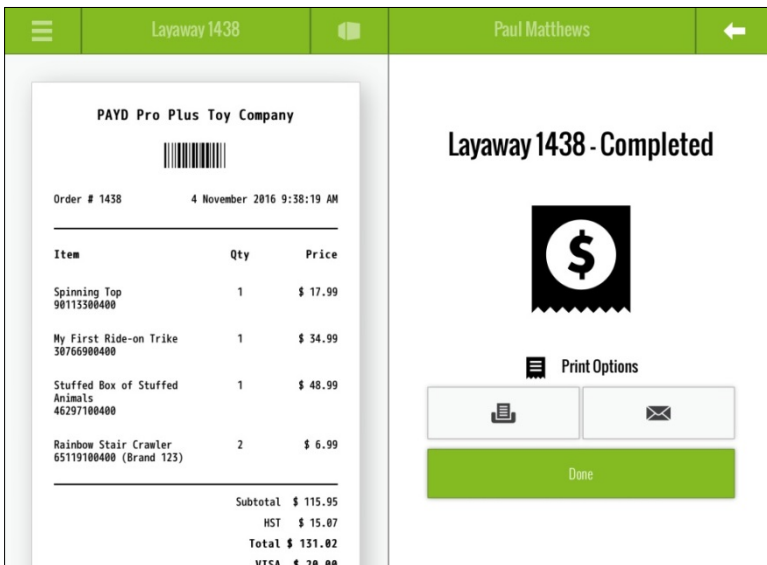
7. On the right pane of the Payments screen, tap the payment method the customer is using (e.g., **Credit Card**).
8. In the \$ field on the right pane, enter the amount the customer is putting down as a deposit, then tap **Process Transaction**.
9. Process the payment. If a credit or debit card is used, hand the PIN Pad to the customer and have them follow the prompts.
10. Once the layaway payment is processed, the receipt appears on the left pane.
11. Process the receipts.
12. Tap **Done** to complete the payment transaction.

Finalizing a layaway

When the customer is ready to pay off their outstanding layaway balance in full, follow the steps below to finalize their layaway.

1. Follow steps 1 – 7 in the *Making layaway payments* section on page 72.

2. In the \$ field on the right pane, enter the amount the customer is paying to pay off the outstanding balance, then tap **Process Transaction**.
3. Process the payment. If a credit or debit card is used, hand the PIN Pad to the customer and have them follow the prompts.
4. Once the layaway payment is processed, the receipt appears on the left pane.
5. Process the receipts.




6. Tap **Done** to finalize the layaway transaction.
7. Give the customer their merchandise.

Refunding layaway payments and transactions


It is possible to refund a layaway deposit, payment, or an entire layaway transaction. Follow these instructions to refund a layaway deposit, payment or an entire layaway transaction.

Note: You are unable to refund a layaway that did not have an initial deposit. See *Cancelling layaways on page 77* for more information.

Refunding layaway deposits and payments


1. Tap the **Main Menu** button ().
2. On the main menu, tap **Transactions**.
3. In the Transactions screen, search for the customer's transaction. See *Searching transactions* on page 99 for more information.
4. Once you locate the transaction, tap it. The transaction information will slide to the right revealing the **Modify** button.
5. Tap the **Modify** button.
The Layaway popup appears.
6. In the Layaway popup, tap the **Refund** button.
The transaction receipt appears on the left pane and the payment types appear on the right.
7. Select the payment type to which you are refunding the deposit:
 - To refund to cash, tap **Cash**. In the \$ field on the right pane, enter the refund amount, then tap **OK**. The drawer opens and you can remove the cash from the till. Proceed to step 8.
 - To refund to cheque, tap **Cheque**. In the \$ field on the right pane, enter the refund amount, then tap **OK**. The drawer opens and you can remove the customer's cheque from the till. Proceed to step 8.
 - To refund to store credit, tap **Store Credit**. Enter the customer's name and phone number in the provided fields, then tap **Process Transaction**. Proceed to step 8.
 - To refund to a credit card, tap **Credit Card**. In the \$ field on the right pane, enter the refund amount, then tap **Process Transaction**. Hand the PIN Pad to the customer and have them follow the prompts. Proceed to step 8.
 - To refund to a debit card, tap **Debit**. In the \$ field on the right pane, enter the refund amount, then tap **Process Transaction**. Hand the PIN Pad to the customer and have them follow the prompts. Proceed to step 8.
8. Process receipts.
9. Tap **Done** to finalize the refund.

Refunding completed layaway transactions

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Transactions**.
3. In the Transactions screen, search for the customer's transaction. See *Searching transactions* on page 99 for more information.
4. Once you locate the transaction, tap it. The transaction information will slide to the right revealing the **Return** button.
5. Refer to *Processing a Return* on page 108 beginning at step 5.

Cancelling layaways

Cancelling a layaway formally closes it and refunds any deposits taken. Follow the steps below to cancel a layaway.

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Transactions**.
3. In the Transactions screen, search for the customer's transaction. See *Searching transactions* on page 99 for more information.
4. Once you locate the transaction, tap it. The transaction information will slide to the right revealing the **Modify** button.
5. Tap the **Modify** button.
The Layaway popup appears.
6. In the Layaway popup, tap the **Cancel** button.
The Layaway Cancellation popup appears.
7. Tap **Yes** to cancel the layaway.
The transaction receipt appears on the left pane and the payment types appear on the right.
8. Select the payment type to which you are refunding any payments made up to this point:

- To refund to cash, tap **Cash**. In the \$ field on the right pane, enter the refund amount, then tap **OK**. The drawer opens and you can remove the cash from the till. Proceed to step 9.
- To refund to cheque, tap **Cheque**. In the \$ field on the right pane, enter the refund amount, then tap **OK**. The drawer opens and you can remove the customer's cheque from the till. Proceed to step 9.
- To refund to store credit, tap **Store Credit**. Enter the customer's name and phone number in the provided fields, then tap **Process Transaction**. Proceed to step 9.
- To refund to a credit card, tap **Credit Card**. In the \$ field on the right pane, enter the refund amount, then tap **Process Transaction**. Hand the PIN Pad to the customer and have them follow the prompts. Proceed to step 9.
- To refund to a debit card, tap **Debit**. In the \$ field on the right pane, enter the refund amount, then tap **Process Transaction**. Hand the PIN Pad to the customer and have them follow the prompts. Proceed to step 9.

9. Process receipts.

10. Tap **Done** to finalize the refund.

Layaway receipts

When a customer begins a layaway, or makes a payment to their outstanding balance, the Merchant and Customer receipts feature the following items that print in addition to the normal transactional information:

LAYAWAY PENDING


Look for this status printed in white on black near the top of the receipt (under the **Order #** and date/time). This status will print while the layaway is still outstanding. Once the layaway is finalized, this status will no longer appear.

Payment history

Each time the customer makes a payment on their outstanding balance, the payment type and amount appears on the receipt, and the balance is updated. If the customer paid with a credit or debit card, each instance of their payment is also shown with the masked card number, date and time,

transaction reference number, Auth ID, and amount paid. This payment history helps with refunding individual payments.

For example, if a customer paid their deposit by credit card, and then made two subsequent payments by debit card to pay off the balance, the receipt would display three separate payments, and three instances of the credit and debit payment information.

Note: Click the  icon in PAYD Administration to see an example of a layaway receipt.


Receipt options

There are 4 types of receipts that can be generated by the PAYD Pro Plus App: receipts printed from the Bluetooth receipt printer, emailed receipts, SMS text receipts, and gift receipts printed from the Bluetooth receipt printer.

The receipts you are able to generate are dependent upon the type of hardware connected to your Apple iPad, as well as the output options you have enabled in the Receipt Settings screen. For more information on configuring receipt layout and output options, refer to the **PAYD Pro Plus Mobile Solution - Configuration Guide** available at getpayd.com/paydproplus/support.

Generating printed receipts

For printed (hardcopy) receipts, you have the option of printing only a customer copy, a merchant copy, or both. You can also have the receipts print automatically at the end of each transaction, or on demand. Before printing receipts, ensure the following conditions are met:


- The Bluetooth receipt printer is powered on and paired to the Apple iPad. For more information on pairing the printer to the Apple iPad, refer to the **PAYD Pro Plus Mobile Solution Hardware Install Guide** available at getpayd.com/paydproplus/support.
- Ensure the Bluetooth receipt printer is showing connected () on the main menu. See *Checking Bluetooth device status* on page 100 for more information.
- Ensure there is enough paper on the roll in the printer to print receipts.

Note: If you have a receipt printer and cash drawer, the drawer will not open until the transaction completes and the receipt prints. The receipt printer controls when the drawer opens.

To generate printed receipts automatically:


- No action required. When the transaction completes, the Customer copy, Merchant copy, or both, will print.

To generate printed receipts on demand:

- After the sale completes, *before tapping Done*, tap the **Print Receipt** button (). The Customer copy of the receipt will print.

Generating email receipts

The PAYD Pro Plus App can email a copy of the receipt to the customer.

1. Complete the transaction and process the payment(s).
2. Before tapping **Done**, tap the **Email** button ().

The Email Receipt popup appears.




3. Do one of the following:
 - If the customer making the purchase is already registered as a customer in your database:
 - The customer's email address may be visible (if you recorded that information in the customer profile at an earlier time). Confirm the email address is correct and tap **OK**. Proceed to step 4.
 - If the email address is not present, or is not correct, tap inside the **Email address** field and use the on-screen keyboard to enter the customer's email address, then tap **OK**. Proceed to step 4.
 - If the customer making the purchase is not yet in your database:
 - Tap inside the **Email address** field and use the on-screen keyboard to enter the customer's email address, then tap **OK**. Proceed to step 4.
4. The PAYD Pro Plus App sends the email to the customer.
5. Tap **Done** to complete the transaction.

Generating SMS text receipts

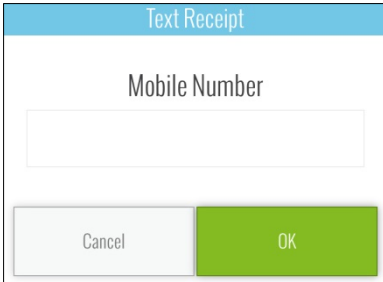
The PAYD Pro Plus App can send a link to the Customer copy of the receipt to the customer's mobile phone as an SMS text message.

Note: Based upon your PAYD Pro Plus software bundle and/or your Merchant Agreement with Moneris, you may encounter a limit to the number of SMS receipts you can send. You are responsible for any fees imposed by your mobile service provider. For more information on how to increase this limit, please visit us at getpayd.com/paydproplus or call us at 1-855-423-PAYD (7293) to upgrade today.

1. Complete the transaction and process the payment(s).

2. Before tapping **Done**, tap the **SMS** button ().


The Text Receipt popup appears.









3. Enter the customer's mobile phone number in the **Mobile Number** field and tap **OK**.
4. The PAYD Pro Plus App sends a text message to the customer containing a link to the Customer copy of the receipt.
5. Tap **Done** to complete the transaction.

Generating gift receipts

When completing a transaction, you have the option to issue a gift receipt to the customer.


1. Complete the transaction and process the payment(s).
2. Before tapping **Done**, tap the **Gift Receipt** button ().

The Select Gift Receipt Items popup appears, with a list of every product that was on the bill.

Select Gift Receipt Items				
	1 Spinning Top Metal	-	0	+
	1 My First Ride-On Trike Red	-	0	+
	1 Stuffed Box Of Stuffed Animals Multi Pack	-	0	+
	2 Rainbow Stair Crawler Small	-	0	+
<div style="display: flex; justify-content: space-around; align-items: center;">  Unselect all Select all  </div>				

- Tap the **+** symbol to the right of the items you wish to add to the gift receipt. In instances where multiples of the same item were purchased, tap **+** as often as necessary to add the appropriate quantity to the bill. For example, if a customer purchases 5 of the same puzzle, and wants 2 of them to be on a gift receipt, tap **+** until the quantity shows 2.
- Repeat step 3 for other items on the bill.

Hint: To add everything on the bill to the gift receipt, tap **Select all**.

- Tap the **checkmark** button () to continue. The gift receipt prints from the Bluetooth receipt printer.
- Generate other receipts as necessary then tap **Done**.

Reprinting transaction receipts

It is possible to reprint receipts after the initial transaction has been completed. You can also email the customer another copy of the receipt if requested.

1. Search for the transaction you wish to reprint. For more help on searching for transactions, see the *Searching transactions* section on page 99.
2. Once you locate the transaction in the list, tap it in the left pane. The right pane loads with the receipt details.
3. Tap the **Receipt Options** button at the bottom of the right pane. The Receipt Options popup appears.
4. Do one of the following:
 - To print a gift receipt for this transaction:
 - Tap **Print gift receipt**. The Select Gift Receipt Items popup appears. Follow the instructions from step 3 of the *Generating gift receipts* section on page 82.
 - To print a customer copy of the receipt:
 - Tap **Print customer copy**. The customer copy prints. Tap somewhere else in the right pane to close the Receipt Options popup.
 - To print a merchant copy of the receipt:
 - Tap **Print merchant copy**. The merchant copy prints. Tap somewhere else in the right pane to close the Receipt Options popup.
 - To email the customer a copy of their receipt:
 - Tap **Email customer copy**. The Email Receipt popup appears. Refer to step 3 of the *Generating email receipts* section on page 80 for instructions.




Optional devices

The Moneris iPP320 PIN Pad

The customer uses the iPP320 PIN Pad to input payment data when prompted during a transaction.



1	Contactless Reader Indicator (green flashing lights) <ul style="list-style-type: none">▪ Four lights flash: The contactless reader is capturing card data (see page 59).
2	Display Screen/Contactless Reader <ul style="list-style-type: none">▪ The WELCOME/BONJOUR screen displays while the PIN Pad is idle.▪ See <i>Wave/tap: Contactless cards</i> on page 59.

3	Function keys (F1, F2, F3, and F4) <ul style="list-style-type: none"> Select the option displayed above the key. F2 and F3 are used to scroll up and down through menus.
4	Alpha-Numeric keys <ul style="list-style-type: none"> Used for data entry (e.g., PINs or tip amounts).
5	Magnetic Stripe Reader <ul style="list-style-type: none"> See <i>Swipe: magnetic stripe cards</i> on page 59.
6	Cancel key  <ul style="list-style-type: none"> Clear a message displayed on the PIN Pad. Cancel the transaction.
7	Correct key  <ul style="list-style-type: none"> Clear data entered on the PIN Pad.
8	OK / Enter key  <ul style="list-style-type: none"> Submit data, or acknowledge a message displayed on the PIN Pad.
9	Chip Reader <ul style="list-style-type: none"> See <i>Insert: Chip cards</i> on page 58.

For more information on setting up the iPP320 PIN Pad to use with the PAYD Pro Plus App, refer to the *Moneris iPP320 with PAYD Pro Plus: Quick Install Guide* available for download at getpayd.com/paydproplus/support, or the *PAYD Pro Plus Online Help*.

The Moneris PAYD® PIN Pad




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



1

Function keys (F1, F2, F3, and F4)

- Select the option displayed above the key.
- F2 and F3 are used to scroll up and down through menus.

2	Alpha-Numeric keys <ul style="list-style-type: none"> Used for data entry (e.g., PINs or tip amounts).
3	Cancel key  <ul style="list-style-type: none"> Clear a message displayed on the PAYD PIN Pad. Cancel the transaction.
4	Correct key  <ul style="list-style-type: none"> Clear data entered on the PAYD PIN Pad.
5	OK / Enter key  <ul style="list-style-type: none"> Submit data, or acknowledge a message displayed on the PAYD PIN Pad.
6	Chip Reader (the slot at the bottom of the PAYD PIN Pad) <ul style="list-style-type: none"> See <i>Insert: Chip cards</i> on page 58.
7	Contactless Reader Indicator (green flashing lights) <ul style="list-style-type: none"> No lights flash: PAYD PIN Pad is in Sleep mode (see page 92), or is powered off. One light flashes: Reader is fully powered on. Four lights flash: Reader is capturing card data (see page 59).
8	Display Screen/Contactless Reader <ul style="list-style-type: none"> WELCOME/BONJOUR screen displays while the PAYD PIN Pad is idle. See <i>Wave/tap: Contactless cards</i> on page 59.
9	Magnetic Stripe Reader (the slot along the top of PAYD PIN Pad) <ul style="list-style-type: none"> See <i>Swipe: magnetic stripe cards</i> on page 59.

10	Micro-USB port (located on the right side) <ul style="list-style-type: none">▪ Plug in USB charging cable here (see <i>Charging the PAYD PIN Pad</i> below).
11	Power button (located on the right side) <ul style="list-style-type: none">▪ For power functions, see the <i>Power management and the PAYD PIN Pad</i> section below.▪ For reset function, press and hold down until the rebooting process starts.

Power management and the PAYD PIN Pad

Charging the PAYD PIN Pad

1. Plug the small end of USB cable into the PAYD PIN Pad's micro-USB port located on the side near the **F4** key.
2. Plug the other end of the USB cable into a powered USB port. If you are using a USB port on your computer, ensure the computer is turned on.
3. Wait while the PAYD PIN Pad powers up.
4. When you see the **TELIUM MENU** screen, set the PAYD PIN Pad aside, and leave it to charge for 3 hours.


Maintaining battery charge

- To maintain battery charge while the PAYD PIN Pad is powered on, connect it to an external power source via the USB charging cable provided with the PAYD PIN Pad.
- Power off the PAYD PIN Pad when it is not in use or being charged (see *Powering off the PAYD PIN Pad* on page 93).





Battery icons on the PAYD PIN Pad


Icons display on WELCOME/BONJOUR screen.

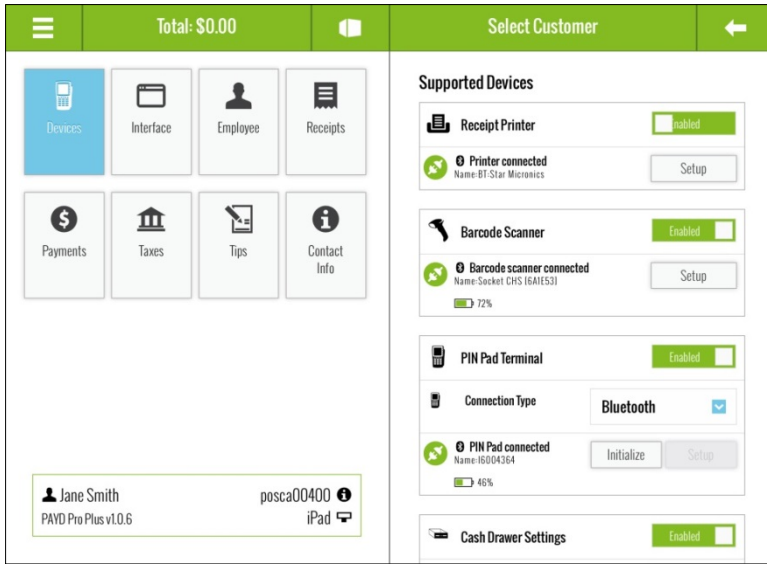
Battery charging

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

Battery charge level

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

The battery charge level also displays in the Settings – Devices screen in the PAYD Pro Plus App. Tap the **Main Menu** button () , then tap **Settings**. On the Settings screen, tap **Devices**. On the right pane, in the **PIN Pad Terminal** section, you can see the charge level.



Powering on the PAYD PIN Pad

The WELCOME/BONJOUR screen displays when the PAYD PIN Pad is fully powered on (see also *Sleep mode* on page 92).

Power on WITH USB charging cable

1. Plug the USB charging cable into the micro-USB port on the PAYD PIN Pad (see page 89).
2. Plug the other end of the cable into a powered USB port. (The PAYD PIN Pad beeps and then powers on.)

Power on WITHOUT charging USB cable

Press the **Power** button on the side of PAYD PIN Pad (see page 91).

Note: *The battery must be sufficiently charged.*

Sleep mode

The PAYD PIN Pad will go into sleep mode (the hardware manufacturer name/logo will display) and then power off after 10 minutes if the PAYD PIN Pad is not connected to an external power source and is operating under one or more of the following conditions:

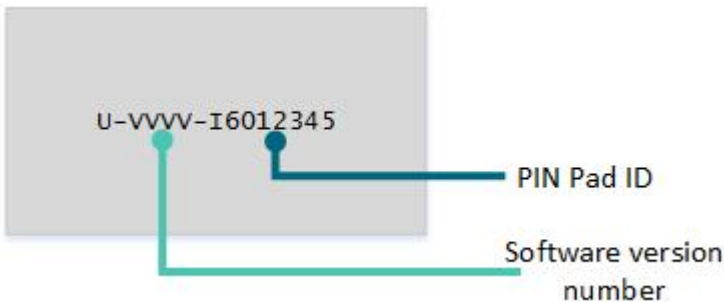
- The PAYD PIN Pad is not within the Bluetooth communication range of the Apple iPad with which it is paired.
- The screen saver is active on the Apple iPad with which the PAYD PIN Pad is paired.
- The PAYD Pro Plus App is not open (i.e., actively running) on the Apple iPad with which the PAYD PIN Pad is paired.
- The PAYD PIN Pad's battery is not sufficiently charged (see page 89).

Exiting sleep mode

To exit Sleep mode, press the **Power** button on the side of the PAYD PIN Pad (see page 92), and then wait for the WELCOME/BONJOUR screen to display.



Determining the PAYD PIN Pad software version

The software version appears in the version info screen as the PIN Pad starts up. Refer to the diagram below to determine the software version on the PAYD PIN Pad.



The **WWW** value depicted in this diagram corresponds to the software version, and can be one of three values: **0608**, **0614**, or **1111**.


Powering off the PAYD PIN Pad

1. Disconnect the USB charging cable if connected.
2. Simultaneously press and hold down both the yellow  key and the  key. The PAYD PIN Pad beeps and powers off.

Pairing the PAYD PIN Pad to the Apple iPad





Follow the instructions below to pair the PAYD PIN Pad to the Apple iPad.

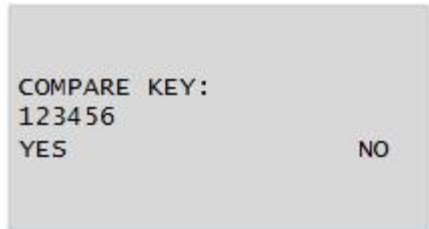
Note: Leave the PAYD PIN Pad connected to the external power source while you perform the pairing steps below. Confirm that the WELCOME/BONJOUR screen is displayed on the PAYD PIN Pad before you proceed.

Note: The following instructions are to be used when pairing the PAYD PIN Pad to an Apple iPad for the **first time**. Instructions for pairing under different circumstances are contained in the PAYD Pro Plus Online Help. Access the Online Help by tapping the **Main Menu** button, then tap **Open Administration**. In PAYD Administration, tap the Help  button.

Note: The instructions in this guide pertain to PAYD PIN Pads using software version **1111** (see Determining the PAYD PIN Pad software version on page 92 for more information). If your PAYD PIN Pad is using version **0608** or **0614**, refer to the **PAYD Pro Plus Mobile Solution: Using PAYD Pro Plus with Apple iPad and POSPAD version 0608 or 0614** guide. This guide is available at getpayd.com/paydproplus/support.

1. Ready your Apple iPad for Bluetooth pairing:
 - a. Turn on your Apple iPad.
 - b. Ensure that your Apple iPad's Bluetooth menu is open and that it is configured to be "discoverable" by another Bluetooth-ready device.
 - c. Set your Apple iPad aside for now.
2. Power on the PAYD PIN Pad. See *Power on WITH USB charging cable* on page 91.

3. At the LANGUAGE/LANGUE screen, select the PIN Pad's display language:
 - Press the **F1** key to select **ENGL** (English).
 - Press the **F4** key to select **FRAN** (French).
4. At the PED SERIAL NUMBER screen, press the green  key.
5. At the BLUETOOTH PAIRING screen, press the **F1** key to select **PAIR**.
6. At the next BLUETOOTH PAIRING screen, press the green  key to select **PAIR IOS**.
7. At the AVAILABLE DEVICES screen, press the green  key to select **SEARCH DEVICES**.
8. When the PAYD PIN Pad finishes searching, the AVAILABLE DEVICES screen is populated with devices. Use the **F2** key to scroll down to your iPad (listed by its name), then press the green  key to select it.
9. Wait for a 6-digit passkey to be generated:
 - On the Apple iPad, a "Bluetooth pairing request" with a 6-digit pass key will display.
 - On the PAYD PIN pad, the COMPARE KEY: screen with a 6-digit pass key will display.
10. If the passkey is the same on both the PAYD PIN pad and the Apple iPad, tap Pair on the Apple iPad's "Bluetooth pairing request". On the PAYD PIN pad (COMPARE KEY: screen), press the **F1** key to select **YES**.
11. Do one of the following:
 - If the TERMINAL WILL BE REBOOTED... prompt displays, go to step 12.
 - If the PAIRING UNSUCCESSFUL prompt displays, repeat steps 7 – 10 of this procedure.



Note: If a "Pairing Unsuccessful" message displays on the Apple iPad, clear the message on the screen before you attempt another pairing. If you are unable to pair the PAYD PIN pad after making several attempts (i.e., the "Pairing Unsuccessful" message displays after each attempt), refer to

the PAYD Pro Plus Online Help tool for assistance in pairing in Legacy mode (search for “Bluetooth Pairing with Legacy Mode”).

12. Wait while the PAYD PIN pad reboots. When the WELCOME/BONJOUR screen displays, proceed to step 13.
13. Confirm that the PAYD PIN Pad is successfully paired to the Apple iPad:
 - On your Apple iPad’s Bluetooth menu, confirm that the 8-digit PAYD PIN Pad ID (e.g., “I6012345”) of the PAYD PIN Pad you have just set up is shown as “Connected.”



Note: This PAYD PIN Pad ID can also be found on:

 - a label affixed to the underside of the PAYD PIN Pad.
 - the version screen, which displays whenever the PAYD PIN Pad is rebooted.
 - If your Apple iPad prompts you to download or install an app, decline the prompt.
14. Once you have confirmed that the PAYD PIN Pad you have just set up is paired with your Apple iPad, charge the battery. See *Charging the PAYD PIN Pad* on page 89 for more information.

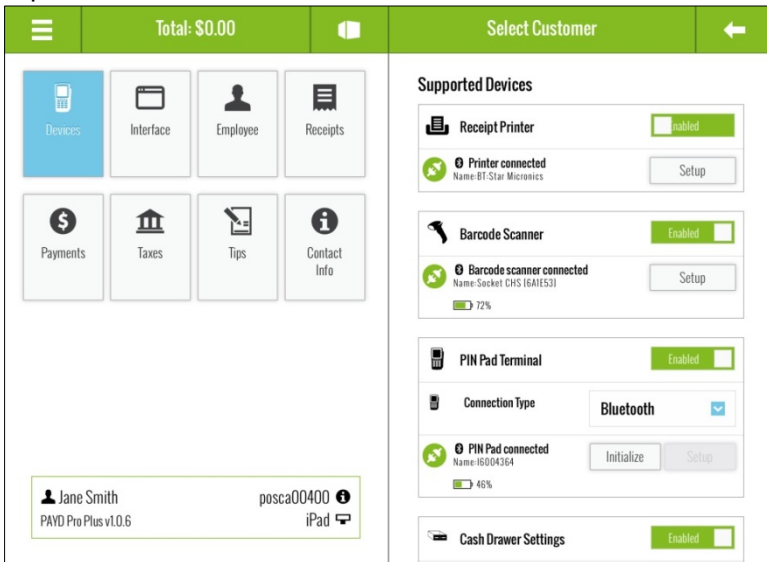
Connecting and initializing the PAYD PIN Pad

Follow these instructions to connect the PAYD PIN Pad to the PAYD Pro Plus App. If you do not have a PAYD PIN Pad, you can skip these instructions.

Note: Leave the PAYD PIN Pad connected to the external power source while you perform the following steps. Confirm that the WELCOME/BONJOUR screen is displayed on the PAYD PIN Pad before you proceed.

1. Launch the PAYD Pro Plus App: from the Apple iPad’s home screen, tap the app’s icon ()
2. Log into the PAYD Pro Plus App (see *Signing into your PAYD Pro Plus App* on page 8 for more information).
3. Tap the **Main Menu** button ()

4. On the main menu, tap **Settings**.
5. In the Settings screen, tap **Devices**.
6. On the right pane, slide the **PIN Pad Terminal** slider to the right (Enabled).
7. Tap the **Connection Type** drop-down menu and select **Bluetooth**.
8. Tap the **Connect** button.
9. In the Information popup, tap **OK**.
10. The popup disappears and the PAYD PIN Pad status now shows “connected”.
11. Tap **Initialize**.



12. At the Warning popup, tap **Yes**.
13. Wait while the PAYD PIN Pad initializes.

Note: The PAYD PIN Pad display screen shows “PLEASE WAIT” while it is initializing. This might take a few minutes to complete.

14. Once the initialization has successfully completed, a popup appears informing you the PAYD PIN Pad has been initialized. Tap **OK**.

When the WELCOME/BONJOUR screen appears on the PAYD PIN Pad's display, it is initialized and ready to use. If you encounter any problems, refer to the *Troubleshooting* section on page 125.

The Moneris PAYD card reader

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

1. Make sure the media speaker on your Apple iPad is turned off.
2. Ensure that the volume level of your Apple iPad is maximized.
3. Connect the PAYD card reader to your Apple iPad by plugging it into the audio jack.



Bluetooth barcode scanner

Use the Bluetooth barcode scanner to scan barcodes when processing transactions, adding inventory, searching for products or searching for receipts. The barcode scanner is an optional device. To purchase a Bluetooth barcode scanner, please contact us at **1-855-423-PAYD (7293)**.



Bluetooth receipt printer



Use the Bluetooth receipt printer to print receipts when transactions are completed. It is possible to connect a cash drawer to the printer. The receipt printer and cash drawer are optional devices. To purchase a Bluetooth receipt printer and a cash drawer, please contact us at [1-855-423-PAYD \(7293\)](tel:1-855-423-PAYD).



Administrative transactions

Searching transactions

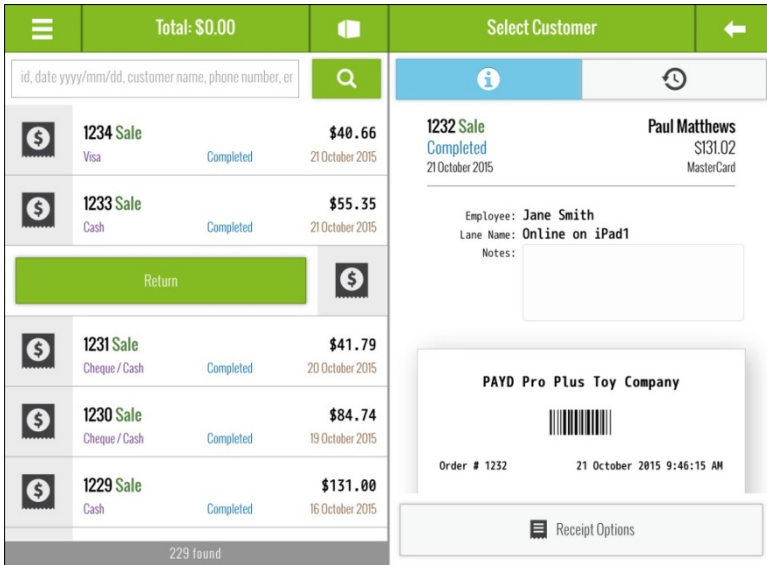
Follow the steps below to search for completed transactions in the PAYD Pro Plus App.

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Transactions**.
3. In the left pane, enter your search criterion into the search field at the top. Search by:
 - **Transaction ID**
 - **Date** (in YYYY/MM/DD format)
 - Customer **name**
 - Customer **phone number**
 - Customer **email address**
4. Once the criterion is entered into the search field, tap the **Search** button ().

Note: To search through all transactions, leave the search field blank and tap the **Search** button.

The results of the search appear below sorted numerically by receipt numbers.

5. Tap the transaction in the results in the left pane. The details appear in the right pane.
6. Repeat steps 3 – 5 to search for other transactions as needed.



Checking Bluetooth device status

Before processing transactions with the PAYD Pro Plus App, it is recommended to check the connection status of your Bluetooth devices. Ensuring they are connected before processing a transaction provides the client with a quick and seamless experience.



The PAYD Pro Plus App provides two quick methods to determine whether the Bluetooth devices are connected and ready to be used from:

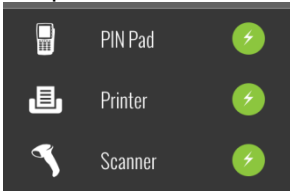
- the main menu
- the Apple iPad's status bar

Main menu

To check device status from the menu:

1. Tap the **Main Menu** button ().
2. On the main menu, scroll down to view the status of the devices.

- A **connected** icon () appears beside devices that are paired and connected to the PAYD Pro Plus App. Connected devices are ready to use immediately.
- A **disconnected** icon () appears beside items that are not paired, not powered on, or not configured in the PAYD Pro Plus App.




3. To connect any disconnected items:

- Refer to the *Troubleshooting* section on page 118 for quick instructions.
- Refer to the *PAYD Pro Plus Mobile Solution - Hardware Install Guide* available at getpayd.com/paydproplus/support.

Apple iPad status bar

To check device status with the Apple iPad's status bar (located across the top of the iPad screen):

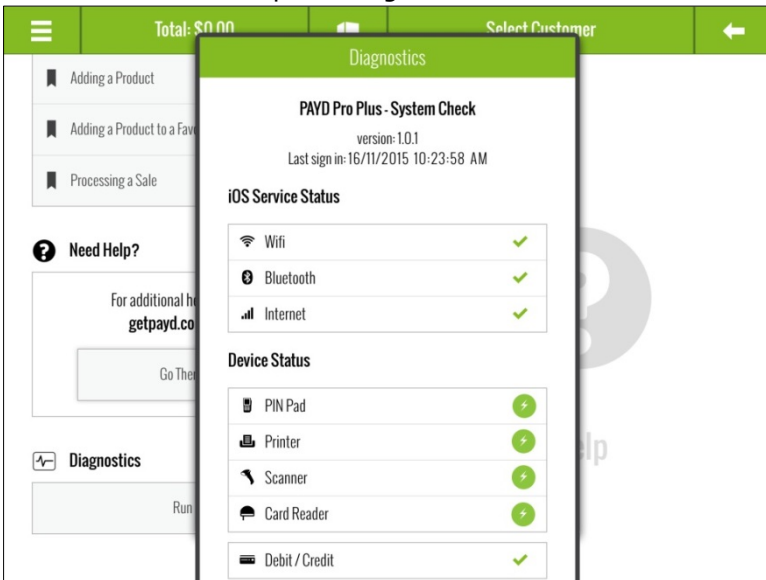
- Within the Apple iPad's status bar, a device icon will appear with an X () if there is a connection problem.
- If the device is enabled in the Settings – Devices screen, but there is a problem, it will be displayed.
- If the device is enabled in the Settings – Devices screen, and is working fine, it will not be visible.

Using Diagnostics






The Diagnostics tool enables PAYD Pro Plus merchants to view all vital connection information in one screen.

The Diagnostics popup displays information about the following items:

- App version and last sign in
- iOS Service Status including:
 - If the Apple iPad is connected to Wifi
 - If the iPad’s Bluetooth functionality is enabled (i.e., is it “discoverable” by other Bluetooth devices)
 - If the iPad has an Internet connection to the PAYD Pro Plus server.
- Device Status including:
 - If the PIN Pad is enabled and connected
 - If the Bluetooth receipt printer is enabled and connected
 - If the Bluetooth scanner is enabled and connected
 - If the PAYD card reader is connected
- If debit and credit card processing is enabled.



To access Diagnostics:

1. Tap the **Main Menu** button ().
2. On the main menu, scroll down and tap **Help**.
3. Tap the **Run Now** button under the **Diagnostics** section.
The Diagnostics popup appears.
4. Use the following guidelines to view the service/device status:
 - A green checkmark () appears beside services that are enabled and working.
 - A red X () appears beside services that are disabled and are not working.
 - A **connected** icon () appears beside devices that are paired (or connected) and connected to the PAYD Pro Plus App.
 - A **disconnected** icon () appears beside devices that are not paired (or connected), not powered on, or not configured in the PAYD Pro Plus App.
 - Devices that are greyed out and do not have a status indicator have not been enabled. For more information on enabling devices, refer to the *PAYD Pro Plus Mobile Solution – Hardware Install Guide* available for download at getpayd.com/paydproplus/support.
5. Tap outside of the Diagnostics popup to close it.

Generating reports

There are 10 reports available in the PAYD Pro Plus App. These reports provide vital financial information to you including total amounts for each tender type, total taxes collected, batch close totals, cash out totals, etc.

The list of reports includes:

Current Totals Summary

Current Cash Totals*




Current Totals Details


Current Cash Totals Details

Previous Totals Summary	Cash-Out Totals*
Previous Totals Details	Cash-Out Details
Employee Daily Transactions	Product Summary
Daily Activity	

These reports have been enhanced and updated to display even more data (marked with the **New label). For a limited time, the original versions of the reports are presented along with the new versions. Eventually, the new versions will replace the originals. Feel free to use either version of the report while both are present in the Reports screen.*

To generate a report:

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Reports**.
3. On the left pane of the Reports screen, tap the report you wish to view. The report information appears in the right pane. Scroll up and down to view the information.
4. Select your output:
 - If you have a Bluetooth receipt printer, you can tap the **Print** button () at the bottom of the right pane to generate a hard copy of the report.
 - If you do not have a receipt printer, you can send an email copy of the report. Tap the **Email** button () at the bottom of the right pane and enter the recipient's email address, then tap **OK**.
5. Repeat step(s) 3 (and 4) as necessary for other reports.


Note: Certain reports like the **Previous Total Summary** and the **Cash-Out Details** reports can be run for dates in the past. Tap the date drop-down arrow () in the top right corner and select a date from the list.

Using the Dashboard

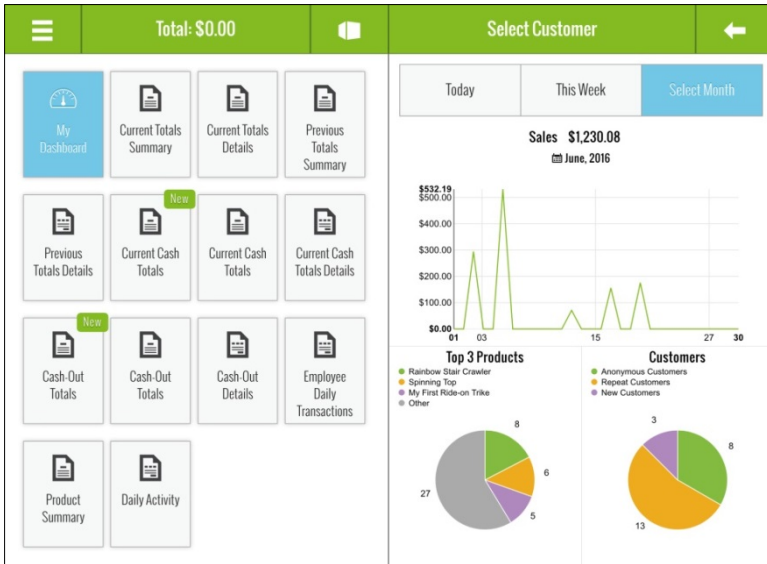
The PAYD Pro Plus App features a sales Dashboard, a user friendly summary of sales and business trends that allow you to view and manage your business with ease. The Dashboard provides access to real-time daily, weekly and monthly reports summaries such as:

- **Sales** – displays total net sales.
- **Top 3 Products** - displays the top 3 products sold based on quantity, as well as a value called **Other**. Other is all other products sold that did not make the top three.
- **Customers** - displays the transaction distribution between anonymous customers, new customers (registered today, this week, or in the selected month), and repeat customers (customers that have been registered in the past and were selected during the transaction).

To access the Dashboard:

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Reports**.

The Dashboard appears on the right pane the first time the Reports screen is accessed.



If you wish to access the Dashboard after viewing reports, tap the **My Dashboard** button on the left pane.

Viewing the Dashboard data

The data that is displayed on the Dashboard is dependent upon the time frame selection that you make on the right pane. The **Today**, **This week** and **Select Month** buttons enable you to make a time frame selection, and the graphs adjust accordingly. Follow the guidelines below to determine how time frame selection changes the displayed data.

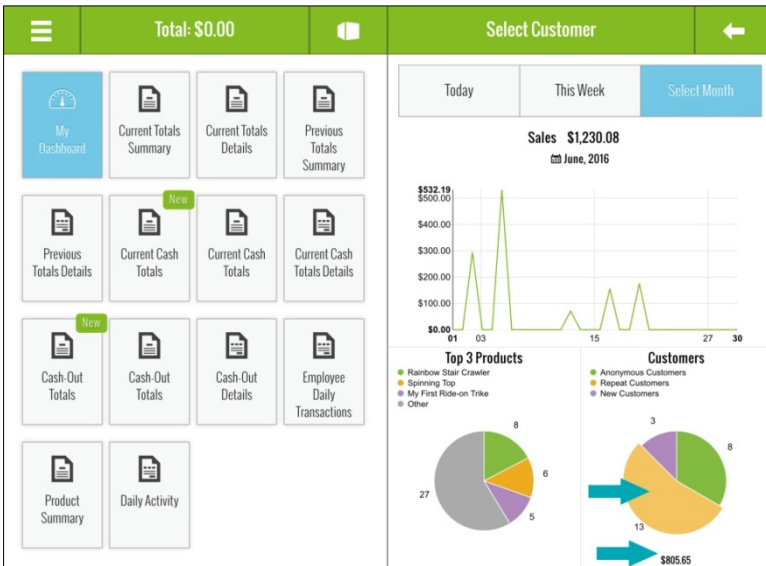
- **Today** – This is the default selection when the Dashboard is first accessed. The values displayed are as of today’s calendar date from midnight to midnight.
- **This week** – Tap this button to see the values that represent the current calendar week from Monday to Sunday.

Note: Due to the nature of this type of time frame, it is more valuable to view the Dashboard closer to the end of the week as viewing it early on a Monday morning would not provide any discernable data.

- **Select Month** – When you tap this button, a month selector will appear. Scroll up/down to select a month, then tap a year, then tap the green checkmark. The displayed values are the totals for the selected month.

Note: Due to the nature of this type of time frame, it is more valuable to view the Dashboard closer to the end of the month as viewing it early in the month would not provide any discernable data.

For even more information, tap on a slice of the Top 3 Products or Customers pie to see gross sales totals attributed to that slice. For example, in the screenshot below, you can see that Repeat Customers generated \$805.65 in June 2016.




Processing a Return

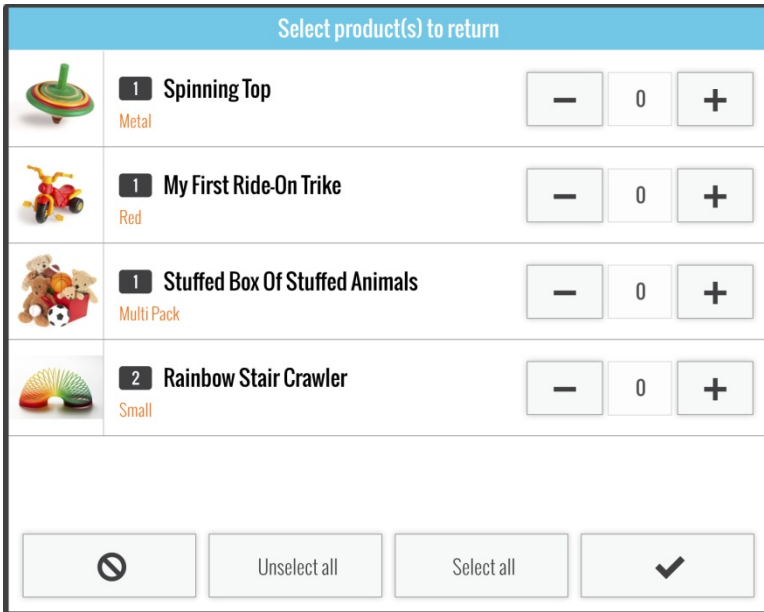
It is possible to return a transaction in the current batch, as well as transactions from previously closed batches. Use the Return function to:

- Return a product (or multiple products) to inventory and provide the customer with a refund (or store credit accordingly).
- Return a transaction that was cashed out by mistake.
- Return a product (or multiple products) to inventory as part of an exchange.

Note: *If the customer wishes to exchange items, process a Return first, then process a Purchase transaction for the products the customer is taking in exchange. Refer to other sections in this guide for instructions on adding items to the bill, processing the payment and the receipts.*



To process a return:

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Transactions**.
3. Search for the transaction you wish to return (see *Searching transactions* on page 99 for more information).
4. Once you locate the transaction, tap it in the left pane.
The transaction info slides to the right revealing a Return button.
5. Tap the **Return** button.
The Select product(s) to return popup appears.



6. Tap the **+** symbol to the right of the items the customer is returning. If the customer purchased multiples of the same item, continue tapping **+** until every item being returned is represented in the quantity counter between the **-** and **+** buttons.
7. Repeat step 6 for other items the customer is returning as necessary.

Hint: If the customer is returning everything on the transaction for a refund, tap **Select all**.

8. Tap the **checkmark** button () to proceed with the return.
9. In the left pane, you will see the items added in steps 6 and 7 listed as negative dollar amounts. Tap the **Shopping Cart** button () at the top of the right pane.
The Payments screen appears with the payment types on the right pane.

10. Follow the instructions below based on the tender type to which you are returning the transaction:

▪ **To return to cash:**

- a. Tap **Cash**.
- b. Review the amount of cash to return.
- c. Tap the **OK** button.
- d. Process receipts.

If connected to your Bluetooth receipt printer and configured, the cash drawer opens at this point.

- e. Remove cash from the till and give it to the customer. Proceed to step 11.

▪ **To return a cheque:**

- a. Tap **Cheque**.
- b. Tap the **OK** button.
- c. Process receipts.

If connected to your Bluetooth receipt printer and configured, the cash drawer opens at this point.

- d. Remove the cheque from the till and give it to the customer. Proceed to step 11.

▪ **To return to an *Interac* Debit card (for integrated merchants only):**

- a. Tap **Debit**.
- b. On the right pane, tap **Process Transaction**.
- c. Swipe, tap or insert the *Interac* Debit card on the PIN Pad.
- d. Hand the PIN Pad to the customer.
- e. Have the customer follow the prompts on the PIN Pad.
- f. Process receipts.
- g. Proceed to step 11.

▪ **To return to a credit card (for integrated merchants only):**

- a. Tap **Credit Card**.
- b. On the right pane, tap **Process Transaction**.
- c. Swipe, tap or insert the credit card on the PIN Pad.
- d. Hand the PIN Pad to the customer.
- e. Have the customer follow the prompts on the PIN Pad.
- f. Process receipts.
- g. Proceed to step 11.

▪ **To return for store credit (for an existing customer):**

- a. Tap **Store Credit**.
The Store Credit screen appears on the right pane. The customer's First and Last Name fields are already populated.
- b. Tap **Process Transaction**.
- c. Process receipts.
- d. Proceed to step 11.

▪ **To return for store credit (for a customer who is not registered):**

- a. Tap **Store Credit**.
The Store Credit screen appears on the right pane.
- b. Tap inside the **First** and **Last Name** fields and use the on-screen keyboard to enter the customer's name.
***Note:** If you leave the First and Last Name fields blank, the system will produce an error and you will not be able to proceed until you enter both names.*
- c. Tap **Process Transaction**.
- d. Process receipts.
- e. Proceed to step 11.

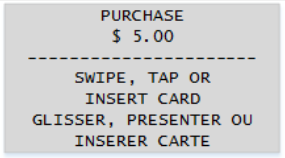
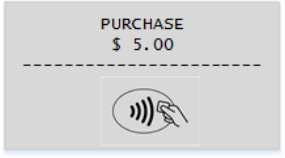

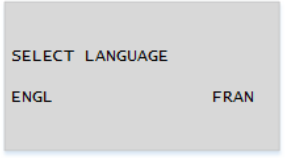
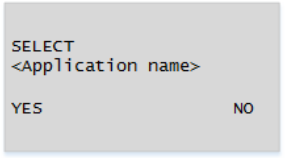
11. Tap **Done** to complete the return.

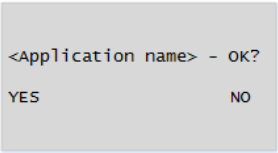
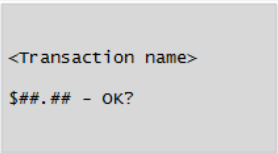

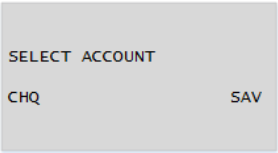

12. Repeat steps 3 – 11 to return other transactions as necessary.

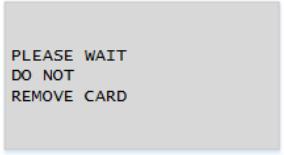
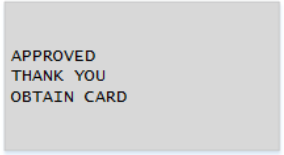
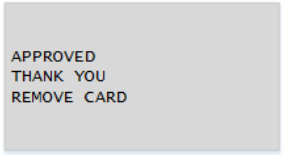
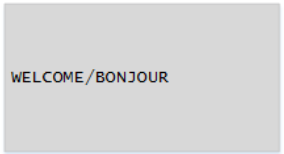
Customer prompts on the PIN Pad

This table displays the prompts (in order of their appearance) that your customers might see during a POS transaction on the PIN Pad, along with the actions to take for each one.

Note: Only some of the prompts listed below will appear for any one transaction.

Prompt	Customer action(s)
 <p>PURCHASE \$ 5.00</p> <hr/> <p>SWIPE, TAP OR INSERT CARD GLISSER, PRESENTER OU INSERER CARTE</p> <p>OR</p>  <p>PURCHASE \$ 5.00</p> <hr/> 	<p>Enters the card on the PIN Pad (see <i>Card entry options</i> on pages 58-61).</p>
 <p>SELECT LANGUAGE</p> <p>ENGL FRAN</p>	<ul style="list-style-type: none"> • For English prompts, presses F1 (ENGL). • For French prompts, presses F4 (FRAN).
 <p>SELECT <Application name></p> <p>YES NO</p>	<ul style="list-style-type: none"> • To select the displayed application, presses F1 (YES). • To view the next available application, presses F4 (NO).

Prompt	Customer action(s)
 <p><Application name> - OK? YES NO</p>	<p>Presses F1 (YES) to use the displayed application.</p>
 <p><Transaction name> \$##.## - OK?</p>	<p>Presses the green key to confirm the displayed transaction amount.</p>
 <p>ENTER TIP AMOUNT \$0.00</p>	<ul style="list-style-type: none"> ▪ Keys in the amount to leave for tip and presses the green key. <p>OR</p> <ul style="list-style-type: none"> ▪ Presses green key to bypass the prompt (and not leave a tip).
 <p>SELECT ACCOUNT CHQ SAV</p>	<ul style="list-style-type: none"> • For chequing, presses F1 (CHQ). • For savings, presses F4 (SAV).
 <p>ENTER PIN & OK</p>	<p>Keys in the Personal Identification Number (PIN) and presses the green key.</p>



Prompt	Customer action(s)
 <p>PLEASE WAIT DO NOT REMOVE CARD</p>	<p>Waits while the transaction is processed.</p>
 <p>APPROVED THANK YOU OBTAIN CARD</p>	<p>Retrieves the card.</p>
 <p>APPROVED THANK YOU REMOVE CARD</p>	<p>Removes the card from chip reader.</p> <p>Note: <i>The PIN Pad beeps until the card is removed.</i></p>
 <p>WELCOME/BONJOUR</p>	<p>Returns the PIN Pad to you.</p>

End of day procedures

Moneris closes your batch for you automatically at the end of each day. As an integrated merchant, you have the ability to request that Moneris perform the batch close for you daily between 10pm and 11pm EST, or you can select a time slot in which the batch close will occur.


The batch close settings can be configured in the Configuration - Settings screen in PAYD Administration. PAYD Administration is accessible using a link from within the PAYD Pro Plus App.


To access PAYD Administration:

1. Tap the **Main Menu** button ().
2. On the main menu, tap **Open Administration**.
3. For assistance using the PAYD Administration, tap the  button to access the Online Help tool.

Cashing out



Follow the steps below to count the cash in your till.






1. Tap the **Main Menu** button ().
2. On the main menu, tap **Cash-Out**.
The Cash-Out popup appears.
3. Count the cash in your till and use the on-screen numberpad to enter the quantities of each denomination into the appropriate field. For coins, enter any loose coins in the left field and enter any rolls into the right field for their denomination. For example, if you have 8 loose dimes and one roll of dimes, you would enter 8 into the left field and 1 into the right field of the 10 cent section.

 Cash-Out

\$100		\$2	2	Rolls	1		
\$50		\$1	11	Rolls			
\$20	3	25¢	3	Rolls	1		
\$10	4	10¢	8	Rolls	1		
\$5	2	5¢	17	Rolls			

Cash	192.40
Cheque	
Total CAD	\$192.40
Total USD	

4. Once all the fields have been filled out according to what is in your till, tap the **right arrow** button () to proceed to the next step.
5. The next Cash-Out screen displays the Cash-Out Totals report. The results of this report show the cash counted (in the Total Cash In Drawer (Actual) row) and expected (in the Closing Balance (Expected) row), as well as amounts for any other tender types used that day.
6. Take one of the following actions:
 - To go back to the previous Cash-Out screen and make changes to the amounts counted, tap the **left arrow** button (). Return to step 3.
 - To open the cash drawer, tap the **Drawer Open** button (). Proceed to step 7.
 - To print a copy of the Cash-Out report from the Bluetooth receipt printer, tap the **Print** button (). Proceed to step 7.
 - To save your count and complete the cash-out procedure, tap the **checkmark** button (). Proceed to step 7.

7. A Cash-Out confirmation appears. Take one of the following actions:
- To cash in and open a new session, tap **Cash-In**. The Cash-In screen appears. Refer to the *Cashing in* section on page 11 for more information.
- OR
- To sign out and end your session, tap **Sign Out**. The PAYD Pro Plus App returns to the Sign In screen. Refer to the *Signing into your PAYD Pro Plus App* section on page 8 for more information.



Troubleshooting


Error messages in the PAYD Pro Plus App

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

Error message	Solution
Error: The connection has failed. Please verify your network status and try again.	The app does not have connection to the data. <ol style="list-style-type: none">Close the PAYD Pro Plus App and check your Apple iPad's communication status (e.g., WiFi connection).If possible, restart the Apple iPad and see if you can reconnect.Try signing into the PAYD Pro Plus App again (see page 8).
The Pin is invalid.	You have tried signing into the PAYD Pro Plus App with an invalid PIN. Try again with a valid PIN (see page 8).
The username / password entered are invalid.	You have tried signing into the PAYD Pro Plus App with an invalid username or password. Try again with a valid username and/or password (see page 8). <i>Note: If you don't remember your password, you can tap Forgot Password and have a password reset message emailed to you.</i>

Error message	Solution
<p>PIN Pad is not connected or paired.</p>	<p>You have attempted to process <i>Interac</i> Debit or credit transaction, but the PAYD PIN Pad is not connected or paired. Try the following steps first:</p> <ol style="list-style-type: none"> a. Power on the PAYD PIN Pad (see page 91). b. Check the PAYD PIN Pad’s status on the main menu. For more information, refer to <i>Checking Bluetooth device status</i> on page 100. <p>If neither of these suggestions work, the PAYD PIN Pad may require pairing. Refer to the pairing instructions in the <i>Pairing the PAYD PIN Pad to the Apple iPad</i> section on page 93.</p>
<p>“Sorry, there are no matching records” when searching for products or customers.</p>	<p>This message appears when the search criteria entered fails to turn up any results.</p> <ul style="list-style-type: none"> • Refine your search criteria and try again. <p>If you are still unable to locate the item/customer for which you are searching, it’s possible that the record for the product or customer has been deleted, or was never entered or saved in the first place.</p>
<p>“Sorry, there are no matching records” when searching for transactions.</p>	<p>This message appears when the search criteria entered fails to turn up any results.</p> <ul style="list-style-type: none"> • Refine your search criteria and try again. <p>If you are still unable to locate the transaction, it is possible that the transaction was cancelled before it was completed, or payment processing for that transaction was declined.</p>

Error message	Solution
<p>Printing Error. Please try again. Msg: Printer offline</p>	<p>You tried to print a transaction receipt or report, but the Bluetooth receipt printer is offline or not connected.</p> <p>Try the following steps first:</p> <ol style="list-style-type: none"> Ensure the printer is powered on. Check the printer's status on the main menu. For more information, refer to <i>Checking Bluetooth device status</i> on page 100. <p>If neither of these suggestions work, the printer may require pairing. Refer to the pairing instructions in the <i>PAYD Pro Plus Mobile Solution Hardware Install Guide</i> available at getpayd.com/paydproplus/support.</p>
<p>The PAYD PIN Pad is paired to the iPad and appears "Connected" in the iPad's Bluetooth menu, but in the PAYD Pro Plus App, it appears as "Not connected".</p>	<p>The PAYD PIN Pad will need to be "un-paired" and "re-paired" with the iPad. Follow these steps to un-pair the PAYD PIN Pad.</p> <ol style="list-style-type: none"> Sign out of the PAYD Pro Plus App (see <i>Signing out</i> on page 10 for more information). Power off the PAYD PIN Pad (see <i>Powering off the PAYD PIN Pad</i> on page 93 for more information). Power on the PAYD PIN Pad (see <i>Powering on the PAYD PIN Pad</i> on page 91 for more information). At the version information screen, press the red  key, then press the green  key. <div data-bbox="691 1279 957 1404" style="border: 1px solid gray; padding: 5px; text-align: center;">U-VVVV-I6012345</div>

Error message	Solution
	<p>e. On the TELIUM MENU screen, press the F4 key (YES). The PRESS F KEY screen displays.</p> <p>f. Press the  key. The FUNCTIONS menu displays.</p> <p>g. Press the 2 key to select BT PAIRING. The BT PAIRING screen displays.</p> <p>h. On the BT PAIRING screen, press the 3 key to select Remove paired device.</p> <p>i. On the REMOVE DEVICE screen, press the number that corresponds to the iPad from which you are unpairing. The message “No paired device” appears, then the screen returns to the BT PAIRING screen.</p> <p>j. To pair the PIN Pad to the iPad again, follow the directions in the <i>Pairing the PAYD PIN Pad to the Apple iPad</i> section on page 93 beginning at step 4.</p> <p>Once the PAYD PIN Pad is re-paired, it will be able to connect to the PAYD Pro Plus App.</p>

Error messages on the PIN Pads

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




Error message	Solution
BATTERY CHARGING IN PROGRESS	<p>The PAYD PIN Pad battery is recharging from a very low charge level.</p> <p>Wait for the WELCOME/BONJOUR screen to display before you attempt to perform a transaction (this may take several minutes).</p>
CANNOT SWIPE CHIP CARD	<p>Insert the chip card into the PIN Pad's chip card reader.</p>
CARD BLOCKED REMOVE CARD	<p>The chip card cannot be used. Ask for another form of payment.</p>
CARD NOT SUPPORTED PLEASE RETRY	<ol style="list-style-type: none">Swipe the card again.If this does not work, request another form of payment.
CARD PROBLEM	<p>Retry the transaction. If the message reappears:</p> <ul style="list-style-type: none">If card was inserted:<ul style="list-style-type: none">Swipe the card.If credit card was swiped:<ul style="list-style-type: none">Manually enter the card (see page 61).If debit card was swiped:<ul style="list-style-type: none">Request another form of payment.
CARD READ ERR	<p>The card data could not be read when the card was swiped or tapped. Retry the transaction.</p>

Error message	Solution
CONTACTLESS TRANSACTION LIMIT EXCEEDED	If the card has a chip, insert it into the chip reader; otherwise, swipe the card.
DECLINED BY CARD	<p>The chip card has declined the transaction.</p> <ol style="list-style-type: none"> a. Retrieve the PIN Pad, and remove the chip card. b. Request another form of payment.
ERROR CARD REMOVED	The chip card was removed during the transaction. Retrieve the PIN Pad, and retry the transaction.
MUST INSERT CARD	If the card has a chip, insert it into the chip reader; otherwise, swipe the card.
NO CARD	The card was not entered on the PIN Pad in the required time.
NO SUPPORTED APPLICATIONS REMOVE CARD	<ul style="list-style-type: none"> • If card inserted: <ul style="list-style-type: none"> ○ Remove the card from the chip reader, and swipe it when prompted. • If card tapped: <ul style="list-style-type: none"> ○ If it has a chip, insert it into the chip reader; otherwise, swipe the card.
NOT ACCEPTED REMOVE CARD or NOT ACCEPTED USE MAG STRIPE REMOVE CARD	<ol style="list-style-type: none"> a. Remove the chip card from the chip reader. b. If prompted, swipe the card on the magnetic stripe reader. <ul style="list-style-type: none"> • Credit only: If this does not work, manually enter the card number (see page 61). • Debit only: Ask for another form of payment.

Error message	Solution
NOT COMPLETED	The customer took more than 30 seconds to respond to the prompts. Retry the transaction.
PLEASE CHARGE THE TERMINAL	The PAYD PIN Pad's battery charge is low. Connect the PAYD PIN Pad to an external power source via the USB charging cable. When BATTERY CHARGING IN PROGRESS appears, refer to that message in this table.
REFUND LIMIT EXCEEDED	<p>The total value of Refunds performed today is greater than your daily Refund Limit.</p> <ol style="list-style-type: none"> Contact us for a temporary increase in your daily Refund Limit. Ensure that you have the original Purchase receipt available for reference.
TAP NOT ACCEPTED	<ol style="list-style-type: none"> Cancel the transaction. Ensure that the PAYD PIN Pad battery has a charge level of at least 50% (see page 90), and retry the transaction. If the issue recurs, insert the card into the chip reader if the card has a chip; otherwise, swipe the card.
WRONG CARD TYPE	The card that was swiped cannot be used for this transaction. Ask for another card and retry.

Other issues (PIN Pads)

Issue	Solution
<p>The PAYD PIN Pad and/or PAYD Pro Plus App stalls or freezes midway during a transaction.</p>	<ol style="list-style-type: none"> a. If the card is inserted, remove it from the chip reader. b. Close/shutdown the PAYD Pro Plus App. c. Power off the PAYD PIN Pad, and then power it on again (see page 91). d. Re-launch the PAYD Pro Plus App, and sign in (see page 8). e. Retry the transaction.
<p>The screen on the PAYD PIN Pad displays the hardware manufacturer name/logo instead of WELCOME/BONJOUR.</p>	<p>The PAYD PIN Pad is in Sleep mode.</p> <ol style="list-style-type: none"> a. Press the Power button (see page 92) to wake the PAYD PIN Pad and return it to the WELCOME/BONJOUR screen. b. To prevent the PAYD PIN Pad from going into Sleep mode and/or powering off when not connected to an external power source, see <i>Sleep mode</i> on page 92.
<p>The PAYD PIN Pad powers off.</p>	<p>The PAYD PIN Pad may have gone into Sleep mode and then shut down to conserve power.</p> <ol style="list-style-type: none"> a. To power on the PAYD PIN Pad, press the PAYD PIN Pad's Power button (see page 91). b. If this does not work (the battery charge may be depleted), connect the PAYD PIN Pad to an external power source via the USB charging cable. c. To prevent the PAYD PIN Pad from going into Sleep mode and/or powering off when not connected to an external power source, see <i>Sleep mode</i> on page 92.

Issue	Solution
<p>The contactless reader does not beep when a card is tapped/waved at the SWIPE, TAP OR INSERT CARD prompt.</p>	<p>The PAYD PIN Pad battery charge level may be too low. See the solution for TAP NOT ACCEPTED on page 124.</p>
<p>PIN Pad initialization error.</p>	<p>There was a problem initializing the iPP320 PIN Pad.</p> <ol style="list-style-type: none"> Tap OK on the error message. Sign out of the PAYD Pro Plus App (see <i>Signing out</i> on page 10 for more information). Power cycle the iPP320 PIN Pad: <ul style="list-style-type: none"> Hold down the yellow  key and press the alphanumeric  key. The PIN Pad will restart. Once the WELCOME/BONJOUR screen appears on the PIN Pad, log in to the PAYD Pro Plus App (see page 8). Tap the Main Menu button (). On the main menu, tap Settings. In the Settings screen, tap Devices. In the PIN Pad Terminal section, tap Initialize, and at the warning prompt, tap Yes. <p>The PIN Pad should initialize.</p> <p>If the above steps do not work, contact Moneris Customer Care toll-free at 1-855-423-PAYD (7293).</p>

Issue	Solution
<p>“PIN Pad requires initialization. Cannot process a transaction until the terminal has been initialized. Remove card from the PIN Pad if present and click YES if you would like to initialize now. Click NO if you would like to do it later”</p>	<p>There was a problem initializing the iPP320 PIN Pad, and this message appears if you try to process a credit or debit transaction without an initialized PIN Pad.</p> <ol style="list-style-type: none"> a. Tap Yes. The PAYD Pro Plus App will attempt to initialize the PIN Pad. b. If initialization was successful, attempt to process the transaction again. <p>If the initialization failed, the “PIN Pad initialization error” appears. See the steps in “PIN Pad initialization error” within this table.</p>

Merchant support

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

We're only one click away.

- Visit getpayd.com/paydproplus/support to:
 - consult the FAQs on how to set up and use PAYD Pro Plus
 - download PAYD Pro Plus guides to assist with getting started, hardware installation, configuration, and usage instructions
- 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 toll-free (available 24/7) at **1-855-423-PAYD (7293)**. We'll be happy to help.

You can also send us a secure message 24/7 by logging in to Merchant Direct® at moneris.com/mymerchantdirect.



BE PAYMENT READY

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