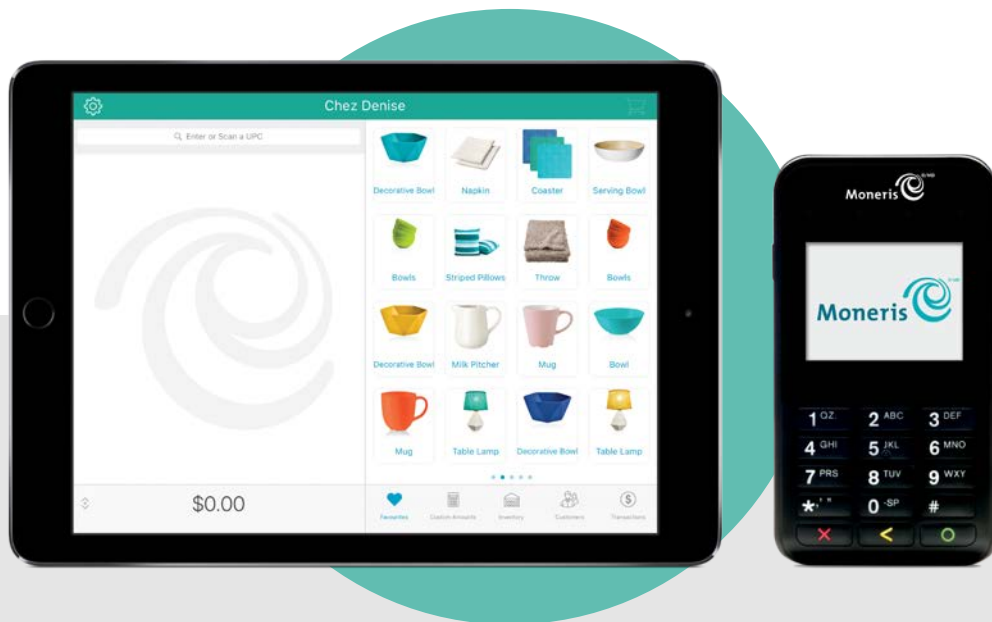


PAYD Pro Plus[®] Mobile Solution Configuration Guide





BE PAYMENT READY

Need help?

Web: moneris.com/support/PAYDProPlus-mobile

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.

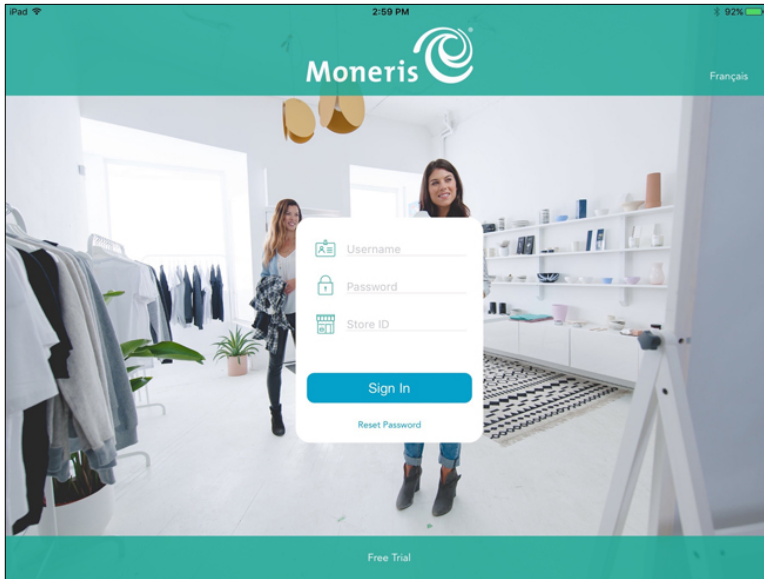
This guide provides you with instructions on how to configure the PAYD Pro Plus App.

Downloading and installing the PAYD Pro Plus App

1. From the home screen of your Apple iPad, open the App Store®.
2. In the Business category, search for "PAYD Pro Plus", then select the app.
Important: Read the PAYD Pro Plus "Terms of Use" before proceeding with the download.
3. Tap **GET**, and then tap **INSTALL**.
4. When prompted, enter your **Apple ID** and **password**, and then tap **OK**.
5. When the installation is complete, your Apple iPad's home screen displays the PAYD Pro Plus icon ().

Logging in to the PAYD Pro Plus App

The first time the PAYD Pro Plus App is launched, you will be prompted to enter your Moneris PAYD® login credentials.



1. Enter your PAYD login credentials (**Username, Password and Store ID**) into the provided fields.

Note: If you are an existing PAYD®, PAYD Pro®, or PAYD Pro Plus user, enter your current PAYD login credentials. Your login credentials can be found in the Confirmation email that you received when you registered or activated your Moneris PAYD account. If you do not have PAYD login credentials, tap **Free Trial** and follow the on screen prompts to register for an account. If you are unsure as to the status of your PAYD account, contact us at **1-855-423-PAYD (7293)**.

2. Tap **Sign In**.

Note: After your first login, the system will prompt you to create a quick PIN for login (“Enter a PIN to login faster next time”). Enter a 4-digit PIN and tap the checkmark button. For more information on quick PINs, see Configuring employee options on page 12.

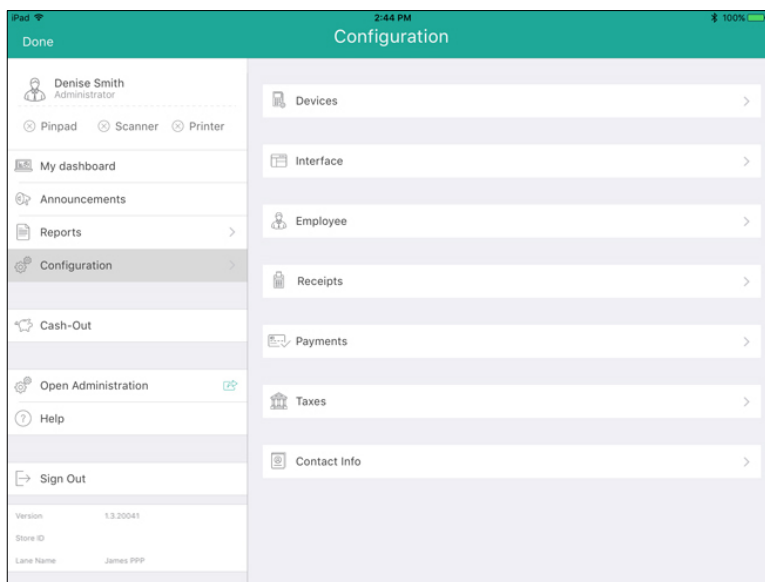
Note: If the system prompts you to Cash-In, leave the fields blank and tap **Continue** for now. Refer to the **PAYD Pro Plus® Mobile Solution - Using PAYD Pro Plus for Apple® iPad®** guide for instructions on how to cash in. This guide is available for free download at moneris.com/support-PAYDProPlus-mobile.

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 **Settings** button (). The main menu appears (shown below).




- To hide the main menu:
 - Tap **Done** in the top left corner of the screen.

The panes

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


The on-screen keyboard and number pad

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

() to finalize your input. The keyboard is hidden again.

Signing out of the PAYD Pro Plus App


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

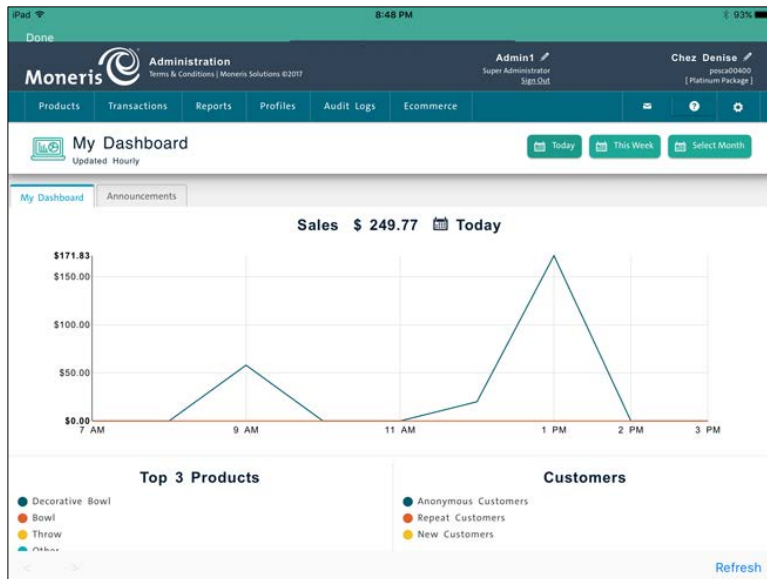
1. Tap the **Settings** button ().
2. On the main menu, tap **Sign Out**.
A confirmation popup appears.
3. Tap **OK** to sign out.
The Login screen appears.

Accessing Moneris PAYD® Administration


The PAYD Pro Plus App has a companion; Moneris PAYD Administration. PAYD Administration runs in a separate window, and contains many additional tools. Based on your Merchant Agreement with Moneris and your PAYD account type, the available tools may include additional reporting, customer and inventory management, additional data setup and software configuration settings, an email marketing engine, eCommerce website design etc.

To access PAYD Administration:

1. Tap the **Settings** button ()
2. On the main menu, tap **Open Administration**.
3. The Moneris PAYD Administration screen appears. You are automatically logged in with the same PAYD login credentials you used to log in to the PAYD Pro Plus App.



4. When you are finished using the Administration functions, tap **Done** in the top left corner of the screen.

Note: Tap the **Help** () button in the PAYD Administration screen to consult the **PAYD Pro Plus Online Help** for more information on operating the software.



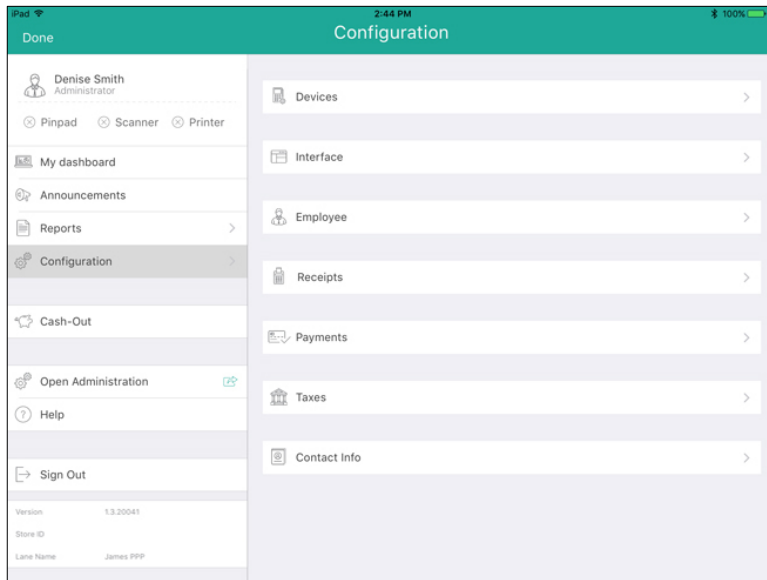
Configuring the PAYD Pro Plus App

In this section, we go over everything you need to know to configure the PAYD Pro Plus App.


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.*

Configuring the PAYD Pro Plus App

All of the configuration options for the PAYD Pro Plus App are accessed via the Configuration screen (shown below).




To access the Configuration screen:

1. Tap the **Settings** button ()
2. On the main menu, tap **Configuration**.

Configuring interface settings

Use the Interface screen to select your logo and configure other display settings in the PAYD Pro Plus App. Your logo will appear as a background image on the left pane when it is not actively engaged in displaying information (i.e., transactional information during a sale). It is not necessary to display your logo, but it can help to improve customer perception of your business if you have it where they can see it.

1. Tap the **Settings** button ()
2. On the main menu, tap **Configuration**.
3. In the Configuration screen, tap **Interface**.
4. Select the image file to display as your background image.

Note: *If you do not wish to display a background image, proceed directly to step 5.*

- a. In the **BACKGROUND LOGO** section on the right pane, tap **Choose**.

A popup appears.

- b. Select the source for your image:

- To take a picture with the Apple iPad's camera:

- i. Tap **Camera**.

Note: *If you are prompted to enable PAYD Pro Plus to access the camera, tap **OK**.*

- ii. Take the picture with the camera.

- iii. If you are satisfied with the image, tap **Use Photo**. Proceed to step 5. If you are unsatisfied, tap **Retake** and repeat step ii.

- To use an image stored on the Apple iPad's internal memory:

- i. Tap **Library**.

The Photos popup appears.

- ii. Tap **Camera Roll**.

- iii. Browse the photos stored on your Apple iPad for your logo, and then tap it to select it.

- iv. Proceed to step 5.

Note: *If you select the wrong image, tap **Delete** in the Interface screen to remove it, then perform step 4 again.*

5. Set the **NUMBER PAD** settings:

- To enable the PAYD Pro Plus App's on-screen number pad, toggle the **Use on-screen number pad** switch to the right. This number pad appears when processing transactions, enabling you to quickly key in numbers. By default, this switch is toggled to the right (Enabled).

OR

- To disable this feature, toggle it to the left.

Note: *If this feature is disabled, the PAYD Pro Plus App will utilize the Apple iPad's own alphanumeric number pad/keyboard for data entry.*

6. Set the Favourite Groups settings:

- To enable the Favourites Group feature, toggle the **Use Favourite Groups** switch to the right. The Favourites Group appears on the right pane when selecting inventory to add to a transaction. By default, this switch is toggled to the right (Enabled).
 - To disable this feature, toggle the switch to the left. When processing a transaction, a breakdown of totals and taxes will appear on the right pane.
- To enable the Custom Amounts function, toggle the **Use Custom Amounts** switch to the right. The Custom Amounts function enables you to quickly assign a price to a product that is not yet defined in inventory in order to sell it. By default, this switch is toggled to the right (Enabled).
 - To disable this feature, toggle it to the left. When processing a transaction, the Custom Amounts button will not appear on the Sale screen.


7. Set how the system deals with items that are currently not defined in inventory (in the **NEW PRODUCTS** section):

- To have new (undefined) items that are scanned/entered during a sale added to your inventory after the sale, toggle the **Automatically Add New Products to Inventory** switch to the right. (Default = Disabled).
- To have the new (undefined) item that is scanned/entered automatically added to the sale cart, toggle **Automatically Add New Products to Sale** switch to the right. (Default = Disabled).

8. Tap **<Configuration** at the top of the right pane to save your work and return to the main Configuration screen.

Configuring employee options

Use the Employee screen to control security settings, passwords and how you log in to the PAYD Pro Plus App in the future. You can login to the PAYD Pro Plus App in one of three ways: using the PAYD login credentials (Store ID, Username, and Password), by using a PIN (personal identification number), or by utilizing the Apple Touch ID feature (fingerprint login). Entering security credentials can help to ensure your data is protected from unauthorized use if your Apple iPad is lost.

1. Have the employee login to the PAYD Pro Plus App (see *Logging in to the PAYD Pro Plus App* on page 4).
2. Tap the **Settings** button () .
3. On the main menu, tap the employee's name at the top left corner of the screen.
The employee's profile loads into the right pane.
4. If you want to (or need to) change your password, follow the steps below. If you do not need to change your password, proceed to step 5.
 - a. In the **PASSWORD** section, tap **Change Password**.
The Change Password popup appears.
 - b. Tap inside the **Enter Current Password** field and enter your current password.
 - c. Tap inside the **Enter New Password** field and enter the desired new password.
 - d. Tap inside the **Re-enter New Password** field and re-enter the desired new password.
 - e. Tap **Finish** at the top of the popup.
 - f. Proceed to step 5.
5. If you want to (or need to) change your security phrase (used to help recall your password), follow the steps below. If you do not need to change your security phrase, proceed to step 6.
 - a. In the **PASSWORD** section, tap **Change Security Phrase**.
The Security Question popup appears with a list of questions.
 - b. Tap a question you would like to use for password recovery (so that it appears with a blue checkmark).
The screen changes to provide new fields.
 - c. Tap inside the **Enter the above question's answer** field and use the on-screen keyboard to enter an answer.
 - d. Tap inside the **Enter current password** field and enter your current password.
 - e. Tap **Finish** at the top of the popup.
6. In the **PIN** section, select your quick PIN login setting:
 - To enable the PIN Login feature, toggle the **Use a 4 digit PIN to sign in** switch to the right (Enabled). Proceed to step 7.
 - To enable standard login credentials (Store ID, Username, and Password), toggle the **Use a 4 digit PIN to sign in** switch to the left (Disabled). This is the default setting. Proceed to step 8.

7. Set your PIN to use for login:

a. Tap **Change Quick PIN**.

The Change PIN popup appears.

b. Tap inside the **Enter Current Password** field and enter your current password.

c. Tap inside the **Enter New PIN** field and enter the desired new PIN.

d. Tap inside the **Re-enter New PIN** field and re-enter the desired new PIN.

e. Tap **Finish** at the top of the popup.

A confirmation popup appears.

f. Tap **OK**.

The Employee screen reappears.

8. To enable the Touch ID feature (a fingerprint login method that makes use of the Apple iPad's fingerprint recognition feature), in the **FINGERPRINT LOGIN** section, toggle the **Enable Fingerprint Login** switch to the right (Enabled). If you do not wish to enable Touch ID, proceed to step 11.

Important: The fingerprint login feature can only be tied to a single staff member. Other employees will need to use their PAYD login credentials or a quick PIN to login.

9. If you have not yet enabled the Touch ID feature on your Apple iPad, tap **Setup Instructions** and follow the instructions to enable it. If you have enabled and configured Touch ID on your Apple iPad previously, proceed to step 10.

Note: *You will need to log out of the PAYD Pro Plus App, enable Touch ID, and record your fingerprints. Once fingerprints have been recorded in the iPad's Settings screen, you are able to proceed to step 10.*


10. You are prompted to logout and then login with the account to be linked to your finger print.

Once you log back in, you are prompted that Touch ID was enabled successfully.

11. Tap **Done** at the top of the right pane to save your work and return to the Sale screen.

Configuring receipt options

Use the Receipts screen to control when receipts print, the number of copies, content, and delivery methods.

1. Tap the **Settings** button ()
2. On the main menu, tap **Configuration**.
3. In the Configuration screen, tap **Receipts**.
4. Configure the receipt settings following the guidelines below:

- **RECEIPT PRINTING**

Note: *This setting is only applicable to merchants using a Bluetooth® receipt printer paired to an Apple iPad. If you do not have a Bluetooth receipt printer, you do not need to make any changes to this section.*

- Determine when you want the receipts to print:
 - To print a receipt automatically after each transaction completes, toggle the **Print after each sale** switch to the right (Enabled).

OR

- To print a receipt on demand, toggle the **Print after each sale** switch to the left (Default = Disabled).

- **INFO ON PRINTED RECEIPT**

- Determine what information gets printed on receipts:
 - To have a transaction barcode print on the receipts (to enable quick returns with a Bluetooth barcode scanner), toggle the **Transaction barcode** switch to the right (Default = Enabled).
 - To have the business' address print at the bottom of the receipt, toggle the **Store address** switch to the right (Default = Enabled).
 - To enable a printout of a credit card transaction that was declined, toggle the **Declined credit card transactions** switch to the right (Default = Disabled).
 - To print a custom (user-defined) message at the bottom of receipts, toggle the **Custom message** switch to the right (Default = Disabled).
 - If you enable the custom message, tap **English message**, and in the screen that appears, use the on-screen keyboard to enter a message that will print at the bottom of receipts. Tap **<Back** when finished. The **French message** is optional, and will print only on transactions where a French-language card was used.

- **PRINTING OPTIONS**

- If you do not have a Bluetooth receipt printer, toggle the **Enable receipt signing on the device screen** switch to the right (Default = Disabled). If you do have a Bluetooth receipt printer, leave this switch as Disabled. Enabling this feature allows the PAYD Pro Plus App to capture a customer's signature on the screen when a transaction is paid by swiped credit card.
- To print a customer copy, toggle the **Print a customer copy** switch to the right (Default = Enabled).

- To print the merchant copy, toggle the **Print a merchant copy** switch to the right (Default = Enabled).

Note: *This setting is dependent upon the **Print a merchant copy when** setting below.*

- To determine when a merchant copy will print, tap **Print a merchant copy when**, and tap your selection.
- To set the default merchant language for your receipts, tap **Merchant language on the receipt**, then tap your selection. Tap **<Back** when finished.
- To set the default language for customer receipts, tap the **Customer language on the receipt** drop-down menu and tap your selection. This will be the default for all cash, cheque, gift card and non-integrated debit and credit transactions. Tap **<Back** when finished.

Note: *For merchants using integrated payment processing with Moneris, this setting will be overridden at the time of the transaction based on the language code of the credit or debit card the customer used.*

▪ **PAYMENT SCREEN SETTINGS**

- Use these options to select how the receipt can be provided to the customer.
 - To have the system prompt to print a paper receipt from a Bluetooth receipt printer, toggle the **Enable print receipt button** switch to the right (Default = Disabled).
 - To have the system prompt to send the receipt to the customer's email address, toggle the **Enable email receipt button** switch to the right (Default = Enabled).

Note: *If you want to e-mail transaction receipts without having to key in the address each time, configure your Apple iPad's privacy settings to allow the PAYD Pro Plus App to access e-mail addresses stored on the device's contacts list.*

- To have the system prompt to send the receipt via SMS text message, toggle the **Enable SMS receipt button** switch to the right (Default = Disabled).
- To have the system prompt to generate a gift receipt, toggle the **Enable gift receipt button** switch to the right (Default = Disabled).

▪ **RECEIPT LOGO AND SOCIAL MEDIA**

- Use this section to select a logo for your printed and digital receipts, and insert your business' social media links onto your printed, emailed, and texted receipts.
 - a. In the **RECEIPT LOGO AND SOCIAL MEDIA** section on the right pane, tap **Choose**.

A popup appears.
 - b. Select the source for your image:
 - To take a picture with the Apple iPad's camera:
 - i. Tap **Camera**.

Note: *If you are prompted to enable PAYD Pro Plus to access the camera, tap **OK**.*
 - ii. Take the picture with the camera.
 - iii. If you are satisfied with the image, tap **Use Photo**. If you are unsatisfied, tap **Retake** and repeat step ii.

- iv. Tap **Logo size**, and then tap the size you wish to use (from 10 – 100%).
- v. Once your desired logo size is selected, tap **<Back** at the top of the right pane.
- To use an image stored on the Apple iPad’s internal memory:
 - i. Tap **Library**.
The Photos popup appears.
 - ii. Tap **Camera Roll**.
 - iii. Browse the photos stored on your Apple iPad for your logo, and then tap it to select it.
 - iv. Tap **Logo size**, and then tap the size you wish to use (from 10 – 100%).
 - v. Once your desired logo size selected, tap **<Back** at the top of the right pane.
- Tap inside the **Web page link (email, SMS)** field and enter your business’ URL (website address).
- Tap inside the **Facebook Link** field and enter your business Facebook address URL (if applicable).
- Tap inside the **Twitter Link** field and enter your business’ Twitter handle (if applicable).

Important: When adding social media links onto your email or text receipts, ensure you are in compliance with applicable anti-spam law.

***Note:** The Web page link, Facebook address, and/or Twitter handle will print on printed copies. On receipts that are emailed or texted to customers, the links will be live hyperlinks which a customer can click/tap to access your business website, Facebook page, and/or Twitter page.*


***Note:** If you do not have a business website, Facebook, or Twitter account, leave these fields blank.*

- 5. Tap **<Configuration** at the top of the right pane to save your work and return to the main Configuration screen.

Configuring payment settings

Use the Payments screen to define the payment methods your business will accept, how to handle cash penny rounding, and exchange rates.

Note: Based upon your PAYD Pro Plus software bundle type and/or your Merchant Agreement with Moneris, some payment types described in this guide may or may not be visible to you in this screen.

1. Tap the **Settings** button ()
2. On the main menu, tap **Configuration**.
3. In the Configuration screen, tap **Payments**.
4. Configure your payment settings by following the guidelines below:
 - **PAYMENT TYPES**
 - Use this section to enable the payment methods your business will accept. There are even two-user defined payment methods you can create.
 - To accept cash as a payment type, toggle the **Cash** switch to the right (Default = Enabled).
 - To accept *Interac* Debit cards as a payment type, toggle the **Debit** switch to the right (Default = Enabled).
 - To accept credit cards as a payment type, toggle the **Credit card** switch to the right (Default = Enabled).
 - To accept cheque as a payment type, toggle the **Cheque** switch to the right (Default = Enabled).
 - To accept store credit as a payment type, toggle the **Store credit** switch to the right (Default = Enabled).
 - To accept Moneris Gift Cards as a payment type, toggle the **Gift card** switch to the right (Default = Disabled)
 - To use the invoicing feature (send customers invoices via email or SMS text with a link to a secure online payment page), toggle the **Invoices** switch to the right (Default = Enabled).
 - To enable layaway functionality to be accessible within the Mobile App, toggle the **Layaways** switch to the right (Default = Disabled).
 - To enable and define other custom payment methods, toggle the **Custom Type 1 & 2** switches to the right (Default = Disabled).

Note: These custom payment types have variable names that you define in the Configuration - Settings screen in PAYD Administration, therefore the PAYD Pro Plus App will display whatever words you have entered in that screen. If you have not entered anything yet, the payment type names will appear as blanks.

- **PENNY ROUNDING**
 - Tap the **Rounding selected** selector to define how the PAYD Pro Plus App will round to the nearest nickel value when cash is selected as the payment method. Choose one of the following:
 - If you do not want the PAYD Pro Plus App to do any rounding, tap **No rounding**.
 - If you want the PAYD Pro Plus App to round up or down to the nearest nickel value, tap **Nearest \$0.05 rounding**.

- **US EXCHANGE RATE**


- Tap the **\$1.00 USD is Equal to** section, then use the on-screen keyboard to enter the current value of a US dollar at your business (e.g., if \$1 US buys \$1.12 Canadian, you would enter "1.12" in the **CAD** field).

***Note:** It is the merchant's responsibility to enter the exchange rates, and to change this value as needed; this value is not changed or monitored by Moneris.*

5. Tap **<Configuration** at the top of the right pane to save your work and return to the main Configuration screen.


Configuring taxes

Use the Taxes screen to enter your business' tax registration numbers for the federal and provincial taxes to which you are subject.

1. Tap the **Settings** button ()
2. On the main menu, tap **Configuration**.
3. In the Configuration screen, tap **Taxes**.
4. In the **Registration number** field(s), enter the business' tax registration number(s) as needed.
5. Tap **<Configuration** at the top of the right pane to save your work and return to the main Configuration screen.

Configuring store contact information

Use the Contact Info screen to enter your business' name, address info, and contact information. This information will appear on receipts and in other areas.

1. Tap the **Settings** button ()
2. On the main menu, tap **Configuration**.
3. In the Configuration screen, tap **Contact Info**.
4. Enter your business' name in the **Store name** field.
5. Enter your business address into the various fields in the **ADDRESS** section.
6. Enter your contact information into the various fields in the **CONTACT INFO** section.
7. Tap **<Configuration** at the top of the right pane to save your work and return to the main Configuration screen.




Merchant support

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

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

We're only one click away.

- To access the **PAYD Pro Plus Online Help** tool:
 - For context-sensitive help from within PAYD Administration, tap the **Help** icon ()
 - For the full webhelp, from within a context-sensitive help window, tap the '**Show**' link in the top left corner of the window. The full webhelp table of contents will appear on the left side of the window.
- Visit moneris.com/support-PAYDProPlus-mobile 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 help setting up? We'll be there.

Moneris offers quick, hassle-free on-site setup of your complete iPad POS Solution by our in-house technicians. Contact us at **1-866-MONERIS** to learn more or visit moneris.com/iPadPOS to learn more.

Can't find what you are looking for?

Call Moneris Customer Care (available 24/7) toll-free at **1-866-319-7450**. We'll be happy to help.

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



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