

PAYD Pro Plus[®] Mobile Solution

Using PAYD Pro Plus for Gift Cards





BE PAYMENT READY

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Introduction

The Moneris® Gift Card Program allows any sized business to sell custom designed gift cards. Now you can offer the perfect gift for any occasion – from the holidays to a birthday, anniversary or even Hug Your Boss Day.

This guide provides you with instructions on how to configure and use the PAYD Pro Plus® App with the Moneris Gift Card Program.

Moneris gift card features

Moneris gift cards have features that include terms & conditions of use, a unique card number, and a 3-digit CVC.

Note: The 3-digit CVC is used when swiping or entering the gift card for transactions with the PAYD Pro Plus App.



Note: Some gift cards are in English only, and some are in French/English. The example presented here is English/French.

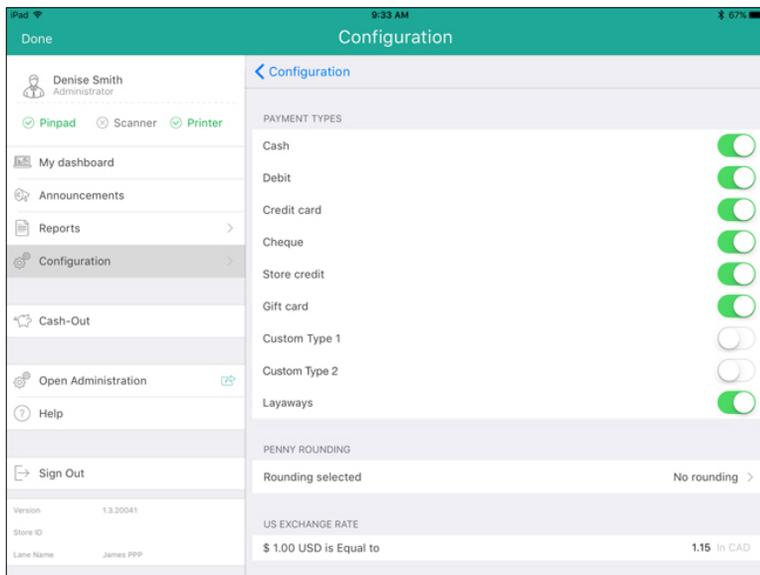
Note: Based upon your PAYD Pro Plus software bundle type and/or your Merchant Agreement with Moneris, certain features described in this guide may not be visible within the PAYD Pro Plus App.

Setting up the PAYD Pro Plus App to work with Moneris gift cards

In order to begin using Moneris gift cards with the PAYD Pro Plus App, a few setup steps need to occur first.

Enable the gift card payment type

1. Tap the **Settings** button ()
2. On the main menu, tap **Configuration**.
3. On the Configuration screen, tap **Payments**.
4. In the Payments screen, on the right pane, under the **PAYMENT TYPES** section, toggle the **Gift card** switch to the right (Enabled).



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

Creating a gift card profile

Before a gift card can be activated and redeemed, you need to create a product profile for the gift card (because PAYD Pro Plus treats a gift card like a product when it is sold). Follow the instructions below to create a gift card profile.

1. On the Sale screen, tap **Inventory** at the bottom of the right pane.

2. Tap the **Add Product** button () at the top of the right pane.

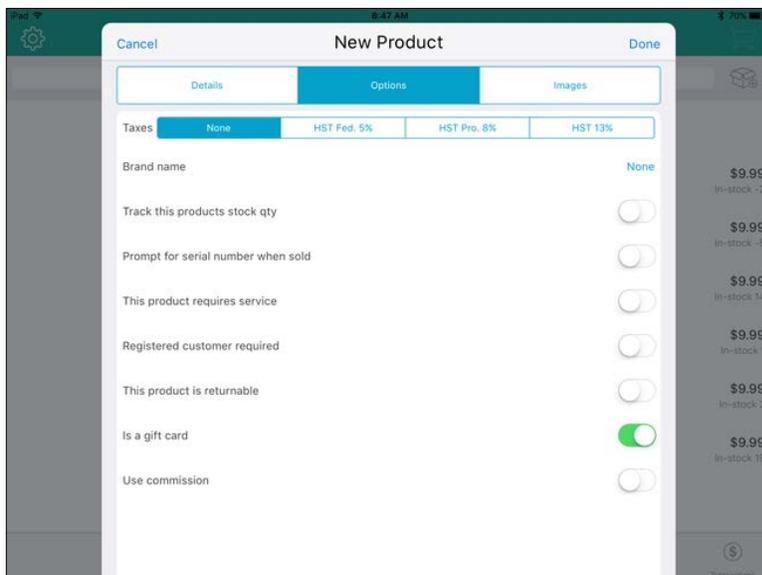
The “New Product” popup appears.

3. Create the gift card’s profile:

- In the **Product name** field, use the on-screen keyboard to enter a name for the gift card.
- In the **Product UPC** field, key in a UPC (a product ID) for the gift card.
- Enter a price for the gift card in the **Retail Price** field. If the gift card will have a variable price, enter \$0.00.

Note: PAYD Pro Plus handles two types of pricing models for gift cards: Variable and Fixed price. Variable priced gift cards mean that the customer can specify the amount to load onto the gift card. Fixed price gift cards can only be activated at the price entered in the **Retail Price** field. Therefore, you should only enter a price in the **Retail Price** field if the gift card will have a Fixed price. If you wish the gift card to have a Variable price that the customer can determine when purchasing, leave this field blank.

- Tap the **Options** tab at the top of the popup.
- At the top of the Options tab, tap the tax rate that applies to the gift card. If the gift card will not be taxable, tap the **None** option.
- Toggle the **Is a gift card** switch to the right (Enabled).



4. Tap **Done** in the top right corner of the “New Product” popup.
An Inventory screen appears in the right pane to provide you with the opportunity to edit the product profile.
5. Tap **<Back** at the top of the right pane to save the product profile.

The PAYD Pro Plus App is now ready to process gift cards.



Gift card management

In this section, we go over everything you need to know to manage Moneris gift cards with the PAYD Pro Plus App.

Activating/reloading a gift card

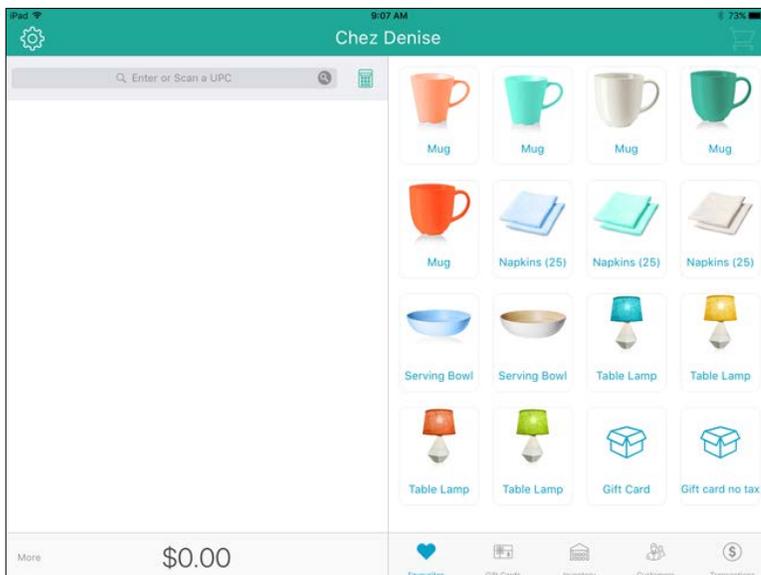
Before a gift card can be used to pay for purchases, the gift card needs to be activated.

Note: To process reload transactions, your Gift Card program must be set up with the card reload feature.

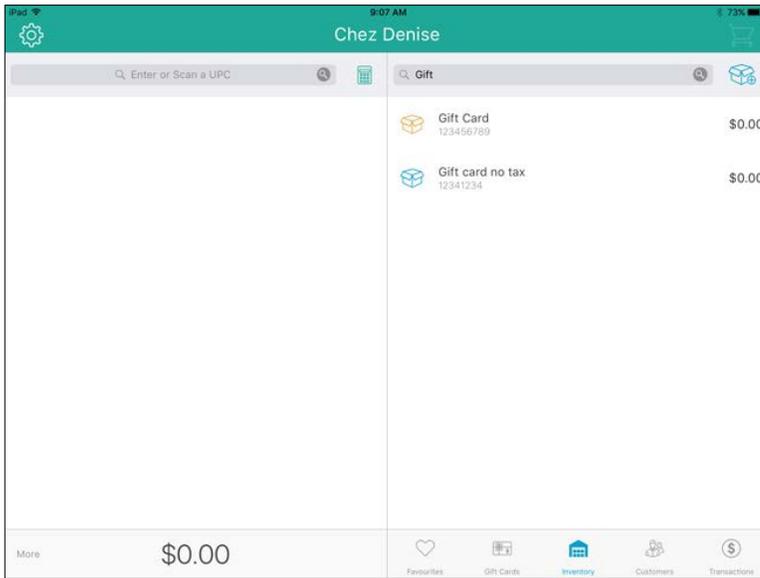
Follow the steps below to activate or reload a single or multiple gift cards for a customer.

1. In the Sale screen, add the gift card product to the bill:
 - From the Favourites Group:
 - a. Tap **Favourites Group** at the bottom of the right pane.

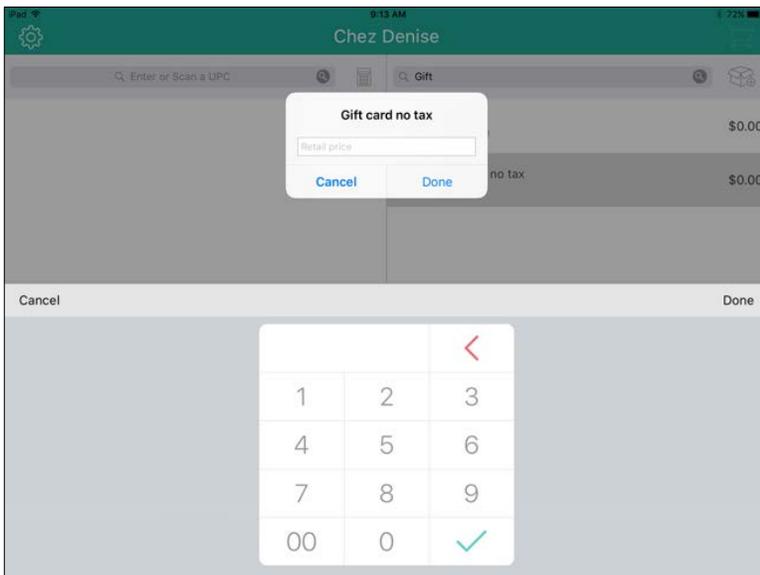
The Favourites Group appears.



- b. On the Favourites Group, tap the tab that contains the gift card, then tap the gift card product.
 - c. Proceed to step 2.
- From the Inventory tab:
 - a. Tap **Inventory** at the bottom of the right pane.
 - b. Tap inside the **Inventory Search** field at the top of the right pane.
 - c. Search for the gift card by name or UPC (or scroll through the list).



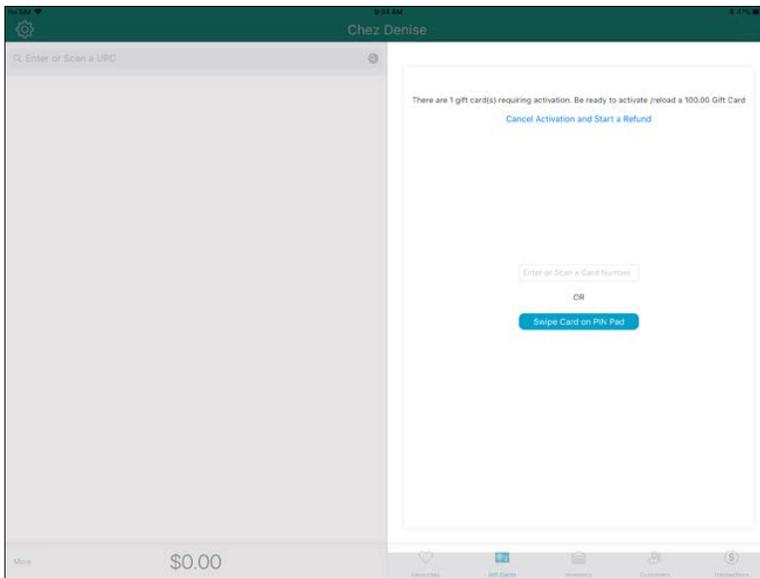
- d. Tap its name in the list.
 - e. Proceed to step 2.
2. If a “Gift Card” popup appears prompting for a retail price, proceed to step 3. If the popup does not appear, proceed to step 4.
 3. In the “Gift Card” popup, tap inside the **Retail price** field and enter a price for the gift card. Tap **Done** at the bottom of the popup when finished.



Note: If reloading the gift card, the reload value must not exceed the Maximum Balance value set up on the gift card’s program. The default Maximum Balance is \$250. If a Maximum Balance greater than \$250 is required, consult with your Moneris representative.

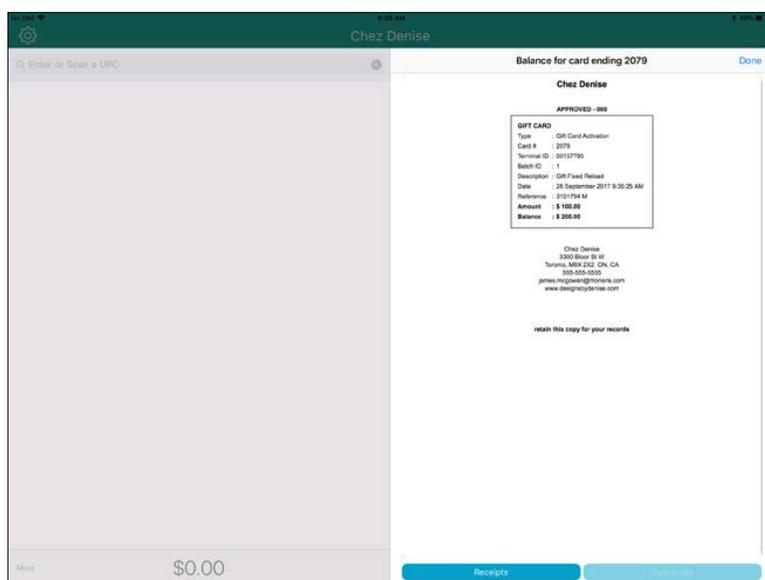
4. Do one of the following:
 - If you're activating one gift card, continue to step 5.
 - If you're activating more than one gift card, repeat steps 2 and 3 to add other gift cards to the sale.
 - If you are selling multiple gift cards for the same value (e.g., selling three gift cards at \$25 each), you can tap the line containing the gift card, and in the right pane, tap the + symbol to increase the quantity. Tap **Update** at the top of the right pane when finished.
5. Add other products to the bill as required. When the customer is ready to pay, proceed to step 6.
6. Tap the **Shopping Cart** button () in the top right corner of the Sale screen.
7. Process the payment for the transaction:
 - a. Tap the payment type the customer is using on the right pane.
 - b. Once you are done accepting payment, tap **Done** on the right pane.
 - c. Select the receipt output options. See *Receipt output options* on page 22 for more information.

The Activation screen reappears with the number of cards ready for activation and their values.



8. Activate the gift card:
 - If you are using a Moneris PIN Pad:
 - a. Tap the **Swipe Card on PIN Pad** button.
The PIN Pad displays SWIPE CARD GLISSER LA CARTE.
 - b. Swipe the gift card through the PIN Pad's magnetic stripe reader.
A "Gift Card" popup appears.
 - c. Tap inside the **CVD** field and enter the gift card's 3-digit CVC value (printed on the back of the gift card).

- d. Optional: If the “Gift Card” popup contains a **Coupon Code** field, enter the coupon (discount) code into the field.
 - e. Tap **Done** at the top of the “Gift Card” popup.
 - f. The PIN Pad processes the gift activation and returns to the WELCOME/BONJOUR screen. The Sale screen displays the gift activation receipt on the left pane. Proceed to step 9.
- If you are manually keying in the gift card number:
 - a. Tap inside the **Enter or Scan a Card Number** field and key in the gift card number using the on-screen numberpad, and tap **Done** when finished.
 - b. Tap the **Process Manually** button.
A “Gift Card” popup appears.
 - c. Tap inside the **CVD** field and enter the gift card’s 3-digit CVC value (printed on the back of the gift card).
 - d. Optional: If the “Gift Card” popup contains a **Coupon Code** field, enter the coupon (discount) code into the field.
 - e. Tap **Done** at the top of the “Gift Card” popup.
 - f. The PAYD Pro Plus App processes the gift activation and returns to the Sale screen, which displays the gift activation receipt on the left pane. Proceed to step 9.



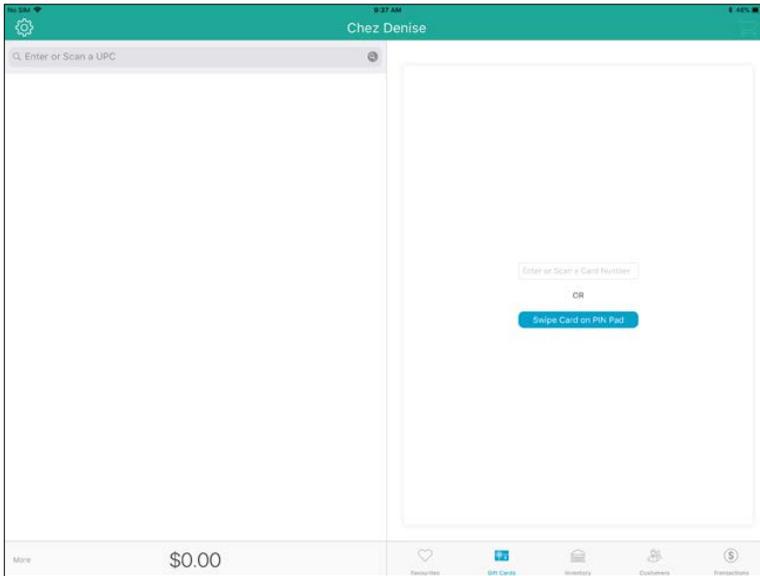
9. Tap the **Receipts** button at the bottom of the right pane.
10. Select your receipt output. See *Receipt output options* on page 22 for more information.
11. Tap **Done** to complete the activation.
12. If you are activating or reloading more than one gift card, the Activation screen appears again and you will be prompted to activate the next gift card at the specified value. Repeat steps 8 – 11 as necessary to activate or reload all the gift cards the customer paid for.

Checking the balance of an activated gift card

At any time, you can check the balance of an activated gift card.

1. On the Sale screen, tap the **Gift Cards** button at the bottom of the right pane.

The Gift Card screen appears on the right pane.



2. Check the balance of the gift card:

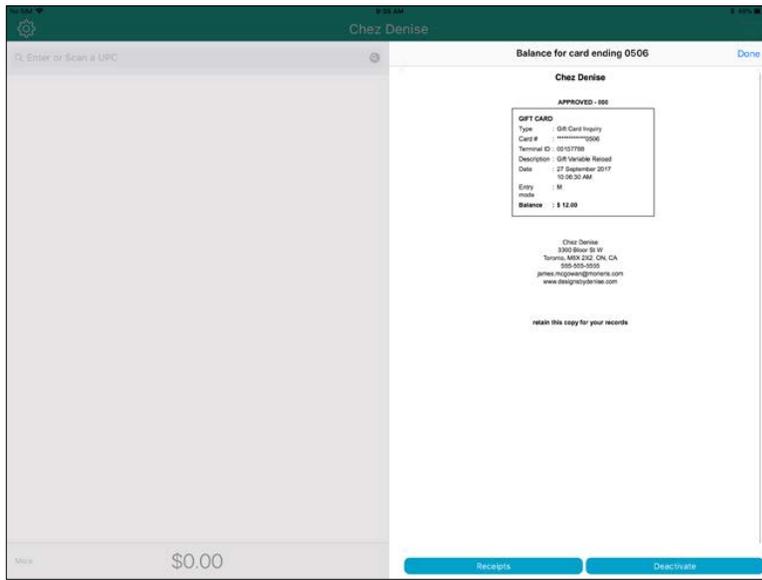
- If you are using a Moneris PIN Pad:
 - a. Tap the **Swipe Card on PIN Pad** button.

The PIN Pad displays SWIPE CARD GLISSER LA CARTE.
 - b. Swipe the gift card through the PIN Pad’s magnetic stripe reader.

A “Gift Card” popup appears.
 - c. Tap inside the **CVD** field and enter the gift card’s 3-digit CVC value (printed on the back of the gift card).
 - d. Tap **Done** at the top of the “Gift Card” popup.
 - e. The PIN Pad returns to the WELCOME/BONJOUR screen. The Gift Cards screen displays the current gift card balance on the right pane. Proceed to step 3.
- If you are manually keying in the gift card number:
 - a. Tap inside the **Enter or Scan a Card Number** field and key in the gift card number using the on-screen numberpad, and tap **Done** when finished.
 - b. Tap the **Process Manually** button.

A “Gift Card” popup appears.

- c. Tap inside the **CVD** field and enter the gift card's 3-digit CVC value (printed on the back of the gift card).
- d. Tap **Done** at the top of the "Gift Card" popup.
- e. The PAYD Pro Plus App returns to the Gift Cards screen and displays the current gift card balance on the right pane. Proceed to step 3.



3. Tap the **Receipts** button at the bottom of the right pane.

4. Select your receipt output:

- To print a copy of the receipt from the Bluetooth® receipt printer (if equipped), tap the **Print receipt**

button ().

- To email a copy of the receipt, tap the **Email receipt** button (). In the "Email Receipt" popup that appears, key in the customer's email address and tap **OK**.

- To send an SMS text copy of the receipt, tap the **Text receipt** button (). In the "Text Receipt" popup, key in the customer's mobile number and tap **OK**.

- To deactivate the gift card, tap **Deactivate**. See *Deactivating a gift card* on page 13 for more information.
- To exit the screen, tap **Done**.

Deactivating a gift card

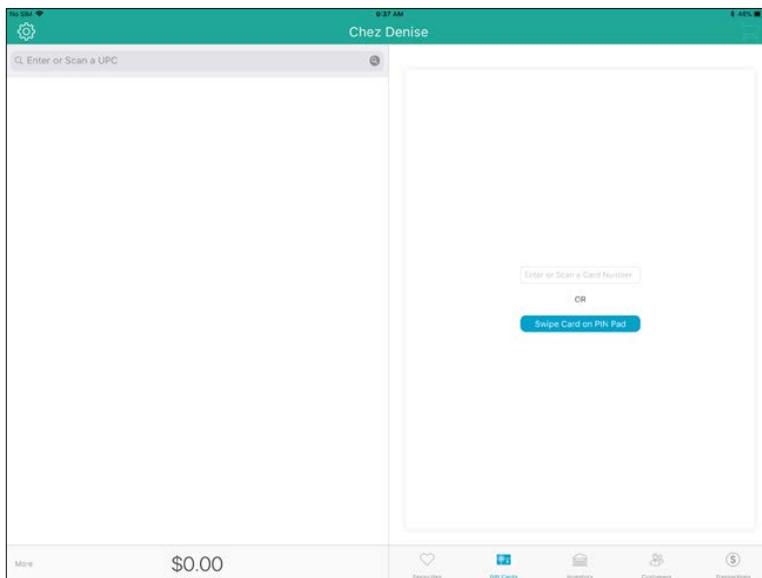
Once a gift card has been activated, it can be deactivated at any time. Follow the steps below to deactivate a gift card.

Note: Once a gift card is deactivated, it can **never** be activated again.

Note: Deactivating a gift card will take the gift card out of circulation, and can be used to increase security and prevent fraud.

1. On the Sale screen, tap the **Gift Cards** button at the bottom of the right pane.

The Gift Card screen appears.

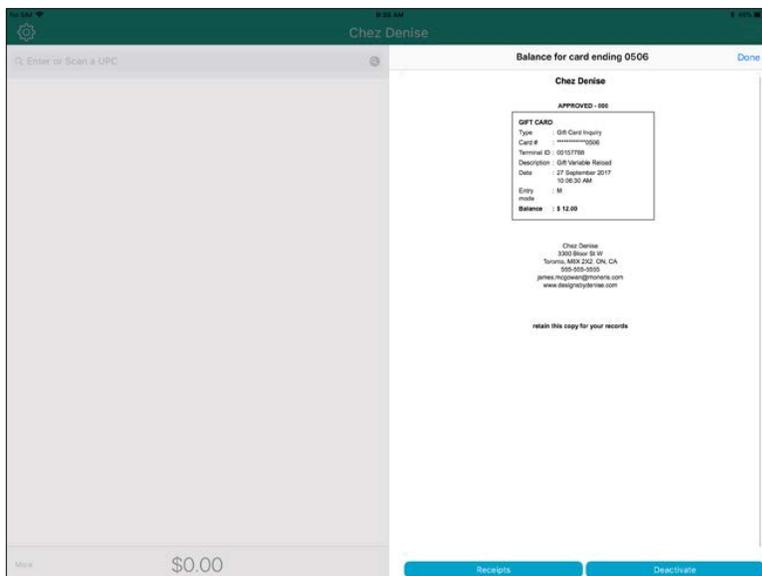


2. Enter the gift card to be deactivated:
 - If you are using a Moneris PIN Pad:
 - a. Tap the **Swipe Card on PIN Pad** button.

The PIN Pad displays SWIPE CARD GLISSER LA CARTE.
 - b. Swipe the gift card through the PIN Pad’s magnetic stripe reader.

A “Gift Card” popup appears.
 - c. Tap inside the **CVD** field and enter the gift card’s 3-digit CVC value (printed on the back of the gift card).
 - d. Tap **Done** at the top of the “Gift Card” popup.
 - e. The PIN Pad returns to the WELCOME/BONJOUR screen. The Gift Cards screen displays the current gift card balance on the right pane. Proceed to step 3.

- If you are manually keying in the gift card number:
 - a. Tap inside the **Enter or Scan a Card Number** field and key in the gift card number using the on-screen numberpad, and tap **Done** when finished.
 - b. Tap the **Process Manually** button.
A “Gift Card” popup appears.
 - c. Tap inside the **CVD** field and enter the gift card’s 3-digit CVC value (printed on the back of the gift card).
 - d. Tap **Done** at the top of the “Gift Card” popup.
 - e. The PAYD Pro Plus App returns to the Gift Cards screen and displays the current gift card balance on the right pane. Proceed to step 3.



3. Once the balance appears, tap the **Deactivate** button.
The “Gift Card” popup appears.
4. Tap inside the **CVD** field and enter the gift card’s 3-digit CVC value (printed on the back of the gift card).
5. Tap **Done** at the top of the “Gift Card” popup.
The PAYD Pro Plus App processes the deactivation, then an information popup appears informing you the gift card has been deactivated.
6. Tap **OK** to complete the operation.
7. Select your receipt output. See *Receipt output options* on page 22 for more information.
8. Tap **Done** at the top of the right pane to complete the deactivation.



Gift card transactions

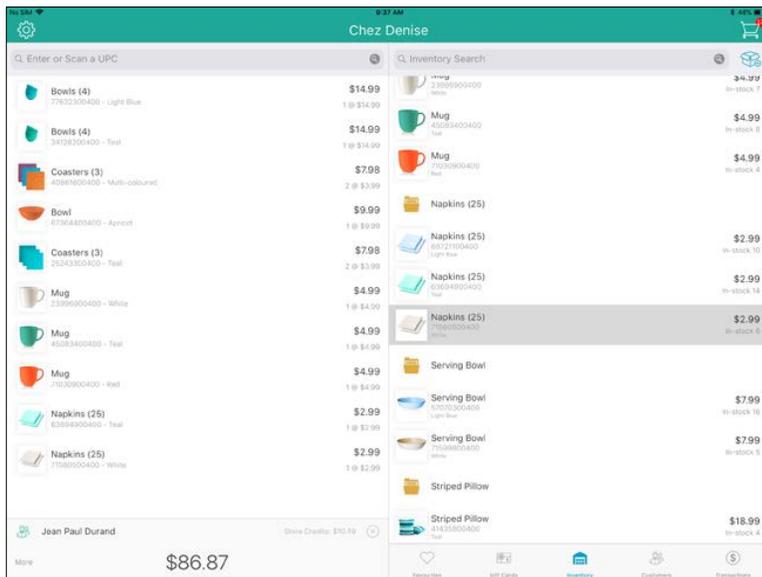
In this section, we go over everything you need to know to process transactions using Moneris gift cards.

Redeeming a gift card

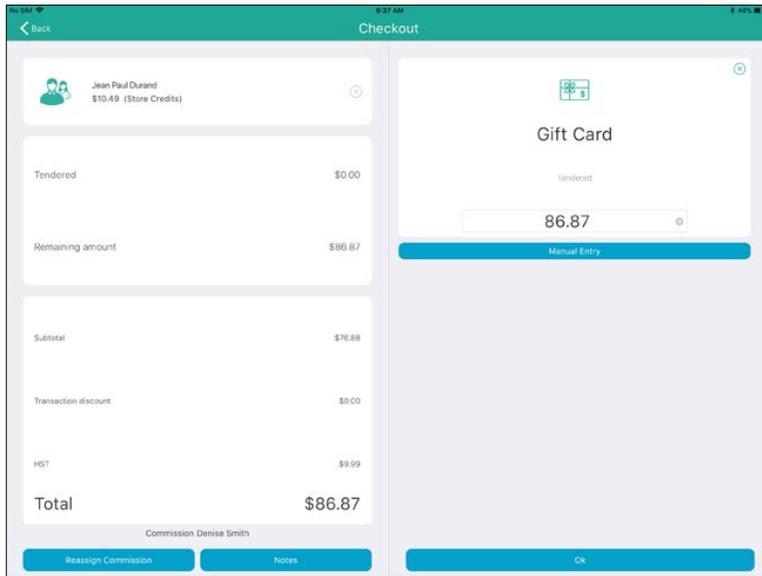
When processing a sale, you can redeem an activated gift card to pay for all or part of the transaction. Follow these steps to redeem a gift card.

Note: For instructions on processing a sale, refer to the **PAYD Pro Plus® Mobile Solution: Using PAYD Pro Plus for Apple® iPad® guide**, available for free download at moneris.com/support-PAYDProPlus-mobile.

1. In the Sale screen, populate the sale with the items the customer is buying, apply any discounts, change prices or quantities as necessary.



2. Once the sale is finalized, tap the **Shopping Cart** button () at the top of the right pane. The Checkout screen appears.
3. In the Checkout screen, tap **Gift Card**.



4. Redeem the gift card:

- If you are using a Moneris PIN Pad:
 - a. Tap the **OK** button at the bottom of the right pane.
The PIN Pad displays SWIPE CARD GLISSER LA CARTE.
 - b. Swipe the gift card through the PIN Pad’s magnetic stripe reader.
A “Gift Card” popup appears.
 - c. Tap inside the **CVD** field and enter the gift card’s 3-digit CVC value (printed on the back of the gift card).
 - d. Optional: If the “Gift Card” popup contains a **Coupon Code** field, enter the coupon (discount) code into the field.
 - e. Tap **Done** at the top of the “Gift Card” popup.
The transaction processes and the Checkout – Completed screen appears.
 - f. Proceed to step 5.
- If you are manually keying in the gift card number:
 - a. Tap the **Manual Entry** button.
The **Card Number** field appears.
 - b. Tap inside the **Card Number** field and key in the gift card number using the on-screen numberpad, and tap **Done** when finished.
 - c. Tap the **OK** button at the bottom of the right pane.
A “Gift Card” popup appears.
 - d. Tap inside the **CVD** field and enter the gift card’s 3-digit CVC value (printed on the back of the gift card).

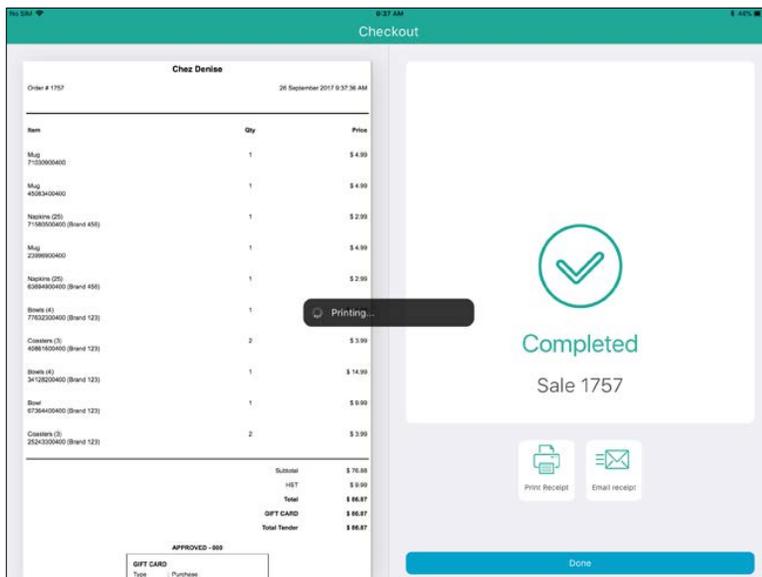
e. Optional: If the “Gift Card” popup contains a **Coupon Code** field, enter the coupon (discount) code into the field.

f. Tap **Done** at the top of the “Gift Card” popup.

The transaction processes and the Checkout – Completed screen appears.

g. Proceed to step 5.

5. In the Checkout – Completed screen, select your receipt output. See *Receipt output options* on page 22 for more information.



6. Tap **Done** to complete the sale (and redemption).

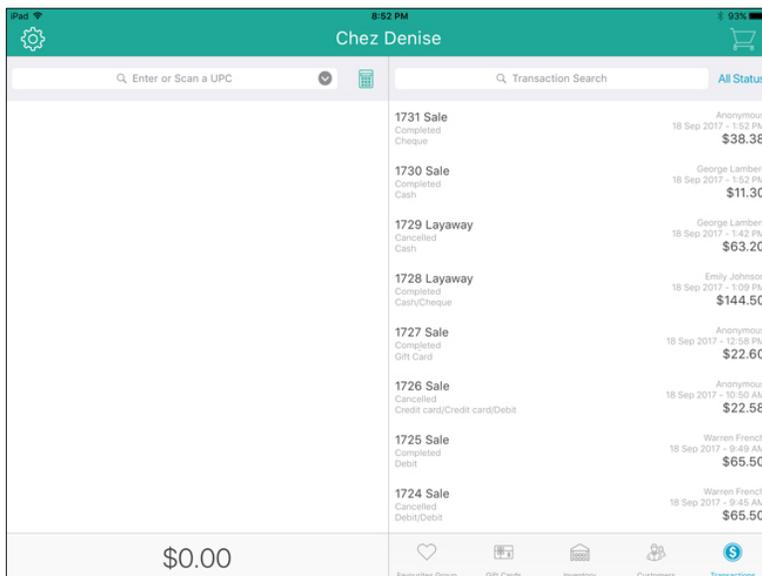
Refunding a sale in which a gift card has been redeemed

If a gift card has been redeemed during a sale, the sale can be refunded and the value can be returned to the gift card.

1. At the bottom right corner of the Sale screen, tap **Transactions**.
2. At the top of the right pane, use the on-screen keyboard to enter your search criterion into the **Transaction Search** field. Search by:
 - **Transaction ID**
 - **Date** (in YYYY/MM/DD format)
 - Customer **name**
 - Customer **phone number**
 - Customer **email address**.
3. Optional: Use the status selector at the top of the right pane to refine your search:
 - **All Status** – This is the default status selection, and will search for transactions of all statuses.OR
 - **Completed** – This will search for only completed transactions.
4. Once the criterion is entered into the **Transaction Search** field, tap the **Search** button on the on-screen keyboard.

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

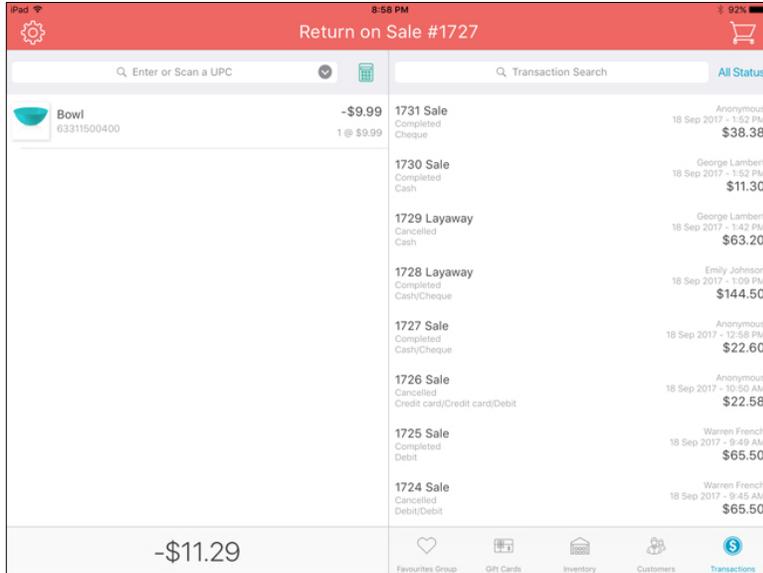
The results of the search appear below sorted numerically by receipt numbers.



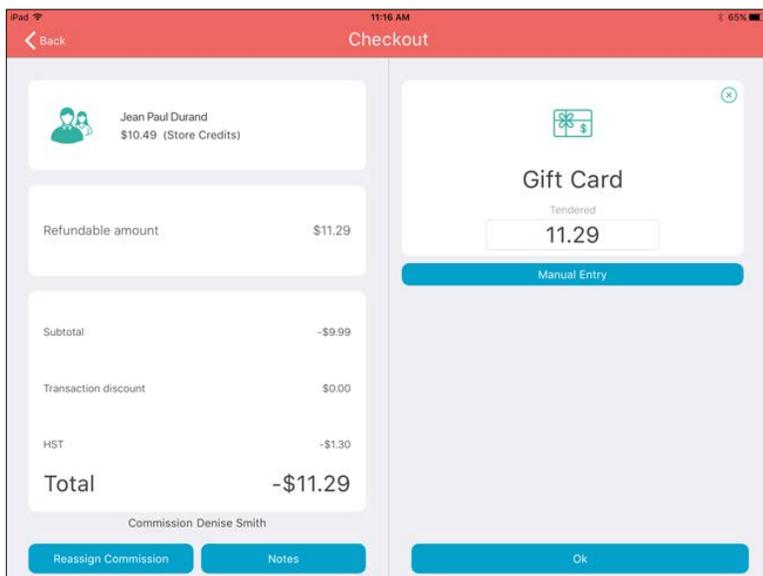
5. Once you locate the transaction, slide it from right to left revealing a **Return** button.
6. Tap the **Return** button.

The “Select product(s) to return” popup appears.

7. 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.
8. Repeat step 7 for other items the customer is returning as necessary.
9. Tap **Done** in the top right corner of the “Select product(s) to return” popup to proceed with the return. In the left pane, you will see the items added in steps 7 and 8 listed as negative dollar amounts.



10. Tap the **Shopping Cart** button () at the top of the right pane. The Checkout screen appears.
11. Tap **Gift Card**.



12. Refund money to the gift card:

- If you are using a Moneris PIN Pad:
 - a. Tap the **OK** button at the bottom of the right pane.
The PIN Pad displays “SWIPE CARD GLISSER LA CARTE”.
 - b. Swipe the gift card through the PIN Pad’s magnetic stripe reader.
A “Gift Card” popup appears.
 - c. Tap inside the **CVD** field and enter the gift card’s 3-digit CVC value (printed on the back of the gift card).
 - d. Optional: If the “Gift Card” popup contains a **Coupon Code** field, enter the coupon (discount) code into the field.
 - e. Tap **Done** at the top of the “Gift Card” popup.
The transaction processes and the Checkout – Completed screen appears.
 - f. Proceed to step 13.
- If you are manually keying in the gift card number:
 - a. Tap the **Manual Entry** button.
The **Card Number** field appears.
 - b. Tap inside the **Card Number** field and key in the gift card number using the on-screen numberpad, and tap **Done** when finished.
 - c. Tap **OK** at the bottom of the right pane.
The “Gift Card” popup appears.
 - d. Tap inside the **CVD** field and enter the gift card’s 3-digit CVC value (printed on the back of the gift card).
 - e. Optional: If the “Gift Card” popup contains a **Coupon Code** field, enter the coupon (discount) code into the field.
 - f. Tap **Done** at the top of the “Gift Card” popup.
The transaction processes and the Checkout – Completed screen appears.
 - g. Proceed to step 13.

13. In the Return – Completed screen, select your receipt output. See *Receipt output options* on page 22 for more information.

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

The gift card’s value has been restored, and it can be redeemed for future purchases (see page 7).

Receipt output options

When you have completed a transaction as described in this guide (gift card activation, balance inquiry, refund etc.), you are presented with receipt output options depending on the way you have configured the PAYD Pro Plus App.

Note: In some instances, you may be required to tap the **Receipts** button at the bottom of the right pane to see the receipt output options.

- To print a copy of the receipt from the Bluetooth receipt printer (if equipped), tap the **Print receipt** button



- To email a copy of the receipt, tap the **Email receipt** button (). In the “Email Receipt” popup that appears, key in the customer’s email address and tap **OK**.



- To send an SMS text copy of the receipt, tap the **Text receipt** button (). In the “Text Receipt” popup, key in the customer’s mobile number and tap **OK**.



For more information on configuring the receipt output options, refer to the **PAYD Pro Plus® Mobile Solution: Configuration Guide** available at moneris.com/support-PAYDProPlus-mobile.

Troubleshooting gift card issues

If an issue or error message appears, and is listed in the table below, follow the instructions in the table. If the problem is still not resolved, call Moneris Customer Care toll-free at [1-855-423-PAYD \(7293\)](tel:1-855-423-PAYD).

Issue	Solution
<p>“Unable to retrieve the Gift card information at the moment. Please try again.” error when trying to perform a transaction with a Moneris gift card (e.g., Balance Inquiry, Activation, Redemption etc.).</p>	<p>Tap OK on this message, and try the transaction again. If the error persists, contact Moneris Customer Care toll-free at 1-855-423-PAYD (7293).</p>
<p>“Error This card cannot be used for refund transactions”</p>	<p>You have attempted to refund money to a gift card that has not been activated. Process the refund to another gift card, or refund to another tender type.</p>
<p>The gift card the customer is trying to redeem has a \$0 balance.</p>	<p>Perform a balance inquiry (see page 11). If the gift card does have a \$0 balance, it will need to be activated/reloaded (see page 7) before it can be redeemed.</p>
<p>The gift card does not have enough value to pay for an entire purchase.</p>	<p>The customer needs to use another payment type for the remaining amount owed (called a Split-tender payment). Refer to the PAYD Pro Plus® Mobile Solution: Using PAYD Pro Plus with Apple® iPad® guide available for free download at moneris.com/support-PAYDProPlus-mobile.</p>
<p>“Card already deactivated” error appears when trying to activate a gift card, or when performing a balance inquiry.</p>	<p>Some types of gift cards are not able to be reloaded (based on your Merchant Agreement with Moneris). If a non-reloadable gift card has been activated and redeemed, it cannot be reloaded. Also, deactivated gift cards cannot be reloaded.</p>



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, login to PAYD Administration and click 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 us on-site? 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** 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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