BE PAYMENT READY

Moneris Core® Wireless

V400m

Setting up Your Software
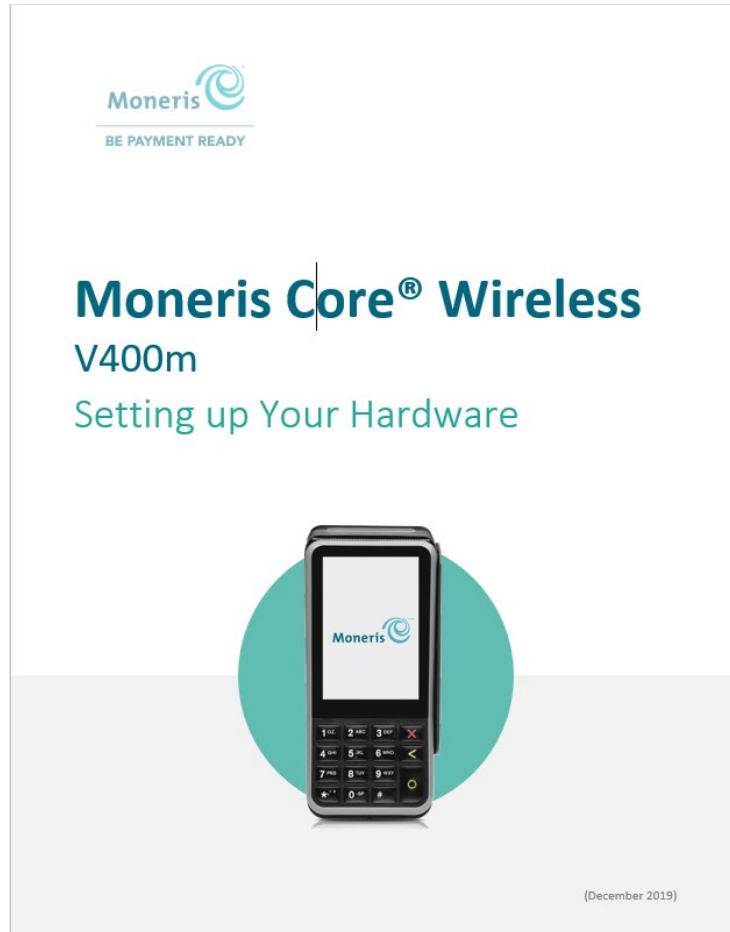
Contents

Before getting started

Before proceeding with software setup, you must set up your terminal hardware. If you have not done so, refer to the *Moneris Core® V400m Setting up Your Hardware* guide, available at **moneris.com/support-v400m**.
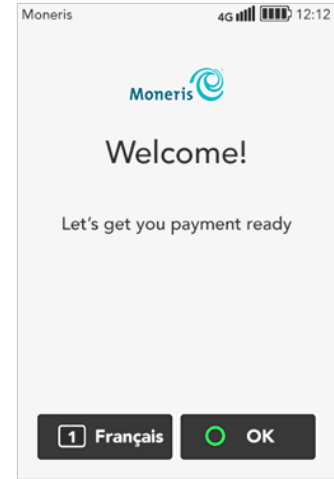
Software setup

To set up your terminal software quickly, simply respond to the prompts on screen. If you need help, follow these step-by-step instructions.

1. Tap **OK**.

   If the terminal is unable to connect to a cellular network (3G or 4G), refer to Troubleshooting terminal communication on page 16.

2. Wait while the terminal scans your environment for available Wi-Fi networks.

   Note: The terminal will display only Wi-Fi networks that are password protected. If your Wi-Fi network is unprotected, it will not appear on the list of available networks on the next screen.
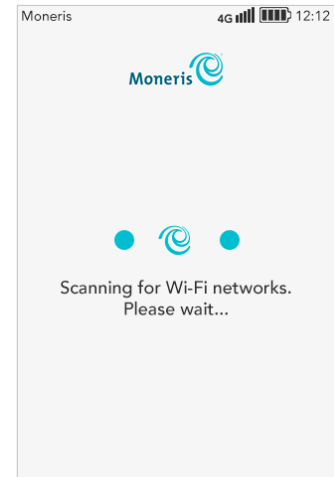
3. This screen shows the list of password-protected Wi-Fi networks found.

   Moneris recommends setting up a Wi-Fi network to complement the 4G network. As the terminal's location changes, it will automatically switch to the signal that is stronger.

   Choose what to do next:

   - To connect a Wi-Fi network from the list of available networks, tap a network and then go to step 4.
   - To scan again, tap **Scan** on the screen or press **1** on the keypad.
   - To manually add a Wi-Fi network, go to page 5.
   - If you want to continue the setup using 4G communication only, go to Securing your terminal on page 8. You will be able to add a Wi-Fi network after the software setup.
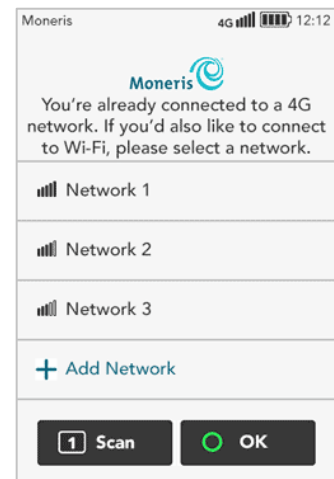
4. Provide the requested information:

- **Wi-Fi Password**: Tap the field, enter the Wi-Fi password, then tap **OK**.

   Note: The terminal will not connect to an unprotected network.

- **Advanced Settings**: To set up a static IP address, tap **Advanced Settings**, then go to Advanced Wi-Fi settings on page 6. Otherwise, go to the next step.

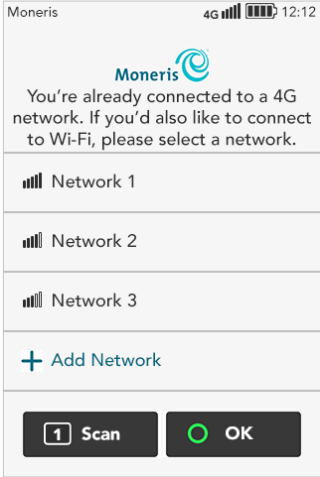5. Tap **OK** to connect to the Wi-Fi network you selected.
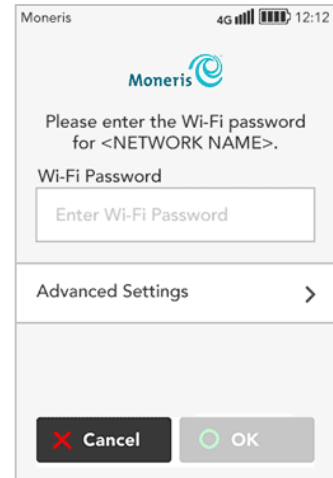
6. Wait while the terminal connects to Moneris to obtain your account settings.

   If the terminal is unable to connect to Moneris, refer to Troubleshooting terminal communication on page 16.
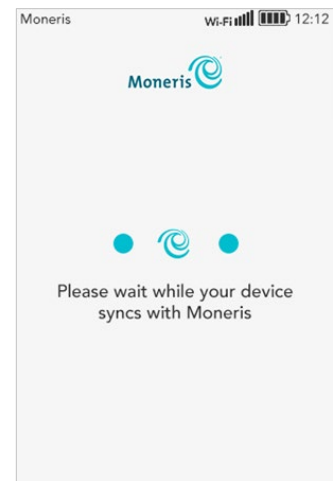
7. The next step is to set up a high security user ID and passcode. Go to the Securing your terminal section on page 8.

Manually add a Wi-Fi network

1. Tap **+ Add Network**.

2. Provide the requested information:

   - **Network Name**: Tap the field and enter the SSID.
   - **Network Password**: Tap the field and enter the network password.

     Note: The terminal will not connect to an un-protected network.

   - **Hidden network**: If the network is hidden, tap the toggle to enable this field.
   - **Advanced Settings**: To set up a static IP address, tap **Advanced Settings** then go to Advanced Wi-Fi settings on page 6. Otherwise, go to the next step.
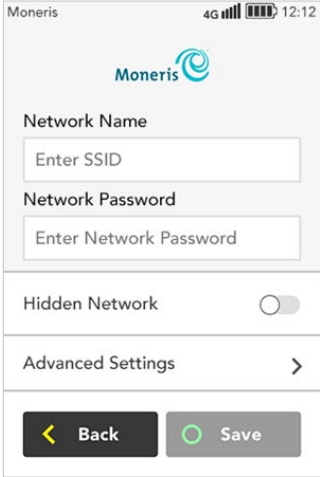
3. Tap **Save** to save your settings and connect to the Wi-Fi network.

4. Wait while the terminal connects to Moneris to obtain your account settings.

   If the terminal is unable to connect to Moneris, refer to Troubleshooting terminal communication on page 16.
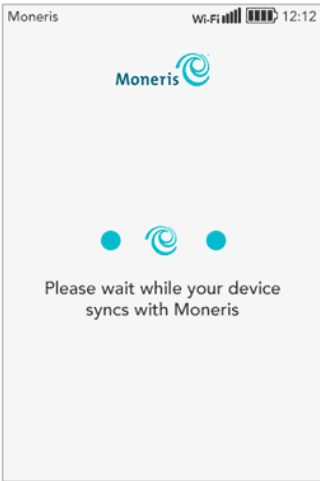
5. The next step is to set up a high security user ID and passcode. Go to the Securing your terminal section on page 8.

Advanced Wi-Fi settings

Your terminal uses dynamic IP addressing with automatic DNS as its default settings for Wi-Fi networks. To change these settings, tap **Advanced Settings** and follow the instructions below.

Set up static IP addressing

1. Under **IP Address Type**, tap the drop down menu and choose **Static IP**.
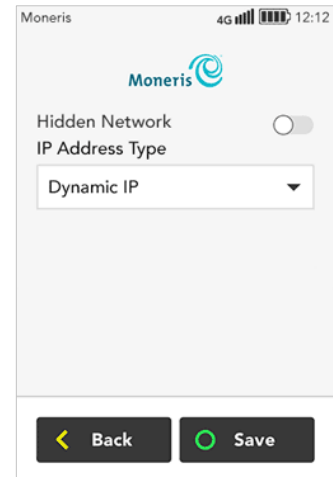
2. If your Wi-Fi network is not discoverable, tap the **Hidden Network** toggle to enable it.

3. Enter a value for each field:

   IP Address: Tap the field and enter the static IP address.
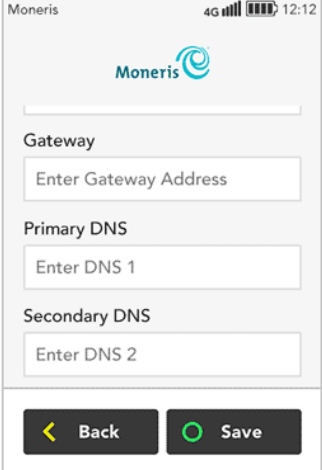   **Subnet Mask**: Tap the field and enter the subnet mask address.
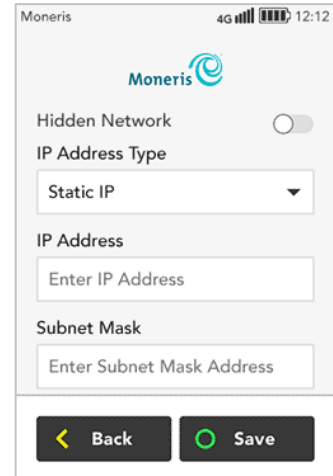
4. Scroll down and enter a value for the remaining fields:

   Gateway: Tap the field and enter the gateway address.
   Primary DNS: Tap the field and enter the address of the primary DNS.
   Secondary DNS: Tap the field and enter the address of the secondary DNS.

5. Tap **Save** when done. The terminal saves the information you entered and returns to the "network password" screen from which you accessed Advanced Settings.

6. Click one of the links below to return to the "network password" step in this guide to continue Wi-Fi setup.

   ▪ Connect to Wi-Fi network from list on page 4;
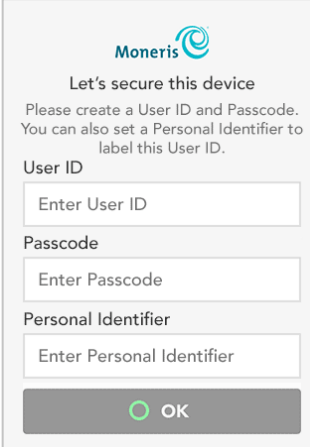   ▪ Manually add Wi-Fi network page 5.

Securing your terminal

A high security user ID and passcode are required to protect the terminal. Use this user ID/passcode to access protected transactions and edit protected settings on the terminal.

Note: If this is a replacement terminal, the user ID/passcode setup prompt will not appear. Moneris will download the high security user ID/passcode you created when setting up your previous terminal.
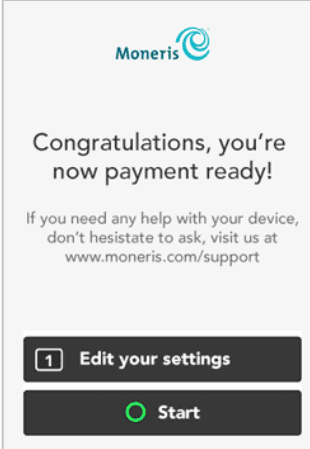
1. Tap the **User ID** field, enter a user ID consisting of 1 to 4 digits, then tap **OK**.

2. Tap the **Passcode** field, enter a passcode consisting of 4 to 10 digits, then tap **OK**.

   - You cannot use 3 or more consecutive numbers such as **123**6, **654**39, or 3 or more repeating numbers such as **999**6, **111**3.

3. Tap the **Personal Identifier** field, enter a name, then tap **OK**.

   - This field is optional. It can be letters or numbers.
   - It could be your name or employee number, or other descriptor such as Manager or Supervisor.

4. Tap **OK** at the bottom of the screen to create your high security user ID and passcode.

Congratulations, your terminal is payment ready!

5. Choose what to do next:

   - To edit the most common settings to ensure they match the needs of your business, tap **Edit your settings** and go to Edit your settings using the Quick Setup menu on page 10.
   - Enrol in Merchant Direct to access merchant reports. See page 9.
   - To continue without editing your settings, tap **Start**. You can always change terminal settings later. To learn more about your terminal and to start processing transactions, refer to the *Moneris Core® V400m Using Your Terminal* guide (available at **moneris.com/support-v400m**).

Enroll in Merchant Direct®

Merchant Direct is the Moneris online tool for accessing all of your merchant reports, including end-of-day reports. To sign up for Merchant Direct, follow these steps.

Note: *If you have already enrolled in Merchant Direct, you do not have to enroll again.*

1. Go to **moneris.com**.

2. In the top, right area of the screen, click **Login** and select **Merchant Direct**.
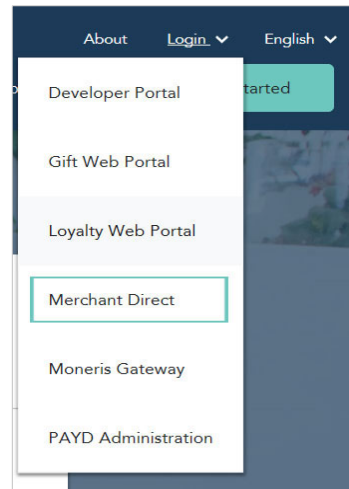
3. Click **Create Account**.
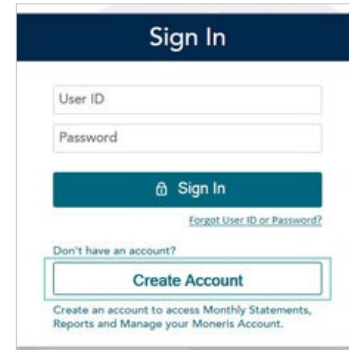
4. Fill in the fields in the online form to complete your enrolment.

Edit your settings using the Quick Setup menu

The Quick Setup menu appears when you tap **1 Edit your Settings** on the "Congratulations" screen. (After completing your initial setup, you can also access the Quick Setup menu from the Main menu of the terminal.)

1. Tap each menu to review the settings and change them if needed.

   Tip: To enable tip and set the tip options, refer to <u>Tip settings</u> below.

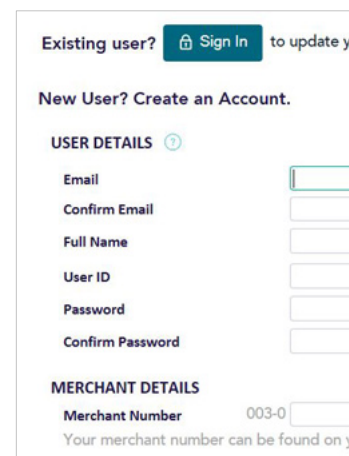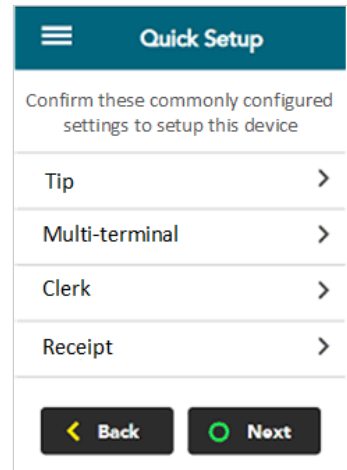   **Multi-terminal**: To enable support for multiple terminals, refer to <u>Multi-terminal settings</u> on page 11.

   Clerk: To enable and manage clerk IDs, refer to <u>Clerk settings</u> on page 12.

   Receipt: To set options for receipts, refer to <u>Receipt settings</u> on page 13.

Tip settings

2. This screen allows you to enable tip and set the tip options. Tap each toggle to enable or disable the setting.

   Tip Support: Enable this setting to prompt customers to leave a tip. Once you enable Tip Support the tip options will appear.

   Tip by Dollar: Enable this setting to allow customers to enter a tip as a dollar amount.

   Tip by Percent: Enable this setting to allow customers to enter a tip as a percentage of the total amount.

   Tip on Subtotal: Enable this setting to allow customers to leave a tip based on the pre-tax amount. This setting will be applied only when the terminal is in restaurant integration mode or semi-integrated mode.

   Tip Preset 1: Enable this setting to allow customers to enter a tip as a pre-set percentage. Tap the **Preset Value** field and enter a percentage (for example, 15), then tap **OK**.

   Tip Preset 2: Enable this setting to allow customers to enter a tip as a pre-set percentage. Tap the **Preset Value** field and enter the percentage; for example, 20. It must be higher than Tip Preset 1. Tap **OK**.

   Tip Preset 3: Enable this setting to allow customers to enter a tip as a pre-set percentage. Tap the **Preset Value** field and enter the percentage; for example, 25. It must be higher than Tip Preset 2. Tap **OK**.

   Tip Warning: Enable this setting to display a notification on screen when customers enter a tip that is *higher* than a specific percentage. It protects customers from data entry errors. Tap the **Preset Value** field and enter the
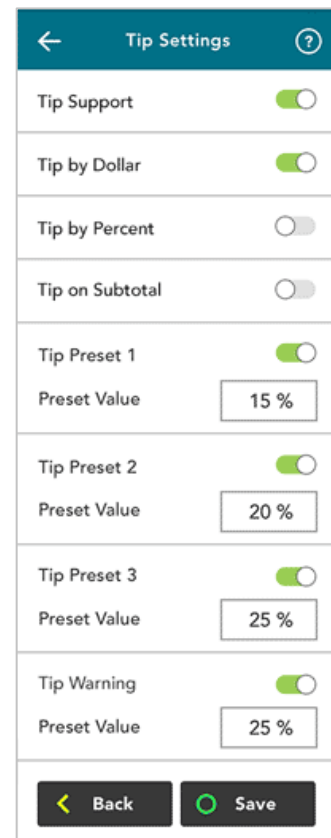
percentage; for example, 25. It must be equal to or higher than Tip Preset 3. Tap **OK**.

3. When you are finished setting all of the tip options, tap **Save**.

4. Tap **Next** to move to the next Quick Setup item.
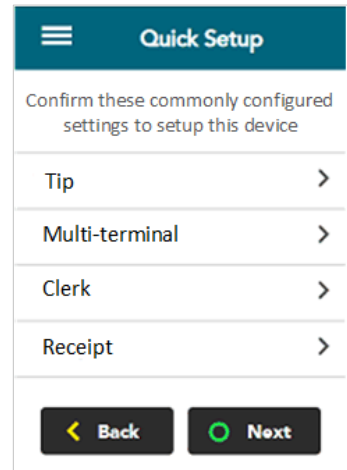
Multi-terminal settings

This screen allows you to enable multi-terminal batch close.

5. Tap each toggle to enable or disable the setting.

   Multi-Terminal Support: Turn this setting on if you want to be able to close the batch for multiple terminals at the same time. Once you enable Multi-Terminal Support the other options will appear.

   Single Terminal Support: Turn this setting on if you enabled multi-terminal support and you want the option of closing the batch for just one of your multiple terminals.

   Terminal Name: To assign a name to the terminal, tap **Terminal Name**, enter a descriptive name (for example, Bar1), then tap **OK**.

6. When you are finished with multi-terminal settings, tap **Save**.

7. Tap **Next** to move to the next Quick Setup item.
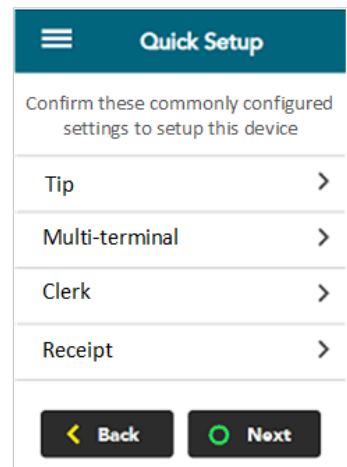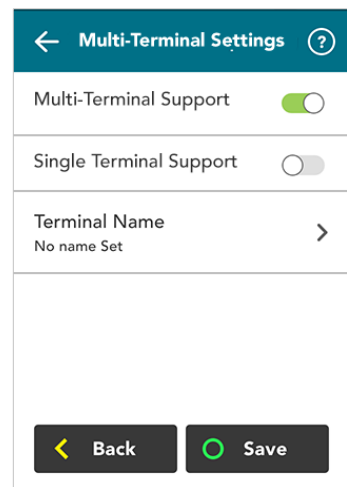
Clerk settings

Use this screen to enable clerk IDs and create a new clerk ID. Turning on clerk IDs allows you to identify which clerk processed a transaction. You can then generate reports such as transaction totals by clerk and tip totals by clerk.

8. Follow these steps.

   Enable Clerk IDs: Tap the toggle to enable clerk IDs.

   Show Clerk IDs: Tap this item to display the current list of clerk IDs. The terminal connects to Moneris to retrieve the list of clerks. Your terminal must be connected to the Moneris host.

   + Add Clerk ID: Tap + **Add Clerk ID** to add a new clerk. Key in a new clerk ID using 1 to 6 digits, then tap **Save**.

9. When you are finished with clerk ID settings, tap **Save**.

10. Tap **Next** to move to the next Quick Setup item
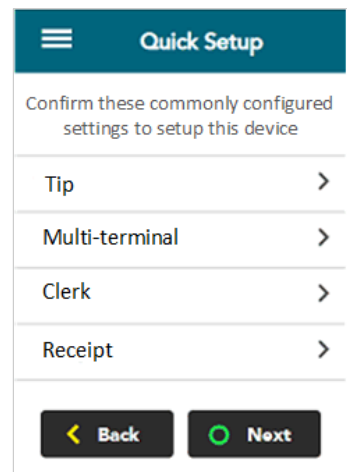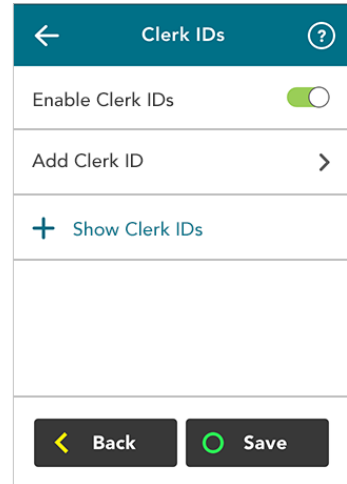
Receipt settings

This screen allows you to:

- enable the options for how a customer can receive their receipt (email, text, none, in addition to printing which is always available). If Cardholder Choice is turned off, the receipt will be printed by default;

- enable or disable specific options for customer receipts (for example, print and text);

- set the print delay (in seconds) between the customer and merchant copies being printed;

- specify the number of merchant receipt copies;

- set up or modify a header on your receipts;

- set up or modify a footer on your receipts.

11. To review or change the settings, follow these instructions.

Cardholder Choice: Tap the toggle to allow your customers to choose the format of their receipt or to choose no receipt.

The following options can be set only when Cardholder Choice is turned on. Tap the toggle beside each option to turn the option on or off.

Note: The option to print the receipt does not appear on the list since a printed receipt must always be available to the customer.

- **Email Receipt**: Enable this option to allow your customers to receive their receipt by email.

- **Text Receipt**: Enable this option to allow your customers to receive their receipt by text.

- **No Receipt**: Enable this option to allow your customers to choose not to receive a receipt.

If you disable these three options, the terminal will automatically print the customer receipt without prompting.

Print Delay: The print delay determines how long the terminal pauses between printing the customer receipt and printing the merchant receipt.

To change the default of 3 seconds, tap the **Print Delay** field, enter a new value (in seconds), then tap **OK**.

Number of Merchant Receipts: This setting determines how many copies of the merchant receipt are printed. To change the default, tap the field, select a new value, then tap **OK**.

*Note: A merchant receipt is always printed for transactions that require a customer signature, even when **Number of Merchant Receipts** is set to zero.*

Header: The header settings allow you to print information at the top of your receipts, such as your website address or other social media contacts. You do not need to enter the name of your business or your address in the header. This information will be included automatically on your receipts.

Note: Information you enter in the header will only appear on the receipt when printed from the terminal. It will not appear on the receipt if it is sent by text or by email to the customer.

To set up a header for your receipts, tap **Header**, choose a language, tap each field you want to fill out, enter the text you wish, then tap **OK**.

Footer: The footer settings allow you to print information at the end of your receipts, such as a holiday greeting (for example, Happy Mother's Day) or a message of appreciation (for example, Thank you for your business).

Note: Information you enter in the header will only appear on the receipt when printed from the terminal. It will not appear on the receipt if it is sent by text or by email to the customer.

To set up a footer for your receipts, tap **Footer**, choose a language, tap each field you want to fill out, enter the text you wish, and then tap **OK**.

12. When you are finished setting the receipt options, tap **Save.**

The Congratulations screen appears when you have reviewed all the Quick Setup options.

13. Tap **OK**.

14. Refer to the ***Moneris Core® V400m Using Your Terminal*** guide (available at **moneris.com/support-v400m**) for:

- an overview of the terminal hardware, the main menu, and the touch screen;
- instructions on how to perform transactions, change settings, run reports, close your batch, and more.
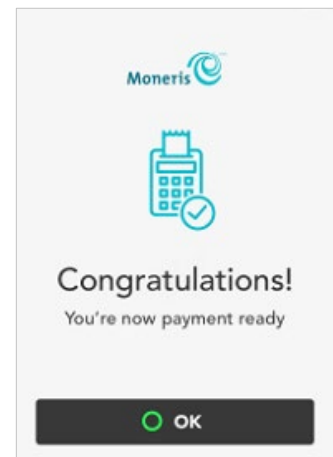
Wireless communication: 4G and Wi-Fi

Your terminal is capable of using both cellular (4G) and Wi-Fi networks to communicate with Moneris. When both are enabled, the terminal will use the signal that is stronger. If you set up a Wi-Fi connection, the terminal will communicate using Wi-Fi when your local network is in range. When your local network is out of range, for example, when you are making a delivery, the terminal will communicate via the cellular network. The terminal will switch back to Wi-Fi when the Wi-Fi signal is stronger.

Network indicator

Icon on the status bar	Description
4G	Terminal is currently connected to the authorized carrier's 4G wireless network.
3G	Terminal is currently connected to the authorized carrier's 3G wireless network (as fallback).
Wi-Fi	Terminal is currently connected to and using your local Wi-Fi network.

To test 4G/3G wireless communication:

1. While the terminal is powered on, confirm that the 4G/3G status icons listed above are displayed.

2. Confirm that there is sufficient signal strength (see the Signal strength indicator table below).

Signal strength indicator

Icon on the status bar	Description
	5 bars: Terminal is receiving a very strong signal from the network and can process transactions.
	4 bars: Terminal is receiving a strong signal from the network and can process transactions.
	3 bars: Terminal is receiving a good signal from the network and can process transactions.
	2 bars: Terminal is receiving a signal from the network and can process transactions but may take longer to complete them.
	1 bar: The terminal is receiving a weak signal and may not be able to process transactions and/or print receipts.
	0 bars: The terminal is not receiving any signal and CANNOT process transactions.

Troubleshooting terminal communication

A message will appear on the screen if an error occurs. In the table below, find the error message that appears on the terminal and try the solution. If the error message re-appears, contact Moneris Customer Care using one of the methods on the next page.

Error message	Solution
Unable to sync with Moneris host **Unable to sync with Moneris cloud** **Please make sure your device is connected to the Internet** **We're unable to connect**	The terminal cannot establish a connection to the Moneris host or cloud. For a **4G** connection, follow these steps: 1. Tap **OK** or press the green ◦ key to clear the error message. 2. Check the battery charge level and charge the battery if needed. Refer to "Battery use" on page 9 of the ***Moneris Core® V400m Setting up Your Hardware*** guide available at **moneris.com/support-v400m**. 3. Confirm that your terminal is connected to a mobile 4G/3G network by checking for the presence of the 4G/3G icon in the status bar. Refer to <u>Network status indicators</u> on page 15 for instructions. 4. Check the signal strength (number of bars) of the connection. You need at least 2 bars to communicate with Moneris. Refer to <u>Signal strength indicator</u> on page 15. 5. Restart terminal. Refer to the "Power off" and "Power on" instructions on page 9 of the ***Moneris Core® V400m Setting up Your Hardware*** guide. For a **Wi-Fi** connection, follow these steps: 1. Tap **OK** or press the green ◦ key to clear the error message. 2. Check the battery charge level and charge the battery if needed. Refer to "Battery use" on page 9 of the ***Moneris Core® V400m Setting up Your Hardware*** guide available at **moneris.com/support-v400m**. 3. Ensure that your Wi-Fi network is working. Contact your Internet Service Provider or your network helpdesk as needed. 4. Check the Wi-Fi setup on your terminal. Ensure the terminal is connected to the desired network using the correct configuration (for example, static IP vs. dynamic IP, manual DNS vs. auto DNS). As needed, review the steps under <u>Software Setup</u> on page 3. 5. Ensure that your terminal is within range of your wireless router or other network equipment. 6. Restart your terminal. Refer to the "Power off" and "Power on" instructions on page 9 of the ***Moneris Core® V400m Setting up Your Hardware*** guide.

Merchant support

If you need assistance with your Moneris Core® terminal, we're here to help, 24/7.

We're only one click away.

- Visit **moneris.com/support-v400m** to:
    - download additional copies of this guide and other resources;
    - consult the *Moneris V400m Online Manual* in WebHelp format to understand all the options on your terminal and how to use them
- Visit **shop.moneris.com** to purchase point-of-sale supplies and receipt paper
- Visit **insights.moneris.com** for business and payment news, trends, customer success stories, and quarterly reports & insights

Need us on-site? We'll be there.

One call and a knowledgeable technician can be on the way. Count on minimal disruptions to your business as our Field Services provide assistance with your payment terminals.

Can't find what you are looking for?

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

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

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V400m 4G + Wi-Fi : Setting up your software guide

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