

# USING PAYD PRO™



For Android™



BE PAYMENT READY



For more information  
and assistance:

**Web:** [getpayd.com/paydpro/support](https://getpayd.com/paydpro/support)

**Email:** [info@getpayd.com](mailto:info@getpayd.com)

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

Record your Moneris® merchant ID here:

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# Important: Read First

## Before you begin

This guide provides instructions on how to pair a Moneris PAYD™ PIN pad with an Android mobile device (referred to as “mobile device” or “device”); download and install the PAYD® App to the mobile device; initialize the PAYD PIN pad; and use the PAYD App to perform transactions.

**Note:** For instructions on how to use Moneris PAYD Administration to manage your PAYD Pro store and any other registered account users, refer to the Using Moneris PAYD Administration guide.

1. Ensure that you have the following components:

- Bluetooth-discoverable **mobile device**.
- **PAYD PIN pad and USB charging cable** (provided in your welcome kit).

**Note:** You will be required to plug this cable into a powered USB port (e.g., on a computer).

- The PAYD PIN pad hardware identifier (“PAYD PIN pad ID”) is an 8-digit alpha-numeric code starting with “**16**” (e.g., “**16012345**”), which is printed on a white label affixed to the underside of the PAYD PIN pad:



You will be asked to refer to this PAYD PIN pad ID in the *Hardware setup* steps on the following pages.

2. If you are activating your PAYD Pro store, ensure that you have your **Merchant ID** and **Store ID** (refer to your Moneris Welcome e-mail for these IDs).

3. Do one of the following:

- If you have all the required elements, go to step 4.
- If you do not have the required elements, please contact us: call **1-855-423-PAYD (7293)** or email [info@getpayd.com](mailto:info@getpayd.com).

4. Refer to the appropriate pairing option (see below and page 6) and follow the instructions to pair the PAYD PIN pad with your mobile device.

### Pairing option 1:

- If you want to **pair a new PAYD PIN pad** (that has never been set up and initialized) **with an Android mobile device that has never been paired with a PAYD PIN pad**: Proceed to *Hardware setup* on page 7.

### Pairing option 2:

- If you want to pair a **replacement PAYD PIN pad** (that has never been set up and initialized) **with an Android mobile device that is currently paired with an initialized PAYD PIN pad**: Proceed to *Pairing a replacement PAYD PIN pad with your mobile device* on page 17.

### Pairing option 3:

- If you want to **pair an initialized PAYD PIN pad with a different Android mobile device**, i.e., one which has never been paired with the initialized PAYD PIN pad: Proceed to *Pairing an initialized PAYD PIN pad with a different mobile device* on page 13.

**Note:** The PAYD PIN pad can only be used to perform transactions with one mobile device at a time. If you follow these steps to pair the PAYD PIN pad with a different mobile device, the PAYD PIN pad will lose its Bluetooth® connection to the first device. You will not be able to perform transactions with the first device until you restore its Bluetooth connection to the PAYD PIN pad (see Pairing option 4 below or Pairing option 6 on page 6).

### Pairing option 4:

- If you want to **restore an initialized PAYD PIN pad’s Bluetooth connection to an Android mobile device with which the PAYD PIN pad has previously been paired**: Proceed to *Restoring a Bluetooth connection between an initialized PAYD PIN pad and a mobile device* on page 15.

### Pairing option 5:

- If you want to **move an initialized PAYD PIN pad to a new Apple® iPad®, iPhone® or iPod touch®**, i.e., one which has never been paired with the initialized PAYD PIN pad: Refer to the *Using PAYD Pro for Apple iPad, iPhone, and iPod touch* guide; follow *Pairing option 1* on page 5 of that guide.

### Pairing option 6:

- If you want to **restore an initialized PAYD PIN pad's Bluetooth connection to an Apple iPad, iPhone or iPod touch with which the PAYD PIN pad has previously been paired**: Refer to the *Using PAYD Pro for Apple iPad, iPhone, and iPod touch* guide; follow *Pairing option 4* on page 5 of that guide.

# Hardware setup

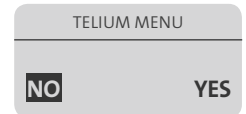
## 1 Power up the PAYD PIN pad

- Plug the USB charging cable into the micro-USB port on the PAYD PIN pad (see page 36).

**IMPORTANT: Use the USB charging cable provided with the PAYD PIN pad. Failure to do so may affect the operability of or cause damage to the PAYD PIN pad.**

- Plug the other end of the charging cable into a powered USB port (e.g., on a computer).
- Wait while the PAYD PIN pad beeps and powers up.

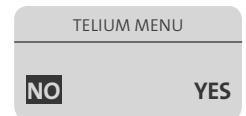
- When the “TELIUM MENU” displays, set the PAYD PIN pad aside and allow it to charge for 3 hours.
- After 3 hours have elapsed, proceed to step 2 (*Configure the PAYD PIN pad's optional settings*) below.



## 2 Configure the PAYD PIN pad's optional settings

**Note:** Leave the PAYD PIN pad connected to an external power source while you perform these setup steps.



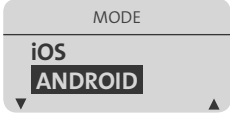

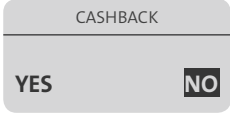

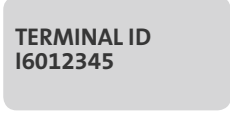

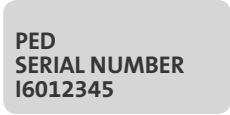
- On the “TELIUM MENU” screen, press **F1** to select **NO**.

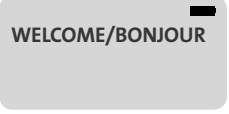


- When the “LANGUAGE/ LANGUE” screen displays, press **F1** to select **ENGL**.





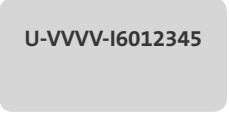
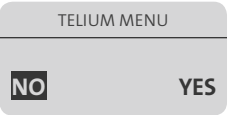
**Note:** Sets the default screen text to display in English.



<p>c. When the “CONTACTLESS READER” screen displays, press <b>F1</b> to select <b>ENABLE</b>.</p> <p><b>Note:</b> Enables the internal contactless reader for contactless transactions.</p>	
<p>d. When the “MODE” screen displays, press <b>F1</b> to scroll to <b>ANDROID</b>, and then press the green  key.</p> <p><b>Note:</b> Enables the PAYD PIN pad to be paired with an Android mobile device.</p>	
<p>e. When the “BEEP” screen displays, press <b>F1</b> to select <b>ON</b>.</p> <p><b>Note:</b> Sets the PAYD PIN pad to beep at the end of a transaction to remind the customer to remove their chip card from the chip reader.</p>	
<p>f. When the “CASHBACK” screen displays, press <b>F4</b> to select <b>NO</b>.</p> <p><b>Note:</b> This feature is not supported and must be disabled.</p>	
<p>g. If the “TERMINAL ID” screen displays, press the green  key to continue.</p>	
<p>h. Wait for the “PED SERIAL NUMBER” screen to display.</p> <p><b>Note:</b> The PED SERIAL NUMBER is an 8-digit alpha-numeric code that will also display on your mobile device’s Bluetooth menu once you have paired the device with the PAYD PIN pad. This code is used as the PAYD PIN pad ID and is printed on a label affixed to the underside of the PAYD PIN pad (see page 4).</p> <p>i. Press the green  key to continue.</p>	

<p>j. When the “WELCOME/BONJOUR” screen displays, proceed to step 3 (Ready the PAYD PIN pad and your mobile device for Bluetooth pairing) below.</p>	
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### 3 Ready the PAYD PIN pad and your mobile device for Bluetooth pairing

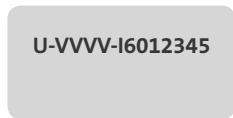
<p>a. Power on your mobile device.</p> <p>b. Ensure Bluetooth is turned on, your mobile device is discoverable, and the Bluetooth menu is displayed.</p> <p>c. Set your mobile device aside.</p> <p>d. Ensure that the PAYD PIN pad is connected to the external power source via the USB charging cable.</p> <p>e. Simultaneously press and hold down both the yellow  key and the  key.</p> <p>f. Wait while the PAYD PIN pad reboots.</p>	
<p>g. As soon as the version screen displays (shown here), press the red  key, and then quickly press the green  key.</p> <p><b>Note:</b> The version screen displays for 10 seconds.</p>	
<p>h. Do one of the following:</p> <ul style="list-style-type: none"> <li>If you see the “WELCOME/BONJOUR” screen again, repeat steps 3e-g of this procedure.</li> <li>If you now see the “TELIUM MENU” screen (shown here), go to step i.</li> </ul>	
<p>i. Do one of the following:</p> <ul style="list-style-type: none"> <li>If you are pairing a new (i.e., never before initialized) PAYD PIN pad, proceed to step 4 (Enable SSP mode) on page 10.</li> <li>If you are pairing an initialized PAYD PIN pad with a mobile device that has never been paired with the PAYD PIN pad, proceed to step 5 (Pair the PAYD PIN pad with your mobile device) on page 11.</li> <li>If you are restoring a previous Bluetooth connection between the PAYD PIN pad and your mobile device, proceed to step 3 (Remove the Android mobile device name from the PAYD PIN pad’s Bluetooth registry) on page 14.</li> </ul>	

#### 4 Enable SSP mode

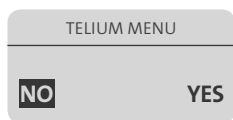
- On the “TELIUM MENU” screen, press **F4** (YES).  
The “PRESS F KEY” screen appears.
- Press the **F** key.  
The “FUNCTIONS” menu displays.
- Press the **2** key to select **BT PAIRING**.
- Press the **6** key to select **Security Mode**.
- Press the **F2** key to highlight **SSP(4)**, then press the green **O** key.
- Wait while the PAYD PIN pad reboots back to the “WELCOME/BONJOUR” screen.
- Ensure that the PAYD PIN pad is connected to the external power source via the USB charging cable.
- Simultaneously press and hold down both the yellow **<** key and the **.,#\*** key.
- Wait while the PAYD PIN pad reboots.

- As soon as the version screen displays (shown here), press the red **X** key, and then quickly press the green **O** key.

**Note:** The version screen displays for 10 seconds.



- Do one of the following:
  - If you see the “WELCOME/BONJOUR” screen again, repeat steps 4h-j of this procedure.
  - If you now see the “TELIUM MENU” screen (shown here), proceed to step 5 (Pair the PAYD PIN pad with your mobile device) on page 11.



#### 5 Pair the PAYD PIN pad with your mobile device

- On the “TELIUM MENU” screen, press **F4** (YES).  
The “PRESS F KEY” screen displays.
- Press the **F** key.  
The “FUNCTIONS” menu displays.
- Press the **2** key to select the **BT PAIRING**.  
The “BT PAIRING” menu displays.
- Press the **1** key to select **Pair device (Android)**.
- On the PAYD PIN pad, the “Waiting for pairing...” screen displays.
- Make your mobile device actively scan for available devices with which to pair.
- When you see the 8-digit PAYD PIN pad ID (e.g., “**16023456**”) on your mobile device, tap the ID.
- Wait for the Bluetooth pairing request with a 6-digit pass key to display on both the PAYD PIN pad and your mobile device.

**Note:** The 6-digit pass key should be the same on the PAYD PIN pad and your mobile device.

- On your mobile device, tap **OK** (or **Pair**); then on the PAYD PIN pad, press the green **O** key.
- On the PAYD PIN pad, wait for “Pairing Success” to display followed by the “BT PAIRING” menu.

**Note:** If the PAYD PIN pad displays “Pairing failure”, go back to step 5d and retry the pairing steps). If you continue to experience pairing issues, try pairing in Legacy mode (visit the Knowledgebase at [getpaid.com/paydpro/support](https://getpaid.com/paydpro/support), and search for “Bluetooth pairing with legacy mode”).

- When the “BT PAIRING” menu displays, press the red **X** key.
- Wait while the PAYD PIN pad reboots back to the “WELCOME/BONJOUR” screen.
- Proceed to step 6 (Confirm that your mobile device is successfully paired with the PAYD PIN pad) on page 12.

## 6 Confirm that your mobile device is successfully paired with the PAYD PIN pad

- On your mobile device's Bluetooth menu, confirm that the 8-digit PAYD PIN pad ID (e.g., "16012345") of the PAYD PIN pad you have just set up is shown as "Paired".

**Note:** This PAYD PIN pad ID can also be found on a label affixed to the underside of the PAYD PIN pad (see page 4).

- Once you have confirmed that the PAYD PIN pad you have just set up is paired with your mobile device, proceed to step 7 (Charge the PAYD PIN pad's battery to full capacity) below.

## 7 Charge the PAYD PIN pad's battery to full capacity

- Leave the USB charging cable plugged into the PAYD PIN pad and the external power source until the PAYD PIN pad's battery is fully charged.

**Note:** It may take up to 3 hours to fully charge the battery depending on the current charge status. Once the battery is fully charged, the icon in the upper right corner of the PAYD PIN pad's screen displays solid black (■).

**IMPORTANT: Use the USB charging cable provided to work with the PAYD PIN pad. Failure to do so may affect the operability of or cause damage to the PAYD PIN pad.**

- Once the battery is fully charged, do one of the following:
  - If you need to activate your PAYD Pro store, proceed to *Activating your PAYD Pro store* on page 18.
  - If your PAYD Pro store is already activated, proceed to *Downloading and installing the PAYD App from Google Play* on page 19.

## Pairing an initialized PAYD PIN pad with a different mobile device

### 1 Ready your mobile device for Bluetooth pairing

- Power off the mobile device with which the PAYD PIN pad is currently paired.
- Power on the mobile device with which you want to pair the PAYD PIN pad.
- Ensure Bluetooth is turned on, your mobile device is discoverable, and the Bluetooth menu is displayed.
- Set this mobile device aside, and proceed to step 2 (Access the initialized PAYD PIN pad's Telium menu) below.

### 2 Access the initialized PAYD PIN pad's Telium menu

- If the PAYD PIN pad is not already connected to an external power source via the USB charging cable, connect it now.
- When the "WELCOME/BONJOUR" screen displays, simultaneously press and hold down both the yellow <img alt="yellow left arrow key" data-bbox="715 555 735 575"/> key and the <img alt="black key with comma and hash symbols" data-bbox="805 555 825 575"/> key.
- Wait while the PAYD PIN pad reboots.

- As soon as the version screen displays (shown here), press the red <img alt="red key with X symbol" data-bbox="615 635 635 655"/> key, and then quickly press the green <img alt="green key with circle symbol" data-bbox="585 655 605 675"/> key.

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**Note:** The version screen displays for 10 seconds.

- Do one of the following:
  - If you see the "WELCOME/BONJOUR" screen again, repeat steps 2a-d of this procedure.
  - If you now see the "TELIUM MENU" screen (shown here), proceed to step 3 (Remove the Android mobile device name from the PAYD PIN pad's Bluetooth registry) on page 14.

TELIUM MENU

NO

YES



### 3 Remove the Android mobile device name from the PAYD PIN pad's Bluetooth registry

- On the PAYD PIN pad's "TELIUM MENU" screen, press **F4** to select **YES**.  
The "PRESS F KEY" screen displays.
- Press the **F** key.  
The "FUNCTIONS" menu displays.
- Press the **3** key to select **Remove paired device**.  
The "REMOVE DEVICE" menu displays.
- Locate the name listing of the currently paired Android device. (e.g., may appear as **#-your mobile device's name**), and press the key representing the number (**#**) beside the name.
  - If the message "No paired device" appears, go to step e.
- When "BT PAIRING" menu displays, proceed to step 5 (*Pair the PAYD PIN pad with your mobile device*) on page 11, and continue at step d.

## Restoring a Bluetooth connection between an initialized PAYD PIN pad and a mobile device

### 1 Ready your mobile device for Bluetooth pairing

- Power off the mobile device with which the PAYD PIN pad is currently paired.
- Power on the mobile device to which you want to restore the connection with the PAYD PIN pad.
- Ensure Bluetooth is turned on, the mobile device is discoverable, and the Bluetooth menu is displayed.
- Set this mobile device aside, and proceed to step 2 (*Access the initialized PAYD PIN pad's Telium menu*) below.

### 2 Access the initialized PAYD PIN pad's Telium menu

- If the PAYD PIN pad is not already connected to an external power source via the USB charging cable, connect it now.
- When the "WELCOME/BONJOUR" screen displays, simultaneously press and hold down both yellow **<** key and the **.,#** key.
- Wait while the PAYD PIN pad reboots.

- As soon as the version screen displays (shown here), press the red **x** key, and then quickly press the green **o** key.

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**Note:** The version screen displays for 10 seconds.

- Do one of the following:
  - If you see the "WELCOME/BONJOUR" screen again, repeat steps 2a-d of this procedure.
  - If you now see the "TELIUM MENU" screen (shown here), go to step f.

TELIUM MENU

NO

YES


f. To restore a PAYD PIN pad connection...

• **...from one Android mobile device to another Android device:**

Proceed to step 3 (*Remove the Android mobile device name from the PAYD PIN pad's Bluetooth registry*) on page 14.

• **...from an Apple iPad, iPhone, or iPod touch to an Android mobile device:**



Go to step g.

g. Press the red  key, and wait while the PAYD PIN pad reboots back to the "WELCOME/BONJOUR" screen.



h. Proceed to step 3 (*Access the initialized PAYD PIN pad's Telium menu*) below.

### 3 Access the initialized PAYD PIN pad's Telium menu

a. Ensure that the PAYD PIN pad is connected to an external power source via the USB charging cable.

b. When the "WELCOME/BONJOUR" screen displays, simultaneously press and hold down both the yellow  key and the  key.

c. Wait while the PAYD PIN pad reboots.

d. As soon as the version screen displays (shown here), press the red  key, and then quickly press the green  key.



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e. Do one of the following:

- If you see the "WELCOME/BONJOUR" screen again, repeat steps 3a-d of this procedure.
- If you now see the "TELIUM MENU" screen (shown here), proceed to step 2 (*Configure the PAYD PIN pad's optional settings*) on page 6.



TELIUM MENU

NO

YES

## Pairing a replacement PAYD PIN pad with your mobile device

### 1 Remove the older PAYD PIN pad from your mobile device's Bluetooth registry

a. Open your mobile device's Bluetooth menu.

b. Make your mobile device forget the 8-digit PAYD PIN pad ID of the older PAYD PINpad that you are replacing and will no longer use.

**Note:** The 8-digit ID can be found on a label affixed to the underside of the older PAYD PIN pad (see page 4).

c. If the PAYD App is open and/or you are signed in, close the PAYD App.

d. Set your mobile device aside.

e. Power off the disused PAYD PIN pad if it is not already powered off (see page 40).

f. Set the disused PAYD PIN pad aside (do not attempt to use it again).

g. Pair the replacement PAYD PIN pad with your mobile device (proceed to *Hardware setup* on page 7).

# Setting up the PAYD App on your mobile device

## Activating your PAYD Pro store

1. Visit [getpayd.com/activate](https://getpayd.com/activate).
2. In the **Merchant ID** and **Store ID** fields, enter your Merchant ID and Store ID (refer to your Moneris Welcome e-mail for these IDs).\*
3. Tap **Next**.
4. In the **First name** and **Last name** fields, enter your first name and last name.\*
5. In the **Email** field, enter your e-mail address.\*  
***Note:** Once you have successfully completed the activation steps, a confirmation e-mail will be sent to this address. If you ever need to have your password reset, a temporary password will be sent to this address.*
6. In the **Employee ID** and **Password/Confirm password** fields, enter the Username and password under which you want to sign into your store.\*
7. In the **Security question** and **Answer** fields, enter a security question and the answer.\*  
***Note:** Periodically you will be prompted to answer this question when signing in.*
8. Tap **Save**.
9. The statement “Activation completed” appears above the fields on the Moneris PAYD Administration sign-in screen.
10. Proceed to *Downloading and installing the PAYD App from Google Play* on page 19.




\*The information entered here applies to both the PAYD App and Moneris PAYD Administration.

## Downloading and installing the PAYD App from Google Play™

***Note:** If you have already downloaded and installed the PAYD App to your mobile device, go directly to step 7.*

1. From your mobile device’s home screen, open **Google Play**.
2. Search for “PAYD”, and then select the PAYD App.
3. Tap **Install**.  
**Important: Read the PAYD “Terms of Use” before proceeding with the download.**
4. Tap **Accept & download**.
5. When the message “Successfully installed...” appears, the download is complete.
6. Return to your device’s home screen.
  - If you want to e-mail transaction receipts or send SMS text message notifications to a contact from your mobile device’s contacts list without having to enter the address or phone number each time you want to take the action (see pages 58 and 59 respectively), ensure that your device’s privacy settings are configured to allow the PAYD App to access the device’s contacts data.
7. Proceed to *Initializing the PAYD PIN pad* on page 20.

## Initializing the PAYD PIN pad

1. From your mobile device's home screen, tap the **PAYD**  icon to launch the PAYD App.
2. Sign into the PAYD App (see page 30).
3. Start on the “Settings” screen.  
**Note:** *If another screen is displayed, tap , and then tap **Settings**.*
4. Tap **Pinpad**.
  - Tap **Connect Pinpad** if it appears.
5. Tap **Initialize Pinpad**.  
**Note:** *If **Connect Pinpad** continues to appear even after you have tapped it, see page 68 for troubleshooting.*
6. Wait while the PAYD PIN pad initializes. The message “PLEASE WAIT” appears on the PAYD PIN pad.  
**Note:** *The initialization process may take a few minutes to complete.*
7. Following a successful initialization, the “Initialization was successful. Pinpad is ready to use” message displays on your mobile device.
8. Tap **OK** to clear the “Success” message.  
**Note:** *The PAYD PIN pad displays “WELCOME/BONJOUR”.*
9. Tap  to return to the main menu.
10. Proceed to *Ready to use the PAYD App?* below.

## Ready to use the PAYD App?



1. To learn about the PAYD App and some of its features, read these sections:
  - Configuring optional PAYD App settings, see pages 21 to 29.
  - Signing in/Signing out of the PAYD App, see pages 30 to 35.
  - PAYD PIN pad power management and card entry options, see pages 36 to 43.
  - Performing transactions, see pages 44 to 55.
  - Generating reports, see pages 60 to 64.

## Optional features

### Setting the transaction details level


Sets the optional transaction details (secondary transaction identifiers, Customer ID and Order ID) that you can enter during a transaction.

**Note:** *Even if optional transaction details are enabled, you may bypass entering data in the **Customer ID** and **Order ID** fields during a transaction. If you enter data in one or both of these fields during a transaction, you can subsequently retrieve the transaction by using one or more of the identifiers as search criteria (e.g., when generating a report or doing a Refund, Void, or Capture).*

1. Start on the “Settings” screen.  
**Note:** *If another screen is displayed, tap  to return to the main menu, and then tap **Settings**.*
2. Tap **Interface**.
3. Specify the optional transaction details to include by tapping one of:
  - **Quick Pay:** excludes the Customer ID and Order ID.
  - **Minimal:** includes only the Customer ID.
  - **Full:** includes the Customer ID and Order ID.
4. Tap  to return to the main menu.  
**Note:** *To change this setting on a different mobile device, repeat these steps on the other device.*

### Setting a default payment device

Sets a default payment device for transactions.

1. Start on the “Settings” screen.  
**Note:** *If another screen is displayed, tap  to return to the main menu, and then tap **Settings**.*

## 2. Tap **Interface**.

### 3. Specify the default payment device by tapping one of:

- **Pinpad:** sets “Pinpad” as the default.
- **Swipe/Keyed:** if the PAYD card reader is connected to your mobile device, sets “Swipe” as the default. If the PAYD card reader is not connected to your mobile device, sets “Keyed” as the default.
- **Cash:** sets “Cash” as the default.

## 4. Tap to return to the main menu.

**Note:** To change this setting on a different mobile device, repeat these steps on the other device.

## Enabling Pre-Authorizations

Enables the option to process Pre-Authorizations.

### 1. Start on the “Settings” screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Settings**.

## 2. Tap **Interface**.

### 3. Tap (checkmark or unmark the box) **Display Preauth:**

- With checkmark: The option “Process as Preauth” always displays on the “Sale” screen (see page 46).
- Without checkmark: The option “Process as Preauth” does not display on the “Sale” screen.

## 4. Tap to return to the main menu.

**Note:** To enable/disable this feature on a different mobile device, repeat these steps on the other device.

## Enabling tip prompting

If enabled, tip prompts appear during every debit/credit Sale or Pre-Authorization.

### 1. Start on the “Settings” screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Settings**.

## 2. Tap **Tip**.

### 3. Tap (checkmark or unmark the box) **Tip on Purchase:**

- With checkmark: Tip prompts appear during every debit/credit Sale or Pre-Authorization.

**Note:** If “Pinpad” is selected as the card entry method, the customer will be prompted to enter a tip as a dollar amount. If “Swipe”/“Keyed” is selected, the customer will be prompted to select a default tip, enter a customized tip, or bypass tip entry.

- Without checkmark: Tip prompts do not appear during any transaction.

### 4. If you enabled tip prompting, you may use the three pre-set percentages, or set your own default values:

#### To change one or more default tip percentages:

a. Enter a tip percentage in one or more “Quick Tip” fields.

b. Tap **Save Tip Values**.

c. When the “Success” message appears, tap **OK**.

#### To leave the default tip percentages as they are:

a. Go directly to the next step.

## 5. Tap to return to the main menu.

**Note:** To enable/disable this feature or change this setting on a different mobile device, repeat these steps on the other device.

## Location-mapping transactions

The PAYD App can map the location of PAYD financial transactions performed from your mobile device if: 1) The device is configured to use a location service; 2) The device is configured to allow the PAYD App to access the device's location data; and 3) the transaction response is **APPROVED** or **DECLINED**.

**Note:** Your mobile device may prompt you to allow the PAYD App to access the device's location data. You must grant this access to use the location mapping feature. If you want to enable this feature on a different mobile device, repeat these steps on the other device.

### Viewing a location map

To view the mapped location of a PAYD transaction, you must access the transaction's "Details" screen (see page 63) from any mobile device.

## Setting a tax rate

Sets a tax name and a percentage by which the tax will be auto-calculated for Sale and Pre-Authorization transactions.

**Note:** The tax will be calculated based on the original transaction amount excluding any tip (for information about tip prompting, see page 23).

1. Start on the "Settings" screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Settings**.

2. Tap **Tax**.

3. Tap (checkmark or unmark the box) **Calculate Tax**:

- With checkmark: Option to calculate/add tax always appears on the "Sale" screen.

**Note:** By default the tax box will always be checkmarked (selected) on the "Sale" screen, but you may unmark (deselect) the box if you do not want to add tax to that Sale (or Pre-Authorization).


- Without checkmark: Option to calculate/add tax does not appear during any transaction.

4. In the **Tax Description** and **Tax Rate (%)** fields, enter the tax name and the tax percentage.

**Note:** This name will appear on the "Sale" screen but may be truncated if longer than 12 characters.

5. Tap **Save Tax Rate**.

6. When the "Success" message appears, tap **OK**.

7. Tap  to return to the main menu.

**Note:** To enable/disable this feature or change this setting on a different mobile device, repeat these steps on the other device.

## Configuring a quick PIN

### Setting a quick PIN for sign-in

Sign into the PAYD App with a 4-digit PIN.

1. Start on the "Settings" screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Settings**.

2. Tap **Quick Login**.

3. Tap (checkmark the box) **PIN Login**.

4. Enter a 4-digit PIN, and then re-enter it when prompted.

5. Tap **Save Quick PIN**.

6. When the "Success" message appears, tap **OK**.

**Note:** The next time you sign in, you will be prompted to enter your 4-digit PIN (see page 32).

7. Tap  to return to the main menu.

**Note:** To enable this feature or change this setting on a different mobile device, repeat these steps on the other device.

## Disabling a quick PIN

1. Start on the “Settings” screen.


**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Settings**.

2. Tap **Quick Login**.

3. Tap (unmark the box) **PIN Login**.

4. When the “Success” message appears, tap **OK**.

**Note:** If you want to set a new (or the same) quick PIN, see Setting a quick PIN for sign-in on page 25.

5. Tap  to return to the main menu.

**Note:** To disable this feature on a different mobile device, repeat these steps on the other device.

## Pre-filling the Username/Store ID at sign-in

Pre-fills the PAYD “full” sign-in fields with your PAYD Username and PAYD Store ID credentials whenever you launch the PAYD App (see page 30).

1. Start on the “Settings” screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Settings**.


2. Tap **Login Credentials**.

3. Fill in the field(s) that you want to have pre-filled whenever you launch the PAYD App.

**Note:** To disable this feature, leave the field(s) blank.

4. Tap **Save Login Credentials**.

5. When the “Success” message appears, tap **OK**.

6. Tap  to return to the main menu.

**Note:** To enable/disable this feature or change this setting on a different mobile device, repeat these steps on the other device.

## Setting an e-mail address to receive exported reports

Sets an e-mail address to which transaction reports will be sent when you export report results to a comma-separated values (CSV) file (see page 60).

**Note:** Results include the following transaction data (CSV fields appear in quotations): Store ID (“store id”), Terminal (PAYD PIN pad) ID (“terminal”), Batch Number (“batch”), Date and Time (“date time”), Transaction Type (“type”), Order ID (“order no”), Customer ID (“cust id”), Amount (“amount”), Card Type (“card type”), Account Number (“card”), Result (“result”), Auth Code (“auth code”), Response Code (“response code”), Clerk ID (“clerk”), and Customer E-mail (“email”).

1. Start on the “Settings” screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Settings**.

2. Tap **Export to CSV**.

3. In the **Export Email Address** field, enter the e-mail address to which the CSV-format text file will be sent when you export your report results.

**Note:** To disable this feature, leave the field blank.

4. Tap **Save Export Email**.

5. When the “Success” message appears, tap **OK**.

6. Tap  to return to the main menu.

**Note:** To enable/disable this feature or change this setting on a different mobile device, repeat these steps on the other device.

## Auto-sending transaction receipts to a set merchant e-mail address

Sets an e-mail address to which the PAYD App will automatically e-mail PAYD transaction receipts. The PAYD App e-mails receipts only for **APPROVED** or **DECLINED** responses.

**Note:** The receipt will be e-mailed to the set address in the background (i.e., the PAYD App will give no visual indication that the e-mail has been sent).

1. Start on the “Settings” screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Settings**.


2. Tap **Merchant Email**.

3. In the **Merchant Email Address** field, enter the e-mail address to which a receipt will automatically be sent following a transaction performed from this mobile device.

**Note:** To disable this feature, leave the field blank.

4. Tap **Save Merchant Email**.

5. When the “Success” message appears, tap **OK**.

6. Tap  to return to the main menu.

**Note:** To enable/disable this feature or change this setting on a different mobile device, repeat these steps on the other device.

## Setting a default PAYD App screen

Sets a default screen (“Sale”, “Reports”, “Totals”, or “Settings”) to open whenever you sign into the PAYD App.

**Note:** “Sale” is pre-set as the default screen.

1. Start on the main menu.

**Note:** If another screen is displayed, tap .

2. Press and hold down the main menu item (**Sale**, **Reports**, **Totals**, or **Settings**) that you want to set as your default screen.

**Note:** “Help” and “Sign Out” cannot be set as default screens.

3. Release your hold on the menu item when a confirmation message appears indicating that the default screen has been set.

**Note:** Whenever you sign in with your credentials, the default screen that you have just set will display. To change this setting on a different mobile device, repeat these steps on the other device.

## Setting the default language of the PAYD App

The language of the PAYD App is determined by the language set for your mobile device.

**Note:** If your device is configured for a language other than English or French, the PAYD App defaults to English.




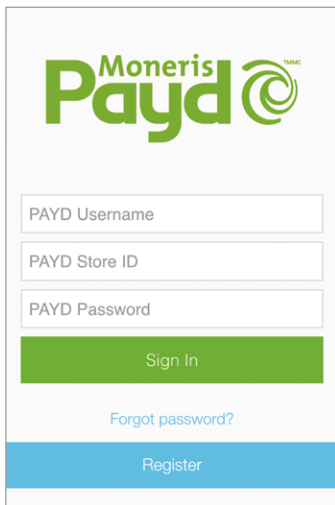
# Signing into/Signing out of the PAYD App

## Signing in with full credentials

Follow these steps to sign in using full credentials.

**Note:** If you have configured a quick PIN, see page 32.

1. From your mobile device's home screen, tap the **PAYD**  icon to launch the PAYD App.
2. Wait for the PAYD “full” sign-in screen to display:



3. Enter your credentials in the sign-in fields: **PAYD Username**, **PAYD Store ID**, and **PAYD Password**.

**Note:** Some fields may be pre-filled (see page 26).


4. Tap **Sign In**.
  - If prompted to change your password, enter the required data, and tap **Save Password**.
  - If prompted to select and answer one or more security questions, see page 35.
5. Your default PAYD screen displays once you are signed in.

**Note:** To change the default screen, see page 29.

## Signing out

To ensure that unauthorized PAYD transactions cannot be performed from your mobile device, sign out of the PAYD App when you are not using it.

1. Start on the main menu.


**Note:** If another screen is displayed, tap .
2. Tap **Sign Out**.
3. When the PAYD sign-in screen displays, it means you are signed out.

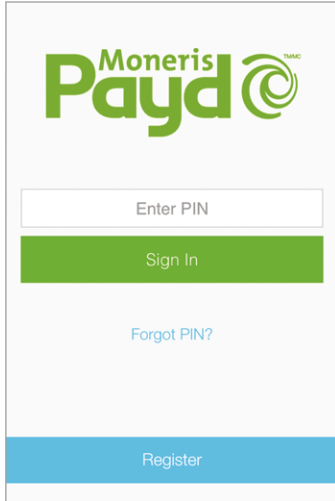
**Note:** Depending on how you have configured the PAYD App, the “full” sign-in screen may display (see page 30) or the “Enter PIN” sign-in screen may display (see page 32).

## Signing in with a quick PIN

Follow these steps to sign in using a 4-digit quick PIN.

**Note:** To enable this method of signing in, see Setting a quick PIN for sign-in on page 25.

1. From your mobile device's home screen, tap the **PAYD**  icon to launch the PAYD App.
2. Wait for the "Enter PIN" sign-in screen to display:



3. In the **Enter PIN** field, enter your 4-digit quick PIN.


**Note:** You will automatically be signed in once you enter the last digit; otherwise, tap **Sign In**.

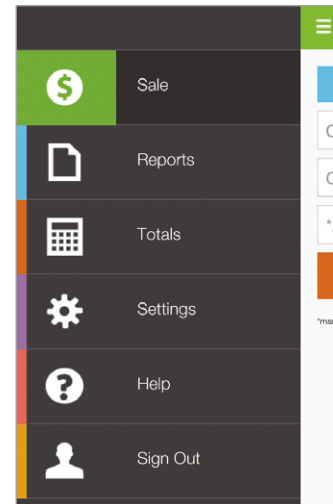
4. Your default PAYD screen displays once you are signed in.

**Note:** To change the default screen, see page 29.


## The PAYD App main menu

From this menu, you can access any transaction, report, or setting in the PAYD App.

- To return to this menu from any other screen, simply tap  at the top of the screen.




## Need to reset your sign-in password?

1. From your mobile device's home screen, tap the **PAYD**  icon to launch the PAYD App.
2. On the PAYD “full” sign-in screen, tap **Forgot Password?**
3. Enter your Username and Store ID, and tap **Next**.
4. Answer the security question, and tap **Next**.
5. When the “Success” message appears, tap **OK**.
6. A temporary password will be e-mailed to the address that you registered to your PAYD store sign-in account.
7. When you next sign in (see page 30), be sure to enter the temporary password in the **PAYD Password** field.

**Note:** You will subsequently be prompted to create a new password, which you will use from that point on to sign into the PAYD App and Moneris PAYD Administration.

## Can't remember your quick PIN?

1. From your mobile device's home screen, tap the **PAYD**  icon to launch the PAYD App.
2. When the PAYD “Enter PIN” sign-in screen displays, tap **Forgot PIN?**
3. When the PAYD “full” sign-in screen displays, enter your full sign-in credentials (see *Signing in with full credentials* on page 30).  
**Note:** If you have also forgotten your sign-in password, see *Need to reset your sign-in password?* above.
4. Once you are signed in, you may change or disable your quick PIN (see *Disabling a quick PIN* on page 26).


## Configuring your security question/answer

The question/answer that you configure will be used to identify you in the event that you forget your password. (Periodically you may be prompted to answer the question when signing in.)

**Note:** The information that you enter here also applies to Moneris PAYD Administration.

1. Select a question from the **Choose security question** drop-down list, and enter an answer in the **Security Answer** field.  
**Note:** If there is more than one drop-down list, select the additional questions, and then enter answers in the corresponding fields.
2. If the **Email Address** field appears, enter your e-mail address.  
**Note:** If you ever need to have your password reset, a temporary password will be sent to this address.
3. Tap **Save Security Question** (or **Save Security Questions**).
4. When the “Sale” screen displays, proceed to *Initializing the PAYD PIN pad* on page 20, and begin at step 3.

## Determining the PAYD App's version number

1. Start on the “Settings” screen.  
**Note:** If another screen is displayed, tap  and then tap **Settings**.
2. The version number of the PAYD App appears near the bottom of the “Settings” screen (appears as “PAYD mobile app v#.##”).

# The PAYD PIN pad

The customer uses the PAYD PIN pad to input data when prompted to do so during a transaction.

- For names and descriptions of labelled areas on the PAYD PIN pad, see page 37.



1	<b>Function keys (F1, F2, F3, and F4)</b> <ul style="list-style-type: none"> <li>• Select the option displayed above the key.</li> </ul>
2	<b>Alpha-Numeric keys</b>
3	<b>Cancel key</b> <ul style="list-style-type: none"> <li>• Clear message displayed on PAYD PIN pad.</li> <li>• Cancel transaction.</li> </ul>
4	<b>Correct key</b> <ul style="list-style-type: none"> <li>• Clear data entered on PAYD PIN pad.</li> </ul>
5	<b>OK / Enter key</b> <ul style="list-style-type: none"> <li>• Submit data, or acknowledge a message displayed on PAYD PIN pad.</li> </ul>
6	<b>Chip Reader</b> (slot at the bottom of PAYD PIN pad) <ul style="list-style-type: none"> <li>• See <i>Insert: chip cards</i> on page 41.</li> </ul>
7	<b>Contactless Reader Indicator</b> (green flashing light) <ul style="list-style-type: none"> <li>• No lights flash: PAYD PIN pad is in Sleep mode (see page 39) or is powered off.</li> <li>• One light flashes: Reader is fully powered on.</li> <li>• Four lights flash: Reader is capturing card data (see page 42).</li> </ul>
8	<b>Display Screen/Contactless Reader</b> <ul style="list-style-type: none"> <li>• “WELCOME/BONJOUR” screen displays while PAYD PIN pad is idle.</li> </ul>
9	<b>Magnetic Stripe Reader</b> (slot along the top of PAYD PIN pad) <ul style="list-style-type: none"> <li>• See <i>Swipe: magnetic stripe cards</i> on page 39.</li> </ul>
10	<b>Micro-USB port</b> (located on right side) <ul style="list-style-type: none"> <li>• Plug USB charging cable here.</li> </ul>
11	<b>Power button</b> (located on right side) <ul style="list-style-type: none"> <li>• For power functions, see page 39.</li> <li>• For reset function, press and hold down until the rebooting process starts.</li> </ul>

# Power management and the PAYD PIN pad


## 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 40).





## 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.)

## Powering on the PAYD PIN pad

The “WELCOME/BONJOUR” screen displays when the PAYD PIN pad is fully powered on (see also *Sleep mode* below).

### Power on WITH USB charging cable:

1. Plug the USB charging cable into the micro-USB port on the PAYD PIN pad (see page 36).
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 USB charging cable:

1. Press the Power button on the PAYD PIN pad (see page 36).

**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 or otherwise being operated under the conditions listed in *Using the PAYD PIN pad while it is in Sleep mode* below.

### Using the PAYD PIN pad while it is in Sleep mode



If you are ready to perform a debit or credit transaction while the PAYD PIN pad is in Sleep mode, simply initiate the transaction in the PAYD App, enter the required data, and tap **Process Transaction**. The PAYD PIN pad will automatically “wake” to the WELCOME/BONJOUR screen and then display the appropriate card entry prompt if:

- The PAYD PIN pad is within communication (Bluetooth) range of the mobile device with which it is paired.
- The screen saver is not active on the mobile device with which the PAYD PIN pad is paired.
- The PAYD PIN pad’s battery is sufficiently charged (see page 38).

## Exiting Sleep mode

1. To exit Sleep mode, press the Power button on the PAYD PIN pad (see page 36), and then wait for the “WELCOME/BONJOUR” screen to display.

## Powering off the PAYD PIN pad

1. Disconnect the USB charging cable if connected.
2. Ensure the “WELCOME/BONJOUR” screen is displayed.  
**Note:** *If the hardware manufacturer name/logo is displayed instead, see Exiting Sleep mode above.*
3. Simultaneously press and hold down both the yellow  key and the  key. (The PAYD PIN pad beeps and powers off.)

# Card entry options

## Insert: chip cards

1. The PAYD PIN pad displays “SWIPE OR INSERT CARD” or “SWIPE, TAP OR INSERT CARD”.
2. The customer **inserts their card** into the PAYD PIN pad’s chip reader.

**Note:** *Unless the PAYD 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 a PIN.**
4. The customer leaves the chip card inserted until “REMOVE CARD” displays on the PAYD PIN pad.

### Tip for proper card insertion:

Hold the PAYD PIN pad with one hand, and insert the card in the chip reader with the other hand. (This will prevent the PAYD PIN pad’s 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 above.)*

1. The PAYD PIN pad displays “SWIPE OR INSERT CARD” or “SWIPE, TAP OR INSERT CARD”.
2. You or the customer **swipes their card** on the PAYD 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**.

3. You may be prompted to capture the customer’s signature on your mobile device.

### Tip for proper card swipe:

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

## Wave/tap: contactless cards\*

1. The PAYD PIN pad displays “SWIPE, TAP OR INSERT CARD”.
2. The customer **taps/waves their card** over the PAYD PIN pad’s display screen:
  - The PAYD PIN pad’s battery charge level should be at least 50% (see page 38) to ensure a successful tap.
  - 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 page 43).



3. The PAYD PIN pad beeps and four green lights flash when the contactless reader is reading the card data.
4. You may be prompted to capture the customer’s signature.

\* In this guide, the term “contactless card” refers to a contactless-enabled card (supported brands include Visa®, MasterCard®, American Express®, Discover®, and Interac®) or other items such as a key fob, mobile tag, or mobile device (e.g., a smartphone, tablet, or smartwatch; the cardholder is responsible for any related software on their mobile device including downloading any required apps and loading their card information into their digital wallet).

## Maximum Contactless Dollar Value (CDV)

To determine the maximum CDV for a card type, contact us.

- **Credit cards:** If a credit card is tapped for an amount that exceeds its maximum CDV, the PAYD PIN pad will display “CONTACTLESS TRANSACTION LIMIT EXCEEDED” (see message on page 71).
- **Debit cards:** If a debit card is tapped for an amount that exceeds its maximum CDV, the PAYD PIN pad will display “MUST INSERT CARD” (see message on page 71).

### Tips for proper card tap/wave:

- The card must be within 0.5 in. (1.3 cm) of the PAYD 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.

## Manual card entry on the PAYD PIN pad

If all available card entry methods fail, you may manually enter the card number for credit cards and some chip debit cards.

1. Initiate the Sale (or Pre-Authorization) on your mobile device.
2. For detailed transaction steps to do a Sale, see page 44 (for a Pre-Authorization, see page 46), but note that you must tap (checkmark the box) **Keyed entry on pinpad**.

**Note:** If you are unable to use the PAYD PIN pad to capture the card data, try using the PAYD card reader (see page 74).



# Transactions

## General guidelines for performing transactions

- Keep the PAYD PIN pad and your mobile device in close proximity to each other.
- Do not attempt to perform transactions near strong sources of electromagnetic interference (see page 77).
- Confirm the operational status of the PAYD PIN pad. It is:
  - Powered on (see page 39).
  - Displaying “WELCOME/BONJOUR” or the hardware manufacturer name/logo.
  - Sufficiently charged (see page 38).
- The transaction is complete once an **APPROVED** or **DECLINED** response displays on your mobile device.

## Sale with debit/credit card

Debit or credit card sale of goods and services.

1. Start on the “Sale” screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Sale**.

2. Tap **Pinpad**.

- If the **Customer ID** and **Order ID** fields appear and you want to track the transaction with your own identifier(s), enter the required data in one or both fields; otherwise, leave these fields blank to bypass entering any identifier.

**Note:** If you enter your own Order ID, it must be unique. If you don't enter your own Order ID, it will be generated automatically.

3. In the **Amount (\$)** field, enter the Sale amount (#.##).

- If the tax **00% (\$)** field/box appears and is checkmarked, the tax that will be added displays in the field while the total transaction amount (including the tax) displays in the **Total (\$)** field.

**Note:** If you do not want to add the tax to this transaction, tap (unmark) the tax **00% (\$)** box.

4. Use the PAYD PIN pad to capture the card data:

- If you want the card to be inserted, tapped, or swiped on the PAYD PIN pad, go to step 5.
- If you need to manually enter the card data on the PAYD PIN pad, see page 47.

5. Tap **Process Transaction**.

6. When “Follow prompts on pinpad” appears on your mobile device, see page 49.

## Sale with cash

Cash sale of goods and services.

1. Start on the “Sale” screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Sale**.

2. Tap **Cash**.

- If the **Customer ID** and **Order ID** fields appear and you want to track the transaction with your own identifier(s), enter the required data in one or both fields; otherwise, leave these fields blank to bypass entering any identifier.

**Note:** If you enter your own Order ID, it must be unique. If you don't enter your own Order ID, it will be generated automatically.

3. In the **Amount (\$)** field, enter the Sale amount (#.##).

- If the tax **00% (\$)** field/box appears and is checkmarked, the tax that will be added displays in the field while the total transaction amount (including the tax) displays in the **Total (\$)** field.

**Note:** If you do not want to add the tax to this transaction, tap (unmark) the tax **00% (\$)** box.



4. In the **Amount Tendered (\$)** field, enter the amount tendered by the customer.

**Note:** The **Change Due (\$)** field will automatically display the amount owed to the customer.

5. Tap **Process Transaction**.


6. Wait for the **APPROVED** response to appear on your mobile device.

7. The transaction is complete.

- To e-mail a transaction receipt, see page 58.

**Note:** If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically e-mails a receipt to the address (the PAYD App will not notify you that the e-mail has been sent).

- To send an SMS text message notification, see page 59.

8. Tap  to return to the main menu.

## Pre-Authorization with credit card

Authorization of an amount on a credit card if the final transaction amount is unknown.

**IMPORTANT: To receive funds, you must perform a Capture at a later time (see page 54).**

1. Start on the “Sale” screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Sale**.

2. Tap (checkmark the box) **Process as Preauth**.

3. Tap **Pinpad**.

- If the **Customer ID** and **Order ID** fields appear and you want to track the transaction with your own identifier(s), enter the required data in one or both fields; otherwise, leave these fields blank to bypass entering any identifier.

**Note:** If you enter your own Order ID, it must be unique. If you don't enter your own Order ID, it will be generated automatically.

4. In the **Amount (\$)** field, enter the Pre-Authorization amount (###).

- If the tax **00% (\$)** field/box appears and is checkmarked, the tax that will be added displays in the field while the total transaction amount (including the tax) displays in the **Total (\$)** field.

**Note:** If you do not want to add the tax to this transaction, tap (unmark) the tax **00% (\$)** box.

5. Use the PAYD PIN pad to capture the card data:

- If you want to have the card inserted or swiped on the PAYD PIN pad, go to step 6.
- If you need to manually enter the card data on the PAYD PIN pad, see page 47.

6. Tap **Process Transaction**.

7. When “Follow prompts on pinpad” appears on your mobile device, see page 49.

## Manually entering card data on the PAYD PIN pad

Ensure that you have entered the transaction amount, selected/added the sales tax if enabled, and entered any optional tracking identifiers (Customer ID and/or Order ID) if applicable before you follow the steps below.


1. Tap (checkmark the box) **Keyed entry on pinpad**.





2. Tap **Process Transaction**.


3. When “Follow prompts on pinpad” appears on your mobile device, go to the next step.

4. Wait for “SWIPE, TAP OR INSERT CARD” or “SWIPE OR INSERT CARD” to appear on the PAYD PIN pad.

5. On the PAYD PIN pad, key in the card number, and press the green  key.

6. When “EXPIRY DATE” appears on the PAYD PIN pad, key in the card expiry date (MMYY), and press the green  key.

- If “PURCHASE \$#.##-OK?” appears on the PAYD PIN pad:
  - a. Hand the PAYD PIN pad to the customer.
  - b. The customer presses the green  key.
  - c. When “ENTER TIP AMOUNT \$0.00” appears on the PAYD PIN pad, the customer keys in a tip amount and presses the green  key (or to bypass entering a tip, they press the green  key without keying in an amount).
  - d. When “PURCHASE \$#.##-OK?” appears on the PAYD PIN pad, the customer confirms the displayed amount and presses the green  key.

**Note:** If the customer wants to change the tip amount, they press the yellow  key once, and then they rekey the tip amount when prompted.

e. When “PLEASE WAIT” appears on the PAYD PIN pad, the customer returns the PAYD PIN pad to you.

7. Wait while the transaction is processed.


- If the “Customer Signature” screen displays on your mobile device, capture the customer’s signature (see page 57).

8. When **APPROVED** or **DECLINED** response appears on your mobile device, the transaction is complete.

- To e-mail a transaction receipt, see page 58.

**Note:** If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically e-mails a receipt to the address (the PAYD App will not notify you that the e-mail has been sent).

- To send an SMS text message notification, see page 59.







9. Tap  to return to the main menu.

## Customer prompts on the PAYD PIN pad

When “Follow prompts on pinpad” appears on your mobile device, do the following:


1. Hand the PAYD PIN pad to the customer.
2. The customer responds to any prompt that appears on the PAYD PIN pad.

**Note:** Potential prompts (and the actions to take for each) are listed in order of appearance in the table below. Only some of the listed prompts will appear for any one transaction.


Prompts	Customer action(s)
<b>SWIPE, TAP OR INSERT CARD</b> or <b>SWIPE OR INSERT CARD</b>	Enters their card on the PAYD PIN pad (see pages 41 to 43 for options).
<b>SELECT LANGUAGE</b> <b>ENGL</b> <b>FRAN</b>	For English prompts: Presses <b>F1</b> (ENGL). For French prompts: Presses <b>F4</b> (FRAN).
<b>SELECT</b> <Application name> <b>YES</b> <b>NO</b>	To select the displayed application: Presses <b>F1</b> (YES). To view the next available application: Presses <b>F4</b> (NO).
<Application name> -OK? <b>YES</b> <b>NO</b>	Presses <b>F1</b> (YES) to use the displayed application.
<b>I PRE-AUTHORIZE</b> <b>UP TO</b> <b>\$#.##-OK?</b>	Presses the green  key to confirm the displayed Pre-Authorization amount.
<TRANSACTION NAME> <b>\$#.##-OK?</b>	Presses the green  key to confirm the displayed transaction amount.
<b>ENTER TIP AMOUNT</b> <b>\$0.00</b>	To add a tip: Keys in an amount and presses the green  key. To bypass adding a tip: Presses the green  key without entering anything.
<TRANSACTION NAME> <b>\$#.##-OK?</b>	Presses the green  key to confirm the displayed transaction amount.  <b>Note:</b> If the customer wants to change the tip amount, they press the yellow  key once, and then they rekey the tip amount when prompted.

This table continues on the next page...

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Prompts	Customer action(s)
<b>SELECT ACCOUNT</b> <b>CHQ</b> <b>SAV</b>	For chequing: Presses <b>F1</b> (CHQ). For savings: Presses <b>F4</b> (SAV).
<b>ENTER PIN &amp; OK</b>	Keys in their Personal Identification Number (PIN) and presses the green  key.
<b>PLEASE WAIT</b>	Waits while the transaction is processed.
<b>APPROVED</b> <b>THANK YOU</b> <b>REMOVE CARD</b>	Removes their card from chip reader. <b>Note:</b> The PAYD PIN pad beeps until the card is removed.
<b>APPROVED</b> <b>THANK YOU</b> <b>OBTAIN CARD</b>	Retrieves their card.
<b>WELCOME/BONJOUR</b>	Returns the PAYD PIN pad to you (go to step 3).

3. Retrieve the PAYD PIN pad from the customer.

**Note:** If the “WELCOME/BONJOUR” screen is not already displayed on the PAYD PIN pad, press the green  key.

- If the “Customer Signature” screen displays on your mobile device, capture the customer’s signature (see page 57).


4. Wait for the **APPROVED** or **DECLINED** response to appear on your mobile device.

5. The transaction is complete.

- To e-mail a transaction receipt, see page 58.

**Note:** If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically e-mails a receipt to the address (the PAYD App will not notify you that the e-mail has been sent).

- To send an SMS text message notification, see page 59.

6. Tap  to return to the main menu.

## Customer prompts in the PAYD App

When “Please specify a tip amount” appears on your mobile device, do the following:

1. Hand your mobile device to the customer.
2. The customer does one of the following:

**To add a default tip percentage:**

- a. The customer taps one of the three displayed percentages.

**To add a different tip as an amount or percentage:**

- a. The customer taps **Custom Tip**.
- b. The customer chooses a tip type:
  - To add a percentage-based tip, they tap %.
  - To add a dollar-amount tip, they tap \$.
- c. In the **Please specify tip** field, the customer enters a value (percentage or dollar amount) and taps **OK**.

**To bypass adding a tip:**

- a. The customer taps **No Tip** (go directly to step 4).

3. When “Please confirm totals” appears, the customer confirms the displayed totals and taps **OK**.

**Note:** If the customer wants to change the tip amount, they tap **Back**, and then they re-enter the tip when prompted (see To add a different tip as an amount or percentage above; begin at step b).

4. When “Processing Transaction” or “Please swipe card” appears on your mobile device, retrieve the device from the customer.

- If “Please swipe card” appears on your mobile device, swipe the card on the connected PAYD card reader.
- If the “Customer Signature” screen displays on your mobile device, capture the customer’s signature (see page 57).


5. Wait for the **APPROVED** or **DECLINED** response to appear on your mobile device.

6. The transaction is complete.

- To e-mail a transaction receipt, see page 58.

**Note:** If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically e-mails a receipt to the address (the PAYD App will not notify you that the e-mail has been sent).

- To send an SMS text message notification, see page 59.

7. Tap  to return to the main menu.

## Voiding/Refunding a transaction


Reverses a debit/credit or cash transaction.

**Note:** If you want to reverse a debit/credit transaction on the same day it was originally processed, you must do a Void for the full amount.

If you want to reverse a debit/credit transaction processed on a different day, you must do a Refund. Debit transactions must be refunded for the full amount. Credit transactions can be refunded for a full or partial amount.

Cash transactions are always reversed (refunded) for the full amount regardless of the date on which the original transaction was processed.

1. Start on the “Reports” screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Reports**.

2. Do one of the following:

**To display the last 10 transactions processed today:**

- a. Leave all search fields blank, and go directly to step 3.

**To narrow the scope of your search:**

- a. Select one or more of the following criteria:

**Note:** The original transaction receipt includes the transaction identifiers submitted with the original transaction.

- Date: To retrieve transactions processed within a date range other than today: Tap the **Today** drop-down list, and select a date range from the list; otherwise, skip this step to retrieve only transactions processed today.
- Order ID: Enter the ID in the **Order ID** field (a full or partial ID may be entered).
- Customer ID: Enter the ID in the **Customer ID** field (a full or partial ID may be entered).
- Amount: Enter the amount in the **Amount (\$)** field.

b. Tap **Sort by**, and select a sort-by option from the drop-down list.

**Note:** Sort results by Amount, Customer ID, Date, Order ID, Card Type, or Transaction Type.


3. Tap **Search Transactions**.

A transaction list appears.

- To display the next 10 transactions if applicable, tap **More** (to maximum of 300).

4. Tap the transaction that you want to reverse.

5. When the transaction “Details” screen displays, confirm this is the transaction that you want to reverse (see page 63).



**Note:** If this transaction is not the one that you want to reverse, tap  (repeat step 4).

6. Tap **Void this transaction** (or tap **Refund this transaction**).

- If the **Refund Amount (\$)** field appears, enter the amount to be refunded.

7. Tap **Process Transaction**.

- If “Follow prompts on pinpad” appears on your mobile device, do one of the following:
  - hand the PAYD PIN pad to the customer (see page 49).
  - manually enter the card data on the PAYD PIN pad yourself (continue on page 47 and begin at step 4).


8. Wait for the  or  response to appear on your mobile device. (If the PAYD PIN pad was used to capture card data, retrieve the PAYD PIN pad from the customer.)

9. The transaction is complete.

- To e-mail a transaction receipt, see page 58.

**Note:** If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically e-mails a receipt to the address (the PAYD App will not notify you that the e-mail has been sent).

- To send an SMS text message notification, see page 59.

10. Tap  to return to the main menu.

## Capturing a Pre-Authorization

Completes a Pre-Authorization so that the funds are transferred to your account at settlement.

1. Start on the “Reports” screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Reports**.

2. Do one of the following:

**To display the last 10 transactions processed today:**

- a. Leave all search fields blank, and go to step 3.

**To narrow the scope of your search:**

- a. Select one or more of the following criteria:

**Note:** The original transaction receipt includes the transaction identifiers submitted with the original transaction.

- Date: To retrieve transactions processed within a date range other than today: Tap the **Today** drop-down list, and select a date range from the list; otherwise, skip this step to retrieve only transactions processed today.
- Order ID: Enter the ID in the **Order ID** field (a full or partial ID may be entered).
- Customer ID: Enter the ID in the **Customer ID** field (a full or partial ID may be entered).
- Amount: Enter the amount in the **Amount (\$)** field.

- b. Tap **Sort by**, and select a sort-by option from the drop-down list.

**Note:** Sort results by Amount, Customer ID, Date, Order ID, Card Type, or Transaction Type.


3. Tap **Search Transactions**.

A transaction list appears.

- To display the next 10 transactions if applicable, tap **More** (to maximum of 300).

4. Tap the “Preauth” transaction that you want to complete.

5. When the transaction “Details” screen displays, confirm this is the transaction that you want to complete (see page 63).

**Note:** If this transaction is not the one that you want to complete, tap  (repeat step 4).

6. Tap **Capture this transaction**.

7. In the **Capture Amount (\$)** field, enter the amount to be completed (captured).

**Note:** If the Pre-Authorization is completed for an amount that is less than the original, the hold on the remaining amount will be released.

8. Tap **Process Transaction**.

**Note:** Your mobile device displays the “Follow prompts on pinpad” message, and the PAYD PIN pad displays “PLEASE WAIT”. This is part of normal operation. A “Customer Signature” screen will not display on your mobile device.

9. Wait for the **APPROVED** or **DECLINED** response to appear on your mobile device.

10. The transaction is complete.

- To e-mail a transaction receipt, see page 58.

**Note:** If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically e-mails a receipt to the address (the PAYD App will not notify you that the e-mail has been sent).

- To send an SMS text message notification, see page 59.

11. Tap  to return to the main menu.

# Receipts

When a transaction is completed, a receipt is always generated. If a debit or credit card was used for the transaction, the receipt includes information about the cardholder verification method used for the transaction (see below).

## Cardholder verification method (CVM) statement

The CVM statement appearing near the bottom in a receipt is determined by the card type and card entry method used during the transaction for which the receipt was generated.

**Note:** The CVM statement is not included in receipts for cash or swiped/contactless debit transactions.

CVM statement	Card type	Card entry method
NO SIGNATURE TRANSACTION	• credit	• tap (contactless)
SIGNATURE	• credit	• swipe (stripe) • manual entry
VERIFIED BY PIN	• credit • debit	• insert (chip)

## Card masking

To reduce the risk of fraudulent card use, masking and truncation are applied to card numbers in receipts. Masking replaces a card's numbers (except for the last 4) with "\*"s (e.g., \*\*\*\*\*1234).

Truncation displays only the last 4 digits of a card (e.g., 1234). The expiry date does not appear in any receipt.


## Signature capture for receipts

The "Customer Signature" screen displays on your mobile device if you are required to capture the customer's signature.

**Note:** If a signature is captured, it will not be included in e-mailed receipts; however, a receipt with signature will be stored on Moneris PAYD Administration and can be viewed or printed from that interface at any time (see the Using Moneris PAYD Administration guide). A receipt with signature can also be viewed via the hyperlink included in any SMS text message notification sent for the transaction.

The captured customer signature can also be viewed when you retrieve the transaction's details in a Transactions Report (see page 60) or when you are doing a Void or Refund (see page 52) or Capture (see page 54).

When the "Customer Signature" screen displays on your mobile device, do the following:


1. Retrieve the PAYD PIN pad if it was used to capture the card data.  
**Note:** The "WELCOME/BONJOUR" screen displays on the PAYD PIN pad.
2. Have the customer "write" their signature above the "Customer Signature" line on the screen of your mobile device.
  - If the customer wishes to redo their signature, they tap **Clear** and then sign again.
3. Once the customer approves their signature, they tap **Done**.
4. Wait for the **APPROVED** or **DECLINED** response to appear on your mobile device.
5. The transaction is complete.
  - To e-mail a transaction receipt, see page 58.  
**Note:** If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically e-mails a receipt to the address (the PAYD App will not notify you that the e-mail has been sent).
    - To send an SMS text message notification, see page 59.
6. Tap  to return to the main menu.




## E-mailing a transaction receipt

When the **APPROVED** or **DECLINED** response appears on your mobile device, follow these steps to e-mail a transaction receipt.

**Note:** If you enabled the PAYD App to auto-send receipts to a set merchant address (see page 28), the PAYD App automatically e-mails a receipt to the address (the PAYD App will not notify you that the e-mail has been sent).



1. Under “Receipt” (bottom of the screen), tap .
2. When the “Send Receipt” screen displays, enter an e-mail address as follows:

### To manually enter an e-mail address:

- a. In the **Email Address** field, enter the address to which you want to send the receipt.
- b. Tap .

### To select an e-mail address from your mobile device’s contacts list:


**Note:** To use this feature, your mobile device’s privacy settings must be configured to allow the PAYD App to access your device’s contacts data. (Your mobile device may prompt you to allow the PAYD App to access the device’s contacts data. You must grant this access to use this feature.)

- a. Tap .
  - b. When the “Contacts” screen displays, tap the **Firstname Lastname** of the contact to whom you want to send the receipt.
  - c. Tap the **name@domain.nnn** (e-mail address) to which to send the receipt.
3. When “Receipt successfully sent” appears, tap **OK**.
  4. If you want to e-mail a receipt to additional addresses, repeat steps 1 to 3 as many times as you require.
  5. When you are finished, tap  to return to the main menu.


## Sending an SMS text message transaction notification

When the **APPROVED** or **DECLINED** response appears on your mobile device, follow these steps to send an SMS (short message system) text message notification.

**Note:** The text message includes a hyperlink to a transaction receipt. If a customer signature was captured for the transaction, the signature will appear on the displayed receipt’s “SIGNATURE” line.

1. Under “Receipt” (bottom of the screen), tap .
2. When the “Send Receipt” screen displays, enter a phone number as follows:



### To manually enter a phone number:

- a. In the **Phone Number** field, enter the phone number to which you want to send the SMS text message.
- b. Tap .

### To select a phone number from your mobile device’s contacts list:

**Note:** To use this feature, your mobile device’s privacy settings must be configured to allow the PAYD App to access your device’s contacts data.

(Your mobile device may prompt you to allow the PAYD App to access the device’s contacts data. You must grant this access to use this feature.)

- a. Tap .
  - b. When the “Contacts” screen displays, tap the **Firstname Lastname** of the contact to whom you want to send the text message.
  - c. Tap the **(123) 456-7890** phone number to which to send the text message.
3. When “Receipt successfully sent” appears, tap **OK**.
  4. If you want to send an SMS text message notification to additional phone numbers, repeat steps 1 to 3 as many times as you require.
  5. When you are finished, tap  to return to the main menu.

# Reporting

## Transactions Report

Search for and display transactions by date, Order ID, Customer ID, or amount. You may also export the search results.

1. Start on the “Reports” screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Reports**.

2. Do one of the following:

**To display the last 10 transactions processed today:**

- a. Leave all search fields blank, and go to step 3.

**To narrow the scope of your search:**

- a. Select one or more of the following criteria:

**Note:** The original transaction receipt includes the transaction identifiers submitted with the original transaction.

- **Date:** To retrieve transactions processed within a date range other than today: Tap the **Today** drop-down list, and select a date range from the list; otherwise, skip this step to retrieve only transactions processed today.
- **Order ID:** Enter the ID in the **Order ID** field (a full or partial ID may be entered).
- **Customer ID:** Enter the ID in the **Customer ID** field (a full or partial ID may be entered).
- **Amount:** Enter the amount in the **Amount (\$)** field.

- b. Tap **Sort by**, and select a sort-by option from the drop-down list.

**Note:** Sort results by Amount, Customer ID, Date, Order ID, or Card Type, or Transaction Type.

3. Tap **Search Transactions**.



A transaction list appears.

4. You may do any of the following:

- To display the next 10 transactions if applicable, tap **More** (to maximum of 300).
- To export the report results in CSV format in a text file, tap **Export Report** (near top of screen).

**Note:** The file will be sent to the e-mail address that you specified in your *Export to CSV* setting (see page 27).

- To view the details of a listed transaction, tap the desired transaction (see page 63).

5. When you are finished, tap  to return to the transaction list, or tap  to return to the main menu.

## Totals (Batches) Report

Displays open and closed batch totals (sub-totals include transaction totals, tip totals, and device ID totals) so that you can determine the amount deposited in your back account for a batch that has been closed.

**Note:** Totals for a batch can be viewed from the PAYD App for up to three months from the date a batch is closed.

1. Start on the “Totals” screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Totals**.

2. Select a date range from the drop-down list.

3. Tap **Search Batches**.


- If the “Totals” screen displays listing one or more “Daily Total” records, tap the record that you want to view.



4. When the “Daily Summary” screen displays, you may review one or more of the following sub-reports:


#### Daily Summary Totals

For the selected date range, displays transaction types and totals grouped by card type (or “Cash”).

- a. To display this sub-report, tap .

#### Tip Totals


For the selected date range, displays tip totals grouped by the PAYD Username (Clerk ID) under which the tip amounts were accrued.

- a. To display this sub-report, tap .



**Note:** If “No tip totals for today” appears, it means no tip amounts were accrued for the specified date range.

#### Terminal Totals

For the selected date range, displays transaction types and totals (excluding cash) grouped by batch number and device ID.

- a. To display this sub-report, tap .



**Note:** Totals grouped under a device ID starting with “16” indicate those transactions were performed on a PAYD PIN pad with the same ID. Totals grouped under a device ID starting with “66” indicate those transactions were performed entirely on the PAYD App (i.e., without the use of a PAYD PIN pad). A blank screen indicates no debit/credit transactions were performed for the specified date range.

5. When you are finished, tap  to return to the “Totals” list, or tap  to return to the main menu.

## Details screen (transactions)

The “Details” screen displays (shown on page 64) when you tap a transaction record listed in a Transactions Report (e.g., you may be performing a Void, Refund, or Capture, or simply reviewing transactions).

**Note:** Line items 1 to 10 and item 16 display by default. To display line items 11 to 15, tap **More Details**.

1. You may do one or more of the following if applicable:
  - To perform a Refund or Void, continue at step 6 on page 53.
  - To perform a Capture, continue at step 6 on page 55.
  - To e-mail a transaction receipt, see page 58.
  - To send an SMS text message notification, see page 59.
  - Tap  to return to the transaction list, or tap  to return to the main menu.

1	Transaction name.
2	Transaction date (DD/MM/YYYY) and time (hh:mm:ss).
3	Unique transaction identifier. Auto-generated if no Order ID entered for transaction.
4	Card type or “Cash”.
5	Card number (masked) or “Cash”.
6	Displays if Customer ID entered for transaction.
7	Transaction amount excluding tax and tip.
8	Tax amount (see page 24).
9	Tip amount (see page 23).
10	Total amount including any tax and/or tip.
11	Transaction performed by user signed in under this Username.
12	Moneris Host identifier (e.g., if “160123450010690030” is the number, then “16012345” is the terminal ID (i.e., PAYD PIN pad ID). This number may be requested by Moneris to help track a transaction.
13	Transaction Response code: <ul style="list-style-type: none"> <li>• &lt; 50: Transaction approved.</li> <li>• &gt;= 50: Transaction declined.</li> <li>• NULL: Transaction was not sent for authorization.</li> </ul>
14	Auth code (6-8 digits) from the card-issuing institution.
15	Location of transaction (see page 24).
16	Customer signature (displays if captured during transaction).

APPROVED

Transaction Type: Nnnnnnnn 1

Date: 00/00/0000 00:00:00 2

Order ID: aaa1234567890 3

Card Type: Aaaaaaaa 4

Account: \*\*\*\* \* 1234 5

Customer ID: nnnnnn 6

Transaction Amt: \$00.00 7

Tax Amount: \$00.00 8

Tip Amount: \$00.00 9

Total Amount: \$00.00 10

----- this transaction. >

More Details ^

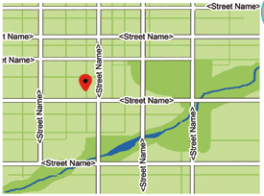
Clerk: nnnnnn 11

Reference: 160123450010690030 12

Response Code: 00 13

ISO Code: 00

Auth Code: 12345678 14



Signature 16

## Re-initializing the PAYD PIN pad

1. Start on the “Settings” screen.

**Note:** If another screen is displayed, tap  to return to the main menu, and then tap **Settings**.

2. Tap **Pinpad**.

• Tap **Connect Pinpad** if it appears.

3. Tap **Initialize Pinpad**.

**Note:** If **Connect Pinpad** continues to appear even after you have tapped it, see page 68 for troubleshooting.


4. Wait while the PAYD PIN pad re-initializes. The message “PLEASE WAIT” appears on the PAYD PIN pad.

**Note:** The re-initialization process may take a few minutes to complete.

5. Following a successful re-initialization, the “Initialization was successful. Pinpad is ready to use” message displays on your mobile device.

6. Tap **OK** to clear the “Success” message.

**Note:** The PAYD PIN pad displays “WELCOME/BONJOUR”.

7. Tap  to return to the main menu.

# Troubleshooting

## Error messages in the PAYD App

If an error message is displayed in the PAYD App (i.e., on your mobile device) 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)**.

**Note:** For error messages displayed on the PAYD PIN pad and/or other PAYD PIN pad hardware issues, see pages 70 to 73.


Error message	Solution
<b>An error occurred on the pinpad. Transaction was not processed.</b>	An application or communication error occurred. 1. Retry the transaction. (See also the issues listed on pages 67 to 69.)
<b>Application PAYD already exists. Replace version XXX with version XXX.</b>	You have already installed an earlier version of the PAYD App. 1. Delete the unusable PAYD App from your mobile device. 2. Download and install the latest version of the PAYD App (see page 19).
<b>Card Read Error. Please swipe again.</b>	The connected PAYD card reader could not read the card data when the card was swiped on it. 1. Try swiping again (see page 74).
<b>Sign In Failed. Please Try Again.</b>	1. Try signing in again. 2. If the text <b>Quit Demo Mode</b> appears at the bottom of the sign-in screen, tap <b>Quit Demo Mode</b> to return to the "live" sign-in screen, and try signing in again. 3. If the authentication fails, and you are: • trying to sign in using your full credentials, use the password reset feature (see page 34) • trying to sign in using your quick PIN, use the forgot PIN feature (see page 34) 4. If the problem persists, redo the setup procedures starting on page 19.

Error message	Solution
<b>The Request has timed out. Please ensure your signal is strong and try again.</b>	There may be too much interference in your area and/or your mobile device is too far from its wireless network access point. 1. Move to a location within your wireless network coverage area where there are no sources of interference (see page 77), and retry the operation.
<b>Unable to connect to Pinpad...</b>	The PAYD App/your mobile device cannot detect the PAYD PIN pad. 1. Confirm that the PAYD PIN pad is powered on (see pages 38 to 39). 2. Confirm that the PAYD PIN pad is in range of your mobile device and operating in a suitable environment (see page 77). 3. Confirm that the 8-digit PAYD PIN pad ID (e.g., "I6012345") is shown as "paired" on your mobile device's Bluetooth menu. 4. If the error message still displays, press and hold down the PAYD PIN pad's Power button (see page 36). 5. Wait for the PAYD PIN pad to reboot back to the "WELCOME/BONJOUR" screen before you retry the transaction.


## Other issues (PAYD App)

Issue	Solution
<b>PAYD App and/or PAYD PIN pad stalls or freezes midway during a transaction.</b>	1. If a card is inserted, remove it from the chip reader. 2. Press and hold down the PAYD PIN pad's Power button (see page 36). 3. Wait while the PAYD PIN pad reboots (the "WELCOME/BONJOUR" screen displays in about 10 seconds). 4. When the PAYD App resumes operation on your mobile device, retry the transaction. 5. If the issue recurs, close the PAYD App, and reboot the PAYD PIN pad again. 6. Re-launch the PAYD App, sign in (see page 30), and retry the transaction.

Issue	Solution
<b>“Initialize Pinpad” button does not appear.</b>	<ol style="list-style-type: none"> <li>1. Ensure that the PAYD PIN pad is powered on.</li> <li>2. Tap <b>Connect Pinpad</b>.</li> <li>3. If the <b>Initialize Pinpad</b> button still does not appear, press and hold down the PAYD PIN pad’s Power button (see page 36).</li> <li>4. Wait for the PAYD PIN pad to display “WELCOME/ BONJOUR”.</li> <li>5. Tap <b>Connect Pinpad</b>.</li> <li>6. If the issue recurs, sign out of the PAYD App.</li> <li>7. Power off your mobile device.</li> <li>8. Press and hold down the PAYD PIN pad’s Power button.</li> <li>9. Wait for the PAYD PIN pad to display “WELCOME/ BONJOUR”.</li> <li>10. Restart your mobile device, and try initializing the PAYD PIN pad again: <ul style="list-style-type: none"> <li>• If you are initializing for the first time, go back to page 20.</li> <li>• If you are re-initializing, go back to page 65.</li> </ul> </li> </ol>
<b>You get a <b>DECLINED</b> response, and the PAYD PIN pad continues to display “WELCOME/ BONJOUR”.</b>	<ol style="list-style-type: none"> <li>1. Press and hold down the PAYD PIN pad’s Power button (see page 36) to reboot the PAYD PIN pad.</li> <li>2. When “WELCOME/BONJOUR” displays, retry the transaction.</li> <li>3. If the issue recurs, re-initialize the PAYD PIN pad (see page 65).</li> </ol>
<b>You cannot remember your sign-in password or quick PIN.</b>	<ol style="list-style-type: none"> <li>1. Reset your password (see page 34), or reset your quick PIN (see page 34).</li> </ol>
<b>The “Export Report” button does not appear on the “Reports” screen.</b>	<ol style="list-style-type: none"> <li>1. Set an e-mail address to receive exported reports (see page 27).</li> <li>2. Redo the report and try exporting it again (the <b>Export Report</b> button should now appear near the top of the “Reports” screen).</li> </ol>

Issue	Solution
<b>Nothing happens when you tap</b> 	<p>Your mobile device’s privacy settings are configured to deny the PAYD App access your device’s contacts list, or you do not have any contact listings stored on your device.</p> <ol style="list-style-type: none"> <li>1. Configure your device’s privacy settings to allow the PAYD App to access to your device’s contacts list, and then retry to access your contacts list from the PAYD App.</li> </ol>
<b>The “Swipe” option does not appear on the transaction page when the PAYD card reader is connected.</b>	<p>Your mobile device was unable to detect the PAYD card reader connection.</p> <p><i>Note: The <b>Swipe</b> option will replace the <b>Keyed</b> option only if a PAYD card reader is properly connected to your mobile device.</i></p> <ol style="list-style-type: none"> <li>1. Ensure the PAYD card reader is securely connected to your mobile device (see page 74).</li> <li>2. If your mobile device has a protective sleeve, ensure it is not preventing the PAYD card reader from being completely plugged in.</li> <li>3. When <b>Swipe</b> is displayed as a card entry option, tap it and continue the transaction.</li> </ol>
<b>Nothing happens when you swipe the card on the connected PAYD card reader.</b>	<p>You may not have swiped the card correctly and/or the PAYD App does not have access to your mobile device’s microphone settings.</p> <ol style="list-style-type: none"> <li>1. Try swiping the card again (see page 74 for correct swipe position).</li> <li>2. If this does not work ensure your mobile device is configured to allow the PAYD App to access the device’s microphone, and then retry swiping the card.</li> <li>3. If you are unable to perform the transaction using the PAYD card reader, you may try manually entering the card data on your mobile device (see page 76).</li> </ol>
<b>A location map does not display on the “Details” screen of a transaction.</b>	<p>Your mobile device is not configured to use location services and/or the PAYD App does not have access to your device’s location data.</p> <ol style="list-style-type: none"> <li>1. To enable location-mapping, see page 24.</li> </ol>
<b>You want to determine the version number of the PAYD App.</b>	<ol style="list-style-type: none"> <li>1. See <i>Determining the PAYD App’s version number</i> on page 35.</li> </ol>

## Error messages on the PAYD PIN pad

If an error message appears on the PAYD 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 \(7293\)](tel:1-855-423-PAYD).

**Note:** For error messages displayed in the PAYD App on your mobile device and/or other PAYD App-related issues on your mobile device, see pages 66 to 69.

Error message	Solution
<b>BATTERY CHARGING IN PROGRESS</b>	The PAYD PIN pad battery is recharging from a very low charge level. 1. Wait for the “WELCOME/BONJOUR” screen to display (may take several minutes) before you attempt to perform a transaction.
<b>CANNOT SWIPE CHIP CARD</b>	1. Insert the chip card into the PAYD PIN pad’s chip card reader.
<b>CARD BLOCKED REMOVE CARD</b>	The chip card cannot be used. 1. Ask for another form of payment.
<b>CARD NOT SUPPORTED PLEASE RETRY</b>	1. Swipe the card again. 2. If this does not work, manually enter the card (see page 43). 3. If this does not work, request another form of payment.
<b>CARD PROBLEM</b>	Retry the transaction. If the message reappears: <ul style="list-style-type: none"> <li>• <b>If card was inserted:</b> 1. Swipe the card.</li> <li>• <b>If credit card was swiped:</b> 1. Manually enter the card (see page 43) or request another form of payment.</li> <li>• <b>If debit card was swiped:</b> 1. Request another form of payment.</li> </ul>
<b>CARD READ ERR</b>	The card data could not be read when the card was swiped or tapped. 1. Retry the transaction.

Error message	Solution
<b>CONTACTLESS TRANSACTION LIMIT EXCEEDED</b>	If the card has a chip, insert it into the chip reader; otherwise, swipe the card.
<b>DECLINED BY CARD</b>	The chip card has declined the transaction. 1. Retrieve the PAYD PIN pad, and remove the chip card. 2. Request another form of payment.
<b>ERROR CARD REMOVED</b>	The chip card was removed during the transaction. 1. Retrieve the PAYD PIN pad, and retry the transaction.
<b>MUST INSERT CARD</b>	If the card has a chip, insert it into the chip reader; otherwise, swipe the card.
<b>NO CARD</b>	The card was not entered on the PAYD PIN pad in the required time.
<b>NO SUPPORTED APPLICATIONS REMOVE CARD</b>	<ul style="list-style-type: none"> <li>• <b>If card inserted:</b> Remove the card from the chip reader, and swipe it when prompted.</li> <li>• <b>If card tapped:</b> If it has a chip, insert it into the chip reader; otherwise, swipe the card.</li> </ul>
<b>NOT ACCEPTED REMOVE CARD</b> or <b>NOT ACCEPTED USE MAG STRIPE REMOVE CARD</b>	1. Remove the chip card from the chip reader. 2. If prompted, swipe the card on the magnetic stripe reader. 3. <b>Credit only:</b> If swiping does not work, manually enter the card number (see page 43). <b>Debit only:</b> Ask for another form of payment.
<b>NOT COMPLETED</b>	The customer took more than 30 seconds to respond to the prompts. 1. Retry the transaction.
<b>PLEASE CHARGE THE TERMINAL</b>	The PAYD PIN pad’s battery charge is low. 1. Connect the PAYD PIN pad to an external power source via the USB charging cable. 2. When “BATTERY CHARGING IN PROGRESS” appears, see page 70.

Error message	Solution
<b>REFUND LIMIT EXCEEDED</b>	The total value of Refunds performed today is greater than your daily Refund Limit. <ol style="list-style-type: none"> <li>Contact us for a temporary increase in your daily Refund Limit.</li> <li>Ensure that you have the original Sale receipt available for reference.</li> </ol>
<b>TAP NOT ACCEPTED</b>	<ol style="list-style-type: none"> <li>Cancel the transaction.</li> <li>Ensure that the PAYD PIN pad battery has a charge level of at least 50% (see page 38), and retry the transaction.</li> <li>If the issue recurs, insert the card into the chip reader if the card has a chip; otherwise, swipe the card.</li> </ol>
<b>WRONG CARD TYPE</b>	The card that was swiped cannot be used for this transaction. <ol style="list-style-type: none"> <li>Ask for another card and retry.</li> </ol>

## Other issues (PAYD PIN pad)


Issue	Solution
<b>The PAYD PIN pad and/or PAYD App stalls or freezes midway during a transaction.</b>	<ol style="list-style-type: none"> <li>If the card is inserted, remove it from the chip reader.</li> <li>Close the PAYD App.</li> <li>Power off the PAYD PIN pad, and then power it on again (see pages 39 and 40).</li> <li>Re-launch the PAYD App, and sign in (see page 30).</li> <li>Retry the transaction.</li> </ol>
<b>The screen displays the hardware manufacturer name/logo instead of “WELCOME/BONJOUR”.</b>	The PAYD PIN pad is in Sleep mode. <ol style="list-style-type: none"> <li>To use the PAYD PIN pad while it is in Sleep mode, see <i>Using the PAYD PIN pad while it is in Sleep mode</i> on page 39.</li> </ol>
<b>The PAYD PIN pad powers off.</b>	The PAYD PIN pad may have gone into Sleep mode and then shut down to conserve power. <ol style="list-style-type: none"> <li>To power on the PAYD PIN pad, press the PAYD PIN pad’s Power button (see page 36).</li> <li>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.</li> </ol>
<b>The contactless reader does not beep when a card is tapped/waved at the “SWIPE, TAP OR INSERT CARD” prompt.</b>	The PAYD PIN pad battery charge level may be too low. <ol style="list-style-type: none"> <li>See solution for “TAP NOT ACCEPTED” on page 72.</li> </ol>
<b>You are unable to pair the PAYD PIN pad with your mobile device (e.g., you get a “failure” message or you are being prompted to enter a PIN code).</b>	Your mobile device (esp. 2008 or earlier models) may not support pairing in SSP mode. <ol style="list-style-type: none"> <li>For other pairing options, visit the PAYD Pro Knowledgebase at <a href="https://getpayd.com/paydpro/support">getpayd.com/paydpro/support</a> and search for “Bluetooth pairing with legacy mode”.</li> </ol>

# Using the PAYD card reader

If you are unable to perform a credit card transaction using the PAYD 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 \(7293\)](tel:1-855-423-PAYD)).

1. Make sure the media speaker on your mobile device is turned off.
2. Ensure that the volume level of your mobile device is maximized.
3. Connect the PAYD card reader:




4. Initiate the Sale (or Pre-Authorization), and then tap **Swipe**.
  - If the **Customer ID** and **Order ID** fields appear and you want to track the transaction with your own identifier(s), enter the required data in one or both of the fields; otherwise, leave the fields blank to bypass entering any identifier.  
**Note:** If you enter your own Order ID, it must be unique. If you don't enter your own Order ID, it will be generated automatically.
5. In the **Amount** field, enter the transaction amount.
  - If the tax **00% (\$)** field/box appears and is checkmarked, the tax that will be added displays in the field while the total transaction amount (including the tax) displays in the **Total (\$)** field.  
**Note:** If you do not want to add the tax to this transaction, tap (unmark) the tax **00% (\$)** box.
6. Tap **Process Transaction**.
  - If “Please specify a tip amount” appears on your mobile device, see page 51.
  - If “Please swipe card” appears on your mobile device, swipe the credit card on the PAYD card reader.
  - If the “Customer Signature” screen displays on your mobile device, capture the customer’s signature (see page 57).
7. Wait for the **APPROVED** or **DECLINED** response to appear on your mobile device.
8. The transaction is complete.
  - To e-mail a transaction receipt, see page 58.  
**Note:** If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically e-mails a receipt to the address (the PAYD App will not notify you that the e-mail has been sent).
  - To send an SMS text message notification, see page 59.
9. Tap  to return to the main menu.



## Manual card entry on your mobile device

If you are unable to perform a Sale or Pre-Authorization using the PAYD card reader (see page 74), follow the steps below to manually enter the transaction entirely on your mobile device. (i.e. neither the PAYD PIN pad nor the PAYD card reader will be used).

1. If the PAYD card reader is connected to your mobile device, disconnect the PAYD card reader.
2. Initiate the Sale (or Pre-Authorization) on your mobile device.
3. Tap **Keyed**.
  - If the **Customer ID** and **Order ID** fields appear and you want to track the transaction with your own identifier(s), enter the required data in one or both fields; otherwise, leave these fields blank to bypass entering any identifier.  
*Note: If you enter your own Order ID, it must be unique. If you don't enter your own Order ID, it will be generated automatically.*
4. In the **Amount (\$)** field, enter the transaction amount (###).
  - If the tax **00% (\$)** field/box appears and is checkmarked, the tax that will be added displays in the field while the total transaction amount (including the tax) displays in the **Total (\$)** field.  
*Note: If you do not want to add the tax to this transaction, tap (unmark) the tax **00% (\$)** box.*
5. In the **Card Number** field, enter the card's number.
6. In the **Exp (MMYY)** field, enter the card expiry date.
  - If the **CVV** field appears, enter the 3- or 4-digit card verification value (code).
7. Tap **Process Transaction**.
  - If "Please specify a tip amount" appears on your mobile device, see page 51.
  - If the "Customer Signature" screen displays on your mobile device, capture the customer's signature (see page 57).
8. Tap  to return to the main menu.

## Sources of electromagnetic interference

Listed below are some common sources of electromagnetic interference that may impair the operability of the PAYD PIN pad:

- Motors and compressors
- Computer screens and televisions
- Radio transmitters and other wireless devices operating at 2.4GHz (e.g., Wi-Fi devices, wireless routers, cordless phone bases, etc.)
  - at least 2 m (6.5 feet) away
- Microwave ovens - at least 3 m (10 feet) away
- Anti-theft barriers, etc.
- Elevator shafts
- Cash registers
- Blenders and food processors
- Air conditioning units, ventilation fans
- Large, metal, horizontal or vertical surfaces (e.g., appliances, metallic blind or countertops, etc.)



# Need help?

For telephone or e-mail assistance:

- Call us toll-free at **1-855-423-PAYD (7293)**, or e-mail us at [info@getpayd.com](mailto:info@getpayd.com) (24 hours a day, 7 days a week).

For online troubleshooting tips, frequently asked questions (FAQ), and other help resources:

- In the PAYD App:

1. Start on the main menu (you must be signed in).

**Note:** *If another screen is displayed, tap to go to the main menu.*

2. Tap **Help**.

- On the Web:

1. Visit [getpayd.com/paydpro/support](http://getpayd.com/paydpro/support) (additional copies of this guide may be downloaded from this site).

**Important: You must use the USB charging cable provided with the PAYD PIN pad. Failure to do so may affect the operability of or cause damage to the PAYD PIN pad.**

# Notes

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## BE PAYMENT READY

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PAYDPR\_And\_YT\_E (01/16)