**BE PAYMENT READY**

# PAYD Pro Plus® Mobile Solution
## Customer Display
## Reference Guide

**Moneris**

**BE PAYMENT READY**

# Need help?

**Web:** moneris.com/support-paydproplus-mobile

**Toll-free:** 1-866-319-7450

Record your Moneris merchant ID here:

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# Contents

# Introduction

The Moneris PAYD Customer Display allows customers to see their orders on an iPad screen as they are being input.

This guide explains how to set up the Customer Display for use with the PAYD Pro Plus App.

# Before you get started

1. Please confirm that you have all the necessary items for the Customer Display solution:

| | | |
|---|---|---|
| Two (2) Apple® iPads® | Display stand (compatible with your Apple iPad) | Wi-Fi network |
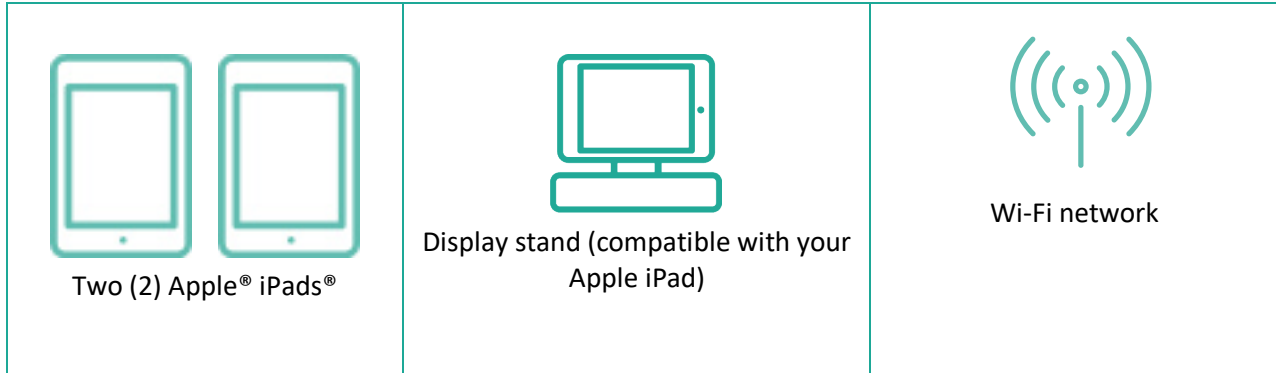
2. Ensure that your Apple iPads are both connected to the same Wi-Fi network.

3. Ensure that the PAYD Pro Plus App is installed on one of your iPads, and that you are able to sign in and use the App. Refer to the *PAYD Pro Plus® Mobile Solution: Configuration Guide* for more information on downloading, signing in, and configuring the PAYD Pro Plus App. This guide is available at **moneris.com/support-paydproplus-mobile**.

## Important notes

### Stand setup

Set up the stand for your Customer Display iPad by following the manufacturer's setup and installation instructions. Secure the stand to your counter in the location where you will be serving your customers, then secure the iPad to the stand.

*Note:*   *A variety of stands are available from Moneris. Visit* **shop.moneris.com** *to order yours today.*

### Terminology in this guide

Here are some terms to keep in mind when reading the instructions in this guide:

- The **Primary iPad** – this term refers to the iPad that has the PAYD Pro Plus App installed on it. This is the iPad you use to operate the App to process customer transactions and perform configuration.

- The **Secondary iPad** – this term refers to the iPad that will serve as the Customer Display.

- **PAYD Pro Plus App** – this term refers to the PAYD Pro Plus App that you use to interact with your customers and process their transactions.

- **Customer Display App** – this term refers to the Customer Display App that you will install on the Secondary iPad.

## If you don't have a Wi-Fi network

▪ It is possible to have the primary and secondary iPad connect in a peer-to-peer network.

- ▪ The primary iPad requires 3G, 4G, or LTE service (e.g. needs a SIM card and cellular service).
- ▪ On the secondary iPad, ensure Wi-Fi is enabled, but the iPad is not connected to any Wi-Fi network. This should allow the iPads to communicate when they are in close proximity to one another.

***Note:*** *This is not the preferred method of connection. It is preferable to connect the iPads to a secure Wi-Fi network to ensure a stable connection.*

## PAYD Pro Plus help resources

The PAYD Pro Plus App has a suite of supporting documentation that explain how to set it up and use it to serve your customers and process their transactions. These resources are available at **moneris.com/support-paydproplus-mobile**.

# Setting up your Customer Display

In this section, we go over everything you need to know to set up your Customer Display for use with the PAYD Pro Plus App.

# Downloading and installing the Customer Display App

Follow these instructions to download and install the free Customer Display App on your secondary iPad.

1. From the home screen of your Apple iPad, open the App Store®.

2. In the Business category, search for "Moneris Customer Display", then select the app.

3. Tap **GET**, and then tap **INSTALL**.

4. When prompted, enter your **Apple ID** and **password**, and then tap **OK**.

5. When the installation is complete, your Apple iPad's home screen displays the Customer Display App icon
(   ).

6. If you have more than one iPad that you are going to use as a Customer Display, repeat steps 1-5 above to install the Customer Display App on the other eligible iPads.

**Important: If you have more than one PAYD Pro Plus lane for processing customer transactions i.e. you have 3 Apple iPads and PIN Pads to be able to process customer transactions simultaneously, each lane could potentially have its own Customer Display. The Customer Displays work with the PAYD Pro Plus App on a one-to-one ratio, meaning the PAYD Pro Plus App installed on one of your iPads will work with one Customer Display App installed on another iPad. Assuming you have 3 lanes, you could potentially use 3 additional iPads as Customer Displays.**

*Note:     If you wish to increase the number of lanes at your location, contact your Moneris sales rep for further information.*

## Activating the Customer Display feature in the PAYD Pro Plus App

Follow these steps to activate the Customer Display feature within the PAYD Pro Plus App on your primary iPad.

*Note:     This task only needs to be performed once on one iPad at your location.*

1. Login to the PAYD Pro Plus App on the primary iPad.

2. From the Sale screen, tap the **Settings** (   ) button.

3. On the main menu, tap **Configuration**.

4. In the Configuration screen, tap **Devices**.

5. In the Configuration - Devices screen, scroll down to the **CUSTOMER FACING DISPLAY** section.
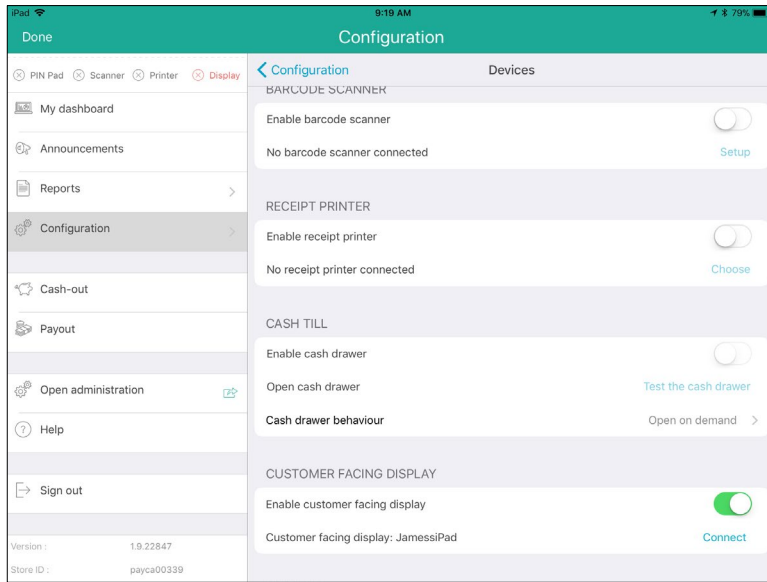
6. Toggle the **Enable customer facing display** switch to the right (Enabled).

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

8. Set the primary iPad aside for now.

## Syncing the Customer Display App with the PAYD Pro Plus App

Once the Customer Display App has been downloaded and installed on the secondary iPad, follow these instructions to synchronize the Customer Display App with the PAYD Pro Plus App on the primary iPad.

1. On the secondary iPad's home screen, tap the Customer Display App icon ().

   The first time the Customer Display App launches, it presents a brief tour of the feature, and a license agreement.

2. Page through the tutorial and read the license agreement, then tap **Accept**.

3. When the "Getting started…" screen appears on the secondary iPad, set the iPad aside for now.

Getting started with the Customer Facing Display is easy!

| Step 1 | Step 2 | Step 3 | Step 4 |
|---|---|---|---|
| [Download the PAYD Pro Plus App (V2.0 or higher) onto a separate Apple iPad] | Connect this device and the PAYD Pro Plus iPad to the same Wi-Fi network | In the PAYD Pro Plus App, open the settings menu, tap Configuration > Devices, and enable the Customer Facing Display functionality | Tap Connect and follow the steps to pair your device |

Device Name:  James's iPad

Device ID:  C6A7712E-F728-43FE-9837-068D249C29BB

4. On the primary iPad, in the Sale screen, tap the **Settings** (⚙) button.

5. On the main menu, tap **Configuration**.

6. In the Configuration screen, tap **Devices**.

7. In the Configuration - Devices screen, scroll down to the **CUSTOMER FACING DISPLAY** section.

8. Tap **Connect** beside "External Display: Not Connected".

   The Customer Facing Display Connect popup appears.
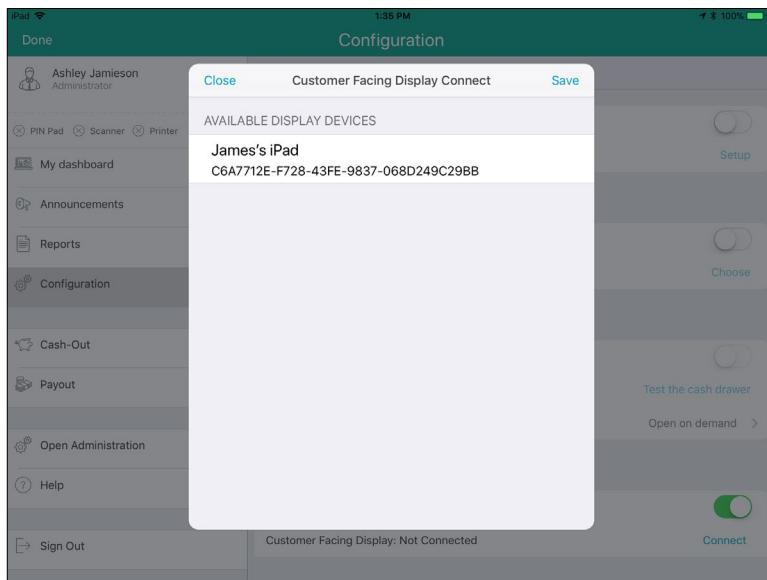
9. In **AVAILABLE DISPLAY DEVICES**, tap the name of the secondary iPad you wish to use as the Customer Display.

   The caption changes to "WAITING ON DEVICE TO ACCEPT OR DECLINE INVITATION".

10. On the secondary iPad, the Connection request popup appears with the name of the primary iPad listed.
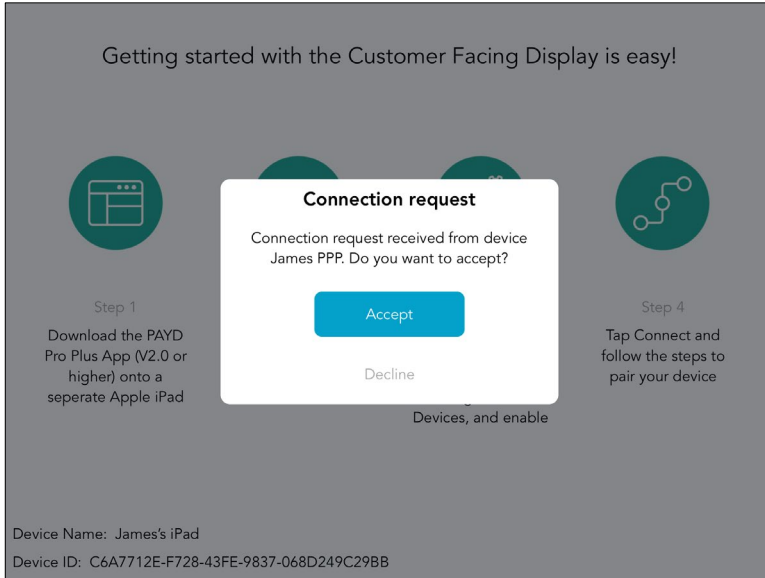


11. Tap **Accept** to link the two iPads together.

    The name of the secondary iPad will now display as a "CONNECTED DISPLAY DEVICE" on the primary iPad.

    ***Note:*** *This operation may take several minutes to complete.*
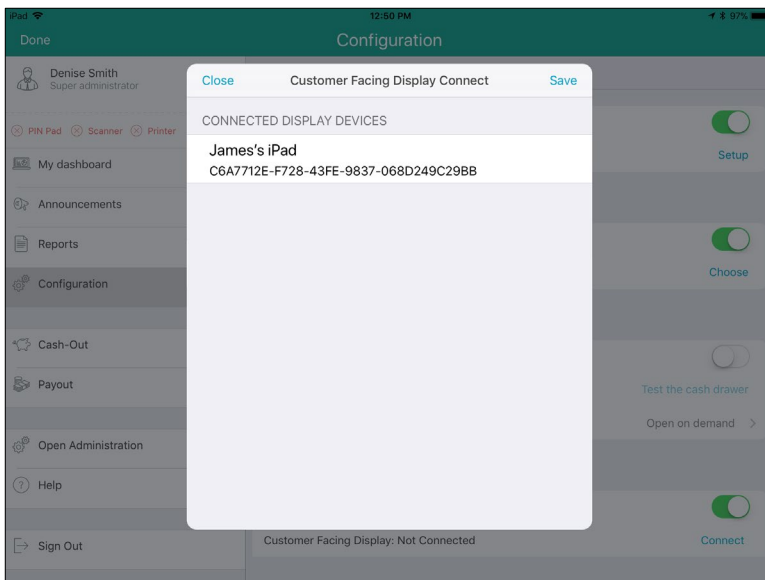


12. Tap **Save** in the top right corner of the Customer Facing Display Connect popup on the primary iPad.

# Configuring your Customer Display

The Customer Display is very customizable. Follow the instructions in this section to:

- <u>Access</u> the Customer Display configuration screen

- <u>Set</u> the default Customer Display language

- <u>Create</u> the screen layouts and colour scheme of the Customer Display

- <u>Define</u> the images and duration of the idle screen

- <u>Set up</u> a video to play on your idle screen

- <u>Define</u> survey questions to ask your customers at the end of a transaction

- <u>Define</u> the type of customer profile data you collect from the customer

- <u>Insert</u> your business logo and define button colours

- <u>Set</u> the schedule for your screen layouts

## Accessing the Customer Display configuration screen

Follow the instructions below to access the Customer Display configuration screen.

1. From the Sale screen, tap the **Settings** (⚙) button.

2. On the main menu, tap **Configuration**.

3. On the right pane of the Configuration screen, tap **Customer Facing Display**.

   The Customer Facing Display screen appears on the right pane.
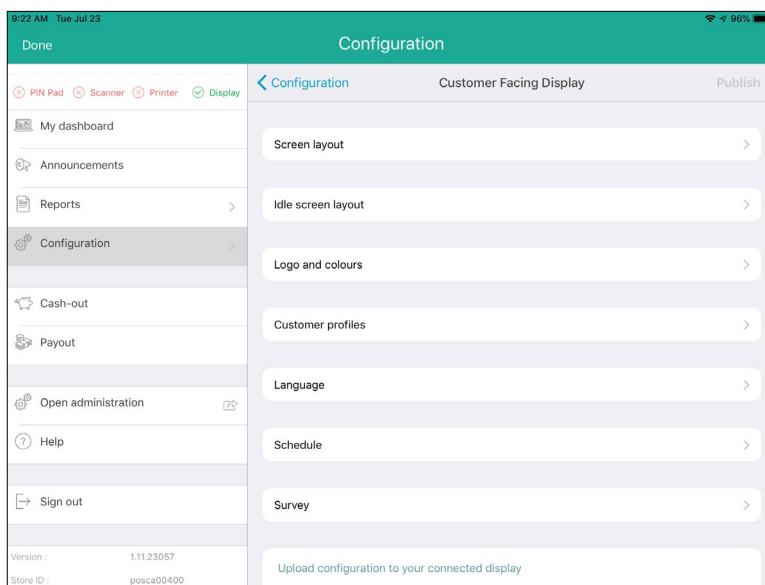
# Setting the default language for the Customer Display
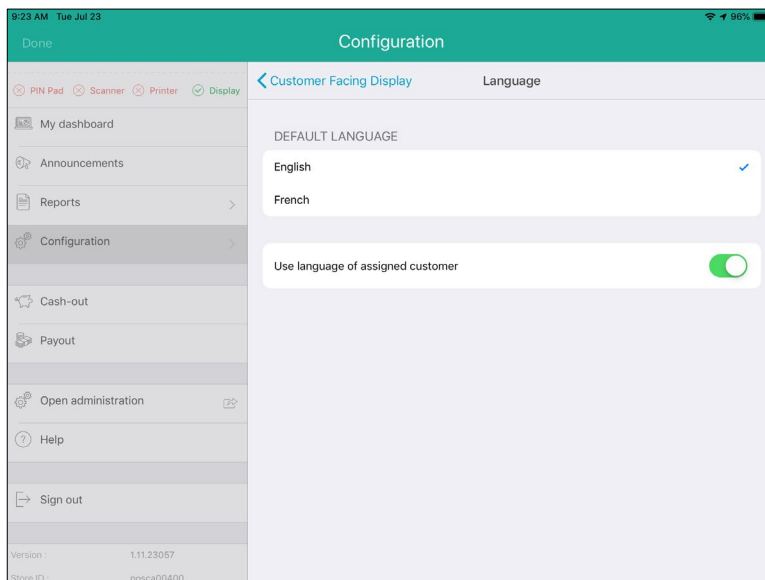
Use the Language screen to set the default language for the Customer Display.

1. Access the Customer Facing Display screen. See Accessing the Customer Display configuration screen on page 10 for instructions.

2. In the Customer Facing Display screen, tap **Language**.

3. In the Language screen, tap the **DEFAULT LANGUAGE** setting you'd like to use (so that it has a blue checkmark).

4. Do one of the following:

   ▪ If you would like to use the customer's default language (set in their customer profile), toggle the **Use language of assigned customer** switch to **On** (Default = Off).
   ▪ If you would like the Customer Display to display your selected language no matter what the customer's language choice is, leave the switch set to **Off**.



5. When finished, tap **<Customer Facing Display** at the top of the Language screen to return to the Customer Facing Display screen.

# Defining the screen layout and colour scheme

Determine the screen layout, schedule, and colour scheme for your Customer Display. You can create multiple displays that have different characteristics such as layouts, or time ranges, so that you can customize different displays for different days of the week or different times.

*Note:* *You are able to create a maximum of 10 templates.*

1. Access the Customer Facing Display screen. See Accessing the Customer Display configuration screen on page 10 for instructions.

2. In the Customer Facing Display screen, tap **Screen layout**.

   A blank Screen layout screen appears.
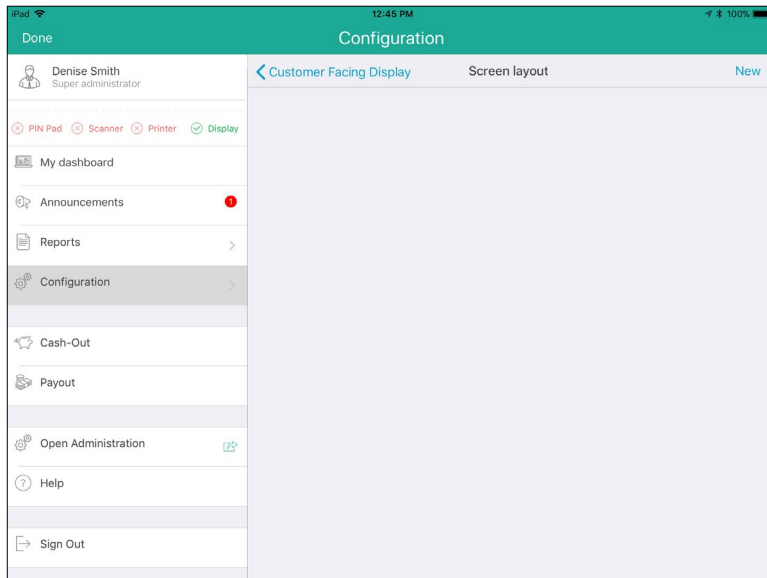


3. Tap **New** in the top right corner of the screen.

   A Screen layout popup appears.



4. Tap inside the **Name** field and give the layout a name.

5.  Define which lane (iPad) to which the layout will apply:

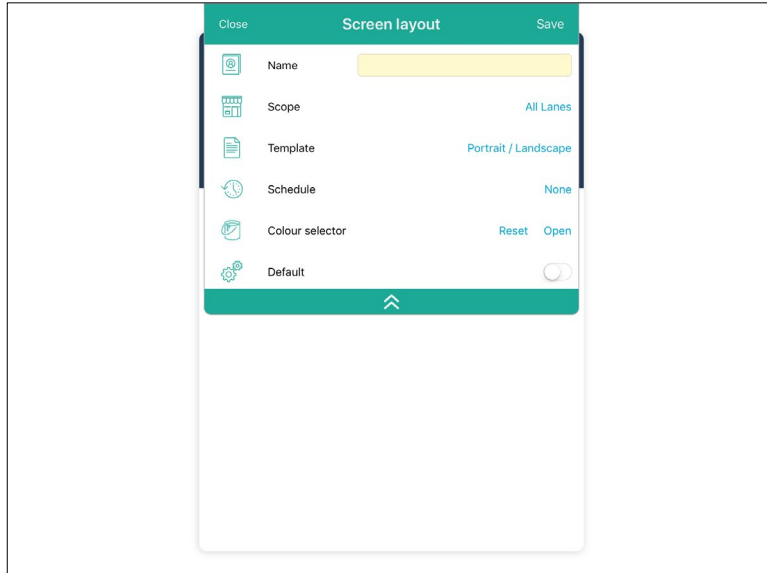    *Note:*  *By default, the layout will apply to all lanes. Use this feature only if you want to have different screen layouts apply to different Customer Displays.*

    a.  Tap **Scope**.

        A Select your lane popup appears.
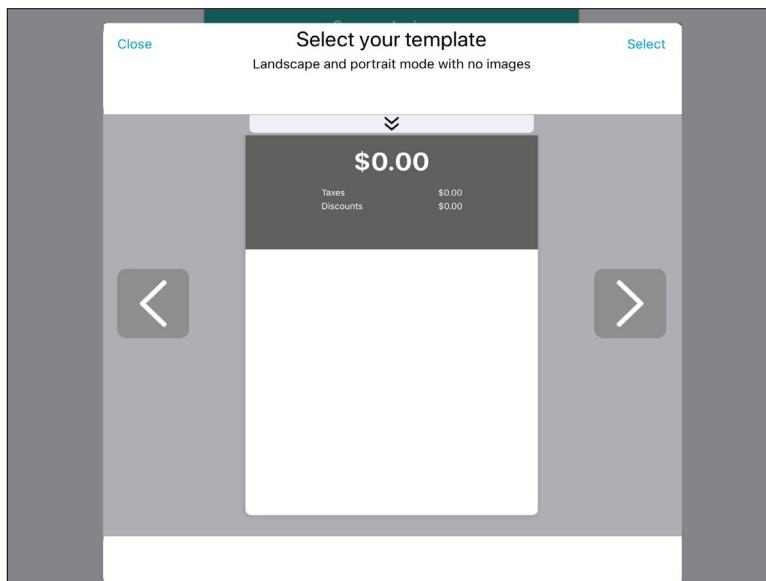
    b.  Tap the name of the primary iPad on which you will be using the Customer Display, then tap **Done**.

        The Screen layout popup reappears.

6.  Create the screen layout:

    a.  Tap **Portrait/Landscape** beside **Template**.

        The Select your template screen appears.



    b.  Swipe right to see the various layout options.
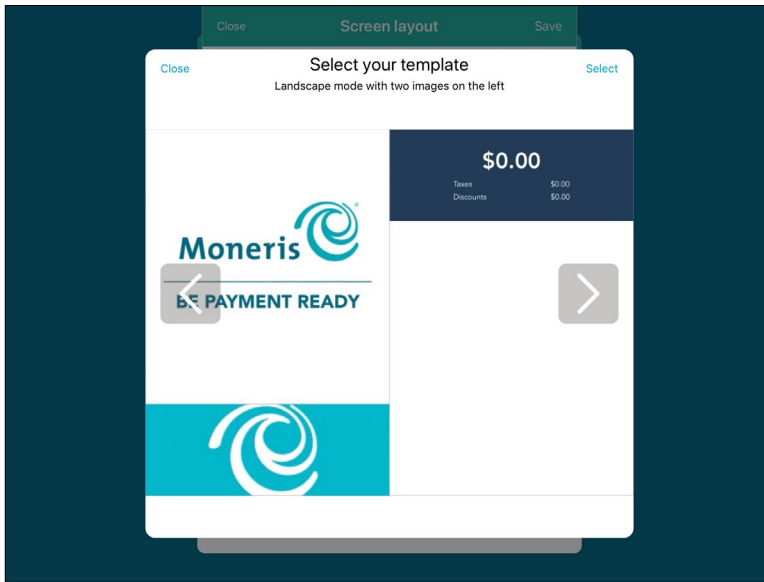
c.  Once you have found a layout that you like, tap **Select** in the top right corner of the screen.

The Screen layout popup reappears.

7.  (Optional) Set your layout's schedule:

*Note:*   *You can access the schedule from the Customer Display configuration screen at anytime to set your schedule. If you do not wish to set up a schedule at this point in time, you can skip this step and return to it later.*

a.  Tap **None** beside **Schedule**.

The Schedule a date or time popup appears.
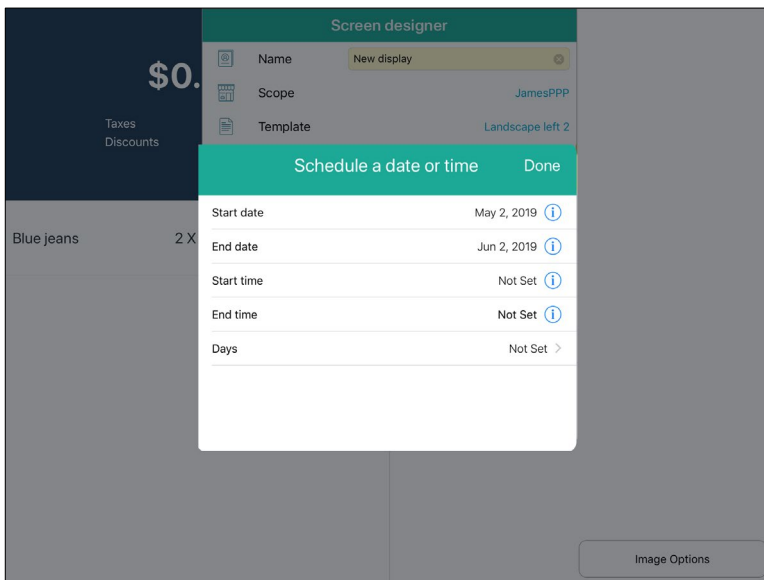


b.  Tap the ⓘ icon beside **Start date** and use the date selector to select when you wish to begin using this layout, then tap **Done**.

c.  Tap the ⓘ icon beside **End date** and use the date selector to select when you wish to cease using the layout, then tap **Done**.

d.  (Optional) Set a start time for the display by tapping the ⓘ icon beside **Start time** and using the time selector, then tap **Done**.

e.  (Optional) Set an end time for the display by tapping the ⓘ icon beside **End time** and using the time selector, then tap **Done**.

f.  (Optional) Set specific days of the week for the display by tapping **Days**. Tap the days of the week you wish to display the layout, then tap **Done**.

8.  Select the colour scheme for the layout:

a.  Beside **Colour selector**, tap **Open**.

Below the Screen layout popup, a Colour selector popup appears.
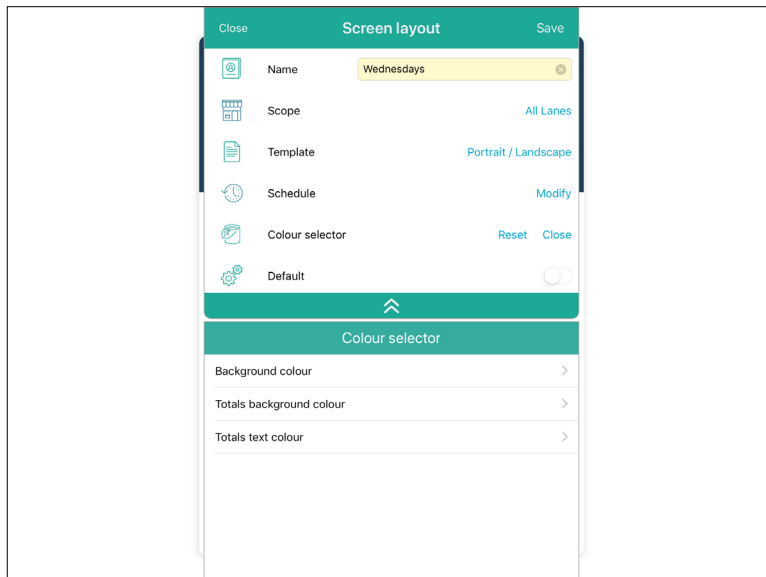


b.  Tap **Background colour**.

The Background colour popup appears.
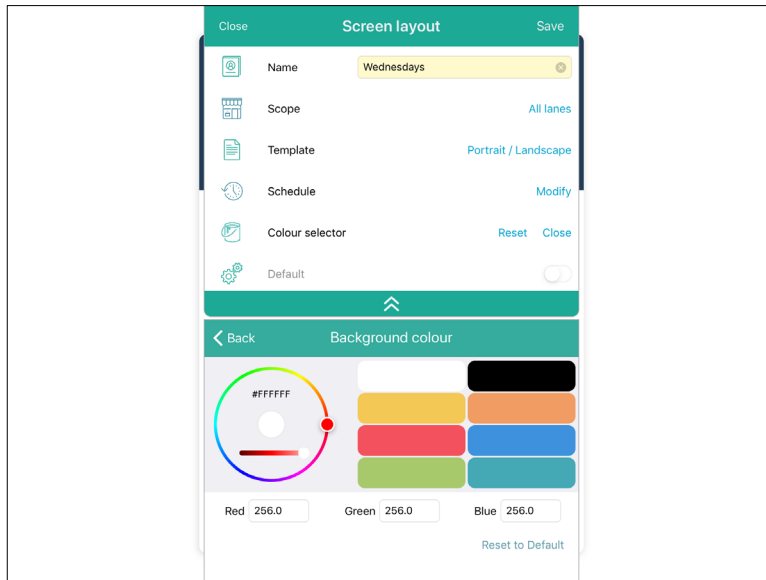
c. Do one of the following to set the background colour:

- Drag your finger around the circle, moving the dot around to the colour you wish to use.
- Tap one of the default colour bars on the right.
- Tap inside the **Red**, **Green**, and **Blue** fields and enter the numeric RGB values.

   *Note:* *If you selected a template with images, the Background colour will not be visible.*

d. When you have finished selecting your colour, tap **<Back** at the top left of the popup.

e. Tap **Totals background colour**.

f. Do one of the following to set the background colour of the totals section (where the totals and taxes are displayed):

- Drag your finger around the circle, moving the dot around to the colour you wish to use.
- Tap one of the default colour bars on the right.
- Tap inside the **Red**, **Green**, and **Blue** fields and enter the numeric RGB values.

g. When you have finished selecting your colour, tap **<Back** at the top left of the popup.

h. Tap **Totals text colour**.

i. Do one of the following to set the colour of the text that appears in the totals section (where the totals and taxes are displayed):

- Drag your finger around the circle, moving the dot around to the colour you wish to use.
- Tap one of the default colour bars on the right.
- Tap inside the **Red**, **Green**, and **Blue** fields and enter the numeric RGB values.

j. When you have finished selecting your colour, tap **<Back** at the top left of the popup.

9. (Optional) Set the layout as the default:

   ▪ Toggle the **Default** switch to ON to set this layout as the default.

   *Note:    Setting a default layout ensures that this layout will always be visible (except when other layouts are scheduled to occur). You can choose to make any layout that you create as the default.*
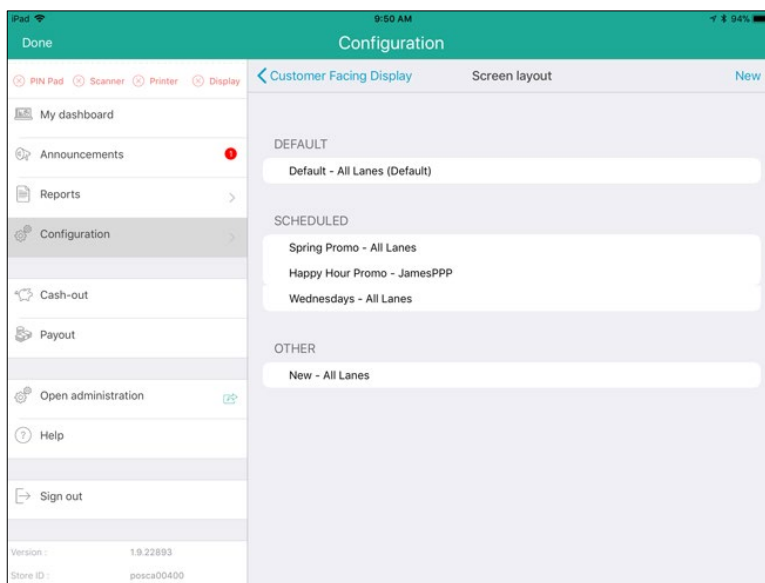
10. Tap **Save** at the top of the Screen layout popup.

    A confirmation popup appears.

11. Tap **OK**.

12. Tap **Close** at the bottom of the Screen designer popup.

    The Screen layouts screen reappears.



13. Repeat steps 3 – 12 to create other layout templates as needed.

    *Note:    You are able to create a maximum of 10 templates.*

## Defining the idle screen layout

When the Customer Display is not displaying a transaction in progress, it reverts to an idle screen. Follow these steps to define the images for the idle screen.

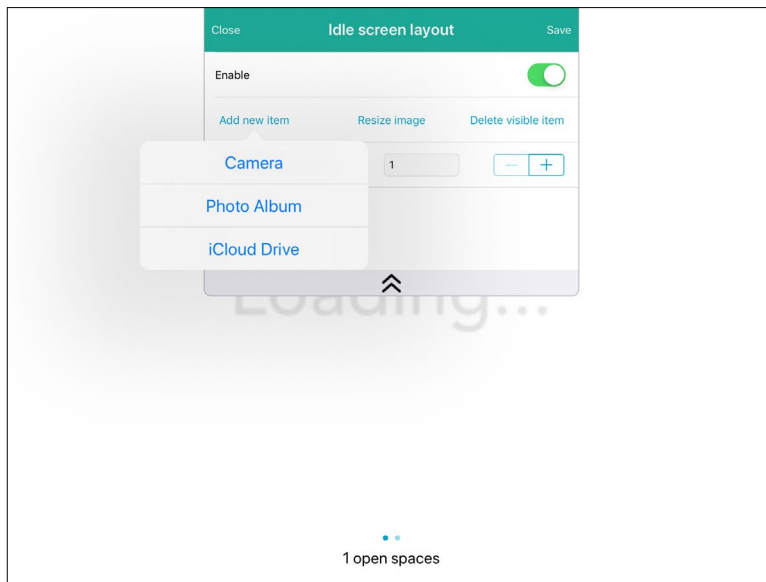1. In the Configuration – Customer Facing Display screen, tap **Idle screen layout**.

   The Idle screen layout popup appears.

2. To enable the idle screen, toggle the **Enable** switch to On (Default = Off).

3. Select an image for the idle screen to display e.g. your company's logo:

   a. Tap **Add new item**.

      A popup appears offering three sources for images.

b.  Select your image source:

- To take a picture with your iPad's camera:

    i.  Tap **Camera**.

    ii.  If prompted to allow the PAYD Pro Plus App access to the camera, tap **OK**.

    iii.  Snap the picture.

    iv.  Choose whether to use the image you took by tapping **Use Photo**, or tap **Retake** and snap another photo. Once you take a picture that you wish to use, tap **Use Photo**. Proceed to step 4.

- To use an image stored on your iPad:

    i.  Tap **Photo Album**.

    ii.  Browse for the image you wish to use.

    iii.  Tap the image you wish to use.

    iv.  Proceed to step 4.

- To use an image stored on the iCloud:

    i.  Tap **iCloud Drive**.

    ii.  In the popup, either browse through the recent images saved to iCloud, or tap **Browse** at the bottom of the popup, then browse through older images.

    iii.  Tap the image you wish to use.

    iv.  Proceed to step 4.

4.  If desired, add up to two more images following the instructions in step 3.

5.  Set the duration of the idle screen display (in seconds):

- Tap the **+** symbol beside **Display time** until the desired amount is shown in the field.
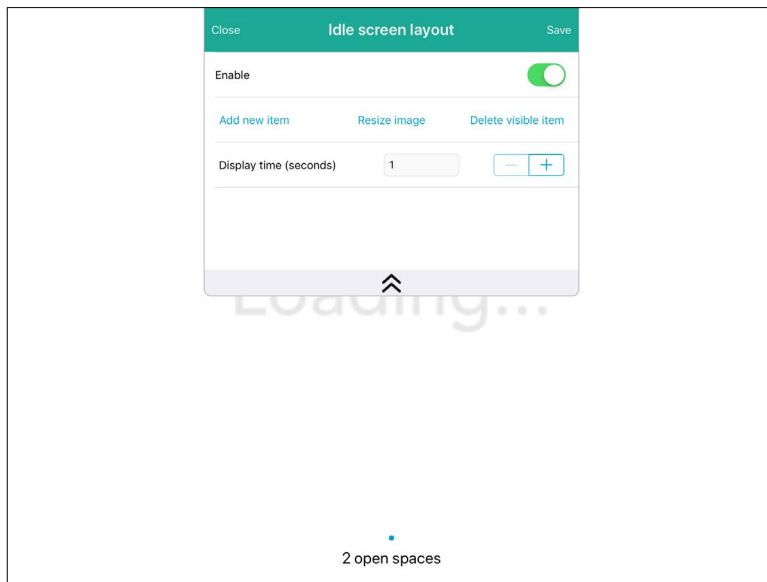
6. Tap **Save** at the top of the Idle screen layout popup.

7. Tap **Close** at the top of the Idle screen layout popup.

   The Customer Facing Display screen reappears.

# Adding video to your idle screen layout

It is possible to display a video on the Customer Display's idle screen when the Customer Display is not displaying transaction information. This video will play in a constant loop.

## Requirements for video inclusion

In order to add and display videos, you require the following items:

- An iCloud account set up. You must be logged in on the iPad to your iCloud account.

  - Videos can only be uploaded from your iCloud account.

- Using the Photos app on your iPad, the video must be saved to a shared folder on your iCloud drive.

- If there are multiple lanes that share the same screen layout/idle screen that contains video(s), all iPads need to be logged in to the same iCloud account in order to see the video.

*Note:    For help setting up and linking iCloud accounts to your iPads, please refer to Apple's instructions called "Set up iCloud on your iPhone, iPad, or iPod touch" located at* **https://support.apple.com/en-us/HT208681**.

Follow the directions below to add video to your Customer Display.

1. In the Configuration – Customer Facing Display screen, tap **Idle screen layout**.

   The Idle screen layout popup appears.

2. In the Idle screen layout popup, tap **Add new item**.

3. In the popup that appears below, tap **iCloud Drive**.

   An iCloud Drive popup appears.

4. Tap the folder that contains your video or browse for it by name or size.
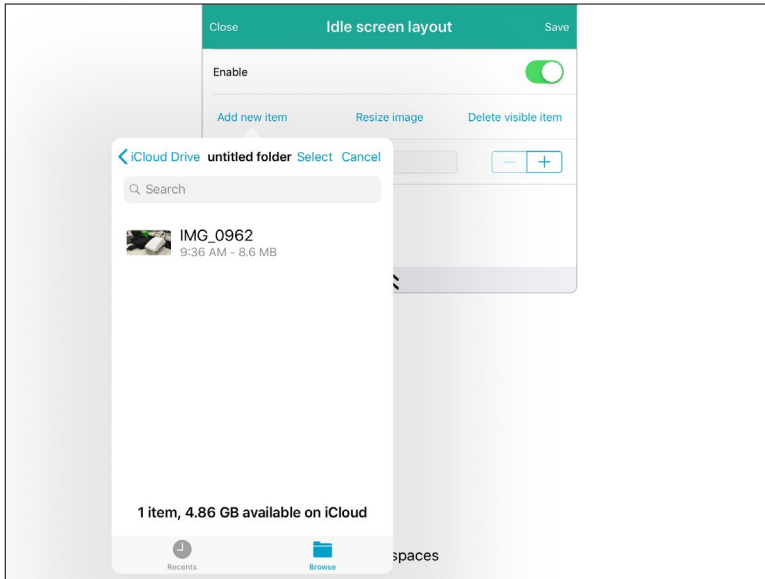


5. Tap your video file.

   The video starts playing in the background.

6. Tap **Save** at the top right corner of the Idle screen layout popup.

## Defining the survey questions

You can create a quick survey for your customers to fill out once their transaction is complete. The surveys work as a star rating system, which means that the customer will tap a star that coincides with their level of satisfaction e.g. if your service was fantastic, it might warrant a 5-star rating. Follow the instructions below to define the survey questions you wish to ask.

*Note:* *Once you enter your questions into the PAYD Pro Plus App, the questions cannot be edited; they can only be deleted and recreated (to ensure consistency of reporting). Therefore, it is important to ensure your questions are succinct to elicit the responses you want, and to ensure they are spelled correctly.*

1. Access the Customer Facing Display screen. See <u>Accessing the Customer Display configuration screen</u> on page 10 for instructions.

2. In the Customer Facing Display screen, tap **Survey**.

3. In the Survey screen, toggle the **Enable survey questions** switch to On (Default = Off).

4. Tap **Add new question**.

5. Tap inside the **English** field and enter your question.
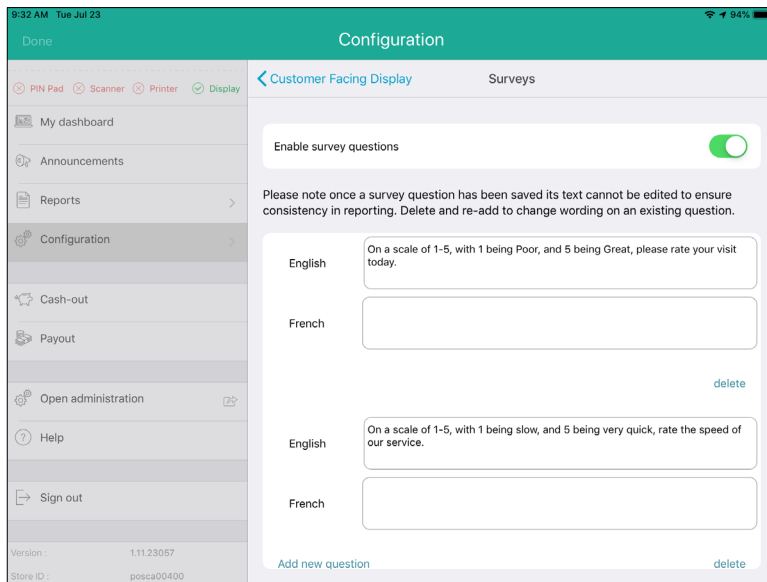
6.  (Optional) Tap inside the **French** field and enter your question.

7.  Repeat steps 4-6 to create additional questions as required.

    **Note:**  *You can create a maximum of three survey questions.*

8.  When finished, tap **< Customer Facing Display** at the top of the Surveys screen to return to the Customer Facing Display screen.

## Defining customer profile parameters

You can use the Customer profile screen to define what information you want to capture on the Customer Display for new unregistered customers.

**Note:**  *For information on creating new customer profiles, refer to the* **PAYD Pro Plus® Mobile Solution: Using PAYD Pro Plus for Apple® iPad®** *guide available at* **moneris.com/support-paydproplus-mobile***.*

1.  Access the Customer Facing Display screen. See Accessing the Customer Display configuration screen on page 10 for instructions.

2.  In the Customer Facing Display screen, tap **Customer profiles**.

3.  In the Customer profiles screen, tap the customer information you wish to collect (so that they have a blue checkmark). Unchecked items will not be collected.
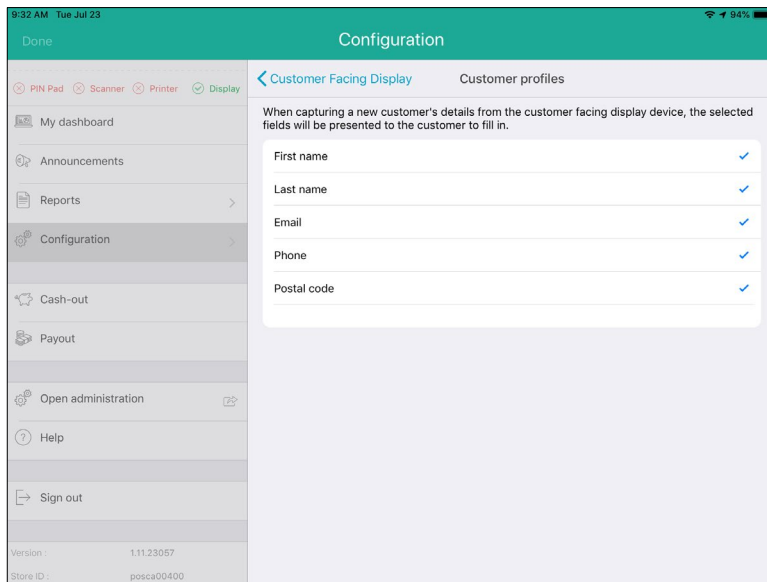
4.  When finished, tap **< Customer Facing Display** at the top of the Customer profiles screen to return to the Customer Facing Display screen.

# Setting your business logo and defining button colours

It is possible to have your business logo displayed on the Customer Display, and to define the button and text colours for buttons on the Customer Display.

1.  Access the Customer Facing Display screen. See Accessing the Customer Display configuration screen on page 10 for instructions.

2.  In the Customer Facing Display screen, tap **Logos and Colours**.

3.  In the Logos and colours screen, tap **Choose** to select your logo.

    A popup appears with three potential image sources.
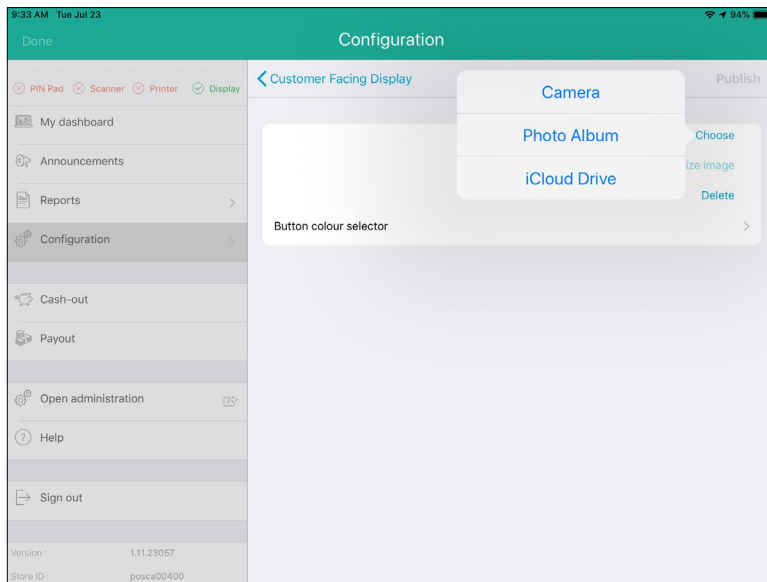
4. Choose the source of your image:

- To take a picture with your iPad's camera:

    a. Tap **Camera**.

    b. If prompted to allow the PAYD Pro Plus App access to the camera, tap **OK**.

    c. Snap the picture.

    d. Choose whether to use the image you took by tapping **Use Photo**, or tap **Retake** and snap another photo. Once you take a picture that you wish to use, tap **Use Photo**. Proceed to step 5.

- To use an image stored on your iPad:

    a. Tap **Photo Album**.

    b. Browse for the image you wish to use.

    c. Tap the image you wish to use.

    d. Proceed to step 5.

- To use an image stored on the iCloud:

    a. Tap **iCloud Drive**.

    b. In the popup, either browse through the recent images saved to iCloud, or tap **Browse** at the bottom of the popup, then browse through older images.

    c. Tap the image you wish to use.

    d. Proceed to step 5.

5. Set the colour for buttons that appear on the Customer Display:

    a. Tap **Button colour selector**.

    The Button colours screen appears.

b. Tap **Button background colour**.

The Button background colour screen appears.
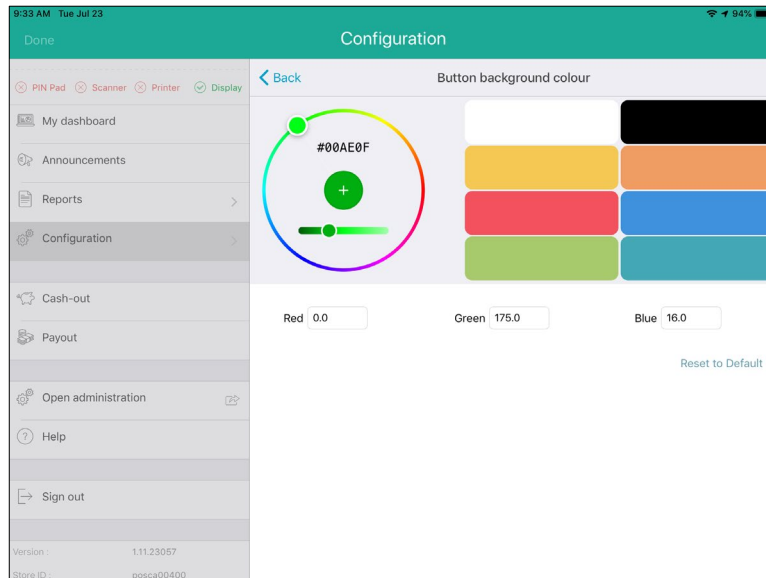


c. Select the colour you want:

- Drag your finger around the circle, moving the dot around to the colour you wish to use.
- Tap one of the default colour bars on the right.
- Tap inside the **Red**, **Green**, and **Blue** fields and enter the numeric RGB values.

d. When finished, tap **< Button colours** to return to the Button colours screen.

6. Set the colour for the text that will appear on the buttons:

a. Tap **Button text colour**.

The Button text colour screen appears.

b. Select the colour you want:

- Drag your finger around the circle, moving the dot around to the colour you wish to use.
- Tap one of the default colour bars on the right.
- Tap inside the **Red**, **Green**, and **Blue** fields and enter the numeric RGB values.

c. When finished, tap **< Button colours** to return to the Button colours screen.

7. Tap **< Logos and colours** at the top of the screen to return to the Logos and colours screen.
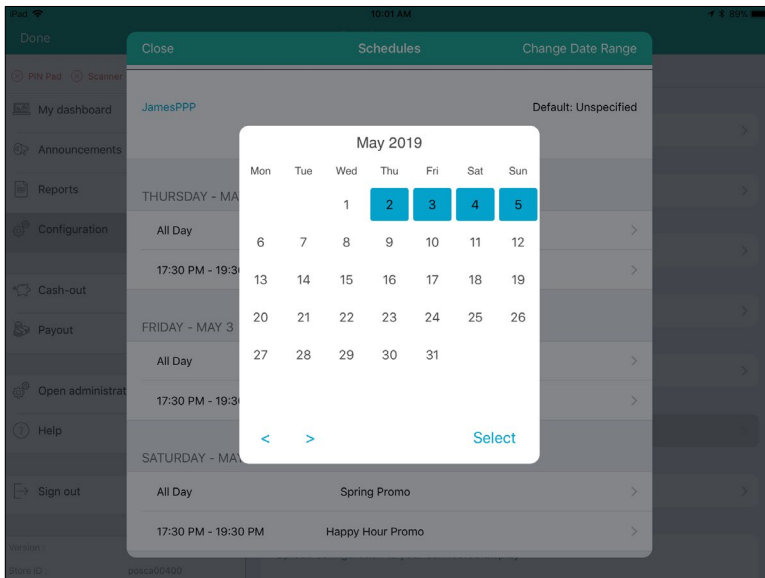
# Reviewing the schedule

Once you have designed and configured your templates, and set their schedules and frequency, you can use the Schedule screen to review what you have set up, and edit the schedule as necessary.

1. Access the Customer Facing Display screen. See Accessing the Customer Display configuration screen on page 10 for instructions.

2. In the Customer Facing Display screen, tap **Schedule**.

3. In the top left, tap the name of the primary iPad whose schedule you wish to view.

   *Note:* *If you have multiple primary iPads, they will be listed by their names.*
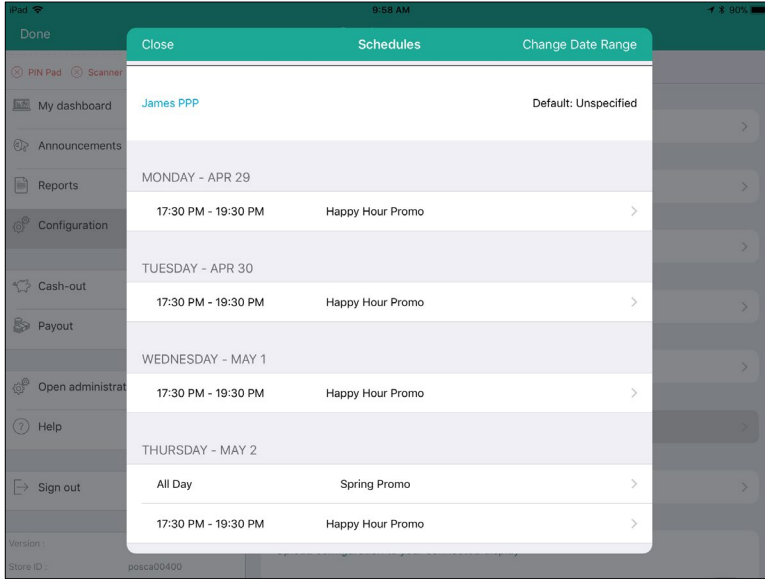


4. Review the information in the Schedules screen.

5. You can change the date range by tapping **Change Date Range** in the top right corner of the screen.

   A calendar popup appears.



6. Select a week that you wish to view, then tap **Select**.

7. (Optional) If you wish to change a schedule for a particular week, use the calendar as described in step 6 above to navigate to a week, then tap it and tap **Select**.

8. When you are finished viewing the scheduling information, tap **Close** in the top left corner of the screen.

   The Customer facing display screen reappears.

**If you wish to change a layout's overall schedule:**

1. Tap the schedule's name in the Schedules screen.

   The Schedule a date or time popup appears.

2. Tap the ⓘ icon beside **Start date** and use the date selector to select when you wish to begin using this layout, then tap **Done**.

3. Tap the ⓘ icon beside **End date** and use the date selector to select when you wish to cease using the layout, then tap **Done**.

4. (Optional) Set a start time for the display by tapping the ⓘ icon beside **Start time** and using the time selector, then tap **Done**.

5. (Optional) Set an end time for the display by tapping the ⓘ icon beside **End time** and using the time selector, then tap **Done**.

6. (Optional) Set specific days of the week for the display by tapping **Days**. Tap the days of the week you wish to display the layout, then tap **<Back**.

7. When finished editing the schedule, tap **Done** in the top right corner of the Schedule a date or time popup.

8. Tap **Save** at the top of the Screen layout popup.

9. Tap **OK** on the confirmation popup.

10. Tap **Close** at the top of the Screen layout popup.

    The Schedules screen reappears.


# Syncing with the secondary iPad

Now that you have finished configuring the customer display, you need to sync your changes to the secondary iPad which will serve as the Customer Display. Follow the instructions below to upload that layout to the secondary iPad.

1. Access the Customer Facing Display screen. See Accessing the Customer Display configuration screen on page 10 for instructions.

2. In the Customer Facing Display screen, scroll down to the bottom of the screen.

3. Toggle the switches to the right (ON) for the items that you configured.
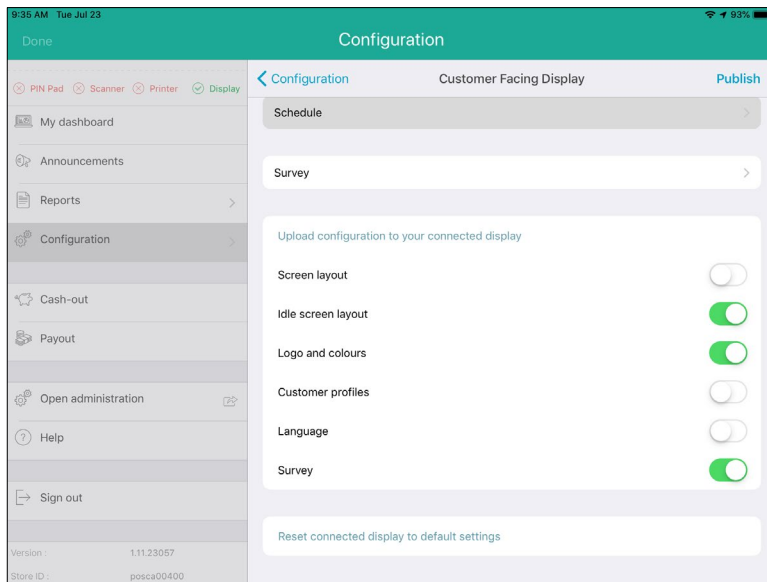
4. Tap **Upload configuration to your connected display** or tap **Publish** in the top right corner.

   A Syncronize popup appears.

5. Tap **Yes**.

   The Customer Display will display the "Display update in progress" message. The process may take a few moments to complete.

   When finished, the Customer Display returns to its idle screen, and the PAYD Pro Plus App displays a completion notification.

6. Tap **OK** on the notification.

   The Customer Display screen updates in real time. If it is at its idle screen, you will see it the next time a transaction is initiated.

# Placing the secondary iPad into Kiosk Mode

Now that the Customer Display options have been configured, the secondary iPad needs to be placed into Kiosk Mode in its Settings page to prevent it from being interacted with in a way that you might not intend e.g. the customer may be able to minimize or close the Customer Display application and launch a web browser or other apps installed on it.

Follow the instructions below to place your secondary Apple iPad into Kiosk Mode.

*Note:* *Only perform this task on the iPad(s) that will be used as displays. Do NOT do this for your primary PAYD Pro Plus iPad(s).*
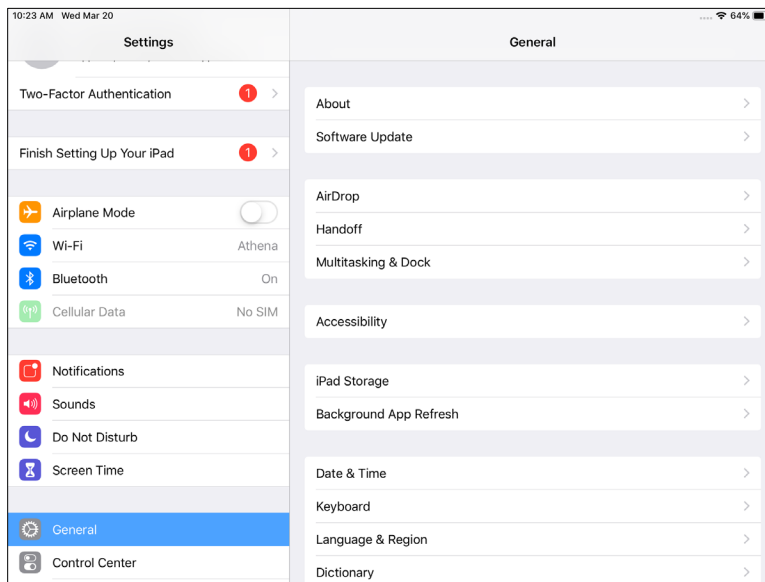


1. From your iPad's home screen, tap the **Settings** icon ( ).

2. Disable previews:

    a. In the Settings screen, tap **Notifications**.

    b. On the right pane, tap **Show Previews**.

    c. Tap **Never**.

    d. Tap **< Notifications** to return to the Settings screen.

3. Turn off the iPad's sounds:

    a. In the Settings screen, tap **Sounds**.

    b. Slide the **RINGERS AND ALERTS** slider all the way to the left to mute the iPad.

    c. Proceed to step 4.

4. Disable gestures:

    a. Tap **General**.

    b. On the right pane, tap **Multitasking & Dock**.

c. Toggle the **Gestures** switch to **OFF**.

d. Tap **< General** to return to the Settings screen.

5. Disable auto-fill options (to prevent the iPad from attempting to fill out data entry fields for names and addresses):

a. On the left pane, scroll down and tap **Safari**.

b. On the right pane, tap **AutoFill**.

c. In the AutoFill screen, toggle the **Use Contact Info** switch to **OFF**.

d. Toggle the **Credit Cards** switch to **OFF**.

e. Tap **< Safari** to return to the Settings screen.

6. Disable the Auto Brightness adjustment:

a. On the left pane, scroll up and tap **General**.

b. On the right pane, tap **Accessibility**.

c. Tap **Display Accommodations**.

d. In the Display Accommodations screen, toggle the **Auto-Brightness** switch to **OFF**.

e. Tap **< Accessibility** to return to the Accessibility screen.

f. Tap **Display & Brightness** on the left pane.

g. Slide the **BRIGHTNESS** slider all the way to the right (for maximum screen brightness).

h. Tap **Auto-Lock**.

i. In the Auto-Lock screen, tap **Never**.

j. Tap **< Display & Brightness** to return to the Display & Brightness screen.

k. Tap **General** on the left pane to return to the General screen.

7. Engage the Guided Access feature:

a. In the General screen, tap **Accessibility**.

b. Scroll down and tap **Guided Access**.

c. In the Guided Access screen, toggle the **Guided Access** switch to **ON**.

   More settings appear once the feature is activated.

d. Tap **Passcode Settings**.

e. In the Passcode Settings screen, tap **Set Guided Access Passcode**.

   The Set Passcode popup appears.

f. Enter a passcode in the popup, then when prompted, re-enter the same passcode.

   Once you finish entering the passcode, the Passcode Settings screen reappears.

g. Tap **< Guided Access** at the top of the screen.

8.  Close the Settings screen (by pressing the Home button).

9.  Launch the Customer Display App by tapping its icon (　　) on the iPad's home screen.

10. Triple-click the iPad's Home button.

    The Guided Access menu appears.

11. Tap **Options** in the bottom left corner of the screen, then toggle the switches on the menu as follows:

    - **Sleep/Wake Button** = OFF
    - **Volume Buttons** = OFF
    - **Motion** = ON
    - **Keyboards** = ON
    - **Touch** = ON
    - **Time Limit** = OFF

12. Tap **Start** in the top right corner of the screen.

    The "Guided Access started" message appears.

13. The iPad is now ready to use in Kiosk Mode. Repeat steps 1-12 on other secondary iPads as needed.

***Note:*** *If the secondary iPad prompts you with the Customise your display popup, tap **Ok** and then follow the instructions in the* <u>Configuring your Customer Display</u> *section.*
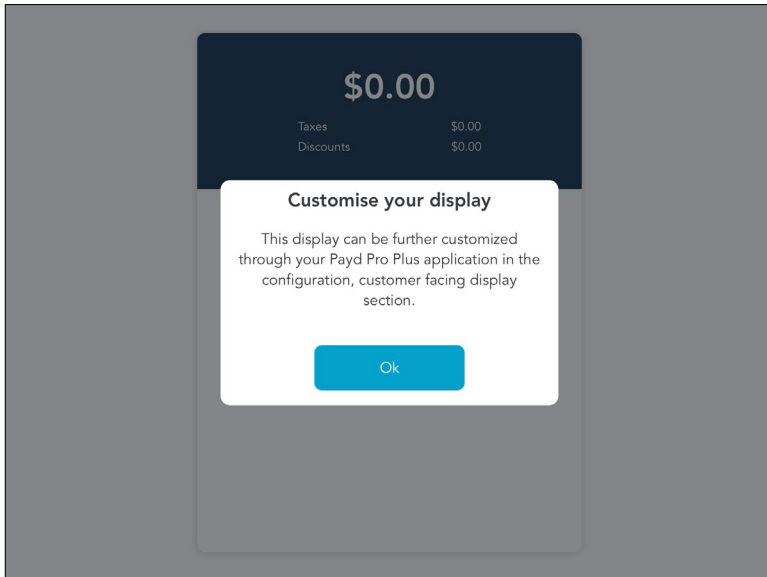


### To take the secondary iPad out of Kiosk Mode:

1.  Triple-click the iPad's home button.

    The Enter Passcode popup appears.

2.  Enter the iPad's passcode (that you entered in step 7f above).

3.  Tap **End**.

    The "Guided Access Ended" message appears.

# Using
# the Customer
# Display

In this section, we go over everything you need to know to use the Customer Display on the secondary iPad.

# Processing transactions

The instructions for processing transactions are contained in the **PAYD Pro Plus® Mobile Solution: Using PAYD Pro Plus with Apple® iPad®** reference guide. This guide is available at **moneris.com/support-PAYDProPlus-mobile**. Search for the chapter called "Processing sales" for complete instructions on assigning a customer, adding products, adjusting prices and quantities, and applying discounts.

This section will provide an abridged set of instructions on processing a transaction to demonstrate how to incorporate the Customer Display in your interaction with the customer at the point-of-sale.

1.  In the Sale screen, do the following as necessary:

    a.  Assign a customer to the sale.

        *Note:  It is possible to have a customer create a profile for themselves, or look up their existing profile. Instructions for performing these tasks are described in* Using the Customer Display to register new customers *on page 42 and* Using the Customer Display for customer lookup *on page 43.*

    b.  Add the products to the sale that the customer is buying (see Figure 1 below).

        As the products are being added to the sale, they appear on the Customer Display, displaying the product name, the quantity, and the unit price. The subtotal and tax are adjusted and calculated as additional items are added, or when discounts are applied (see Figure 2 below).
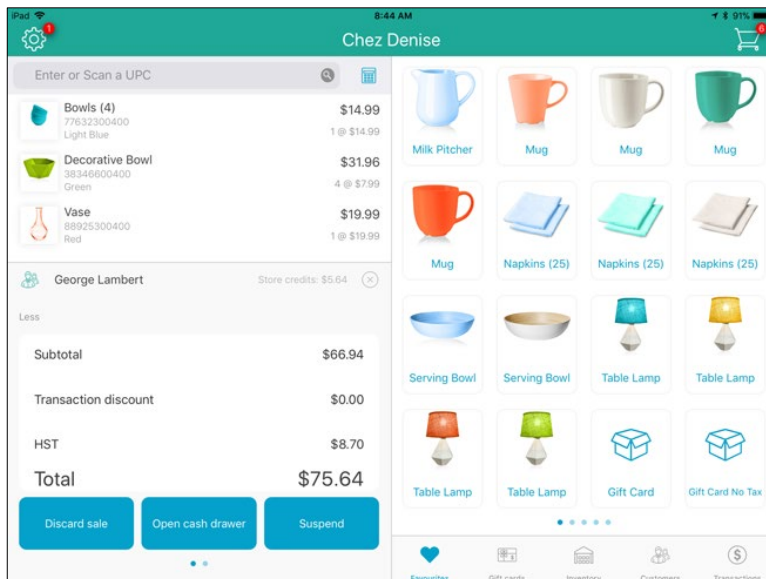


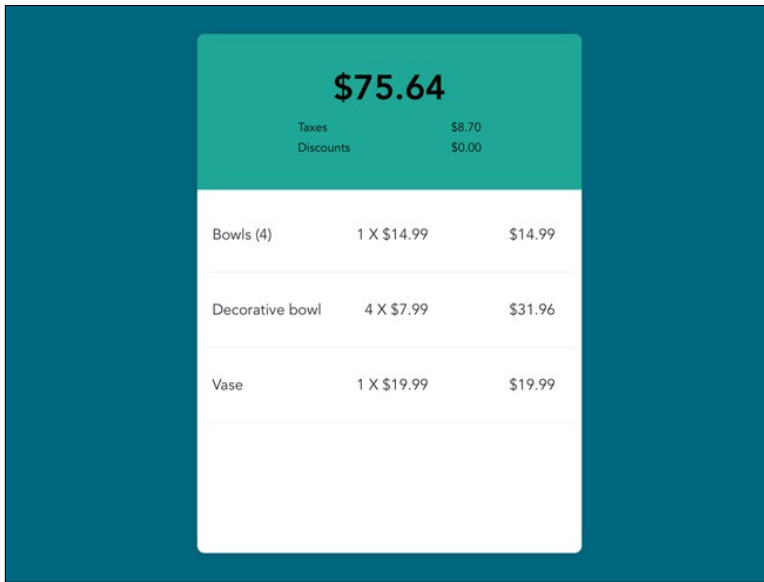*Figure 1 – The Sale screen populated with the customer's purchase items.*

*Figure 2 – The Customer Display screen updates with the items the customer is purchasing.*

   c.   Use the Customer Display to verify with the customer that the transaction is correct. If so, proceed to step 2. If not, edit the items on the sale as necessary, then when it is correct, proceed to step 2.

2.   At the Checkout screen, process the customer's payment.
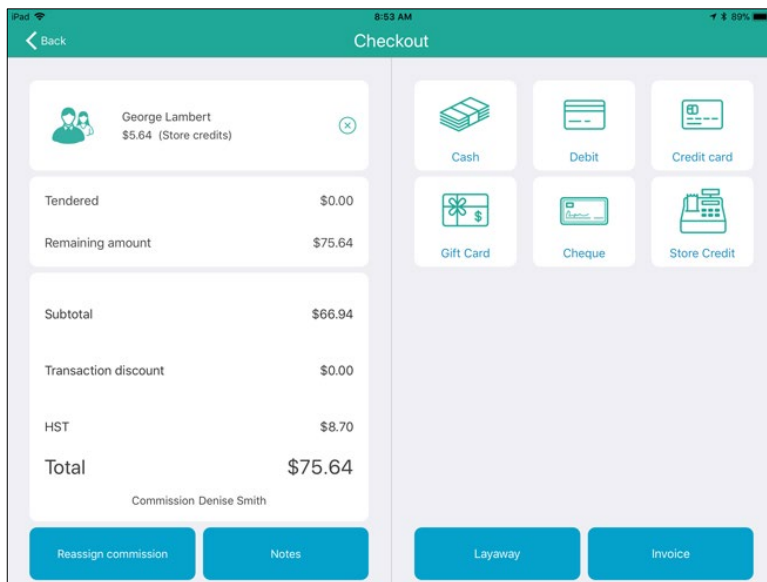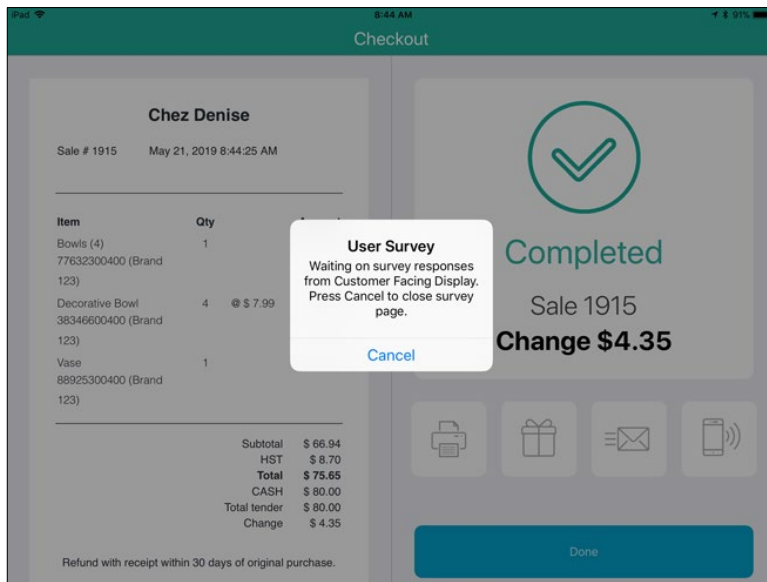
3. If the survey feature has been enabled (refer to *Defining the survey questions* on page 19), the customer will be prompted to answer the survey (refer to *Obtaining customer feedback via surveys* on page 35).

   **Note:** *The customer may also opt out of leaving feedback by tapping **No Thanks**.*
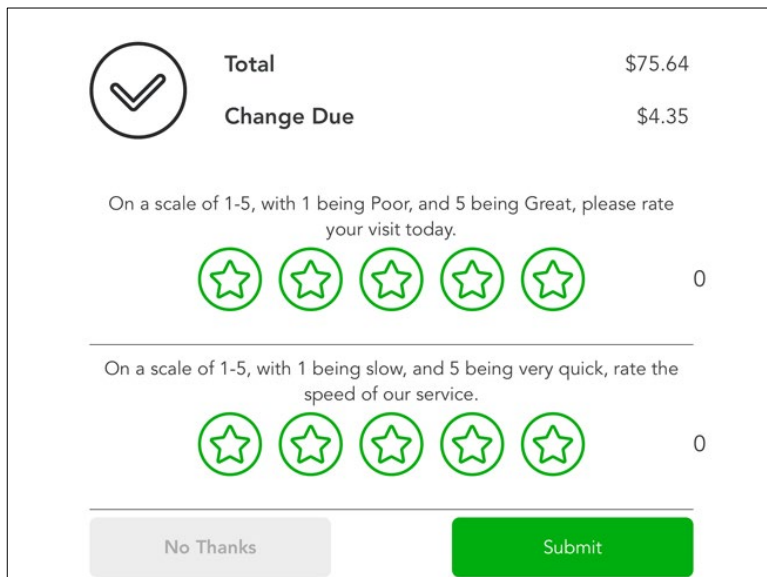


4. Complete the transaction and process the receipts.

5. Once complete, the Customer Display App returns to its idle screen.

# Obtaining customer feedback via surveys

If you enabled surveys, and created at least one survey question, it will appear on the Customer Display as a way to solicit customer feedback about their shopping experience. Follow the instructions below to record customer feedback.

1. Process the customer's transaction on the primary iPad.

2. At the survey screen that appears (on the secondary iPad), the customer taps the star rating this visit deserved.



3. The customer taps **Submit** at the bottom of the screen.

   The feedback is recorded for later reporting, and the Customer Display returns to its idle screen.
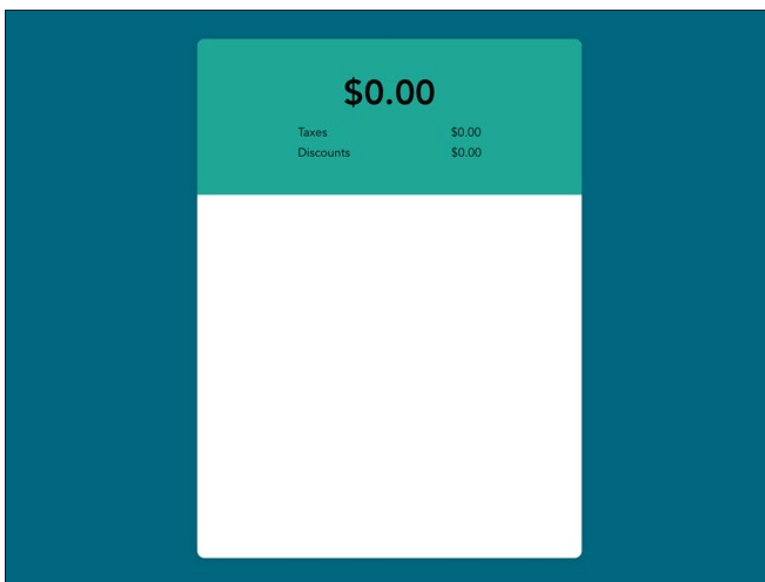
**If a customer does not wish to leave feedback:**

▪ They can tap **No Thanks**. The Customer Display returns to its idle screen.

# Customer feedback reporting

The Surveys report that outlines all customer survey responses is located in PAYD Administration, and can be accessed on your primary iPad.

1. From the Sale screen, tap the **Settings** button ( ⚙ ).

2. On the main menu, tap **Open administration**.

   The PAYD Administration main screen launches in the Safari browser, and you are logged in with your credentials.
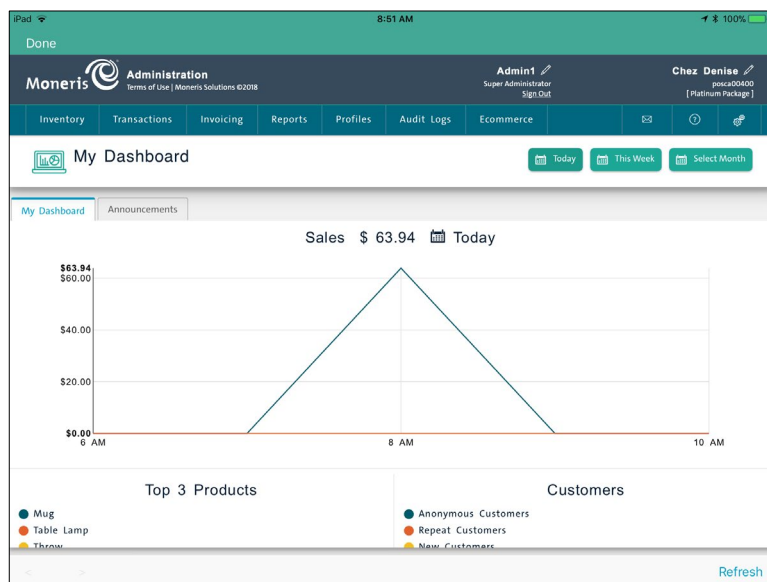


3. On the PAYD Administration main screen, tap **Reports**.

4. On the Reports menu, tap **Miscellaneous**.

5. On the Miscellaneous menu, tap **Surveys**.

6. Generate the report, using the following guidelines to narrow the report results:

   ▪ To change the date range for the report:

   a. Tap the **Starting date** field and use the calendar to select a start date for the report.

   b. Tap the **Ending date** field and use the calendar to select a report end date.

   c. Tap the **View** button.

      The summary and report results appear below.

   d. Proceed to step 7.

- To change the time frame for the report:

  a. Tap the **Period** drop-down menu and tap the time frame that you want e.g. **This week** or **Last month**.

  b. Tap the **View** button.

     The summary and report results appear below.

  c. Proceed to step 7.

- To change the time of the report (to report on results from a specific time of the day):

  a. Tap the **Start of day** drop-down menu and tap a starting time for the report e.g. 9:00.

  b. Tap the **End of day** drop-down menu and tap an end time for the report e.g. 14:00.

  c. Tap the **View** button.

     The summary and report results appear below.

  d. Proceed to step 7.

- To report on responses from a specific POS lane:

  a. Tap the **Lanes** button.

     The Select lane(s) popup appears. By default all lanes are selected.

  b. Tap the **Clear all** button.

     All the lane names become unchecked.

  c. Tap the lane names on which you want reporting (so that they have a checkmark visible).

  d. Tap the **OK** button at the bottom of the Select lane(s) popup.

     The popup closes.

  e. Tap the **View** button.

     The summary and report results appear below.

  f. Proceed to step 7.

- To report on responses tied to a specific employee:

  a. Tap the **Employees** button.

     The Select employee(s) popup appears. By default, all employee names are selected.

  b. Tap the **Clear All** button.

     All the employee names become unchecked.

  c. Tap the employee names on which you want reporting (so that they have a checkmark visible).

  d. Tap the **OK** button at the bottom of the Select employee(s) popup.

     The popup closes.

e.  Tap the **View** button.

    The summary and report results appear below.

f.  Proceed to step 7.

▪  To filter the report based on star ratings given:
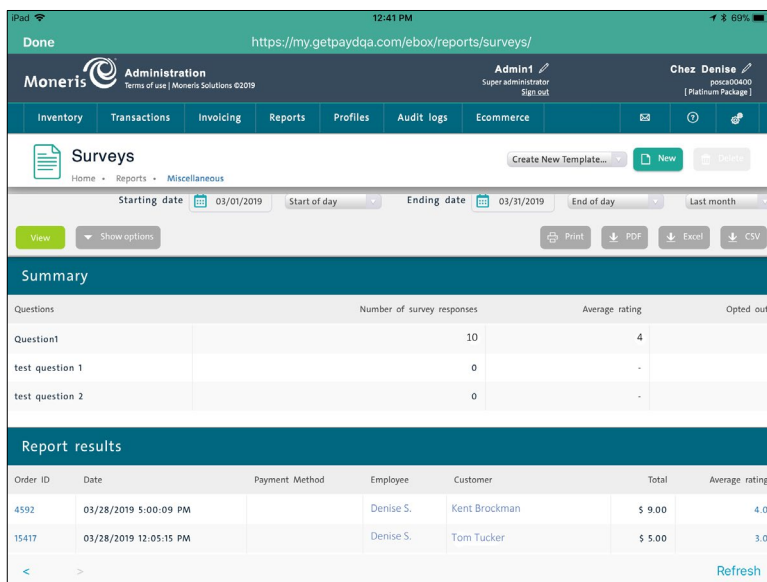
a.  Tap the **Rating** drop-down menu.

b.  Tap the rating on which you would like reporting. By default the report displays all star ratings, so doing this will only report on what you are selecting.

c.  Tap the **View** button.

    The summary and report results appear below.

d.  Proceed to step 7.

7.  View the results of the report.



8.  When finished viewing, tap **Done** in the top left corner of the screen to exit PAYD Administration.

*Note:*    *If you wish to print or export the results of the report, access PAYD Administration on a laptop or PC that has access to a printer and/or Microsoft Excel.*

# Viewing survey results in customer profiles

The customer profiles in PAYD Pro Plus also store the customer's survey results. Follow the instructions below to view survey results in a customer profile.

1.  On the primary iPad, in the Sale screen, tap **Customers** at the bottom of the right pane.

2.  In the Customer Search screen, search for the customer you wish to view. For more information on searching for customer profiles, refer to the ***PAYD Pro Plus® Mobile Solution: Using PAYD Pro Plus for Apple® iPad®*** guide available at **moneris.com/support-paydproplus-mobile**.

3.  Slide the customer's name from right to left, revealing three buttons.
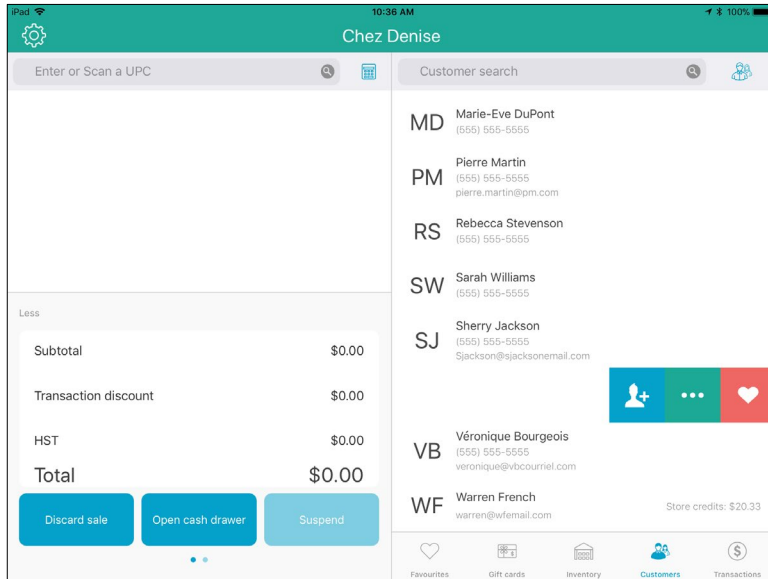


4.  Tap the **Edit** button ( ![...] ).

    The Customer details screen appears.

5.  Tap the **History** tab at the top of the right pane.
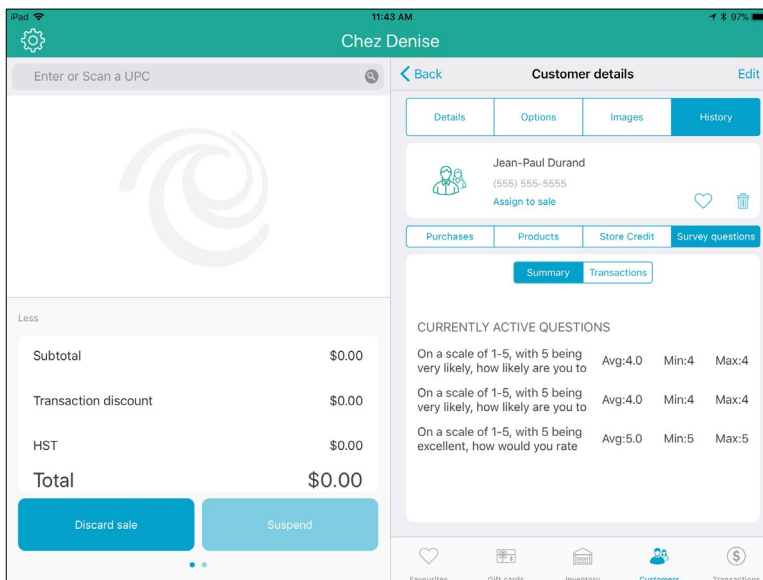
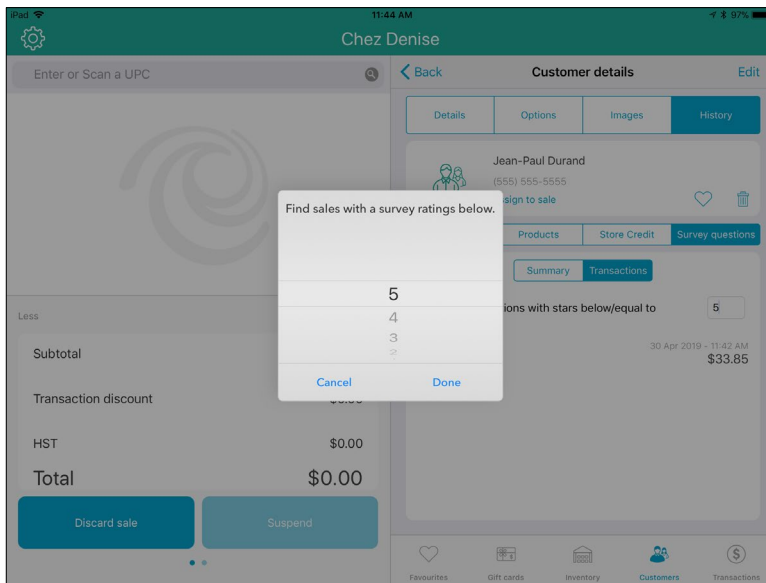6.  Tap **Survey questions**.

7.  Choose what you wish to view:

    ▪ If you wish to view a summary of their responses:

      a.  Tap **Summary**.

          A summary of the customer's survey responses appears below.

b. Once finished viewing, proceed to step 8.

▪ If you wish to view transactions associated with the customer's survey responses:

a. Tap **Transactions**.

b. Tap inside the **Display transactions with stars below/equal to** field.
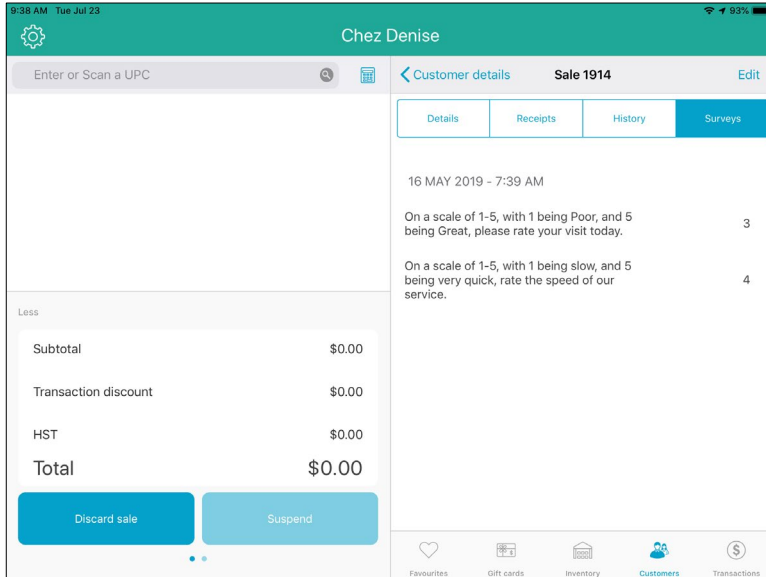
A Find sales with a survey ratings below popup appears.



c. Scroll/tap the star rating you wish to view.

d. Tap **Done**.

The results appear below.
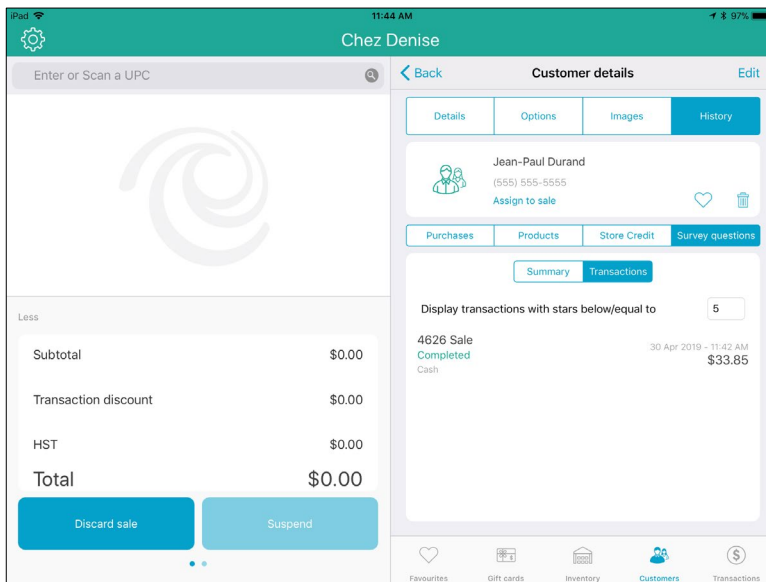
e.  (Optional) If you wish to see more detail, tap the sale in the results.

f.  Click **Surveys** to see the individual responses to the survey questions on this particular transaction appear.



g.  Once finished viewing, tap **<Customer details** to return to the History tab, then proceed to step 8.

8.  Tap **<Back** at the top of the right pane.

The Customer search screen reappears.

# Collecting customer information via the Customer Display

It is possible to use the Customer Display in a couple different ways to interact with your customers. You can:

- Use the Customer Display to have a customer create a profile for themselves.

- Use the Customer Display to have the customer look up their own existing profile (to assign themselves to the transaction).

## Using the Customer Display to register new customers

It is possible to have a new (unregistered) customer use the Customer Display to enter their information to create a customer profile. Follow the steps below to use the Customer Display to collect new customer information.

1. On the primary iPad, in the Sale screen, tap **Customers** at the bottom of the right pane.

2. In the Customer Search screen, tap the **Add New Customer** button (  ) in the top right corner of the screen.

   A Select option popup appears.
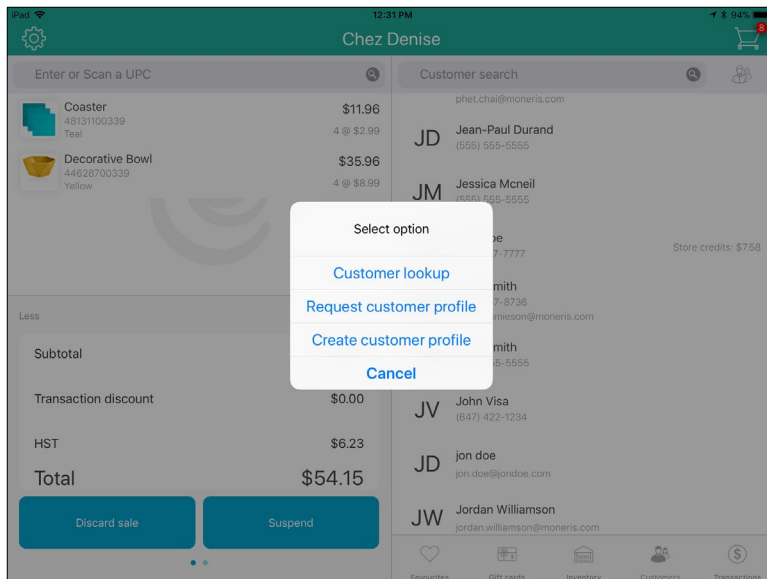


3. Tap **Request customer profile**.

   On the Customer Display, the screen switches to a data entry screen prompting the customer to enter their name and contact information into the fields.

   **Note:**   *All fields in this screen are mandatory.*

Please complete the following fields

First name

Last name

Email address

Phone number

Cancel        Submit

4.  Ask the customer to tap inside the yellow fields and enter their information.

5.  Ask them to tap **Submit** when finished.

    The customer's profile appears in the right pane on the primary iPad, indicating that they have been registered and assigned to the transaction.

6.  Process the customer's transaction.

*Note:*    *If you wish to add the customer yourself in the PAYD Pro Plus App, refer to the* **PAYD Pro Plus® Mobile Solution: Using PAYD Pro Plus with Apple® iPad®** *guide for instructions.*

## Using the Customer Display for customer lookup

It is possible to have a customer look up their profile via the Customer Display. Follow the directions below to facilitate customer lookup.

1.  On the primary iPad, in the Sale screen, tap **Customers** at the bottom of the right pane.

2.  In the Customer Search screen, tap the **Add New Customer** button () in the top right corner of the screen.

    A Select option popup appears.
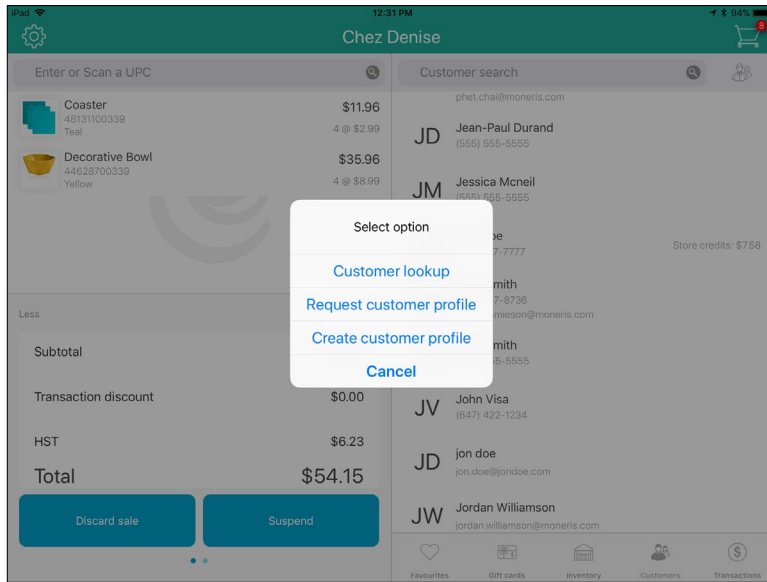
3. On the popup, tap **Customer lookup**.

   On the Customer Display, the screen switches to customer lookup screen, prompting the customer to enter either a telephone number or email address to search for their profile.

   *Note:* *The customer can search by either home, work, or mobile phone, depending on what phone numbers you have stored on file for them.*
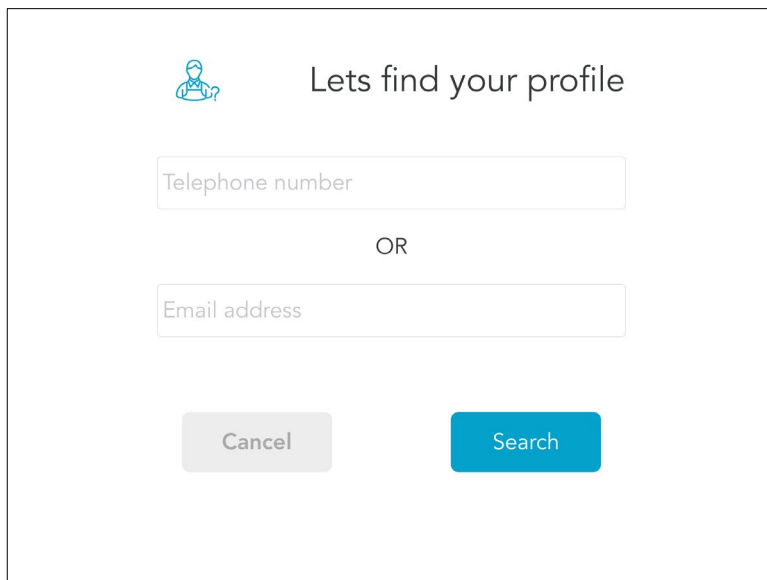


4. Ask the customer to enter either their phone number or email into the applicable field, then tap **Search**.

   The customer's name appears on the right pane of the primary iPad (in the search results of the Customers tab).

5.  Confirm with the customer that you have the correct name and information.

    ▪ If the correct customer is retrieved, proceed to process their transaction.
    ▪ If it is not the correct customer, return to step 2 and try again.

## If the search returns no results

In the event that the customer lookup turns up no results, it is possible that the customer is not yet registered, or that they keyed in the wrong information e.g. they keyed in a number that you do not have on file for them, or the information you have on file is incorrect.

▪ If the customer is not yet registered, you can offer to create a customer profile for them. Follow the instructions in _Using the Customer Display to register new customers_ section on page 42.

▪ If the customer is registered, ask them to try entering a different phone number or email address on the Customer Display screen to see if their information is retrieved.

▪ If the lookup still yields no results, it is possible that the customer's information is incorrect within PAYD Pro Plus. You can look them up on the primary iPad to assign them to the sale. Afterwards, you can edit the customer profile to ensure you capture accurate information. Refer to the **PAYD Pro Plus® Mobile Solution: Using PAYD Pro Plus with Apple® iPad®** guide for instructions on editing customer profiles.

# Editing Customer Display settings

Once the Customer Display is functional, you may decide to change some of the settings e.g. you wish to change the survey question, or to change the text colour. PAYD Pro Plus enables you to make changes and then upload them to the Customer Display App in real-time. Follow the instructions below to update the Customer Display settings.

1. Access the Customer Display configuration screen:

    a. On the primary iPad, from the Sale screen, tap the **Settings** icon (  ).

    b. On the main menu, tap **Configuration**.

    c. On the Configuration screen, tap **Customer Facing Display**.

2. In the Customer Facing Display screen, make your changes to any of the following settings:

    - Screen layout: refer to *Defining the screen layout and colour scheme* on page 11.
    - Idle screen layout: refer to *Defining the idle screen layout* on page 17.
    - Logo and colours: refer to *Setting your business logo and defining button colours* on page 22.
    - Customer profiles: refer to *Defining customer profile parameters* on page 21.
    - Language: refer to *Setting the default language for the Customer Display* on page 11.
    - Schedule: refer to *Reviewing the schedule* on page 24.
    - Survey: refer to *Defining the survey questions* on page 19.

3. Once you have made your changes to one or more of these settings, you will need to sync your updates to the Customer Display by following these steps:

    a. In the Customer Facing Display screen, scroll to the bottom of the screen.

    b. Toggle the switches to the right (ON) for the items that you updated. For example, if you changed the survey questions, a background colour, and the idle screen layout, toggle the **Survey**, **Logo and colours**, and **Idle screen layout** switches to ON. Leave the other ones toggled off.
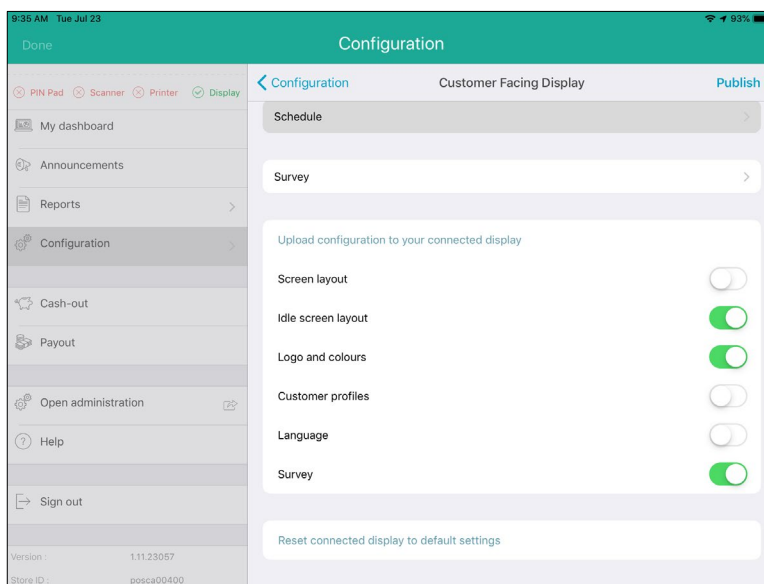
c.   Tap **Upload configuration to your connected display**, or tap **Publish** in the top right corner of the screen.

A Syncronize popup appears.

d.   Tap **Yes**.

The Customer Display will display the "Display update in progress" message. The process may take a few moments to complete.

When finished, the Customer Display returns to its idle screen, and the PAYD Pro Plus App displays a completion notification.

e.   Tap **OK** on the notification.

The Customer Display screen updates in real time. If it is at its idle screen, you will see it the next time a transaction is initiated.

# Troubleshooting

If an error message is displayed in the PAYD Pro Plus App or on the Customer Display, 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, contact Moneris Customer Care at **1-866.319-7450**.

| Problem | Solution |
|---------|----------|
| The Customer Display is not connecting to the primary iPad. | There could be a couple of potential issues. Check the following:<br><br>▪ Are the iPads both on the same WiFi network?<br><br>▪ Is the Customer Display iPad synced to a different primary iPad?<br><br>▪ Be sure that you know the names of the primary and secondary iPads.<br><br>To determine the WiFi network to which the iPad is connected:<br><br>1. From the iPad's home screen, tap **Settings** ( ).<br><br>2. In the Settings screen, look for the setting labelled as **Wi-Fi**, and confirm the name of the network to which it is connected. If necessary, connect to a different network.<br><br>To learn the iPad's name:<br><br>1. From the iPad's home screen, tap **Settings** ( ).<br><br>2. In the Settings screen, tap **General**.<br><br>3. On the right pane, look for the **Name**.<br><br>If your iPads are both on the same network, and you have confirmed the names, return to the sync instructions in the *Synching the Customer Display App with the PAYD Pro Plus App* section on page 7 for more information. |

| Problem | Solution |
|---|---|
| One or both of the iPads have gone to sleep. | Once the iPads are "awoken" out of sleep mode, they should reconnect automatically, but it can take up to a minute for the connection to be re-established. Wait for the Customer Display to reconnect. If the connection is still not established, check to ensure the following:<br><br>▪ That the iPads are both on the same WiFi network.<br><br>▪ Reboot both iPads, then restart the Customer Display App and the PAYD Pro Plus App.<br><br>▪ Set the secondary iPad to Kiosk Mode to prevent it from going to sleep in the future. Refer to *Placing the secondary iPad into Kiosk Mode* on page 28 for instructions.<br><br>▪ If the connection still fails, return to the sync instructions in the *Synching the Customer Display App with the PAYD Pro Plus App* section on page 7 for more information. |
| I powered off my iPads at night, and now they are not connecting today. | Once the iPads have been powered on, they should reconnect automatically, but it can take up to a minute for the connection to be re-established. Wait for the Customer Display to reconnect.<br><br>If the connection is still not established, check to ensure that the iPads are both on the same WiFi network.<br><br>If the connection still fails, return to the sync instructions in the *Synching the Customer Display App with the PAYD Pro Plus App* section on page 7 for more information. |
| My iPads are connected to a peer-to-peer network, but they are not communicating with one another. | Try rebooting both iPads and ensuring they are still connected via peer-to-peer. If the connection still fails, connect both iPads to Wi-Fi and try the connection again. |

| Problem | Solution |
|---------|----------|
| The Customer Display iPad is stuck at the "Getting started…" screen. | 1. Close both the PAYD Pro Plus App and the Customer Display App.<br><br>2. Log in to the PAYD Pro Plus App.<br><br>3. Launch the Customer Display App.<br><br>4. Follow the instructions in the *Synching the Customer Display App with the PAYD Pro Plus App* section on page 7.<br><br>If the Customer Display App remains stuck at the "Getting started…" screen, do the following to remove and reconnect to the secondary iPad.<br><br>1. Log in to the PAYD Pro Plus App on the primary iPad.<br><br>2. On the Sale screen, tap the **Settings** icon ().<br><br>3. On the main menu, tap **Configuration**.<br><br>4. In the Configuration screen, tap **Devices**.<br><br>5. In the CUSTOMER FACING DISPLAY section, tap **Connect** beside the name of your iPad.<br><br>6. In the Customer Facing Display Connect popup, tap **Remove** beside the name of your iPad.<br><br>7. Tap **Save** at the top of the popup.<br><br>8. Tap **Close** at the top of the popup.<br><br>9. Begin syncing the iPads again following the steps in the *Synching the Customer Display App with the PAYD Pro Plus App* section on page 7. |

# Merchant support

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

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

## We're only one click away.

- Visit **moneris.com/support-paydproplus-mobile** to download additional copies of this guide and other resources

- Visit **shop.moneris.com** to purchase point-of-sale supplies and receipt paper

- Visit **moneris.com/insights** for business and payment news, trends, customer success stories, and quarterly reports & insights

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

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

## Can't find what you are looking for?

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

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

# Moneris

## BE PAYMENT READY

Your credit and/or debit card processing is governed by the terms and conditions of your agreement for PAYD credit/debit card processing services with Moneris Solutions Corporation. It is your responsibility to ensure that proper card processing procedures are followed at all times. Please refer to the *Moneris Merchant Operating Manual* (available at: **moneris.com/support**) and the terms and conditions of your applicable agreement(s) for credit/debit processing or other services with Moneris Solutions Corporation for details.

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