

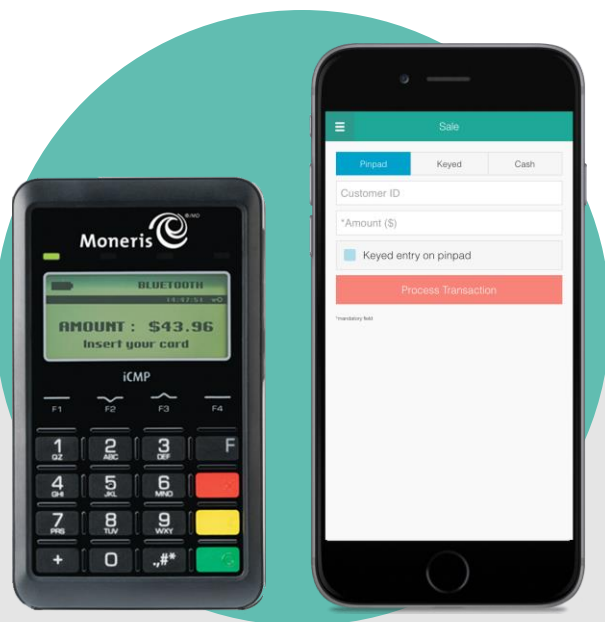


BE PAYMENT READY

Using PAYD Pro[®]

for Apple[®] iPad[®], iPhone[®] and iPod touch[®]

Reference Guide





BE PAYMENT READY

Need help?

Web: moneris.com/support-paydpro

Email: info@getpayd.com

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

Record your Moneris® merchant ID here:

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Setting up for PAYD Pro

In this section, we go over everything you need to know to activate your PAYD Pro store; download the PAYD® App; and pair the PAYD PIN Pad with an Apple iPad, iPhone, or iPod touch.

Introduction

PAYD Pro allows you to accept *Interac*[®] Debit and credit payments right on your mobile device, just about anywhere your business takes you.

This guide provides instructions on how to pair a Moneris PAYD[®] PAYD PIN Pad with an Apple iPad, iPhone, and iPod touch (collectively 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 PAYD Administration to manage your PAYD Pro store and any other registered account users, refer to the **Using Moneris[®] PAYD Administration** guide (visit moneris.com/support-paydpro to download a copy).

Before you get started

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 ("terminal ID") is an 8-digit alpha-numeric code starting with "I6" (e.g., "I6012345").



Note: This ID (also known as the "PAYD PIN Pad ID") is printed on a white label affixed to the underside of the PAYD PIN Pad (you will be asked to refer to this ID during the setup steps):

2. Ensure that you have the required credentials for your PAYD Pro store:

- If you are activating your store, ensure that you have your merchant ID and store ID (refer to your "Useful Information" Email for these IDs).
- If your store is already activated, ensure that you have your sign-in credentials (contact your store administrator for these credentials).

3. Do one of the following:

- If you have all the required components and IDs, 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.

4. Determine your setup requirements:

- If you need to activate your PAYD Pro store, proceed to [Activating your PAYD Pro store](#) (page 6).
- If your PAYD Pro store is already activated, proceed to [Setting up the PAYD App on your mobile device](#) (page 7).

Activating your PAYD Pro store

1. Visit moneris.com/activatePAYD.
2. In the **Merchant ID** and **Store ID** fields, enter your merchant ID and store ID (refer to your "Useful Information" Email for these IDs).*
3. Tap the **Next** button.
4. In the **First name** and **Last name** fields, enter your first name and last name.*
5. In the **Email** field, enter your email address.*

Note: Once you have successfully completed the activation steps, an "Activation Confirmation" Email will be sent to this address. If you ever need to have your password reset, a password reset link will be sent to this address.

6. In the **Employee ID**, **Password**, and **Confirm password** fields, enter the username and password under which you want to sign into your store.*

Note: The password must be from 8 to 16 characters in length and include at least 1 letter, 1 number, and 1 special character. Accents are not supported. Password fields are case sensitive. You will be prompted to update your password every 90 days (your new password must be different than your last 4 passwords).

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 the **Save** button.
9. The statement "Activation completed" displays above the fields on the PAYD Administration sign-in screen.

Note: You will shortly receive an "Activation Confirmation" Email containing your store ID and employee ID (the username you created).

10. Proceed to [Setting up the PAYD App on your mobile device](#) (page 7).

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

Setting up the PAYD App on your mobile device

The PAYD App must be downloaded and installed on your mobile device before you can start to perform PAYD Pro transactions.

1. Do one of the following:

- If you need to download/install the PAYD App to your mobile device, proceed to [Downloading and installing the PAYD App from the App Store](#) (page 8).
- If you have already downloaded/installed the PAYD App to your mobile device, proceed to [Setting up the PAYD PIN Pad](#) (page 9).

Downloading and installing the PAYD App from the App Store

Follow the steps below to download and install the PAYD App to your mobile device.

1. From your mobile device's home screen, open the App StoreSM.
2. In the Business category, enable the "iPhones Only" filter, search for "PAYD", and then select the PAYD App.
3. Download the PAYD App.
 - If at any time the PAYD App requests permission to access data from your mobile device (e.g., location, microphone, or contacts data), allow the PAYD App to access the data.
4. Confirm that the PAYD App is closed so that it is not running in the background on your mobile device.
5. Return to your mobile device's home screen.
6. Proceed to [Setting up the PAYD PIN Pad](#) (page 9).

Setting up the PAYD PIN Pad

Your PAYD PIN Pad must be paired with a mobile device before it can be used to perform PAYD Pro transactions.

1. Confirm that the PAYD App is closed so that it is not running in the background on your mobile device.
2. Determine your setup requirements:
 - If you need to pair a PAYD PIN Pad, go to step 3.
 - If you do not need to pair a PAYD PIN Pad (i.e., your PAYD PIN Pad is already paired with your mobile device), proceed to setup step 6 (page 14).
3. Follow one of the pairing options below:

Pairing option 1:

- If you want to pair a new PAYD PIN Pad (that has never been paired and initialized) with an iPad, iPhone, or iPod touch that is not currently paired with a PAYD PIN Pad, proceed to [Pairing a new PAYD PIN Pad with your mobile device](#) (page 10).

Pairing option 2:

- If you want to pair a new PAYD PIN Pad (that has never been paired and initialized) with an iPad, iPhone, or iPod touch that is currently paired with an initialized PAYD PIN Pad, proceed to [Pairing a replacement PAYD PIN Pad with your mobile device](#) (page 19).

Pairing option 3:

- If you want to pair an initialized PAYD PIN Pad with a different iPad, iPhone, or iPod touch, proceed to [Pairing an initialized PAYD PIN Pad with a different mobile device](#) (page 17).

Note: *The PAYD PIN Pad can be used to perform transactions with only one mobile device at a time.*

Pairing option 4:

- If you want to move an initialized PAYD PIN Pad to an Android™ mobile device, refer to the **Using PAYD Pro for Android™** guide (follow *Pairing option 3* on page 9 of that guide).

Pairing a new PAYD PIN Pad with your mobile device

1 Power on the new PAYD PIN Pad

- a. Plug the small end of the USB charging cable into the micro-USB port on the new PAYD PIN Pad (see page 45).

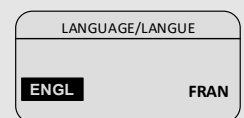
Important! Use the USB charging cable provided with the PAYD PIN Pad. Failure to do so may affect the operability of or cause damage to the PAYD PIN Pad.

- b. Plug the other end of the charging cable into a powered USB port (e.g., on a computer).

Note: Leave the charging cable connected to the PAYD PIN Pad for the remainder of the PAYD PIN Pad setup procedures.

- c. Wait while the PAYD PIN Pad beeps and powers on.

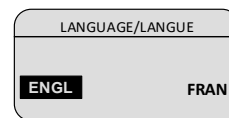
- d. When the "LANGUAGE/LANGUE" screen displays, proceed to step 2 ([Configure the PAYD PIN Pad's default language](#)) on page 11.




2 Configure the PAYD PIN Pad's default language

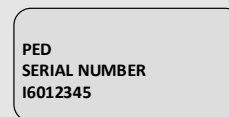
- a. On the "LANGUAGE/LANGUE" screen, press the **F1** key (ENGL).

Note: If the "WELCOME/BONJOUR" screen displays instead, press **F1** and **F4** in sequence, and go directly to step 2c of this procedure.



- b. When the "PED SERIAL NUMBER" screen displays press the green  key to continue.

Note: The serial number (e.g., "I6012345") also represents the PAYD PIN Pad's terminal ID, which can also be found on a label affixed to the underside of the PAYD PIN Pad (see page 5).



- c. When the "BLUETOOTH PAIRING" screen displays, proceed to step 3 (Ready your mobile device for Bluetooth pairing) below.



3 Ready your mobile device for Bluetooth pairing

- a. Power on the mobile device with which you want to pair the PAYD PIN Pad.

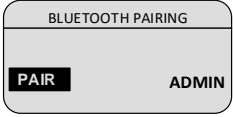


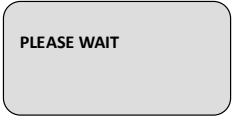





- b. Ensure that Bluetooth is turned on, the mobile device is discoverable, and its Bluetooth settings screen is displayed.


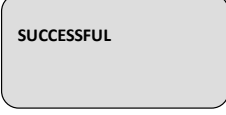
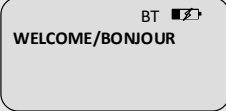

Note: If the mobile device has ever been paired with a different PAYD PIN Pad in the past, ensure that the mobile device does not continue to retain the older PAYD PIN Pad's terminal ID in its Bluetooth memory (i.e., if necessary, unpair the older PAYD PIN Pad from the mobile device so that it forgets the PAYD PIN Pad's terminal ID).

- c. Set the mobile device down beside the PAYD PIN Pad.

- d. Proceed to step 4 (Pair the PAYD PIN Pad with your mobile device) on page 12.

4 Pair the PAYD PIN Pad with your mobile device

<p>a. On this "BLUETOOTH PAIRING" screen, press F1 (PAIR).</p>	
<p>b. When this next "BLUETOOTH PAIRING" screen displays, press the green  key (PAIR IOS).</p>	
<p>c. When the "PLEASE WAIT" screen displays, go to the next step.</p>	
<p>d. When the "AVAILABLE DEVICES" screen displays, press the green  key (SEARCH DEVICES).</p>	
<p>e. When the "PLEASE WAIT" screen displays, go to the next step. <i>Note: If a "Pairing Unsuccessful" pop-up displays on the mobile device, clear the pop-up before you continue.</i></p>	
<p>f. When the "AVAILABLE DEVICES" screen displays, press F2 until you scroll to the mobile device with which you want to pair the PAYD PIN Pad, and then press the green  key to select the mobile device.</p>	
<p>g. When the "START PAIRING..." screen displays, go to the next step.</p>	
<p>h. Wait for a 6-digit passkey to be generated:</p> <ul style="list-style-type: none"> ▪ On the mobile device, a Bluetooth pairing request with a 6-digit passkey will display. ▪ On the PAYD PIN Pad, the "COMPARE KEY:" screen with a 6-digit passkey will display. 	
<p>i. If the passkey is the same on both the PAYD PIN Pad and the mobile device, tap Pair on the mobile device's Bluetooth pairing request.</p>	

<p>j. On the PAYD PIN Pad ("COMPARE KEY: screen"), press F1 (YES).</p>	 <p>COMPARE KEY: 000000 YES NO</p>
<p>k. When the "SUCCESSFUL" screen displays (shown here), go to step 4l of this procedure.</p> <ul style="list-style-type: none"> If you cannot complete the pairing, clear any error pop-up displayed on the mobile device (e.g., "Pairing Unsuccessful" may be displayed), then press F4 (NO) on the PAYD PIN Pad ("COMPARE KEY:" screen), and then repeat steps 4b to 4j of this procedure. <p>Note: <i>If you are unable to pair the PAYD PIN Pad after making several attempts, proceed to Bluetooth pairing in Legacy mode (page 22).</i></p>	 <p>SUCCESSFUL</p>
<p>l. When the "WELCOME/BONJOUR" screen displays, proceed to step 5 (<u>Confirm that your mobile device is successfully paired with the PAYD PIN Pad</u>) on page 14.</p> <p>Note: <i>The battery icon in the upper right corner on the screen may appear fuller than is shown here.</i></p>	 <p>BT  WELCOME/BONJOUR</p>

5 Confirm that your mobile device is successfully paired with the PAYD PIN Pad

- a. Ensure that the PAYD PIN Pad's 8-digit terminal ID (starts with prefix "iCMP" as in "iCMP-I6012345") is shown as "Paired" on your mobile device's Bluetooth settings screen.

Note: The terminal ID (e.g., "I6012345") can also be found on a label affixed to the underside of the PAYD PIN Pad (see page 5).


- If your mobile device prompts you to download or install an app, decline the prompt.

- b. Proceed to step 6 (Initialize the PAYD PIN Pad) below.

6 Initialize the PAYD PIN Pad


The PAYD PIN Pad must be successfully initialized from your mobile device before you can use it to perform PAYD Pro transactions. Follow the steps below to initialize the PAYD PIN Pad.

Note: If the PAYD PIN Pad is already initialized, go to step 6k of this procedure.

- a. From your mobile device's home screen, tap the **PAYD** icon () to launch the PAYD App.
- If the "Terms of Use" screen displays, read the terms, and tap **I Agree**.
 - If at any time the PAYD App requests permission to access data from your mobile device (e.g., location, microphone, or contacts data), allow the PAYD App to access the data.
 - If at any time the "Pinpad has been successfully connected" pop-up displays, tap the **OK** button.

- b. When the sign-in screen displays, sign into the PAYD App (see page 38).

- c. In the PAYD App, start on the "Settings" screen.

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

- d. Tap the **Pinpad** button.

- If the **Connect Pinpad** button displays, tap it.

- e. Tap the **Bluetooth** button if it is not already selected.

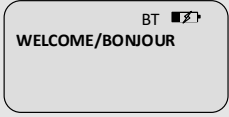

- f. Tap the **Initialize Pinpad** button.

Note: If the **Connect Pinpad** button continues to display even after you have tapped it, see page 75 for troubleshooting.

- g. When "PLEASE WAIT" displays on the PAYD PIN Pad, wait while it initializes.

Note: During this process, the PAYD App displays the "Initializing Pinpad. This may take a few minutes" screen.


PLEASE WAIT

<p>h. When the PAYD App displays the "Initialization was successful. Pinpad is ready to use" pop-up, tap the OK button.</p>	
<p>i. When the PAYD PIN Pad displays the "WELCOME/BONJOUR" screen, go to the next step.</p> <p>Note: The "BT" icon displays in the upper right corner on the PAYD PIN Pad screen to indicate that Bluetooth connectivity is established (for more information, see page 46).</p>	
<p>j. Tap the main menu icon () to return to the main menu, and then tap Signout.</p>	
<p>k. Proceed to step 7 (<u>Charge the PAYD PIN Pad's battery to full capacity</u>) on page 16.</p>	

7

Charge the PAYD PIN Pad's battery to full capacity

- a. 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. (If the USB charging cable is not connected to the PAYD PIN Pad, connect it now.)

Note: *It may take up to 3 hours to fully charge the battery depending on its 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.

- b. Once the battery is fully charged, proceed to [Ready to use the PAYD App?](#) (page 25).

Pairing an initialized PAYD PIN Pad with a different mobile device

1 Remove the initialized PAYD PIN Pad's terminal ID from your mobile device's Bluetooth memory

a. Open the Bluetooth settings screen on the mobile device with which the initialized PAYD PIN Pad is currently paired.

b. On the Bluetooth settings screen, locate the initialized PAYD PIN Pad's 8-digit terminal ID (displays with prefix "iCMP-" as in "iCMP-I6012345").

Note: The terminal ID (e.g., "I6012345") can also be found on a label affixed to the underside of the PAYD PIN Pad (see page 5).

c. Unpair the PAYD PIN Pad so that the mobile device forgets the PAYD PIN Pad's terminal ID.

d. Power off the mobile device, and set it aside.

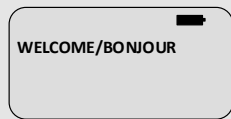
e. Proceed to step 2 (Reset the initialized PAYD PIN Pad to its factory defaults) on page 18.

2

Reset the initialized PAYD PIN Pad to its factory defaults


a. If the initialized PAYD PIN Pad is not already powered on, press its power button (see page 45), and wait until the PAYD PIN Pad powers on.

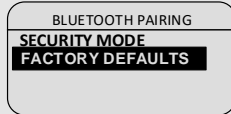
b. When the "WELCOME/BONJOUR" screen displays, press **F1** and **F4** in sequence.



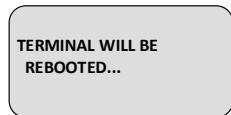
c. When this "BLUETOOTH PAIRING" screen displays, press **F4** (ADMIN).



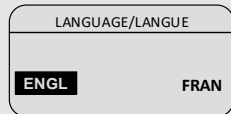
d. When this next "BLUETOOTH PAIRING" screen displays, press **F2** to scroll to **FACTORY DEFAULTS**, and then press the green  key to select it.



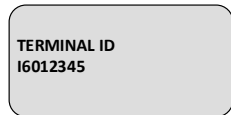
e. When the "TERMINAL WILL BE REBOOTED..." screen displays, wait while the PAYD PIN Pad reboots.




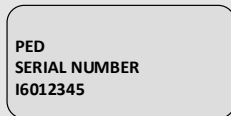
f. When the "LANGUAGE/LANGUE" screen displays, press **F1** (ENGL).



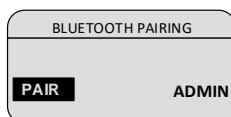
g. When the "TERMINAL ID" screen displays, press the green  key to continue.



h. When the "PED SERIAL NUMBER" screen displays, press the green  key to continue.



i. When this "BLUETOOTH PAIRING" screen displays, proceed to step 3 (Ready your mobile device for Bluetooth pairing) on page 11.



Pairing a replacement PAYD PIN Pad with your mobile device

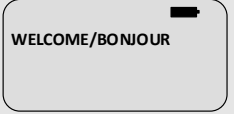


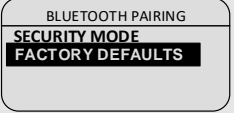

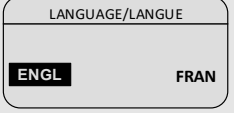


1

Remove the older PAYD PIN Pad's terminal ID from your mobile device's Bluetooth memory

- a. Open the Bluetooth settings screen on the mobile device with which the older (initialized) PAYD PIN Pad is currently paired.
- b. On the Bluetooth settings screen, locate the older (initialized) PAYD PIN Pad's 8-digit terminal ID (displays with prefix "iCMP-" as in "iCMP-I6012345").
Note: *The terminal ID (e.g., "I6012345") can also be found on a label affixed to the underside of the PAYD PIN Pad (see page 5).*
- c. Unpair the PAYD PIN Pad so that the mobile device forgets the older PAYD PIN Pad's terminal ID.
- d. If the PAYD App is open and/or you are signed in, close the PAYD App so that it is not running in the background on your mobile device.
- e. Set the mobile device aside.
- f. Proceed to step 2 ([Reset the older PAYD PIN Pad to its factory defaults](#)) on page 20.

2

Reset the older PAYD PIN Pad to its factory defaults



a. If the older PAYD PIN Pad is not already powered on, press its power button (see page 45) and wait until the PAYD PIN Pad powers on.	
b. When the "WELCOME/BONJOUR" screen displays, press F1 and F4 in sequence.	
c. When this "BLUETOOTH PAIRING" screen displays, press F4 (ADMIN).	
d. When this next "BLUETOOTH PAIRING" screen displays, press F2 to scroll to FACTORY DEFAULTS , and then press the green  key to select it.	
e. When the "TERMINAL WILL BE REBOOTED..." screen displays, wait while the PAYD PIN Pad reboots.	
f. When the "LANGUAGE/LANGUE" screen displays, go to the next step.	
<p>g. Simultaneously press and hold down both the yellow  key and the  key until the PAYD PIN Pad starts to power off.</p> <p>Important! When this older PAYD PIN Pad is powered off completely, set it aside, and do not attempt to use it again.</p>	
<p>h. Pair the new/replacement PAYD PIN Pad with your mobile device (proceed to Pairing a new PAYD PIN Pad with your mobile device on page 10).</p>	



Other PAYD PIN Pad settings

Changing an initialized PAYD PIN Pad's default language

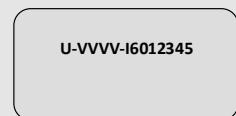
1 Access the initialized PAYD PIN Pad's LANGUAGE/LANGUE screen

Note: If the USB charging cable is connected to the PAYD PIN Pad, disconnect the cable before you continue.

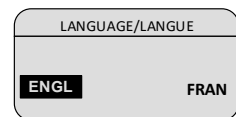
- a. Simultaneously press and hold down both the yellow  key and the  key until the PAYD PIN Pad starts to power off, and then wait while it powers off completely.
- b. Once the PAYD PIN Pad is powered off, press the power button (see page 45), and wait while the PAYD PIN Pad powers on.

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

Note: The version screen displays for 10 seconds.



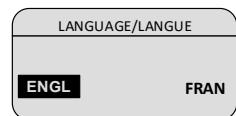
- d. When the "LANGUAGE/LANGUE" screen displays (shown here), go to step 1e of this procedure.
 - If the "WELCOME/BONJOUR" screen displays, repeat steps 1a to 1c of this procedure.





- e. Proceed to step 2 (Select a default display language for the PAYD PIN Pad) below.

2 Select a default display language for the PAYD PIN Pad

- a. On the LANGUAGE/LANGUE screen, select a default display language:
 - For English, press **F1** (ENGL).
 - For French, press **F4** (FRAN).



- b. When the next screen displays, simultaneously press and hold down both the yellow  key and the  key until the PAYD PIN Pad starts to power off, and then wait while it powers off completely.

- c. Power on the PAYD PIN Pad when you are ready to use it to perform transactions.

Note: The PAYD PIN Pad is now configured to display the new default language (you do not have to re-initialize the PAYD PIN Pad). If you also want to change the language of the PAYD App, see [Setting the default language of the PAYD App](#) (page 36).

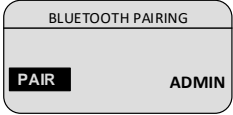


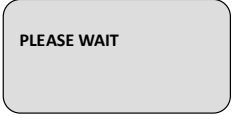






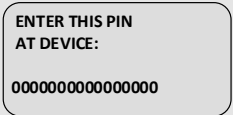
Bluetooth pairing in Legacy mode


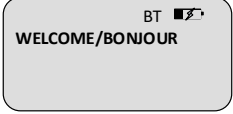
If you are following the PAYD PIN Pad setup steps and have been unable to pair a PAYD PIN Pad with your mobile device, follow the steps below to pair the PAYD PIN Pad using Legacy mode.

1 Enable Legacy mode on the PAYD PIN Pad

<p>a. On this "BLUETOOTH PAIRING" screen, press the red  key once.</p>	
<p>b. When this next "BLUETOOTH PAIRING" screen displays, press F4 (ADMIN).</p>	
<p>c. When this next "BLUETOOTH PAIRING" screen displays, press the green  key (SECURITY MODE).</p>	
<p>d. When the "SECURITY MODE" screen displays, press F1 (LEGACY).</p>	
<p>e. When the "TERMINAL WILL BE REBOOTED..." screen displays, wait while the PAYD PIN Pad reboots.</p>	
<p>f. When the "LANGUAGE/LANGUE" screen displays, press F1 (ENGL).</p>	
<p>g. If the "TERMINAL ID" screen displays, press the green  key to continue.</p>	
<p>h. When the "PED SERIAL NUMBER" screen displays, press the green  key to continue.</p>	
<p>i. When this "BLUETOOTH PAIRING" screen displays, proceed to step 2 (<u>Pair the PAYD PIN Pad with your mobile device using legacy mode</u>) on page 23.</p>	

2 Pair the PAYD PIN Pad with your mobile device using legacy mode

<p>a. On this "BLUETOOTH PAIRING" screen, press F1 (PAIR).</p>	
<p>b. When this next "BLUETOOTH PAIRING" screen displays, press the green  key (PAIR IOS).</p>	
<p>c. When the "PLEASE WAIT" screen displays, go to the next step.</p>	
<p>d. When the "AVAILABLE DEVICES" screen displays, press the green  key (SEARCH DEVICES). Note: If your mobile device is listed on this screen, go directly to step 2f of this procedure.</p>	
<p>e. When this "PLEASE WAIT" screen displays, go to the next step. Note: If a "Pairing Unsuccessful" pop-up displays on the mobile device, clear the pop-up before you continue.</p>	
<p>f. When the "AVAILABLE DEVICES" screen displays, press F2 to scroll to the mobile device with which you earlier tried to pair the PAYD PIN Pad, and then press the green  key to select the mobile device.</p>	
<p>g. When this "START PAIRING..." screen displays, go to the next step.</p>	
<p>h. When the "ENTER THIS PIN AT DEVICE:" screen displays (includes a 16-digit PIN), go to the next step.</p>	
<p>i. When the mobile device displays a prompt to enter a PIN, enter same the 16-digit PIN that is currently displayed on the PAYD PIN Pad.</p>	

<p>j. When the "SUCCESSFUL" screen displays (shown here), go to step 2k of this procedure.</p> <ul style="list-style-type: none"> ▪ If you cannot complete the pairing, clear any error pop-up displayed on the mobile device (e.g., "Pairing Unsuccessful" may be displayed), and repeat steps 2b to 2i of this procedure. 	 <p>A screenshot of a mobile device screen showing the word "SUCCESSFUL" in a simple, sans-serif font, centered on a light gray background.</p>
<p>k. When the "WELCOME/BONJOUR" screen displays, proceed directly to step 5 (<u>Confirm that your mobile device is successfully paired with the PAYD PIN Pad</u>) on page 14.</p> <p>Note: The battery icon in the upper right corner on the screen may appear fuller than is shown here.</p>	 <p>A screenshot of a mobile device screen showing the text "WELCOME/BONJOUR" in a simple, sans-serif font, centered on a light gray background. In the top right corner, there is a small "BT" icon and a battery level indicator.</p>

Ready to use the PAYD App?

To learn about the PAYD App and some of its features, read the sections listed here:

- Configuring optional PAYD App settings, see the [Optional features](#) section (pages 27 to 36).
- Signing in/Signing out of the PAYD App, see the [Signing into/Signing out of the PAYD App](#) section (pages 38 to 39).
- PAYD PIN Pad power management and card entry options, see the [The PAYD PIN Pad](#) section (pages 45 to 50).
- Performing transactions, see the [Transactions](#) section (pages 51 to 62).
- Generating reports, see the [Reporting](#) section (pages 68 to 70).



Configuring PAYD App's optional settings

In this section, we go over everything you need to know to configure the optional settings in the PAYD App.


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 and/or doing a Refund, Void, or Capture).*

1. In the PAYD App, start on the "Settings" screen.

Note: *If another screen is displayed, tap the main menu icon () 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 the main menu icon () 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. In the PAYD App, start on the "Settings" screen.

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

2. Tap **Interface**.
3. Under "Default payment device", tap the desired default option:
 - **Pinpad:** Sets "Pinpad" as default.
 - **Swipe/Keyed:** Sets "Keyed" as the default.
 - **Cash:** Sets "Cash" as the default.

4. Tap the main menu icon (☰) 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 (see [Pre-Authorization with credit card](#) on page 54).

1. In the PAYD App, start on the "Settings" screen.

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


2. Tap **Interface**.
3. Tap (checkmark or unmark the box) **Display Preauth:**
 - With checkmark: Option to "Process as Preauth" always displays on the "Sale" screen.
 - Without checkmark: Option to "Process as Preauth" does not display on the "Sale" screen.
4. Tap the main menu icon (☰) 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 display during every credit Sale transaction.

1. Ensure that the paired PAYD PIN Pad is powered on and ready (see 51).
2. In the PAYD App, start on the "Settings" screen.

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

3. Tap **Tip**, and do one of the following:

To enable tip prompting:

- a. Tap (checkmark the box) **Tip on Purchase**.
- b. When the "Tip settings have been successfully configured on the Pinpad" pop-up displays, tap the **OK** button.
- c. Go to step 4.

To disable tip prompting:

- a. Tap (unmark the box) **Tip on Purchase**.
- b. When the "Tip settings have been successfully configured on the Pinpad" pop-up displays, tap the **OK** button.
- c. Go to step 5.

4. Configure the three tip percentages:

To change one or more pre-set tip percentages:

- a. Enter a tip percentage in one or more "Quick Tip" fields.
- b. Tap **Save Tip Values**.
- c. When the "Success" pop-up displays, tap the **OK** button.

To bypass changing the pre-set tip percentages:

- a. Go directly to the next step.

5. Tap the main menu icon () 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 tax rate

Sets a tax name and a percentage by which the tax will be auto-calculated during any Sale, Pre-Authorization, Refund, or Capture.

Note: The tax will be calculated based on the original transaction amount excluding any tip (for information about tip prompting, see [Enabling tip prompting on page 29](#)).

1. In the PAYD App, start on the "Settings" screen.

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

2. Tap **Tax**, and do one of the following:

To enable a tax rate:

- a. Tap (checkmark the box) **Calculate Tax**.

Note: The option to calculate/add tax will display on all transaction screens except "Void". By default the tax box will always be checkmarked (selected) on a transaction screen, but you may unmark (deselect) the box if you do not want to add tax to the transaction.

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

Note: This name will display on the transaction screen but may be truncated if longer than 12 characters.

- c. Tap the **Save Tax Rate** button
- d. When the "Success" pop-up displays, tap the **OK** button.

To disable a tax rate:

- a. Tap (unmark the box) **Calculate Tax**.

Note: The option to calculate/add tax will not display on any transaction screen.

3. Tap the main menu icon () 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:

- The device is configured to use a location service;
- The device is configured to allow the PAYD App to access the device's location data;
- 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 69) from any mobile device.

Setting a quick PIN for sign-in

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

1. In the PAYD App, start on the "Settings" screen.

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

2. Tap **Quick Login**.
3. Do one of the following:

To enable a quick PIN:

- a. Tap (checkmark the box) **PIN Login**.
- b. In the **Please enter PIN** field, enter a 4-digit PIN.
- c. In the **Please confirm PIN** field, re-enter the same 4-digit PIN.
- d. When the "Success" pop-up displays, tap the **OK** button.

Note: *You will be prompted to enter a PIN when you next attempt to sign in (see page 40).*

To change a quick PIN:

- a. Disable the current quick PIN (see *To disable a quick PIN* below).
- b. Enable a new quick PIN (see *To enable a quick PIN* above).

To disable a quick PIN:

- a. Tap (unmark the box) **PIN Login**.
- b. When the "Success" pop-up displays, tap the **OK** button.


4. Tap the main menu icon (☰) 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.*

Pre-filling the employee ID/store ID at sign-in


Pre-fills the PAYD full sign-in fields with your PAYD employee ID and store ID credentials whenever you launch the PAYD App (see page 38).

1. In the PAYD App, start on the "Settings" screen.

Note: *If another screen is displayed, tap the main menu icon () 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 the **Save Login Credentials** button.
5. When the "Success" pop-up displays, tap the **OK** button.
6. Tap the main menu icon () 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 email address to receive exported reports

Sets an email address to which transaction reports will be sent when you export report results to a comma-separated values (CSV) file (see page 68).


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"), employee ID ("clerk"), and customer email ("email").

1. In the PAYD App, start on the "Settings" screen.

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

2. Tap **Export to CSV**.
3. In the **Export Email Address** field, enter the email 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 the **Save Export Email** button.
5. When the "Success" pop-up displays, tap the **OK** button.
6. Tap the main menu icon () 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 address

Sets an email address to which the PAYD App will automatically email PAYD transaction receipts. The PAYD App emails receipts only for "APPROVED" or "DECLINED" responses.


Note: Receipts will be emailed to the set address in the background (i.e., the PAYD App will give no visual indication that an email has been sent following a transaction).

1. In the PAYD App, start on the "Settings" screen.

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

2. Tap **Merchant Email**.
3. In the **Merchant Email Address** field, enter the email 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 the **Save Merchant Email** button.
5. When the "Success" pop-up displays, tap the **OK** button.
6. Tap the main menu icon () 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. In the PAYD App, start on the main menu.

Note: If another screen is displayed, tap the main menu icon () to return to the main menu.

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 pop-up displays 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. To change the PAYD PIN Pad's default language, see page 21

Determining the PAYD App's version number

1. In the PAYD App, start on the "Settings" screen.

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

2. The version number of the PAYD App displays near the bottom of the "Settings" screen (displays as "PAYD Mobile App v#.##").



PAYD Pro transactions


In this section, we go over everything you need to know to use the PAYD PIN Pad and the PAYD App to perform PAYD Pro transactions on an Apple iPad, iPhone, or iPod touch.

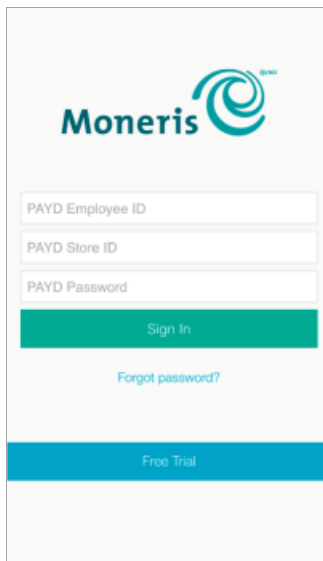
Signing into/Signing out of the PAYD App

Signing in with full credentials

Follow these steps to sign in using full credentials.

Note: If you have configured a quick PIN, see [Signing in with a quick PIN](#) on page 40.

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 Employee ID**, **PAYD Store ID**, and **PAYD Password**).

Note: Some fields may be pre-filled (see [Pre-filling the employee ID/store ID at sign-in](#) on page 33).

4. Tap **Sign In**.

- If at any time the PAYD App requests permission to access data from your mobile device (e.g., location, microphone, or contacts data), allow the PAYD App to access the data.
- If the PAYD App prompts you to change your password, enter a new password, and tap **Save Password**.

Note: The password must be from 8 to 16 characters in length and include at least 1 letter, 1 number, and 1 special character. Accents are not supported. Password fields are case sensitive. You will be prompted to update your password every 90 days (your new password must be different than your last 4 passwords).


- If the PAYD App prompts you to select and answer one to three security questions, see [Configuring your security question/answer](#) (page 44).
 - If the PAYD App prompts you to answer one security question, enter the answer, and tap **Next**.
5. Your default PAYD App screen displays once you are signed in.

Note: To change the default screen, see [Setting a default PAYD App screen](#) (page 36).

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. In the PAYD App, start on the main menu.

Note: *If another screen is displayed, tap the main menu icon () to return to the main menu.*

2. Tap **Sign Out**.


3. When the PAYD App sign-in screen displays, it means you are signed out.

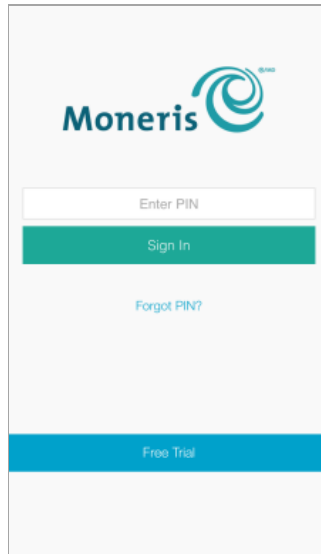
Note: *Depending on how you have configured the PAYD App, the full sign-in screen may display (see page 38) or the "Enter PIN" sign-in screen may display (see page 40).*

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](#) (page 32).

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:

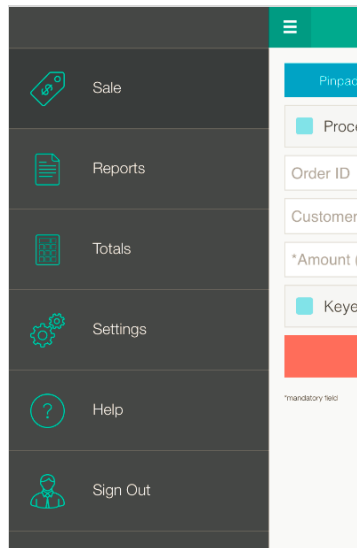


3. In the **Enter PIN** field, enter your 4-digit quick PIN.
Note: You will automatically be signed in once you enter the last digit; otherwise, tap **Sign In**.
4. Your default PAYD App screen displays once you are signed in.
Note: To change the default screen, see [Setting a default PAYD App screen](#) (page 36).


The PAYD App main menu

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

- To return to this menu from any other screen, simply tap the main menu icon (☰) 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 (employee ID) and store ID, and tap **Next**.
4. Answer the security question, and tap **Next**.
5. When the "Success" pop-up displays, tap the **OK** button.
6. Wait for a "Password reset" email (from getpayd.com) to be sent to the address that is registered to your PAYD user account.
7. Open the email, and tap the **Reset my password** link.
8. Wait for the "New Password" page to display on PAYD Administration.
9. In the **New password** and **Confirm password** fields, enter a new password, and tap **Save**.

Note: *The password must be from 8 to 16 characters in length and include at least 1 letter, 1 number, and 1 special character. Accents are not supported. Password fields are case sensitive. You will be prompted to update your password every 90 days (your new password must be different than your last 4 passwords).*

10. When the "Password reset successfully" message displays on PAYD Administration's sign-in screen, it means your password has been reset.

Note: *You must enter the new password when signing into the PAYD App/PAYD Administration.*

Can't remember your quick PIN?

1. From your 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 38).

Note: *If you have also forgotten your sign-in password, see [Need to reset your sign-in password?](#) (page 42).*

4. Once you are signed in, you may change or disable your quick PIN (see [Setting a quick PIN for sign-in](#) on page 32).

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 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 displays, enter your email address.

Note: *If you ever need to have your password reset, a password reset link will be sent to this address.*




3. Tap **Save Security Question** (or **Save Security Questions**).

4. When the "Sale" screen displays, do one of the following:

- If the PAYD PIN Pad with which you have paired your mobile device has not yet been initialized, proceed to setup step 6 (page 14); begin at step c.
- If the PAYD PIN Pad with which you have paired your mobile device is already initialized, proceed to Ready to use the PAYD App? (page 25).

The PAYD PIN Pad


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

Label	Description
1	Function keys <ul style="list-style-type: none"> Select the option displayed above the key (F1, F2, F3, and F4).
2	Alpha-Numeric keys
3	Cancel key (red)  <ul style="list-style-type: none"> Clear message displayed on PAYD PIN Pad. Cancel transaction.
4	Correct key (yellow)  <ul style="list-style-type: none"> Clear data entered on PAYD PIN Pad.
5	OK / Enter key (green)  <ul style="list-style-type: none"> Submit data, or acknowledge a message on PAYD PIN Pad.
6	Chip Reader (slot at the bottom of PAYD PIN Pad) <ul style="list-style-type: none"> See page 48.
7	Contactless Reader Indicator (green flashing light) <ul style="list-style-type: none"> No lights flash: PAYD PIN Pad is in Sleep mode (see page 47) or off. One light flashes: Reader is fully powered on. Four lights flash: Reader capturing card data (see page 49).
8	Display Screen/Contactless Reader <ul style="list-style-type: none"> "WELCOME/BONJOUR" screen displays when PAYD PIN Pad idle.
9	Magnetic Stripe Reader (slot along the top of PAYD PIN Pad) <ul style="list-style-type: none"> See page 48.
10	Micro-USB port (located on right side) <ul style="list-style-type: none"> Plug USB charging cable here.
11	Power button (located on right side) <ul style="list-style-type: none"> For power functions, see pages 47 to 47. For reset function, press and hold down until the rebooting starts.



Bluetooth connectivity indicator


The Bluetooth connectivity icon (shown below) displays on the "WELCOME/BONJOUR" screen in the upper right corner of the screen.

Icon	Description
	Displays when your mobile device is paired with the PAYD PIN Pad, and: <ul style="list-style-type: none">Bluetooth is enabled on your mobile device;The PAYD PIN Pad is within Bluetooth communication range of your mobile device.





Battery charge indicator

The battery charge icons (shown below) display on "WELCOME/BONJOUR" screen in the upper right corner of the 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 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.)

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 page 47).

Powering on the PAYD PIN Pad

The "WELCOME/BONJOUR" screen displays when the PAYD PIN Pad is fully powered on (see also *Sleep mode* on page 47).

1. To power on the PAYD PIN Pad, do one of the following:

With the USB charging cable:

- a. Plug the small end of the USB charging cable into the micro-USB port on the PAYD PIN Pad (see page 45).
- b. Plug the other end of the cable into a powered USB port.

Without the USB charging cable:

- a. Press the power button on the PAYD PIN Pad (see page 45).

Note: *The battery must be sufficiently charged (see page 46).*

2. Wait while the PAYD PIN Pad beeps and powers on to the "WELCOME/BONJOUR" screen.

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 and is operating under one or more of the following conditions:

- The PAYD PIN Pad is outside the communication (Bluetooth) range of the mobile device with which it is paired.
- The screen saver is active on the mobile device with which the PAYD PIN Pad is paired.
- The PAYD App is closed (i.e., not actively running) on the mobile device with which the PAYD PIN Pad is paired.
- The PAYD PIN Pad's battery is insufficiently charged (see page 46).

Exiting Sleep mode

1. To exit Sleep mode, press the power button on the PAYD PIN Pad (see page 45), and then wait for the "WELCOME/BONJOUR" screen to display.

Powering off the PAYD PIN Pad

1. Disconnect the USB charging cable from the PAYD PIN Pad if it is 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 until the PAYD PIN Pad starts to power off, and then wait while it powers off completely (the screen is blank when the PAYD PIN Pad is powered 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 page 48).

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 contactless card* over the PAYD PIN Pad's display screen:
 - The PAYD PIN Pad's battery charge level should be at least 50% (see page 46) 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 card's maximum Contactless Dollar Value (see below).
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 77).
- 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 78).

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. In the PAYD App, initiate a Sale (or Pre-Authorization).
2. For detailed transaction steps to a Sale, see page 52 (for a Pre-Authorization, see page 54).
3. On the "Sale" screen, tap (checkmark the box) **Keyed entry on pinpad**.

Note: *If you are unable to use the PAYD PIN Pad to capture the card data, manually enter the transaction using your mobile device (see [Manual card entry on your mobile device](#) on page 80).*

Transactions


General guidelines for transactions

1. Keep the PAYD PIN Pad and your mobile device in close proximity to each other.
2. Do not attempt to perform transactions near strong sources of electromagnetic interference (see page 81).
3. Before you perform a transaction, confirm the operational status of the PAYD PIN Pad:
 - It must be powered on (see page 47);
 - It must display "WELCOME/BONJOUR" and "BT" (see page 46);
 - It must be sufficiently charged (see page 46).
4. If the status of the PAYD PIN Pad's connection with the PAYD App/mobile device changes while the PAYD App is open, the PAYD App will display a notification:
 - If the "Pinpad has been successfully connected" pop-up displays, tap the **OK** button, and continue the transaction.
 - If the "Pinpad has been disconnected" pop-up displays, tap the **OK** button (see page 73 for troubleshooting).
5. A transaction is complete once the PAYD App displays an **APPROVED** or **DECLINED** response.

Sale with debit/credit card

Debit or credit card sale of goods and services.

1. Ensure that the PAYD PIN Pad is powered on and ready (see page 51).
2. In the PAYD App, start on the "Sale" screen.

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

3. Tap the **Pinpad** button.
 - If the **Customer ID** and **Order ID** fields display 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 Sale amount (#.##).
 - If the tax **AA% (\$)** field/box displays 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 **AA% (\$)** box.*

5. 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:

- a. Tap the **Process Transaction** button.
- b. When the "Follow prompts on pinpad" screen displays, do one of the following:
 - If tip prompting is disabled, see [Customer prompts on the PAYD PIN Pad](#) on page 56.
 - If tip prompting is enabled, see [Customer prompts on the PAYD PIN Pad \(tip prompting enabled\)](#) on page 58.


If you need to manually enter the card data on the PAYD PIN Pad:

- a. See [Manually entering card data on the PAYD PIN Pad](#) (page 55).

Sale with cash

Cash sale of goods and services.

1. In the PAYD App, start on the "Sale" screen.

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

2. Tap the **Cash** button.

- If the **Customer ID** and **Order ID** fields display 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 **AA% (\$)** field/box displays 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 **AA% (\$)** box.

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

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

5. Tap the **Process Transaction** button.

6. When the PAYD App displays the "**APPROVED**" response, the transaction is complete:

- To email a transaction receipt, see [Emailing a transaction receipt](#) (page 66).

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

- To send an SMS text message notification, see [Sending an SMS text message transaction notification](#) (page 67).

7. Tap the main menu icon () 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 (see page 62).

1. Ensure that the PAYD PIN Pad is powered on and ready (see page 51).
2. In the PAYD App, start on the "Sale" screen.

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

3. Tap (checkmark the box) **Process as Preauth**.
4. Tap the **Pinpad** button.

5. When the "Pinpad has successfully connected" pop-up displays, tap the **OK** button.

- If the **Customer ID** and **Order ID** fields display 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.*

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

- If the tax **AA% (\$)** field/box displays 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 **AA% (\$)** box.*

7. Use the PAYD PIN Pad to capture the card data:

If you want the card to be inserted or swiped on the PAYD PIN Pad:




- a. Tap the **Process Transaction** button.
- b. When the "Follow prompts on pinpad" screen displays, do one of the following:
 - If tip prompting is disabled, see [Customer prompts on the PAYD PIN Pad](#) on page 56.
 - If tip prompting is enabled, see [Customer prompts on the PAYD PIN Pad \(tip prompting enabled\)](#) on page 58.

If you need to manually enter the card data on the PAYD PIN Pad:

- a. See [Manually entering card data on the PAYD PIN Pad](#) (page 55).

Manually entering card data on the PAYD PIN Pad

In the PAYD App, 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) before you follow the steps below.




1. Tap (checkmark the box) **Keyed entry on pinpad**.
2. Tap the **Process Transaction** button.
3. When the "Follow prompts on pinpad" screen displays, go to the next step.
 - If the "PURCHASE \$0.00-OK?" screen displays on the PAYD PIN Pad, see [Customer prompts on the PAYD PIN Pad \(tip prompting enabled\)](#) on page 58.
4. Wait for the "ENTER CARD #" screen to display on the PAYD PIN Pad.
5. On the PAYD PIN Pad, key in the card number, and press the green  key.
6. When the "EXPIRY DATE MMY" screen displays on the PAYD PIN Pad, key in the card expiry date (MMYY), and press the green  key.
7. Wait while the transaction is processed.
 - If the PAYD App displays the "Customer Signature" screen, capture the customer's signature on your mobile device (see [Signature capture for receipts](#) on page 65).
8. When the PAYD App displays the "**APPROVED**" or "**DECLINED**" response, the transaction is complete:
 - To email a transaction receipt, see [Emailing a transaction receipt](#) (page 66).
***Note:** If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).*
 - To send an SMS text message notification, see [Sending an SMS text message transaction notification](#) (page 67).
9. Tap the main menu icon () to return to the main menu.

Customer prompts on the PAYD PIN Pad


When the PAYD App displays the "Follow prompts on pinpad" screen, do the following:


1. Hand the PAYD PIN Pad to the customer.
2. The customer responds to any prompt that displays 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 display for any one transaction.

Prompt	Customer action
SWIPE, TAP OR INSERT CARD or SWIPE OR INSERT CARD	Enters their card on the PAYD PIN Pad (see pages 48 to 49 for options).
SELECT LANGUAGE ENGL FRAN	<ul style="list-style-type: none"> For English prompts, presses F1 (ENGL). For French prompts: Presses F4 (FRAN).
SELECT <Application name> YES NO	<ul style="list-style-type: none"> To select the displayed application, presses F1 (YES). To view the next available application, presses F4 (NO).
<Application name> -OK? YES NO	Presses F1 (YES) to use the displayed application.
I PRE-AUTHORIZE UP TO \$0.00-OK?	Presses the green  key to confirm the displayed Pre-Authorization amount.
<TRANSACTION NAME> \$0.00-OK?	Presses the green  key to confirm the displayed amount.
SELECT ACCOUNT CHQ SAV	<ul style="list-style-type: none"> For chequing account, presses F1 (CHQ). For savings account, presses F4 (SAV).
ENTER PIN & OK	Keys in their Personal Identification Number (PIN) and presses the green  key.
PLEASE WAIT	Waits while the transaction is processed.
APPROVED THANK YOU REMOVE CARD	Removes their card from chip reader. Note: The PAYD PIN Pad beeps until the card is removed.
APPROVED THANK YOU OBTAIN CARD	Retrieves their card.
WELCOME/BONJOUR	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 red  key until it does.






- If the PAYD App displays the "Customer Signature" screen, capture the customer's signature on your mobile device (see [Signature capture for receipts](#) on page 65).
4. When the PAYD App displays the "APPROVED" or "DECLINED" response, the transaction is complete:
- To email a transaction receipt, see [Emailing a transaction receipt](#) (page 66).
Note: *If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).*
 - To send an SMS text message notification, see [Sending an SMS text message transaction notification](#) (page 67).
5. Tap the main menu icon () to return to the main menu.

Customer prompts on the PAYD PIN Pad (tip prompting enabled)

When the "PURCHASE \$0.00-OK?" screen displays on the PAYD PIN Pad during a Sale transaction, do the following:

1. Hand the PAYD PIN Pad to the customer.
2. The customer responds to any prompt that displays 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.

Prompt	Customer action
PURCHASE \$0.00-OK?	Presses the green  key to confirm the displayed amount.
ENTER TIP AMOUNT \$0.00	<ul style="list-style-type: none"> ▪ To add a tip, keys in an amount and presses the green  key. ▪ To bypass adding a tip, presses the green  key without keying in an amount.
PURCHASE \$0.00-OK?	Presses the green  key to confirm the displayed amount (go to step 3). 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.

3. Do one of the following:
 - If the "SWIPE, TAP OR INSERT CARD" screen displays on the PAYD PIN Pad, continue on page 56; begin at step 2.
 - If the "ENTER CARD #" screen displays on the PAYD PIN Pad, the customer returns the PAYD PIN Pad to you (continue on page 55; begin at step 5).

Customer prompts in the PAYD App

When the PAYD App displays the "Please specify a tip amount" screen during a Sale transaction, 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:

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

To bypass adding a tip:

- a. The customer taps the **No Tip** button (go directly to step 4).
3. When "Please confirm totals" displays, the customer confirms the displayed totals and taps the **OK** button.

Note: If the customer wants to change the tip amount, they tap the **Back** button 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 the "Processing Transaction" screen displays, retrieve your mobile device from the customer.
 - When the "Customer Signature" screen displays, capture the customer's signature on your mobile device (see [Signature capture for receipts](#) on page 65).
 5. When the PAYD App displays the "**APPROVED**" or "**DECLINED**" response, the transaction is complete:
 - To email a transaction receipt, see [Emailing a transaction receipt](#) (page 66).

Note: If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).
 - To send an SMS text message notification, see [Sending an SMS text message transaction notification](#) (page 67).
 6. Tap the main menu icon () 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. Ensure that the PAYD PIN Pad is powered on and ready (see page 51).
2. In the PAYD App, start on the "Reports" screen.

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

3. Do one of the following:

To display the last 10 transactions processed today:

- a. Leave all search fields blank, and go directly to step 4.

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 order (amount, customer ID, date, order ID, card type, or transaction type) from the drop-down list.
4. Tap the **Search Transactions** button, and wait for a transaction list to display.
 - To display the next 10 transactions if applicable, tap **More** (to maximum of 300).
 5. Tap the transaction that you want to reverse.
 6. When the transaction "Details" screen displays, confirm this is the transaction that you want to reverse (see page 69), and then:

Note: If you do not want to reverse this transaction, tap the back icon () and repeat step 5.

To do a Void:

- a. Tap **Void this transaction**.

To do a Refund:

- a. Tap **Refund this transaction**.
- b. In the **Refund Amount (\$)** field, enter the Refund amount.
 - If the tax **AA% (\$)** field/box displays and is checkmarked, the tax that will be added displays in the field while the total transaction amount (with tax) displays in the **Total (\$)** field.

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

7. Tap the **Process Transaction** button.

- If the PAYD App displays the "Follow prompts on pinpad" screen, do one of the following:
 - Hand the PAYD PIN Pad to the customer (see page 56).
 - Manually enter the card data on the PIN Pad yourself (continue on page 55, and begin at step 4).

8. When the PAYD App displays the "**APPROVED**" or "**DECLINED**" response, the transaction is complete:

- To email a transaction receipt, see [Emailing a transaction receipt](#) (page 66).

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

- To send an SMS text message notification, see [Sending an SMS text message transaction notification](#) (page 67).


9. Tap the main menu icon () 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.

Note: *If the Pre-Authorization was performed via card swipe or insert on a PAYD PIN Pad, you must perform the Capture with the same PAYD PIN Pad (you will not be prompted to enter card data during the Capture).*

1. Ensure that the PAYD PIN Pad is powered on and ready (see page 51).
2. In the PAYD App, start on the "Reports" screen.

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

3. Do one of the following:

To display the last 10 transactions processed today:

- a. Leave all search fields blank, and go to step 4.

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 (amount, customer ID, date, order ID, card type, or transaction type) from the drop-down list.

4. Tap the **Search Transactions** button, and wait for a transaction list to display.
 - To display the next 10 transactions if applicable, tap the **More** button (to maximum of 300).

5. Tap the "Preauth" transaction that you want to complete.

6. When the transaction "Details" screen displays, confirm this is the transaction that you want to complete (see page 69).

Note: *If this transaction is not the one that you want to complete, tap the back icon () , and repeat step 5.*

7. Tap **Capture this transaction**.

8. 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.*

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

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

9. Tap the **Process Transaction** button.

Note: The PAYD App displays the "Follow prompts on pinpad" screen, 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.

10. When the PAYD App displays the "**APPROVED**" or "**DECLINED**" response, the transaction is complete:

- To email a transaction receipt, see [Emailing a transaction receipt](#) (page 66).

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

- To send an SMS text message notification, see [Sending an SMS text message transaction notification](#) (page 67).

11. Tap the main menu icon () 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	<ul style="list-style-type: none">• credit	<ul style="list-style-type: none">• tap (contactless)
SIGNATURE	<ul style="list-style-type: none">• credit	<ul style="list-style-type: none">• swipe (stripe)• manual entry
VERIFIED BY PIN	<ul style="list-style-type: none">• credit• debit	<ul style="list-style-type: none">• 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 PAYD App displays the "Customer Signature" screen if you are required to capture the customer's signature.

Note: *If a signature is captured, it will not be included in emailed receipts; however, a receipt with signature will be stored on PAYD Administration and can be viewed or printed from there 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 in the PAYD App when you retrieve the transaction's details in a Transactions Report (see page 68) or when you are doing a Void or Refund (see page 60) or Capture (see page 62).


When the PAYD App displays the "Customer Signature" screen, 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. When the PAYD App displays the "**APPROVED**" or "**DECLINED**" response, the transaction is complete:
 - To email a transaction receipt, see [Emailing a transaction receipt](#) (page 66).
Note: *If you enabled the PAYD App to auto-send receipts to a set merchant address, the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).*
 - To send an SMS text message notification, see [Sending an SMS text message transaction notification](#) (page 67).
5. Tap the main menu icon () to return to the main menu.


Emailing a transaction receipt

When the PAYD App displays the "APPROVED" or "DECLINED" response, follow these steps to email a transaction receipt.

Note: If you enabled the PAYD App to auto-send receipts to a set merchant address (see page 35), the PAYD App automatically emails a receipt to the address (the PAYD App will not notify you that the email has been sent).



1. Under "Receipt" (bottom of the screen), tap the email icon (.
2. When the "Send Receipt" screen displays, enter an email address as follows:

To manually enter an email address:

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

To select an email 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 the contacts icon (.
 - 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** (email address) to which to send the receipt.
3. When the "Receipt successfully sent" pop-up displays, tap the **OK** button.
 4. If you want to email a receipt to additional addresses, repeat steps 1 to 3 as many times as you require.
 5. When you are finished, tap the main menu icon () to return to the main menu.


Sending an SMS text message transaction notification

When the PAYD App displays the "APPROVED" or "DECLINED" response, 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 the SMS text message icon ().
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 the send SMS text message icon (.

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 the contacts icon (.
 - 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 the "Receipt successfully sent" pop-up displays, tap the **OK** button.
 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 the main menu icon ( 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. In the PAYD App, start on the "Reports" screen.

Note: If another screen is displayed, tap the main menu icon () 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 4.

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 (amount, customer ID, date, order ID, card type, or transaction type) from the drop-down list.



3. Tap **Search Transactions**, and wait for a transaction list to display.

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 the top of the screen).

Note: The file will be sent to the email address that you specified in your *Export to CSV* setting (see page 34).



- To view the details of a listed transaction, tap the desired transaction (see page 69).

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

"Details" screen (transactions)

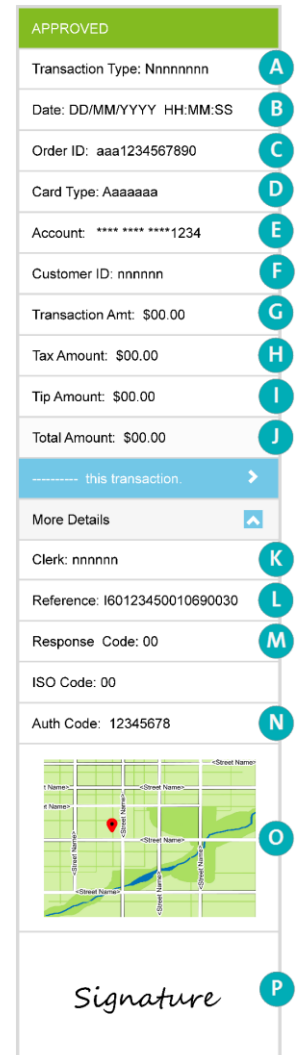
The "Details" screen (shown below) displays when you tap a transaction record listed in a Transactions Report (e.g., you may be performing a Void, Refund, or Capture, or simply reviewing transactions).

Note: Line items A to J and item P display by default. To display line items K to O, tap **More Details**. (For descriptions of the labelled line items, see the table below.)

- You may do one or more of the following if applicable:
 - To perform a Refund/Void, continue at step 6 on page 60 ([Voiding/refunding a transaction](#)).
 - To perform a Capture, continue at step 7 on page 62 ([Capturing a Pre-Authorization](#)).
 - To email a transaction receipt, see [Emailing a transaction receipt](#) (page 66).
 - To send an SMS text message notification, see [Sending an SMS text message transaction notification](#) (page 67).
 - Tap the back icon () to return to the transaction list, or tap the main menu icon () to return to the main menu.

This table describes the "Details" screen shown on the right.

Label	Description
A	Transaction name.
B	Transaction date (DD/MM/YYYY) and time (hh:mm:ss).
C	Unique transaction identifier. Auto-generated if no order ID entered for transaction.
D	Card type or "Cash".
E	Card number (masked) or "Cash".
F	Displays if customer ID entered for transaction.
G	Transaction amount excluding tax and tip.
H	Tax amount (see Setting a tax rate on page 30).
I	Tip amount (see Enabling tip prompting on page 29).
J	Total amount including tax and/or tip if entered.
K	Transaction performed by user signed in under this employee ID.
L	Moneris host identifier (e.g., if "I60123450010690030" is the number, then "I6012345" is the terminal ID (i.e., PAYD PIN Pad ID). This number may be requested by Moneris to help track a transaction.
M	Transaction response code: <ul style="list-style-type: none"> < 50: Transaction approved. >= 50: Transaction declined. NULL: Transaction was not sent for authorization.
N	Auth code (6-8 digits) from the card-issuing institution.
O	Location of transaction (see Location-mapping transactions on page 31).
P	Customer signature (displays if captured for transaction).




Batch totals report

Displays open and closed batch totals (sub-totals include transaction totals, tip totals, and terminal 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 the main menu icon () to return to the main menu, and then tap **Totals**.*

2. Select a date range from the drop-down list.
3. Tap the **Search Batches** button.
 - 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 the daily summary totals icon ()

Daily Tip Totals

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

- a. To display this sub-report, tap the daily tip totals icon ()



Note: *If "No tip totals for today" displays, 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 terminal ID.


- a. To display this sub-report, tap the terminal totals icon ()

Note: *Totals grouped under a terminal ID starting with "16" indicate those transactions were performed on a PAYD PIN Pad with the same ID. Totals grouped under the terminal 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 the back icon () to return to the "Totals" list, or tap the main menu icon () to return to the main menu.

Re-initializing the PAYD PIN Pad

1. Ensure that the PAYD PIN Pad is powered on and ready (see page 51).
2. In the PAYD App, start on the "Settings" screen.

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


3. Tap **Pinpad**.
4. Tap the **Bluetooth** button if it is not already selected.
 - Tap the **Connect Pinpad** button if it displays.

5. Tap the **Initialize Pinpad** button.

Note: *If the **Connect Pinpad** button continues to display even after you have tapped it, see page 75 for troubleshooting.*

6. When "PLEASE WAIT" displays on the PAYD PIN Pad, wait while it initializes.

Note: *During this process, the PAYD App displays the "Initializing Pinpad. This may take a few minutes" screen.*

7. When the PAYD App displays the "Initialization was successful. Pinpad is ready to use" pop-up, tap the **OK** button.
8. When the PAYD PIN Pad displays the "WELCOME/BONJOUR" screen, the operation is complete.
9. Tap the main menu icon () to return to the main menu.



Troubleshooting



In this section, we go over everything you need to know to troubleshoot any issues.

Error messages in the PAYD App









If an error message/pop-up 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 77 to 79.

Error message	Solution
An error occurred on the pinpad. Transaction was not processed.	An application or communication error occurred. <ol style="list-style-type: none"> 1. Retry the transaction (see also the issues listed on pages 75 to 76).
Application PAYD already exists. Replace version ### with version ###.	You have already installed an earlier version of the PAYD App. <ol style="list-style-type: none"> 1. Delete the unusable App from your mobile device. 2. Download and install the latest version of the PAYD App (see page 8).
Pinpad has been disconnected.	The PAYD App/your mobile device can no longer detect the PAYD PIN Pad with which it is paired. <ol style="list-style-type: none"> 1. See "Unable to connect to Pinpad" (page 74).
Please enter a valid cvd value	"Mandatory CVV" is enabled in PAYD Administration. <ol style="list-style-type: none"> 1. Locate the 3- or 4-digit card validation value on the credit card, and enter the value in the CVV field before you submit the transaction for processing.
Sign in failed. Please Try Again.	<ol style="list-style-type: none"> 1. Try signing in again. 2. If the text "Quit Demo Mode" displays at the bottom of the sign-in screen, tap Quit Demo Mode to return to the "live" sign-in screen, and retry signing in again. 3. If the authentication fails, and you are: <ul style="list-style-type: none"> ▪ Trying to sign in using your full credentials, use the password reset feature (see page 42). ▪ Trying to sign in using your quick PIN, use the forgot PIN feature (see page 43). 4. If the problem persists, redo the setup procedures starting on page 8.
The Request has timed out. Please ensure your signal is strong and try again.	There may be too much interference in your area and/or your mobile device is too far from its wireless network access point. <ol style="list-style-type: none"> 1. Move to a location within your wireless network coverage area where there are no sources of interference (see page 81), and retry the operation.


Error message	Solution
<p>Tip has not been configured on the pinpad. Please connect pinpad to update pinpad settings.</p>	<p>Tip prompting cannot be enabled/disabled on the PAYD PIN Pad because the PAYD App/your mobile device is unable to detect the PAYD PIN Pad with which it is paired.</p> <ol style="list-style-type: none"> 1. See "Unable to connect to Pinpad" (page 74).
<p>Unable to connect to Pinpad.</p>	<p>The PAYD App/your mobile device cannot detect the PAYD PIN Pad with which it is paired.</p> <ol style="list-style-type: none"> 1. Confirm that the PAYD PIN Pad is powered on (see page 47). 2. Confirm that the PAYD PIN Pad is in range of your mobile device and operating in a suitable environment (see page 81). 3. Confirm that the PAYD PIN Pad's 8-digit terminal ID (e.g., "I6012345") is shown as "paired" on your mobile device's Bluetooth settings screen. 4. If the error message continues to display, simultaneously press and hold down both the yellow  key and the  key on the PAYD PIN Pad until it starts to power off, and then wait while it powers off completely. 5. When the PAYD PIN Pad is powered off, press its power button (see page 45), and then wait while the PAYD PIN Pad powers on. 6. When the "WELCOME/BONJOUR" screen displays, retry the transaction.

Other issues (PAYD App)

Issue	Solution
<p>PAYD App and/or PAYD PIN Pad stalls or freezes midway during a transaction.</p>	<ol style="list-style-type: none"> 1. If a card is inserted, remove it from the chip reader. 2. Simultaneously press and hold down both the yellow  key and the  key on the PAYD PIN Pad until it starts to power off, and then wait while it powers off completely. 3. When the PAYD PIN Pad is powered off, press its power button (see page 45), and wait while the PAYD PIN Pad powers on to the "WELCOME/BONJOUR" screen. 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 38), and retry the transaction.
<p>"Initialize Pinpad" button does not display.</p>	<ol style="list-style-type: none"> 1. Ensure that the PAYD PIN Pad is powered on. 2. In the PAYD App, tap the Connect Pinpad button. 3. If the Initialize Pinpad button still does not display, simultaneously press and hold down both the yellow  key and the  key on the PAYD PIN Pad until it starts to power off, and then wait while it powers off completely. 4. When the PAYD PIN Pad is powered off, press its power button (see page 45), and then wait while the PAYD PIN Pad powers on to the "WELCOME/BONJOUR" screen. 5. In the PAYD App, tap the Connect Pinpad button. 6. If the issue recurs, sign out of the PAYD App. 7. Power off your mobile device. 8. Simultaneously press and hold down both the yellow  key and the  key on the PAYD PIN Pad until it starts to power off, and then wait while it powers off completely. 9. When the PAYD PIN Pad is powered off, press its power button (see page 45), and then wait while the PAYD PIN Pad powers on to the "WELCOME/BONJOUR" screen. 10. Restart your mobile device, and try initializing the PAYD PIN Pad again: <ul style="list-style-type: none"> ▪ If you are initializing for the first time, go back to page 14 (begin at setup step 6). ▪ If you are re-initializing, go back to page 71.
<p>You get a "DECLINED" response, and the PAYD PIN Pad continues to display "WELCOME /BONJOUR".</p>	<ol style="list-style-type: none"> 1. Simultaneously press and hold down both the yellow  key and the  key on the PAYD PIN Pad until it starts to power off, and then wait while it powers off completely. 2. When the PAYD PIN Pad is powered off, press its power button (see page 45), and then wait while the PAYD PIN Pad powers on to the "WELCOME/BONJOUR" screen. 3. Retry the transaction. 4. If the issue recurs, re-initialize the PAYD PIN Pad (see page 71).

Issue	Solution
<p>You cannot remember your sign-in password or quick PIN.</p>	<ol style="list-style-type: none"> 1. Reset your password (see page 42), or reset your quick PIN (see page 43).
<p>The "Export Report" button does not display on the "Reports" screen.</p>	<ol style="list-style-type: none"> 1. Set an email address to receive exported reports (see page 34). 2. Redo the report and try exporting it again (the Export Report button should now display near the top of the "Reports" screen).
<p>Nothing happens when you tap the contacts icon ().</p>	<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"> 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.
<p>A location map does not display on a transaction's "Details" screen.</p>	<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"> 1. To enable location mapping, see Location-mapping transactions (page 31).
<p>You want to determine the version number of the PAYD App.</p>	<ol style="list-style-type: none"> 1. See Determining the PAYD App's version number (page 36).

Error messages on the PAYD PIN Pad

If an error message displays 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)**.

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 73 to 76.

Error message	Solution
BATTERY CHARGING IN PROGRESS	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.
CANNOT SWIPE CHIP CARD	1. Insert the chip card into the PAYD PIN Pad's chip card reader.
CARD BLOCKED REMOVE CARD	The chip card cannot be used. 1. Ask for another form of payment.
CARD NOT SUPPORTED PLEASE RETRY	1. Swipe the card again. 2. If this does not work, request another form of payment.
CARD PROBLEM	1. Retry the transaction. 2. If the message reappears: <ul style="list-style-type: none"> ▪ If card was inserted: Swipe the card. ▪ If credit card was swiped: Manually enter the card (see page 50).
CARD READ ERR	The card data could not be read when the card was swiped or tapped. 1. Retry the transaction.
CONTACTLESS TRANSACTION LIMIT EXCEEDED	1. If the card has a chip, insert it into the chip reader; otherwise, swipe the card.
DECLINED BY CARD	The chip card has declined the transaction. 1. Retrieve the PAYD PIN Pad, and remove the chip card. 2. Request another form of payment.
ERROR CARD REMOVED	The chip card was removed during the transaction. 1. Retrieve the PAYD PIN Pad, and retry the transaction.

Error message	Solution
MUST INSERT CARD	<ol style="list-style-type: none"> If the card has a chip, insert it into the chip reader; otherwise, swipe the card.
NO CARD	The card was not entered on the PAYD PIN Pad in the required time.
NO SUPPORTED APPLICATIONS REMOVE CARD	<ul style="list-style-type: none"> ▪ If card was inserted: Remove the card from the chip reader, and swipe it when prompted. ▪ If card was tapped: If the card has a chip, insert it into the chip reader; otherwise, swipe the card.
NOT ACCEPTED REMOVE CARD or NOT ACCEPTED USE MAG STRIPE REMOVE CARD	<ol style="list-style-type: none"> Remove the chip card from the chip reader. If prompted, swipe the card on the magnetic stripe reader. Credit only: If swiping does not work, manually enter the card number (see page 50).
NOT COMPLETED	<p>The customer took more than 30 seconds to respond to the prompts.</p> <ol style="list-style-type: none"> Retry the transaction.
PLEASE CHARGE THE TERMINAL	<p>The PAYD PIN Pad's battery charge is low.</p> <ol style="list-style-type: none"> Connect the PAYD PIN Pad to an external power source via the USB charging cable. When "BATTERY CHARGING IN PROGRESS" displays, see page 77.
REFUND LIMIT EXCEEDED	<p>The total value of Refunds performed today is greater than your daily Refund Limit.</p> <ol style="list-style-type: none"> Contact us for a temporary increase in your daily Refund Limit. Ensure that you have the original Purchase receipt available for reference.
TAP NOT ACCEPTED	<ol style="list-style-type: none"> Cancel the transaction. Ensure that the PAYD PIN Pad battery has a charge level of at least 50% (see page 46), and retry the transaction. If the issue recurs, insert the card into the chip reader if the card has a chip; otherwise, swipe the card.
WRONG CARD TYPE	<p>The card that was swiped cannot be used for this transaction.</p> <ol style="list-style-type: none"> Ask for another card and retry.


Other issues (PAYD PIN Pad)

Issue	Solution
<p>The PAYD PIN Pad and/or PAYD App stalls or freezes midway during a transaction.</p>	<ol style="list-style-type: none"> 1. If the card is inserted, remove it from the chip reader. 2. Close/shutdown the PAYD App. 3. Power off the PAYD PIN Pad, and then power it on again (see pages 47 and 47). 4. Re-launch the PAYD App, and sign in (see page 38). 5. Retry the transaction.
<p>The screen displays the hardware manufacturer name/logo instead of "WELCOME/BONJOUR" .</p>	<p>The PAYD PIN Pad is in Sleep mode.</p> <ol style="list-style-type: none"> 1. Press the PAYD PIN Pad's power button (see page 45) to wake the PAYD PIN Pad and return it to the "WELCOME/BONJOUR" screen. 2. To prevent the PAYD PIN Pad from going into Sleep mode when not connected to an external power source, see Sleep mode (page 47).
<p>The PAYD PIN Pad powers off.</p>	<p>The PAYD PIN Pad may have gone into Sleep mode and then shut down to conserve power.</p> <ol style="list-style-type: none"> 1. To power on the PAYD PIN Pad, press the PAYD PIN Pad's power button (see page 45). 2. 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.
<p>The contactless reader does not beep when a card is tapped/waved at the "SWIPE, TAP OR INSERT CARD" prompt.</p>	<p>The PAYD PIN Pad battery charge level may be too low.</p> <ol style="list-style-type: none"> 1. See "TAP NOT ACCEPTED" (page 78).

Manual card entry on your mobile device

If you are unable to perform a Sale or Pre-Authorization using the PAYD PIN Pad, follow the steps below to manually enter the transaction entirely on your mobile device.

1. In the PAYD App, start on the "Sale" screen.

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

2. Tap the **Keyed** button.

- If the **Customer ID** and **Order ID** fields display 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 transaction amount (#.##).

- If the tax **AA% (\$)** field/box displays 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 **AA% (\$)** box.

4. In the **Card Number** field, enter the card number.

5. In the **Exp (MMYY)** field, enter the card expiry date.

- If the **CVV** field displays, enter the 3- or 4-digit card verification value (code).

6. Tap the **Process Transaction** button, and do one of the following:

- If the PAYD App displays the "Please specify a tip amount" screen, see [Customer prompts in the PAYD App](#) (page 59).
- If the PAYD App displays the "Customer Signature" screen, capture the customer's signature on your mobile device (see [Signature capture for receipts](#) on page 65).

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.)



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 - Download PAYD Pro guides to assist with getting started, configuration, and usage instructions.
- Visit shop.moneris.com to purchase point-of-sale supplies and accessories.
- Visit moneris.com/insights for business and payment news & trends, customer success stories, and quarterly reports & insights.

Can't find what you are looking for?

- Email info@getpayd.com or call Moneris Customer Care toll-free (available 24/7) at **1-855-423-PAYD (7293)**. We'll be happy to help.



BE PAYMENT READY

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.

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