

USING MONERIS PAYD™ ADMINISTRATION



BE PAYMENT READY



For more information
and assistance:

Web: getpayd.com/support

Email: info@getpayd.com

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

Record your Moneris® merchant ID here:

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Important: Read First

Before you begin

This guide provides instructions on how to use the Web browser-based Moneris PAYD Administration to manage your store and any registered account employees/users. This guide is intended for PAYD Pro™ and PAYD® users.

Note: *If you are using PAYD Pro Plus™, refer to the online help available in Moneris PAYD Administration.*

1. Ensure that your hardware meets or exceeds the following requirements:
 - **Internet-accessible computer.**
 - **Web browser:** Internet Explorer 11 or higher with cookies enabled.
2. If you are activating a PAYD Pro or PAYD store, ensure that you have your **Merchant ID** and **Store ID** (refer to your Moneris Welcome e-mail for these IDs).

Note: *Depending on your account type, you may need to upgrade to be able to accept credit and/or Interac Debit. Please visit getpayd.com or call us toll-free at **1-855-423-PAYD (7293)** to learn more.*

3. Do one of the following:
 - If you have all the required elements, go to step 4.
 - If you do not have the required elements, please contact us: call **1-855-423-PAYD (7293)** or e-mail info@getpayd.com.
4. Determine your setup requirements:
 - If your store is not yet activated, proceed to *Activating your PAYD Pro or PAYD store* page 5.
 - If your store is already activated, proceed to *Ready to use Moneris PAYD Administration?* on page 6.

Setting up your store

Activating your PAYD Pro or PAYD store

1. Visit getpayd.com/activate.
2. In the **Merchant ID** and **Store ID** fields, enter your Merchant ID and Store ID (refer to your Moneris Welcome e-mail for these IDs).*
3. Click on **Next**.
4. In the **First name** and **Last name** fields, enter your first name and last name.*
5. In the **Email** field, enter your e-mail address.*

Note: *Once you have successfully completed the activation steps, a confirmation e-mail will be sent to this address. If you ever need to have your password reset, a temporary password will be sent to this address.*

6. In the **Employee ID** and **Password/Confirm password** fields, enter the username and password under which you want to sign into your store.*
7. In the **Security Question** and **Answer** fields, enter a security question and the answer.*

Note: *Periodically you will be prompted to answer this question when signing in.*

8. Click on **Save**.
9. The statement "Activation completed" appears above the fields on the Moneris PAYD Administration sign-in page.

Note: *You will receive an Activation Confirmation e-mail containing your Store ID and Employee ID (the Username you created).*

10. Proceed to *Ready to use Moneris PAYD Administration?* on page 6.

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

Ready to use Moneris PAYD Administration?

1. To learn about Moneris PAYD Administration and the available features, read the sections listed here:
 - To sign into/sign out of Moneris PAYD Administration, see pages 7 to 9.
 - To change your own employee/user profile settings, see pages 10 to 14.
 - To manage other employee/user profiles, see pages 15 to 29.
 - To change your store's contact information see pages 31 to 32.
 - To view transaction reports, see pages 34 to 38.
 - To view audit logs, see pages 39 to 40.
2. For instructions on how to install and use the PAYD App to perform financial transactions on a mobile device, refer to the applicable PAYD App user guide (see page 41).

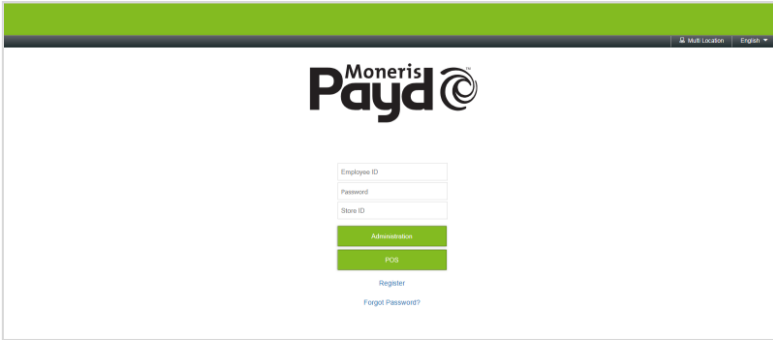
Signing in/signing out

Signing into Moneris PAYD Administration

Starts your session on Moneris PAYD Administration.

1. Visit my.getpayd.com.
2. Wait for the Moneris PAYD Administration sign-in page to display:

Important! Do not press your keyboard's Enter button while the sign-in page is displayed.



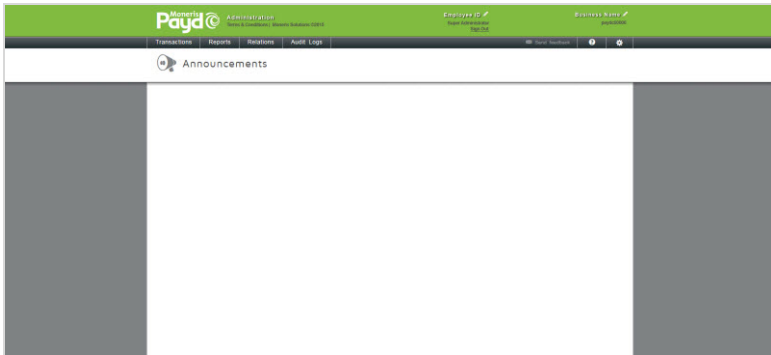
3. Enter your credentials in the sign-in fields: **Employee ID** (Username), **Password**, and **Store ID**.

Note: If you do not have a PAYD Pro or PAYD account, please visit getpayd.com or call us toll-free at **1-855-423-PAYD (7293)** to learn more. Otherwise, click on the **Register** link and follow the on screen prompts to register for a cash account.

4. Click on the **Administration** button.
 - If prompted to update your password, enter the new password, and click on the **Save** button.
5. When the Moneris PAYD Administration home page displays (see page 8), you have successfully signed in.

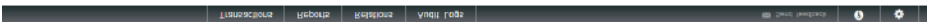
The home page

Once you have signed in, the Moneris PAYD Administration home page (shown below) displays. From this page you can access any available function to manage and configure your store.



The menu bar

All Moneris PAYD Administration features are accessible from the grey menu bar.



- For a list of available features and functions, see *Ready to use Moneris PAYD Administration?* on page 6.

Signing out of Moneris PAYD Administration

Ends your sign-in session on Moneris PAYD Administration.

1. Click on **Sign Out** (appears under your displayed Employee ID/Username at the top of the page).
2. When the Moneris PAYD Administration sign-in page displays (see page 7), it means you have successfully ended your session and signed out.

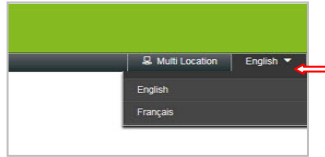
Note: *The statement "You were successfully logged out" appears for several seconds above the sign-in fields.*

Changing the default display language for your session

Selects the default display language for the duration of your sign-in session.

Note: If you are currently signed into Moneris PAYD Administration, you must sign out first (see page 8).

1. Start on the Moneris PAYD Administration sign-in page (see page 7).
2. In upper right corner on the page, click on **English** (to display English) or **Français** (to display French).



Need to reset your password?

1. Start on the Moneris PAYD Administration sign-in page (see page 7).
2. Click on **Forgot password?** (appears at the bottom of the page).
3. When the "Forgot Password" page displays:
 - a. In the **Employee ID** and **Store ID** fields, enter your Employee ID/Username and Store ID.
 - b. Click on the **Submit** button.
 - c. When your security question displays, enter the answer in the **Answer** field and click on the **Submit** button.
4. The Moneris PAYD Administration sign-in page displays.

Note: The statement "Temporary password was sent to your email account" appears above the sign-in fields.

5. Your temporary password will shortly be sent to the e-mail address registered to your employee/user profile.

Note: When you next sign in, enter the temporary password in the **Password** field. You will subsequently be prompted to create a new password.

Managing your own employee/user profile

Viewing your session activity

Displays the last 5 successful and 5 unsuccessful attempts to sign into Moneris PAYD Administration under your credentials (IP addresses are also logged).

1. Click on your **Employee ID/Username** (appears at the top of the page).
2. When the "Details" page displays, click on the **Login History** tab to view the session logs for your profile.

Changing your name information

Changes the first name and last name associated with your Moneris PAYD Administration profile.

1. Click on your **Employee ID/Username** (appears at the top of the page).
2. When the "Details" page displays, click on the **General Info** tab.
3. Under "General Info", enter name data in the **First Name** and/or **Last Name** fields.
4. Click on the **Save** button.
5. When **<First/Last name>'s profile was updated successfully** appears (near the top of the page), the operation is complete.

Changing your Employee ID/Username

Changes the Employee ID/Username that you use to sign into Moneris PAYD Administration and the PAYD App.

1. Click on your **Employee ID/Username** (appears at the top of the page).
2. When the "Details" page displays, click on the **General Info** tab.
3. Under "Password Management", enter your new Employee ID/Username in the **Employee ID** field.

Note: *You must enter data in this field (i.e., you must have an Employee ID registered to your profile).*

4. Click on the **Save** button.
5. When **<First/Last name>'s profile was updated successfully** appears (near the top of the page), the operation is complete.

Changing your password

Changes your Moneris PAYD Administration and PAYD App sign-in password.

1. Click on your **Employee ID/Username** (appears at the top of the page).
2. When the "Details" page displays, click on the **General Info** tab.
3. Under "Password Management", click on the "Password" **Reset** button.
4. When the "Reset password" window to opens, do the following:
 - a. In the **New Password** and **Confirm Password** fields, enter your new password.
 - b. Click on the **Save** button to close the window.
5. Click on the **Save** button near the top of the page.
6. When **<First/Last name>'s profile was updated successfully** appears (near the top of the page), the operation is complete.

Changing your security question/answer

Changes your Moneris PAYD Administration and PAYD App security question/answer.

1. Click on your **Employee ID/Username** (appears at the top of the page).
2. When the "Details" page displays, click on the **General Info** tab.
3. Under "Password Management", click on the "Security question/answer" **Reset** button.
4. When the "Reset security question" window opens, do the following:
 - a. In the **Security Question** field, enter your new security question.
 - b. In the **Answer** field, enter an answer.
 - c. Click on the **Save** button to close the window.
5. Click on the **Save** button near the top of the page.
6. When **<First/Last name>'s profile was updated successfully** appears (near the top of the page), the operation is complete.

Changing your notification settings

Configures if and how you receive system notifications issued by Moneris PAYD Administration.

1. Click on your **Employee ID/Username** (appears at the top of the page).
2. When the "Details" page displays, click on the **General Info** tab.
3. Under "Notification", choose whether or not you want to subscribe to Moneris system notifications:

To subscribe to Moneris system notifications:

- a. Checkmark the **Included** box under "Moneris Notifications List".

Note: *Moneris system notifications will be sent to the e-mail address and any phone numbers that you have registered in your profile.*

To unsubscribe from Moneris system notifications:

- a. Unmark the **Included** box under "Moneris Notifications List".

Note: *Moneris system notifications will not be sent to the e-mail address nor any phone numbers registered to your profile.*

4. Change your e-mail and/or phone information if required:
 - a. In the **Email** field, enter a new e-mail address.

Note: *You must have an e-mail address registered. If you forget your sign-in password, a temporary password will be sent to this address.*
 - b. In the **Phone** and **Ext** fields, enter your new telephone number (and the extension if any).
 - c. In the **Mobile** and **Ext** fields, enter your new cell phone number (and the extension if any).
5. Click on the **Save** button.
6. When **<First/Last name>'s profile was updated successfully** appears (near the top of the page), the operation is complete.

Changing your address information

Changes the address information associated with your employee/user profile.

1. Click on your **Employee ID/Username** (appears at the top of the page).
2. When the "Details" page displays, click on the **General Info** tab.
3. Under "Address", do any of the following:
 - a. In the **Address, Address 2, City, and Postal/Zip Code** fields, enter your new address data.
 - b. From the **Country** and **Province/State** drop-down lists, select your new geographic location.
4. Click on the **Save** button.
5. When **<First/Last name>'s profile was updated successfully** appears (near the top of the page), the operation is complete.

Managing the profiles of other employees/users

Adding a new employee/user profile

- 1. Click on **Relations > Add Employee**.
- 2. Under "General Info", do the following:
- 3. Ensure the **Status** drop-down indicates **Active**.
- 4. In the **First Name** and **Last Name** fields, enter the new employee/user's first name and last name.
- 5. From the **Role** drop-down list, select the permissions level for the new employee/user (see table below).

Role	Permissions
Super Administrator	Full access to every supported feature (i.e., transaction reports, audit logs, add /delete/modify employees/users or store information). This role is automatically assigned to the employee/user who activated the store.
Administrator	Same permissions as the Super Administrator (see above) except this role cannot delete the Super Administrator employee/user profile or change its status to "inactive".
Manager	Can access all transaction reports. Cannot access audit logs, add/delete/modify another employee/user profile, or modify the store information.
Cashier	No access to Moneris PAYD Administration.

6. Under "Password Management", do the following:
 - a. In the **Employee ID** field, enter the Employee ID/Username that you want the new employee/user to use when signing into Moneris PAYD Administration and the PAYD App.
 - b. In the **Temporary Password** and **Confirm Temporary Password** fields, enter the new employee/user's password.

Note: *When the new employee/user signs into Moneris PAYD Administration or the PAYD App for the first time, they will be prompted to change their password.*
7. Under "Notification", do the following:
 - a. In the **Email** field, enter the new employee/user's e-mail address.
 - b. In the **Phone** and **Ext** fields, enter the new employee/user's telephone number (and the extension if any).
 - c. In the **Mobile** and **Ext** fields, enter the new employee/user's cell phone number (and the extension if any).
 - d. To allow the new employee/user to receive Moneris PAYD system notifications, checkmark the **Included** box under "Moneris Notification List".
8. Under "Address", do the following:
 - a. In the **Address**, **Address 2**, **City**, and **Postal / Zip Code** fields, enter the new employee/user's address data.
 - b. From the **Country** and **Province/State** drop-down lists, select the new employee/user's location.
9. Tap the **Save** button.
10. When **<First/Last name>'s profile was updated successfully** appears (near the top of the page), the operation is complete.





Deleting an employee/user profile

Permanently deletes an employee/user profile.


Note: To render an employee/user profile temporarily inactive (i.e., without permanently deleting it), see page 21.

1. Click on **Relations > Search**.
2. Wait for the "Employees" page to display.
3. Retrieve the employee/user profile to be deleted:

To do a search by the employee/user's first or last name or the Employee ID/Username:

- a. In the **Search**    field, enter the desired search parameter (or leave this field blank to retrieve all employees/users).
- b. Click on the  button.

To do an advanced search:





- a. Click on the  button beside the **Search** field.
 - b. Wait for the "Advanced search" window to open, and do one or more of the following:
 - To narrow the search by first name, last name, or Employee ID/Username, enter the data in the **Search Criteria** field.
 - To narrow the search by role, select an option from the **Role** drop-down list.
 - To narrow the search by status, checkmark the **Active** or **Inactive** box.
 - To narrow the search by employee/user profile creation date, checkmark the **Creation Date Range** box, and then select dates from the **Starting Date** and **Ending Date** calendars.
 - c. Click on the **Search** button to close the window.
4. When the results are displayed, click on the **Employee ID/Username** of the employee/user profile you want to delete.

5. Click on the **Delete** button near the top of the page.
6. When the "Are you sure you want to delete employee" window appears, click on the **OK** button to close the window.
7. When **The employee was deleted successfully** appears (near the top of the page), the operation is complete.


Changing another employee/user's role (permissions)

1. Click on **Relations > Search**.
2. Wait for the "Employees" page to display.
3. Retrieve the employee/user profile to be modified:

To do a search by the employee/user's first or last name or Employee ID/Username:

- a. In the **Search**    field, enter the desired search parameter (or leave this field blank to retrieve all employees/users).
- b. Click on the  button.

To do an advanced search:

- a. Click on the  button beside the **Search** field.
 - b. Wait for the "Advanced search" window to open, and do one or more of the following:
 - To narrow the search by first name, last name, or Employee ID/Username, enter the data in the **Search Criteria** field.
 - To narrow the search by role, select an option from the **Role** drop-down list.
 - To narrow the search by status, checkmark the **Active** or **Inactive** box.
 - To narrow the search by employee/user profile creation date, checkmark the **Creation Date Range** box, and then select dates from the **Starting Date** and **Ending Date** calendars.
 - c. Click on the **Search** button to close the window.
4. When the results are displayed, click on the **Employee ID/Username** of the employee/user profile that you want to modify.
 5. When the "Details" page displays, click on the **General Info** tab.

- Under "General Info", click on the **Role** drop-down list and select a new role (see table below):

Role	Permissions
Super Administrator	Full access to every supported feature (i.e., transaction reports, audit logs, add/delete/modify users or store information). This role is automatically assigned to the employee/user who activated the store and cannot be assigned to another user.
Administrator	Same permissions as the Super Administrator (see above) except this role cannot delete the Super Administrator employee/user profile or change its status to "inactive".
Manager	Can access all transaction reports. Cannot access audit logs, add/delete/modify another employee/user profile, or modify the store information.
Cashier	No access to Moneris PAYD Administration.

- Click on the **Save** button.
- When **<First/Last name>'s profile was updated successfully** appears (near the top of the page), the operation is complete.





Changing an employee/user profile's activity status

Changes an employee/user profile to "Active" or "Inactive" status.


Note: To permanently delete an employee/user profile, see page 17.

1. Click on **Relations > Search**.
2. Wait for the "Employees" page to display.
3. Retrieve the employee/user profile to be modified:

To do a search by the employee/user's first or last name or Employee ID/Username:

- a. In the **Search**    field, enter the desired search parameter (or leave this field blank to retrieve all employees/users).
- b. Click on the  button.

To do an advanced search:

- a. Click on the  button beside the **Search** field.
- b. Wait for the "Advanced search" window to open, and do one or more of the following:
 - To narrow the search by first name, last name, or Employee ID/Username, enter the data in the **Search Criteria** field.
 - To narrow the search by role, select an option from the **Role** drop-down list.
 - To narrow the search by status, checkmark the **Active** or **Inactive** box.
 - To narrow the search by employee/user profile creation date, checkmark the **Creation Date Range** box, and then select dates from the **Starting Date** and **Ending Date** calendars.
4. Click on the **Search** button to close the window.
5. When the results are displayed, click on the **Employee ID/Username** of the employee/user profile that you want to modify.

- When the "Details" page displays, click on the **General Info** tab.
- Under "General Info", click on the **Status** drop-down list and select a new status (see table below).

Role	Definition
Active	User can perform transactions based on their assigned role level.
Inactive	User cannot perform transactions or sign in under their Employee ID/Username until their profile status is changed back to "Active."





- Click on the **Save** button.
- When **<First/Last name>'s profile was updated successfully** appears (near the top of the page), the operation is complete.

Changing an Employee ID/Username


Changes the Employee ID/Username associated with an employee/user profile.

1. Click on **Relations > Search**.
2. Wait for the "Employees" page to display.
3. Retrieve the employee/user profile to be modified:

To do a search by the employee/user's first or last name or Employee ID/Username:

- a. In the **Search**    field, enter the desired search parameter (or leave this field blank to retrieve all employees/users).
- b. Click on the  button.

To do an advanced search:





- a. Click on the  button beside the **Search** field.
 - b. Wait for the "Advanced search" window to open, and do one or more of the following:
 - To narrow the search by first name, last name, or Employee ID/Username, enter the data in the **Search Criteria** field.
 - To narrow the search by role, select an option from the **Role** drop-down list.
 - To narrow the search by status, checkmark the **Active** or **Inactive** box.
 - To narrow the search by employee/user profile creation date, checkmark the **Creation Date Range** box, and then select dates from the **Starting Date** and **Ending Date** calendars.
 - c. Click on the **Search** button to close the window.
4. When the results are displayed, click on the **Employee ID/Username** of the employee/user profile that you want to modify.
 5. When the "Details" page displays, click on the **General Info** tab.

6. Under "Password Management", enter the new Employee ID/Username in the **Employee ID** field.
7. Click on the **Save** button.
8. When **<First/Last name>'s profile was updated successfully** appears, the operation is complete.


Changing an employee/user's password

1. Click on **Relations > Search**.
2. Wait for the "Employees" page to display.
3. Retrieve the employee/user profile to be modified:

To do a search by the employee/user's first or last name or Employee ID/Username:

- a. In the **Search**    field, enter the desired search parameter (or leave this field blank to retrieve employees/users).
- b. Click on the  button.

To do an advanced search:

- a. Click on the  button beside the **Search** field.
 - b. Wait for the "Advanced search" window to open, and do one or more of the following:
 - To narrow the search by first name, last name, or Employee ID/Username, enter the data in the **Search Criteria** field.
 - To narrow the search by role, select an option from the **Role** drop-down list.
 - To narrow the search by status, checkmark the **Active** or **Inactive** box.
 - To narrow the search by employee/user profile creation date, checkmark the **Creation Date Range** box, and then select dates from the **Starting Date and Ending Date** calendars.
 - c. Click on the **Search** button to close the window.
4. When the results are displayed, click on the **Employee ID/Username** of the employee/user profile that you want to modify.
 5. When the "Details" page displays, click on the **General Info** tab.
 6. Under "Password Management", click on the "Password" Reset button.
 7. When the "Reset password" window to opens, do the following:
-





- a. In the **New Password** and **Confirm Password** fields, enter the employee/user's new password.
 - b. Click on the **Save** button to close the window.
8. Click on the **Save** button near the top of the page.
9. When **<First/Last name>'s profile was updated successfully** appears, the operation is complete.

Changing an employee/user profile's notification settings


Configures if and how the employee/user receives system notifications issued by Moneris PAYD Administration.

1. Click on **Relations > Search**.
2. Wait for the "Employees" page to display.
3. Retrieve the employee/user profile to be modified:

To do a search by the employee/user's first or last name or Employee ID/Username:

- a. In the **Search**    field, enter the desired search parameter (or leave this field blank to retrieve all employees/users).
- b. Click on the  button.

To do an advanced search:

- a. Click on the  button beside the **Search** field.
 - b. Wait for the "Advanced search" window to open, and do one or more of the following:
 - To narrow the search by first name, last name, or Employee ID/Username, enter the data in the **Search Criteria** field.
 - To narrow the search by role, select an option from the **Role** drop-down list.
 - To narrow the search by status, checkmark the **Active** or **Inactive** box.
 - To narrow the search by employee/user profile creation date, checkmark the **Creation Date Range** box, and then select dates from the **Starting Date** and **Ending Date** calendars.
 - c. Click on the **Search** button to close the window.
4. When the results are displayed, click on the Employee ID/Username of the employee/user profile that you want to modify.

5. When the "Details" page displays, click on the **General Info** tab.
6. Under "Notification", choose whether or not you want the employee/user to be subscribed to Moneris system notifications:

To subscribe the employee/user to receive Moneris system notifications:

- a. Checkmark the Included box under "Moneris Notifications List".

Note: *Moneris system notifications will be sent to the e-mail address that is registered to the profile.*

To unsubscribe the employee/user from Moneris system notifications:

- a. Unmark the Included box under "Moneris Notifications List".

Note: *Moneris system notifications will not be sent to the e-mail address nor any phone numbers registered to the profile.*





7. Change the employee/user's e-mail and/or phone information if required:
 - a. In the **Email** field, enter the employee/user's new e-mail address.

Note: *The employee/user must have an e-mail address registered. If they forget their sign-in password, a temporary password will be sent to this address.*
 - b. In the **Phone** and **Ext** fields, enter the employee/user's new telephone number (and the extension if any).
 - c. In the **Mobile** and **Ext** fields, enter the employee/user's new cell phone number (and the extension if any).
8. Click on the **Save** button.
9. When **<First/Last name>'s profile was updated successfully** appears (near the top of the page), the operation is complete.


Changing an employee/user's address information

1. Changes the address information associated with an employee/user profile.
2. Click on **Relations > Search**.
3. Wait for the "Employees" page to display.
4. Retrieve the employee/user profile to be modified:

To do a search by the employee/user's first or last name or Employee ID/Username:

- a. In the **Search**    field, enter the desired search parameter (or leave this field blank to retrieve employees/users).
- b. Click on the  button.

To do an advanced search:

- a. Click on the  button beside the **Search** field.
 - b. Wait for the "Advanced search" window to open, and do one or more of the following:
 - To narrow the search by first name, last name, or Employee ID/Username, enter the data in the **Search Criteria** field.
 - To narrow the search by role, select an option from the **Role** drop-down list.
 - To narrow the search by status, checkmark the **Active** or **Inactive** box.
 - To narrow the search by employee/user profile creation date, checkmark the **Creation Date Range** box, and then select dates from the **Starting Date** and **Ending Date** calendars.
 - c. Click on the **Search** button to close the window.
5. When the results are displayed, click on the Employee ID/Username of the employee/user profile that you want to modify.

6. When the "Details" page displays, click on the **General Info** tab.
7. Under "Address", do any of the following:
 - a. In the **Address**, **Address 2**, **City**, and **Postal / Zip Code** fields, enter the new address data.
 - b. From the **Country** and **Province/State** drop-down lists, select the new geographic location.
8. Click on the **Save** button.
9. When **<First/Last name>'s profile was updated successfully** appears (near the top of the page), the operation is complete.

Changing your store's contact information

Changing your store's business name

Changes the business name that appears on any transaction receipt sent from your store (Moneris PAYD Administration and the PAYD App).

Note: *Changes will not affect transaction receipts already stored on the system.*

1. Click on your store's **Business Name** (appears at the top right corner of the page).
2. Wait for the "Contact Information" page to display.
3. Under "General" enter the new business name in the **Store Name** field.
4. Click on the **Save** button.
5. When **Saved successfully** appears (near the top of the page), the operation is complete.

Changing your store's address information

Changes the address that appears at the top of any transaction receipt sent from your store (Moneris PAYD Administration and the PAYD App).

Note: *Changes will not affect transaction receipts already stored on the system.*

1. Click on your store's **Business Name** (appears at the top right corner of the page).
2. Wait for the "Contact Information" page to display.
3. Under "Address", enter new data in the **Address**, **Address 2**, **City**, and **Postal/ZIP Code** fields.

Note: *All fields except the **Address 2** field are mandatory.*

4. Click on the **Save** button.
5. When **Saved successfully** appears (near the top of the page), the operation is complete.

Changing your store's phone and e-mail address information

Changes the phone number and e-mail address that appear at the top of any transaction receipt sent from your store (Moneris PAYD Administration and the PAYD App).

Note: *Changes will not affect transaction receipts already stored on the system.*

1. Click on your store's **Business Name** (appears at the top right corner of the page).
2. Wait for the "Contact Information" page to display.
3. Under "Contact", enter phone number data in the **Phone**, **Ext** and the **Fax** fields. (The phone/fax numbers will appear in transaction receipts.)
4. In the **Email** field, enter the e-mail address that you want to appear in transaction receipts.

5. In the **URL** field, the full Web address that you want to appear in transaction receipts.
6. Click on the **Save** button.
7. When **Saved successfully** appears (near the top of the page), the operation is complete.

Transaction reports

Generating a filtered transaction report

Displays financial transaction reports using specific criteria.

1. Click on **Reports > Financial > All financial Transaction Types**.
2. Select a reporting date. You have two options:

To select a specific start date-time and end date-time:

- a. Click on **Starting Date**, and then click on a specific day in the open calendar.
- b. Click on the **Start of Day** drop-down list, and click on a specific time.
- c. Click on **Ending Date**, and then click on a specific day in the open calendar.
- d. Click on the **End of Day** drop-down list, and click on a specific time.

To select a pre-set date-range:

- a. Click on the **Period** drop-down list, and click on a period (e.g., **Today, Yesterday, Last Week**).
3. Do one of the following:
 - To filter by Employee ID/Username and payment type, go to step 4.
 - To bypass these filters, go directly to step 5.

4. Click on the **Show Options** button, and do one or more of the following:

To search by Employee ID (Username):

- a. Click on the **Employees** button.
- b. Checkmark the **Select Employee(s)** box.
- c. When the "Select employee(s)" window opens, do the following:
 - To include an Employee ID in the report, checkmark the box beside the **Employee ID** that you want to include.
 - To exclude an Employee ID from the report, unmark the box beside the **Employee ID** that you want to exclude.
- d. Repeat step c for each Employee ID that you want to include or exclude from the report.
- e. Click on the **OK** button to close the window.

To search by payment type:

- a. Click on the **Payment Methods** button.
 - b. Checkmark the **Select Payment Method(s)** box.
 - c. When the "Select payment Type(s)" window opens, do any of the following:
 - To include a payment type in the report, checkmark the box beside the payment method that you want to include.
 - To exclude a payment type from the report, unmark the box beside the payment method that you want to exclude.
 - d. Repeat step c for each payment type you want to include or exclude.
 - e. Click on the **OK** button to close the window.
5. Click on the **View** button to generate the report.
 6. Do any of the following:
 - To export and/or print the "Report Results", see page 36.
 - To view the transaction details for a specific transaction record, see page 38.

Generating an unfiltered transaction report

Displays an unfiltered report showing all financial transactions.

1. Click on **Transactions**.
2. Wait while the results are displayed.
 - To export and/or print the report, see below.

Exporting or printing a filtered transaction report

1. Generate a filtered transaction report (see page 34).
2. Do one or more of the following:

To print the report:

- a. Click on the **Print** button.
- b. When the "Print" window opens, select a printer, and click on the **Print** button.

To export the report as a PDF file:

Note: To use this feature, your computer must have an installed application capable of saving files in portable document format (PDF).

- a. Click on the **PDF** button.
- b. When your browser prompts you to **View** or **Save** the report, click one of the options to generate the PDF file.
- c. If you click on **Save**, ensure that you select the "pdf" file format and the location where you want to download the exported report.

To export the report as a spreadsheet:

Note: To use this feature, your computer must have an installed application capable of saving files in spreadsheet format.


- a. Click on the **Excel** button.

- b. When your browser prompts you to **View** or **Save** the report, click one of the options to generate the spreadsheet file.
- c. If you click on **Save**, ensure that you select the spreadsheet application file format and the location where you want to download the exported report.

To export the report as a comma separated values (CSV) text file:

- a. Click on the **CSV** button.
- b. When your browser prompts you to **View** or **Save** the report, click one of the options to generate the spreadsheet file.
- c. If you click on **Save**, ensure that you select the "CSV" format and the location where you want to download the exported report.

Printing an unfiltered transaction report

1. Generate an unfiltered report (see page 36).
2. Near the top of the page, click on the  button.
3. When the "Print" window opens, select a printer, and click on **Print**.

Viewing, e-mailing, or printing a transaction's details

1. Generate the report (for options, see pages 34 to 36).
2. Click on the 4-digit numeric **Order ID** displayed for the transaction.

Note: *The 4-digit Order ID displayed on Moneris PAYD Administration is different than the full alpha-numeric Order ID that was associated with the transaction at the time it was originally processed in the PAYD App. The PAYD App references only the full alpha-numeric Order ID. To locate the full alpha-numeric Order ID in Moneris PAYD Administration, see step 4.*

3. When the "Transactions" page opens, click on the **Transactions** tab.
4. When the transaction's details are displayed, do any of the following:

Note: *The PAYD App's full alpha-numeric Order ID displays as part of the overall transaction details shown in Moneris PAYD Administration.*

To e-mail the transaction details (receipt):

- a. Click on the **Email Receipt** button.
- b. When the "Email" window opens, enter the e-mail address of the recipient to whom you want to send the transaction receipt.
- c. Click on the **Send** button.

To print the transaction details (receipt):

- a. Click on the **Print Receipt** button.
 - b. When the "Print" window opens, select a printer, and click on **Print**.
5. To export and/or print the content under "Report Results", see page 36.

Audit logs

View change logs

Displays administrative changes to employee/user profiles and your store.

1. Click on **Audit Logs > Change Logs > Employees**.
2. Click on **Starting Date**, and then click on a specific day in the displayed calendar.
3. Click on **Ending Date**, and then click on a specific day in the displayed calendar.

To narrow the scope of the search by other criteria, do the following:

- a. Click on the **Show Options** button.
 - To narrow the scope by changes made by a specific employee/user, select an option from the "Changes made by employee" drop-down list.
 - To narrow the scope by a specific employee that was changed, select an option from the "Employee that was changed" drop-down list.
 - To narrow the scope by a specific type of change, select an option from the "Type of change" drop-down list.
4. Click on the **View** button to generate the report.
 - To export and/or print the content under "Report Results", see page 36.

View employee/user login logs

Displays employee/user login records.

1. Click on **Audit Logs > Login Logs > Employees**.
2. Click on **Starting Date**, and then click on a specific day in the displayed calendar.
3. Click on **Ending Date**, and then click on a specific day in the displayed calendar.
4. Click on the **View** button to generate the report.
 - To export and/or print the content under "Report Results", see page 36.

Need help?

For telephone or e-mail assistance:

- Call us toll-free at **1-855-423-PAYD (7293)**, or e-mail us at **info@getpayd.com** (24/7).
- On the Web, visit **getpayd.com/support** (additional copies of this guide may be downloaded from this site).



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