



## Moneris Go Plus Small Business Month Just got Better User Manual

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**Moneris® Go Plus**  
**Setting up Your Terminal**



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## What's in the box

1. Confirm you have received the required hardware. If not, contact Moneris.



Moneris Go Plus



Optional charging base



USB Charging cable



Receipt paper

2. Continue to Hardware setup.

## Hardware setup

### Install the receipt paper

1. Lift the printer latch up to release the printer cover, then pull the cover back to expose the paper compartment.



2. Insert the receipt paper roll into the paper compartment with the loose end unrolling away from the terminal.



3. Unroll enough paper to extend at least one inch (2.5 cm) past the top of the printer cover.

**Note:** If the paper is installed backward, your printouts will be blank.



4. Close the printer cover and press down to snap it back into place so that the extended paper is held securely.  
Hardware setup is complete.
5. Continue to Charge the battery.

## Charge the battery

Charge the terminal's internal battery for 3 hours using one of the following methods:

- Use the charging cable
- Use the optional charging base (if you have it)
- Use the optional communication base (available if purchased)

Recommendations: You must use the exact power adaptor and cables provided by Moneris to work with the Moneris Go Plus terminal and base. Failure to do so may affect the operability of, or cause damage to, the equipment. Always plug the charging cable into the power source last to avoid power surges. Use a power bar equipped with surge protection where possible.

## Use the charging cable

1. Un-fold the charging cable and insert the micro-USB connector into the USB port on the left side of the terminal.



2. Make sure the AC adaptor is connected to the other end of the charging cable. Plug the AC adaptor into a working electrical outlet **Note:** Use a power bar to avoid electrical surges.



3. The terminal displays the charging screen.
  - a. Wait for the battery charging icon to display. This indicates that the terminal is receiving power and the battery is charging.
  - b. Continue charging the terminal during the rest of the setup procedures.



4. Continue to Power on the terminal.

#### **Use the optional charging base**

Use the optional charging base if you have it, otherwise continue to Power on the terminal.

1. Unfold the charging cable and insert the USB connector into the USB port in the back of the base.  
**Note:** See manual in the box.



2. Make sure the AC adaptor is connected to the other end of the charging cable. Plug the AC adaptor into a working electrical outlet

**Note:** Use a power bar to avoid electrical surges.



3. Dock the terminal on the base. Ensure the terminal fits securely over the two prongs on the base.
4. The terminal displays the charging screen.
  - a. Wait for the battery charging icon to display. This indicates that the terminal is receiving power and the battery is charging.
  - b. Continue charging the terminal during the rest of the setup procedures.



5. Continue to Power on the terminal.

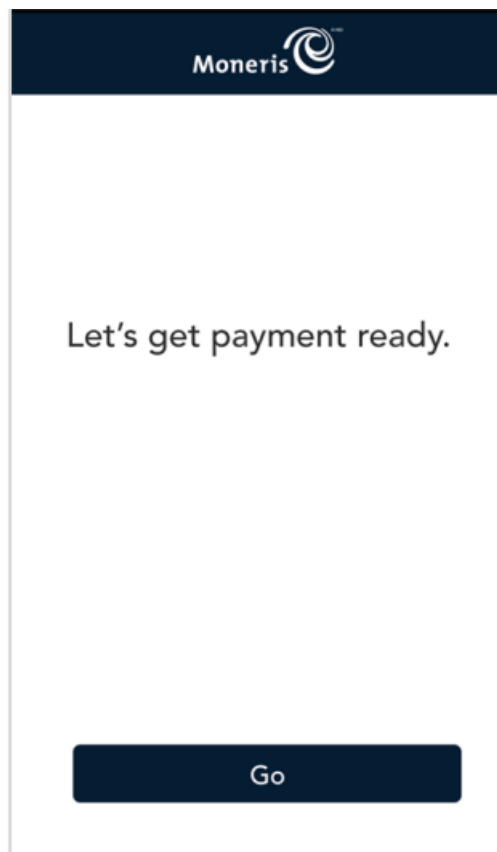
### **Power on the terminal**

1. Locate the thin power button on the left side of the terminal.
2. Press and hold the power button for 3 seconds or until the terminal screen turns on.  
The terminal powers on.  
The hardware setup is complete.
3. Continue to Application setup.

### **Application setup**

To set up Moneris Go Plus quickly, simply respond to the prompts on screen. If you need help, follow the stepby-step instructions in each section below.

1. Tap Go.
2. Wait while the terminal connects to Moneris to obtain your account settings.  
For any connection problems, refer to Troubleshooting on page 23.  
Password rules. In the next step, you will be asked to set up a password.  
Think of a password now while keeping these rules in mind.  
It must be at least 4 characters.

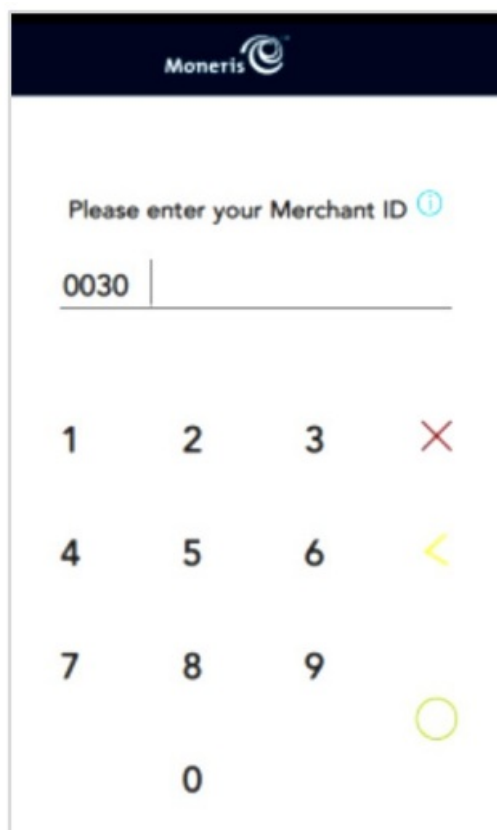


No more than 2 repeating characters. For example, lou449 is acceptable but lou444 is not.

No common sequences like 123 or abc. For example, jp126 is acceptable but jp123 is not.

3. Enter your merchant ID using the on-screen keypad then tap the OK key.

You can find your merchant ID in your welcome email from Moneris.



### Set up an Admin user

The Add initial user screen appears. Tap each field and enter the required information. You will automatically be assigned the Admin user role. This user role can access all functions and create new user roles.



+

Add initial user

Let's set up your first user. This user will be an admin user with access to all functions of the application. You will be able to set up other users later through the Settings menu.

Language

English Français

Username

First name

Last name

Email

Confirm email

Password

Confirm password

Next

**Note:** If an Admin user has already been created, the application will skip this step.

**Language:** Tap English or French. Your selection will become the default language for all other users. However, other users can change the language if desired.

**Username:** You will need to enter your username each time you use the terminal. Make sure your username is easy to remember and easy to type.

First name: Enter your first name.

Last name: Enter your last name.

Email address: For example, [john.smith@company.ca](mailto:john.smith@company.ca). This field is required for the first user.

- Confirm email: Enter your email address again.

Password: Enter a password you will remember. It must be at least 4 characters long.

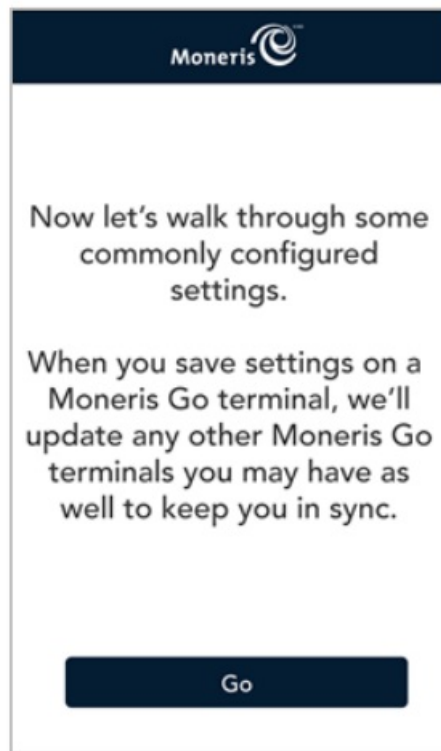
- Confirm password: This field must match the Password field.

When finished, tap Next.

### Review common settings

Tap Go to begin configuring your Moneris Go Plus application.

**Note:** If you make any changes to these settings, those changes will be reflected on your other Moneris Go Plus terminals. The settings for all of your Moneris Go Plus terminals will be kept in sync.



Review the Receipt settings screen and choose an action:

- To accept the settings shown and move to the next screen, tap Next.  
You will be able to change the settings later.
- To change the settings, tap each toggle or field:
- Customer receipt format: When "Cardholder choice" is enabled, you can enable or disable the receipt options available to your customers. If Cardholder choice is disabled, the application will automatically print the customer receipt.
- Print QR code: This setting is enabled by default. To stop printing QR codes on all receipts, tap the toggle.
- Print delay: This setting determines the delay (in seconds) between printing the customer receipt and printing the merchant receipt.
- Number of merchant receipts: By default, the terminal will not print a merchant receipt. If you want a receipt for each transaction, tap the field and select a new value (1 or 2 receipts).
- Custom receipt text: Use this setting to add lines of text (headers and footers) to the top and bottom of your customer receipts.
- When finished, tap Next.

< Receipt settings


|                             |                                     |
|-----------------------------|-------------------------------------|
| Cardholder choice           | <input checked="" type="checkbox"/> |
| Email receipt               | <input checked="" type="checkbox"/> |
| Text receipt                | <input checked="" type="checkbox"/> |
| No receipt                  | <input checked="" type="checkbox"/> |
| Print QR code               | <input checked="" type="checkbox"/> |
| Print delay                 | 1 sec                               |
| Number of merchant receipts | 0                                   |
| Custom receipt text         |                                     |

Next

Review the Tip settings screen and choose an action:

- To accept the settings shown and move to the next screen, tap Next.  
You will be able to change the settings later.
- To change the settings, tap each toggle or field:
- Tips: Enable this setting to prompt customers to leave a tip. Once you enable Tip Support the tip options will appear.
- Tip by dollar: Enable this setting to allow customers to enter a tip as a dollar amount.
- Tip by percentage: Enable this setting to allow customers to enter a tip as a percentage of the total amount.
- Tip pre-set type: Decide if you want your pre-set tips to be fixed dollar values or percentages of the purchase total, then tap Dollar or Percentage as required. Depending on your choice, enter dollar amounts (no cents) or percentages for the pre-set tips below.
- Tip Pre-set 1: Enable this setting to allow customers to enter a predefined tip.  
Tap the Pre-set value field and enter a percentage or a dollar amount depending on your tip pre-set type above, then tap the checkmark.
- Tip Pre-set 2: Enable this setting to allow customers to enter a predefined tip. Tap the Pre-set value field and enter a percentage or a dollar amount, then tap the checkmark.
- Tip Pre-set 3: Enable this setting to allow customers to enter a pre-defined tip. Tap the Pre-set value field and enter a percentage or a dollar amount, then tap the checkmark.
- When finished, tap Next.

<

 Tip settings

Tips

Tip by dollar

Tip by percentage

Tip preset type

Percentage

Dollar

Tip preset 1

Preset value

10 %

Tip preset 2

Preset value

15 %

Tip preset 3

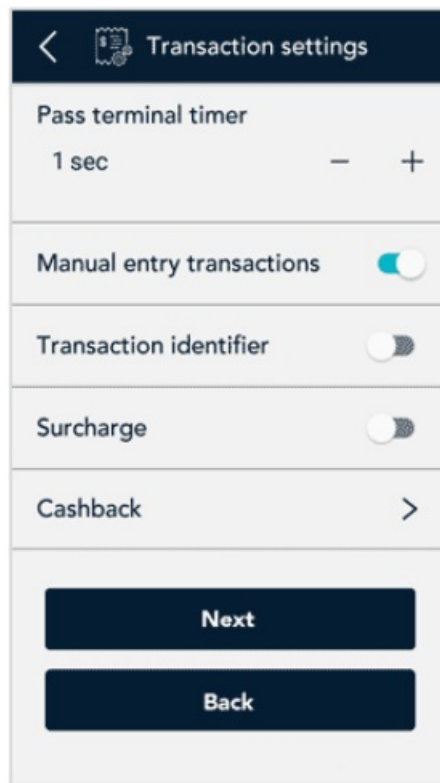
Preset value

20 %

Next

Back

Review the Transaction settings screen and choose an action:

The image shows a mobile application screen titled "Transaction settings". At the top, there is a dark blue header bar with a back arrow icon, a card icon, and the title "Transaction settings". Below the header, the screen is divided into several sections. The first section is "Pass terminal timer" with a value of "1 sec" and minus/plus icons. The second section is "Manual entry transactions" with a blue toggle switch. The third section is "Transaction identifier" with a grey toggle switch. The fourth section is "Surcharge" with a grey toggle switch. The fifth section is "Cashback" with a right arrow icon. At the bottom, there are two dark blue buttons labeled "Next" and "Back".

| Transaction settings      |                                     |     |
|---------------------------|-------------------------------------|-----|
| Pass terminal timer       | 1 sec                               | - + |
| Manual entry transactions | <input checked="" type="checkbox"/> |     |
| Transaction identifier    | <input type="checkbox"/>            |     |
| Surcharge                 | <input type="checkbox"/>            |     |
| Cashback                  | >                                   |     |
| Next                      |                                     |     |
| Back                      |                                     |     |

- To accept the settings shown and move to the next screen, tap Next. You will be able to change the settings later.
- To change the settings, tap each toggle or field:
- Pass terminal timer: When a customer response is needed, the application displays the “Please pass the terminal to your customer” screen for 1 second. Tap the minus sign or plus sign to change this time period.
- Manual entry transactions: This setting allows you to manually enter a card number for email and telephone orders.
- Transaction identifier: Enable this setting to create a custom field which you can use to capture specific information. Once you tap the toggle, a field appears showing “Custom ID”. You can replace “Custom ID” with a name for the type of information you want to record for each transaction. For example, Invoice # or Customer name.
- Surcharge: Enable this setting to charge your customers a fee for Interac debit transactions. Once you tap the toggle, a field appears for you to enter the amount of the surcharge.
- Cashback: Enable this setting to offer cashback to customers paying with debit or pre-paid cards.
- When finished, tap Next.

Review the General application settings screen and choose an action:

General application settings

Automatic sign out time 120

Sign out after transaction ☐

Display timeout 1 minute

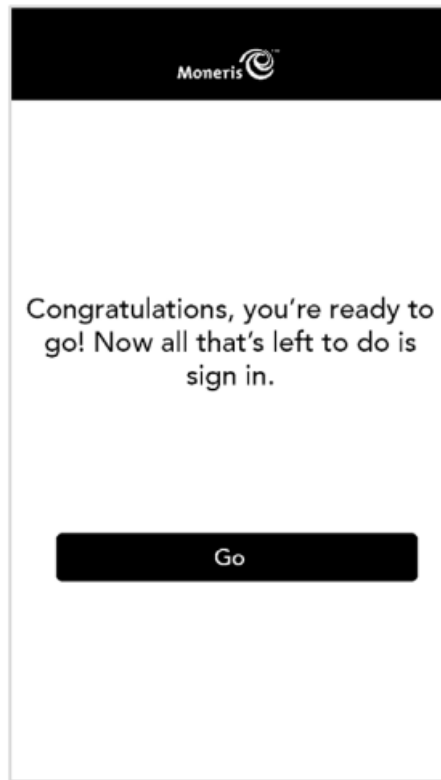
Report reset time 11:00 PM

Next

Back

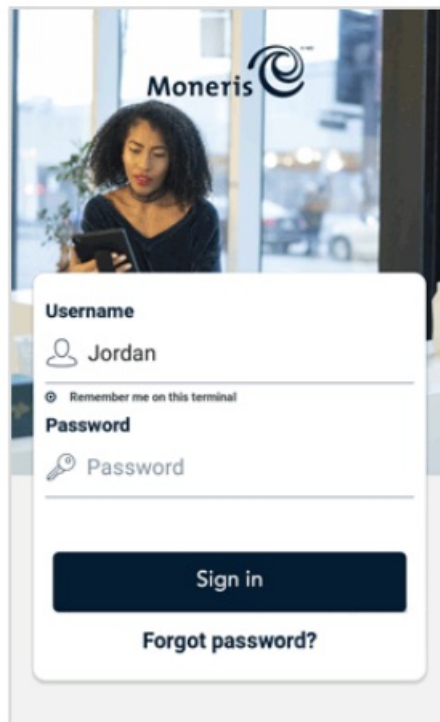
- To accept the settings shown and move to the next screen, tap Next.  
You will be able to change the settings later.
- To change the settings, tap each toggle or field:
- Automatic sign out time: The application will automatically sign you out after 120 minutes of no activity. To change this time period, tap the control bar.
- Sign out after transaction: This option is disabled by default. If you enable it, the application will sign you out after each transaction.
- Display timeout: By default, the terminal goes into sleep mode after 1 minute of no activity in order to save battery power. To increase this time, tap Display timeout and select 2 minutes or 5 minutes.
- Report reset time: This is the time when your reports will reset to \$0. To change it, tap the field and set a new time. For example, if you set it for 12:00am, the reports in the application will cover the period from 12:00 a.m. to 11:59 p.m. It is best to set the Report reset time 2 to 3 hours outside of your typical business hours – if you close at 10 p.m. set it for 12 a.m., if you close at 2 a.m. set it for 4 a.m. If you are open 24 hours, choose a logical break point like a shift change.
- When finished, tap Next.

Tap Go to sign in to the application.



### Sign in

To ensure the security and integrity of your terminal, you must sign in before performing any transactions or other functions.



1. Sign in to the application.
  - a. Tap the Username field and enter your username.
  - b. Tap Remember me on this terminal. The application will remember your username so that you don't have to enter it the next time you sign in.

Note: The application will remember the last 3 users who tapped "Remember me on this terminal".
  - c. Tap the Password field and enter the Admin user password you set up in step 3.

- d. Tap Sign in.
2. The application displays the Purchase screen. This is the default screen.

You are ready to process your first sale.

Visit [moneris.com/en/support/moneris-go/monerisgoplus](https://moneris.com/en/support/moneris-go/monerisgoplus) to download the Using your terminal guide for instructions on using your terminal.

### **Wireless Communication: Wi-Fi**

The terminal is already set up to use long-range cellular communication (4G or 3G) to send and receive information to and from the Moneris host. The terminal communicates via 4G by default for faster communication and uses 3G as a fallback where 4G is not available.

If you set up a Wi-Fi network, the terminal will switch to Wi-Fi when the Wi-Fi signal is stronger. To setup a Wi-Fi network:

1. Swipe down from the top of the screen to view the dropdown settings panel.  
You may have to swipe down again to see the full settings panel.
2. Tap Wi-Fi to turn it on if the Wi-Fi setting is off.
3. Wait for 10 seconds to allow all available networks to load.
4. Press and hold the power button until you see the menu on the right side of the screen, then tap Base.  
The terminal displays a list of the available Wi-Fi networks.
5. Tap the network to which you want to connect.  
The password screen appears.
6. Enter the Wi-Fi password and tap Connect.

### **Setting up and using the communication base**

Use the optional communication base (if you have it) when there is a weak cellular signal on your terminal. The communication base enables the terminal to communicate with Moneris using your Ethernet or Wi-Fi network.

**Note:** The communication base can only be connected using Ethernet connectivity.

#### **How to connect the power**

1. Unfold the charging cable.
2. Connect the charging cable to the power adaptor.
3. Then turn the communication base upside down and connect the power adaptor cable to the power port in the back of the communication base.





4. Make sure the AC adaptor is connected to the other end of the charging cable. Plug the AC adaptor into a working electrical outlet.  
Note: Use a power bar to avoid electrical surges.
5. Turn the communication base right side up and dock the terminal on the base. Ensure the terminal fits securely over the two prongs on the base.
6. Locate the power button on the left side of the terminal. Press and hold the power button for 3 seconds to turn on the terminal. The terminal will continue to charge while on the base.



7. Choose one of the following methods to connect the terminal/base to your local network:

- Ethernet
- Wi-Fi

#### **How to connect the Ethernet cable**

1. Uncoil your Ethernet cable; both ends of the cable will look the same.

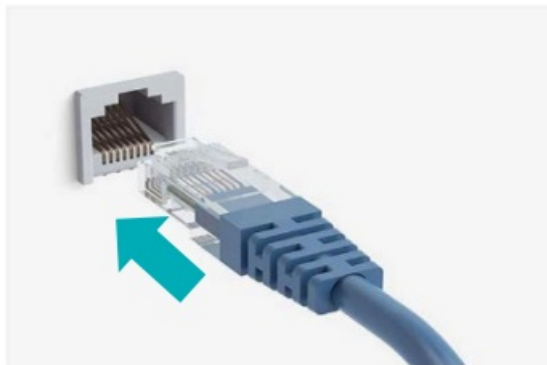


2. Turn the communication base upside down. Use one end of the cable and insert it into the Ethernet port on the back of the base.

The Ethernet cable will clip in when it is inserted correctly.



3. Connect the other end of the Ethernet cable to your Ethernet network infrastructure (modem, router, Ethernet wall ports, other equipment). The Ethernet cable will clip in when it is inserted correctly.



4. Turn the base right side up and dock the terminal on the communication base. Ensure the terminal fits securely over the two prongs on the base.
5. The terminal displays the charging screen.
  - a. Wait for the battery charging icon to display. This indicates that the terminal is receiving power and the battery is charging.
  - b. Continue charging the terminal during the rest of the setup procedures.

The Ethernet cable is now connected



6. Continue to How to pair the communication base with the terminal.

### **How to pair the communication base with the terminal**

Now that the base is connected to your network infrastructure, you need to connect the terminal to the base.

1. Locate the power button on the left side of terminal. Press and hold the power button on the terminal for 3 seconds or until the terminal screen turns on.

The terminal will continue to charge while on the base.



Note: Red light on the left side of the power button indicates the terminal is available for pairing.

2. The terminal powers on and the 60 second count down appears. Wait while the terminal attempts to establish a connection to Moneris.

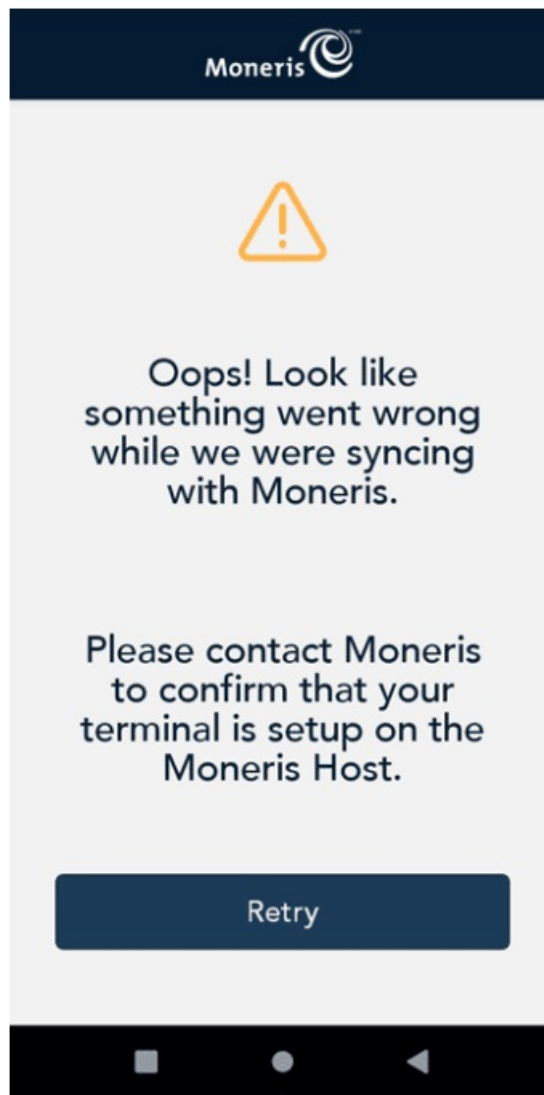


3. The "Oops!" message may appear.

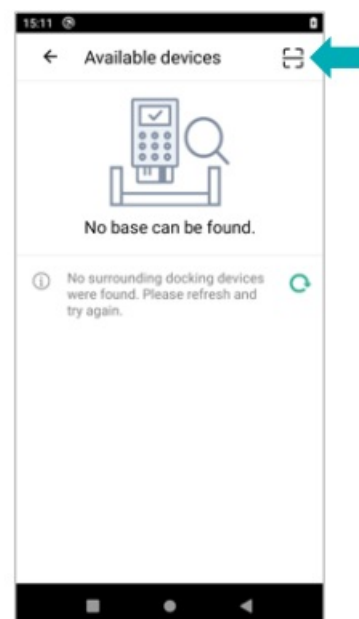
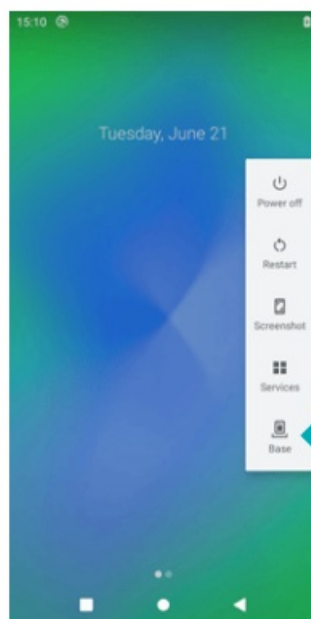
**Note:** Message appears because there is no established connection.


a. Ignore this message.

b. Tap on the white circle in the navigation bar at the bottom to go to the terminal home screen.



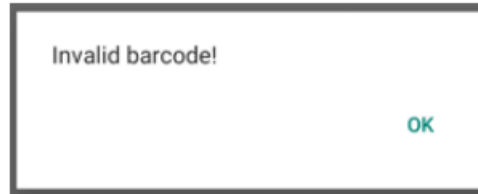
4. Press and hold the power button until you see the menu on the right side of the screen, then tap Base. The “No base can be found.” message appears.



5. Tap the Scanning Box  located on the top right corner of the screen.
  - a. Lift the terminal off the base.

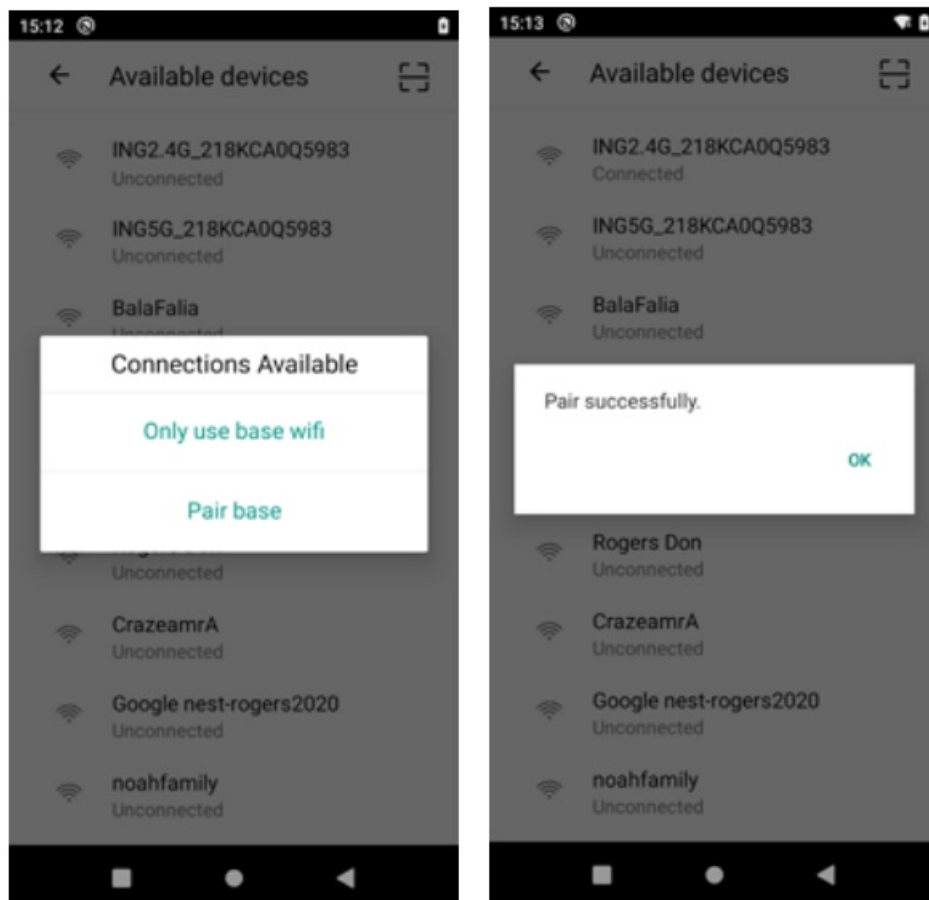
- b. Locate the QR code on the back of the base.
- c. Scan the QR code using the terminal camera.

**Note:** If the “Invalid barcode!” message appears, tap OK and retry.



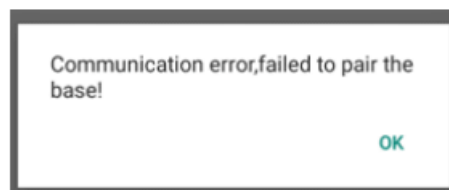
- 6. When the “Connections Available” message appears, tap Pair base.
- 7. When the “Pair successfully” message appears, tap OK.

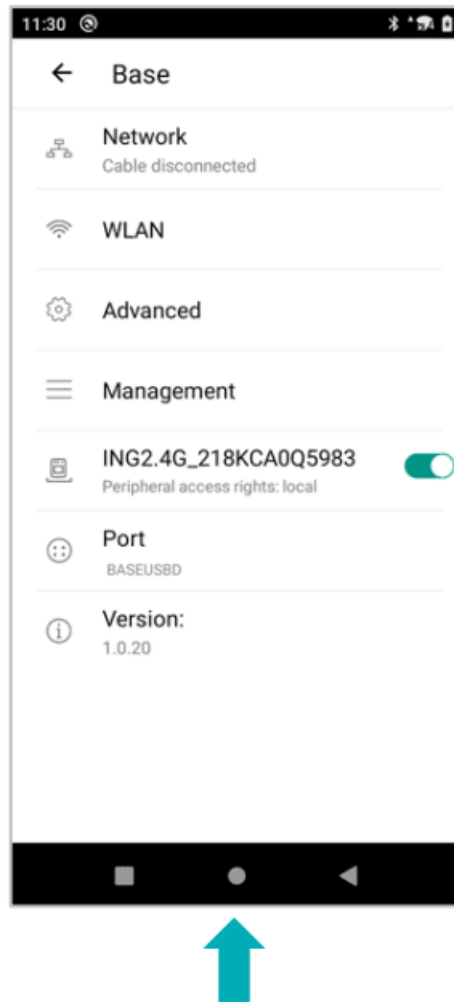
**Note:** Green light on the left side of the base indicates base is connected with the paired terminal.  
The base connectivity information screen appears.



- 8. Tap the white circle in the navigation bar at the bottom to go to the terminal screen.  
The pairing process is complete.

**Note:** If the “Communication error, failed to pair the base!” message appears, tap OK and retry.





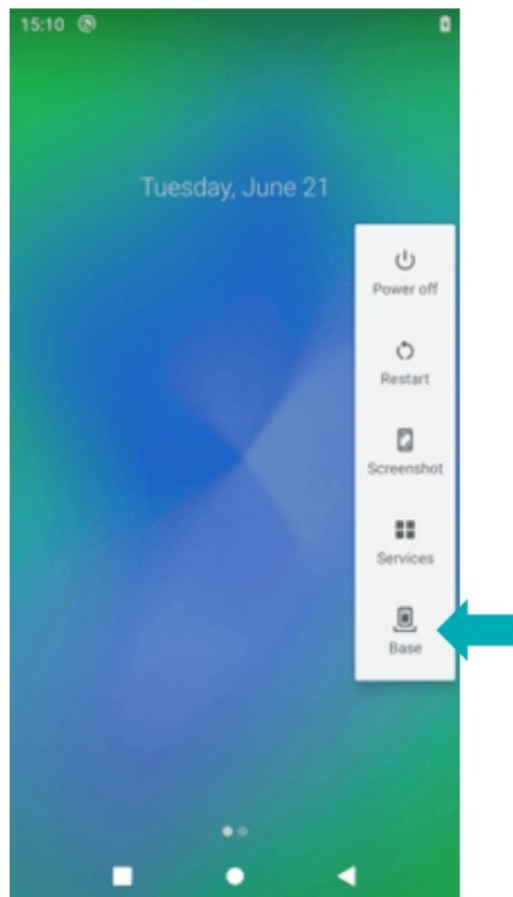
### How to connect to the Wi-Fi network


1. Press and hold the power button on the terminal for 3 seconds or until the terminal screen turns on.  
The terminal powers on and the 60 second count down appears.  
Wait while the terminal attempts to establish a connection to Moneris.





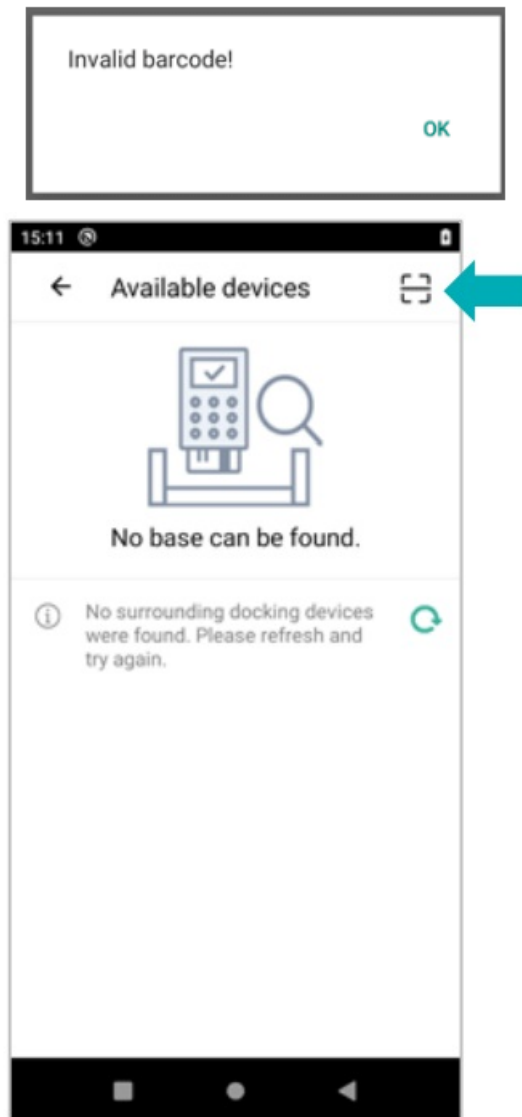
2. Press and hold the power button until you see the menu on the right side of the screen, then tap Base. The "No base can be found." message may appear.



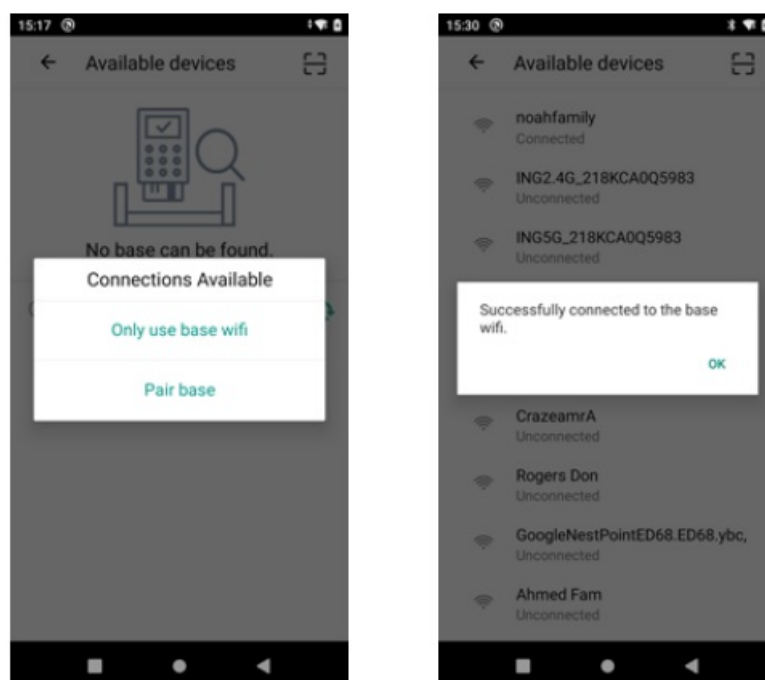
3. Tap the Scanning Box  located on the top right corner of the screen.
  - a. Lift the terminal off the base.
  - b. Locate the QR code on the back of the base.

c. Scan the QR code using the terminal camera.

**Note:** If the “Invalid barcode!” message appears, tap OK and retry.



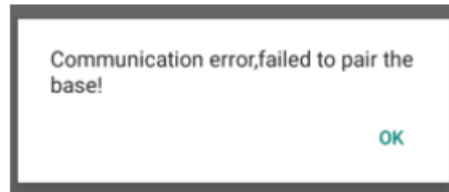
4. When the “Connections Available” pop-up appears, tap Only use base wifi.



5. When the “Successfully connected to the base wifi.” Message appears, tap OK.

**Note:** Green light on the left side of the base indicates base is connected with the paired terminal.

**Note:** If the base Wi-Fi pairing was not successful, the following message will appear:



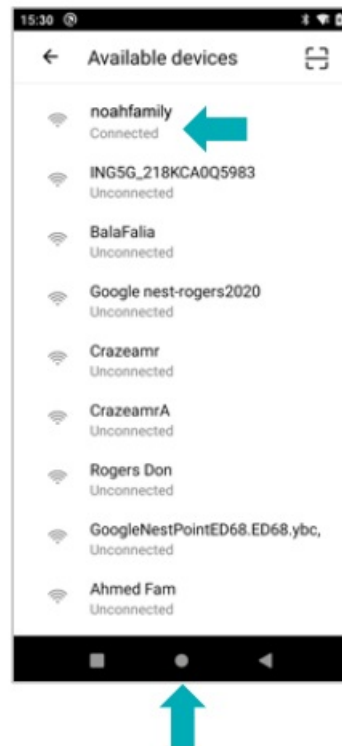
6. Press and hold the power button until you see the menu on the right side of the screen, then tap Base.

a. Tap the network you want to connect to.

b. Enter the password for the selected Wi-Fi network. You will be connected to the network.

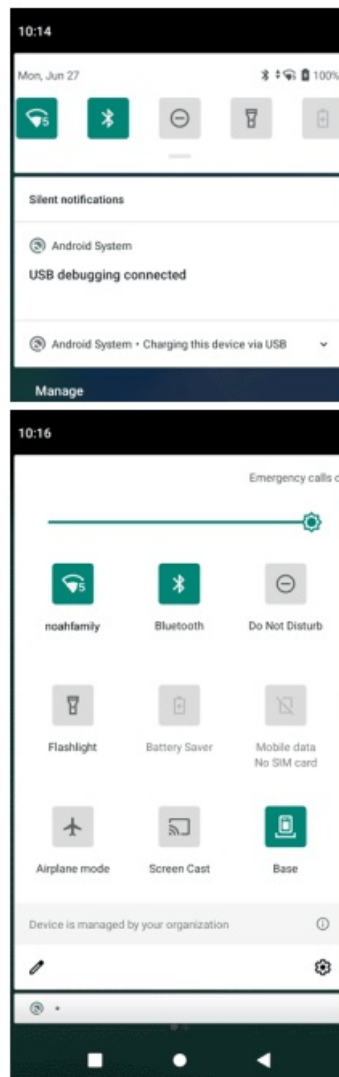
Note: The network selected will show as Connected.

The “Successfully connected to the base wifi.” message appears.



7. Tap on the white circle in the navigation bar at the bottom to go to the terminal home screen.

8. You can swipe down from the top of the screen to view the dropdown settings panel at any time.



9. You can swipe down again to see the full settings panel. Tap on each button to turn on and off as needed.

### **Enroll in Merchant Direct®**

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

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

1. Go to [moneris.com](https://moneris.com)
2. In the top, right area of the screen, click Login and select Merchant Direct.

The top screenshot shows a navigation menu with the following options: Developer Portal, Gift Web Portal, Loyalty Web Portal, Merchant Direct (highlighted with a red box), Moneris Gateway, and PAYD Administration. The bottom screenshot shows the 'Sign In' page with fields for User ID and Password, a 'Sign In' button, a link for 'Forgot User ID or Password?', a link for 'Don't have an account?', and a 'Create Account' button (highlighted with a red box). Below the 'Create Account' button, it says: 'Create an account to access Monthly Statements, Reports and Manage your Moneris Account.'

3. Click Create Account.
4. Fill in the fields in the online form to complete your enrolment.

The 'New User? Create an Account' form is divided into two sections: 'USER DETAILS' and 'MERCHANT DETAILS'. The 'USER DETAILS' section includes fields for Email, Confirm Email, Full Name, User ID, Password, and Confirm Password. The 'MERCHANT DETAILS' section includes a field for Merchant Number, with a placeholder '003-0' and a note: 'Your merchant number can be found on y'.

## Troubleshooting

| Error message  | Problem and solution  |
|--|---|
| Login failed<br>Whoops! Looks like something went wrong.                 | Tap OK to clear the message.<br>Enter your username and password exactly as you created them during the Admin user setup.   |
| No connection<br>Whoops. Looks like you're not connected to the Internet | <p>The terminal cannot establish a connection to Moneris.<br/>For a 4G connection, follow these steps:</p> <ol style="list-style-type: none"> <li>1. Tap OK to clear the error message.</li> <li>2. Swipe down from the top of the screen if needed to reveal the status bar. Check the battery charge level and charge the battery as required. Swipe down again to see the full status panel. Refer to Battery use (page 9).</li> <li>3. Confirm that your terminal is connected to a cellular network by checking for the presence of the cellular network icon in the status bar.</li> <li>4. Check the signal strength (number of bars) of the connection. It is best to have at least 2 bars to communicate with Moneris.</li> <li>5. Restart terminal. Press and hold the power button for about 2 seconds until a menu appears. Tap Reboot, then tap Reboot again to confirm.</li> </ol> <p>To troubleshoot a Wi-Fi connection, follow these steps:</p> <ol style="list-style-type: none"> <li>1. Tap OK to clear the error message.</li> <li>2. Swipe down from the top of the screen if needed to reveal the status bar. Check the battery charge level and charge the battery as required. Swipe down again to see the full status panel. Refer to Battery use (page 9).</li> <li>3. Ensure that your terminal is within range of your wireless router.</li> <li>4. Ensure the terminal is connected to the desired Wi-Fi network.</li> <li>5. Ensure that your Wi-Fi network is working. Tap Mobile data to turn it on (icon is green with up/down arrows) if the Mobile data is off (icon is grey).</li> </ol> <p>Contact your Internet Service Provider or your network helpdesk as needed.</p> <ol style="list-style-type: none"> <li>6. Restart your terminal. Press and hold the power button for about 2 seconds until a menu appears. Tap Reboot, then tap Reboot again to confirm.</li> </ol> |

## Merchant support

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

**We're only one click away.**

- Visit [moneris.com/en/support/moneris-go/monerisgoplus](https://moneris.com/en/support/moneris-go/monerisgoplus) to download additional copies of this guide and to access other Moneris Go Plus resources, including:
  - Videos for setting up and using your terminal
  - The Using Your Terminal guide
  - The Gift Card Program Reference guide
  - The Moneris Go Plus Online User Manual
  - Visit [shop.moneris.com](https://shop.moneris.com) to purchase point-of-sale supplies and receipt paper
- Visit [insights.moneris.com](https://insights.moneris.com) for business and payment news, trends, customer success stories, and quarterly reports & insights

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

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

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

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

You can also send us a secure message 24/7 by logging in to Merchant Direct® at [moneris.com/mymerchantdirect](https://moneris.com/mymerchantdirect).



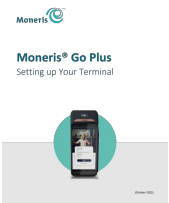
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Moneris Go Plus DX8000 SYT EN (October 2022)

## Documents / Resources

|   |  |
|---|--|
|  | <p><b><a href="#">Moneris Go Plus Small Business Month Just got Better</a></b> [pdf] User Manual<br/>Go Plus Small Business Month Just got Better, Go Plus, Small Business Month Just got Better, Month Just got Better, Just got Better</p> |
|---|--|

## References

- [Moneris: Debit and Credit Card Payment Processing](#)
- [Terms and Conditions | Moneris](#)
- [Moneris Go Plus Support | Moneris](#)
- [Merchant Direct - Sign In](#)
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