

# Moneris Go Portable Payment Solutions User Manual

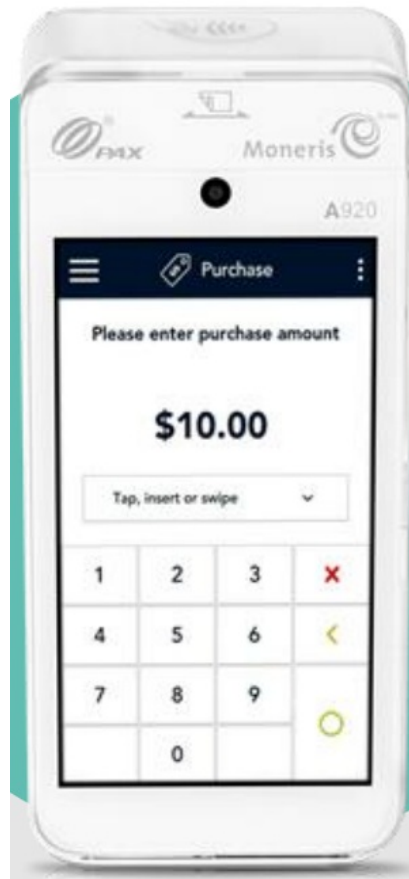
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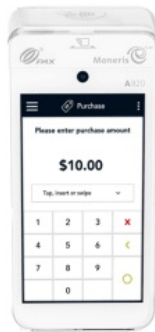


**Moneris Go Portable Payment Solutions**



## What's in the box

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



Moneris Go terminal



Optional charging base



USB Charging cable



Receipt paper

2. Go to Hardware setup on page 3.

## Hardware setup

### Install the receipt paper

1. Place the terminal face-down on a clean, dry, flat surface.
2. Lift the printer latch up to release the printer cover, then pull the cover back to expose the paper compartment.



3. Insert the receipt paper roll into the paper compartment with the loose end unrolling from the bottom of the roll and away from the terminal.
  4. 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.



5. Close the printer cover, and press down to snap it back into place so that the extended paper is held securely.



6. Turn the terminal over so that the screen is once again facing up. You are ready to print receipts and reports.



## Charge the battery

- Charge the terminal's internal battery for 3 hours using one of the following methods:
  - Charging cable (see page 5).
  - Optional charging base (see below)
- **Recommendations:** You must use the exact power adaptor and cables provided by Moneris to work with the Moneris Go 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 optional charging base

1. Unfold the charging cable and insert the USB connector into the USB port in the back of the base.



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 on a power bar.



3. Dock the terminal on the base. Ensure that the metal contacts on the underside of the terminal fit securely over

the leads prong on the base.



4. The terminal displays the charging screen.

- Wait for the battery icon to display the lightning bolt symbol. This indicates that the terminal is receiving power and the battery is charging.
- Continue charging the terminal during the rest of the setup procedures.



5. Refer to Power on the terminal on page 5.

### **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 on a power bar.



3. The terminal displays the charging screen.

- Wait for the battery icon to display the lightning bolt symbol. This indicates that the terminal is receiving power and the battery is charging.
- Continue charging the terminal during the rest of the setup procedures.
- Go to the next section Power on the terminal.



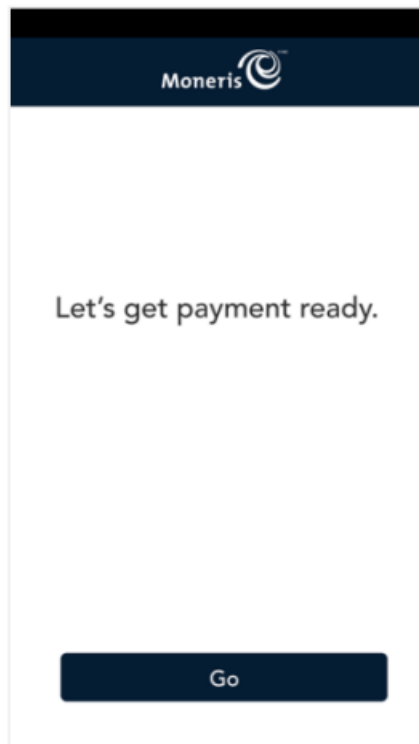
### **Power on the terminal**

1. Locate the thin rectangular power button on the right side of the terminal.
2. Press and hold the power button for about 2 seconds until the screen illuminates.
  - The terminal powers on.
  - The hardware setup is complete. Continue to the next section Application setup

### **Application setup**

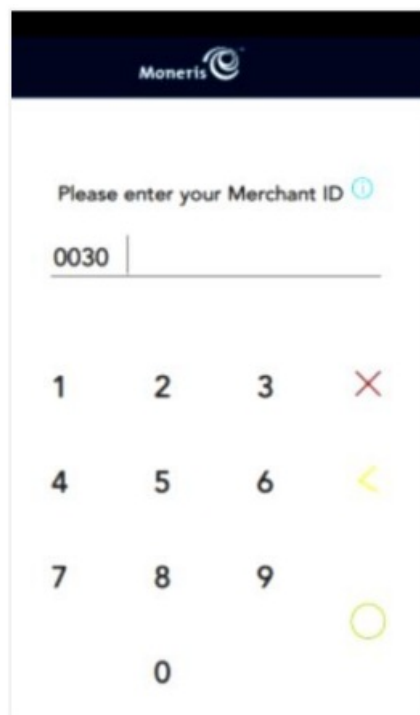
To set up Moneris Go quickly, simply respond to the prompts on screen. If you need help, follow the step-bystep instructions in each section below.

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 13.
  - 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

4. The Add 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.

**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. 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.

+

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

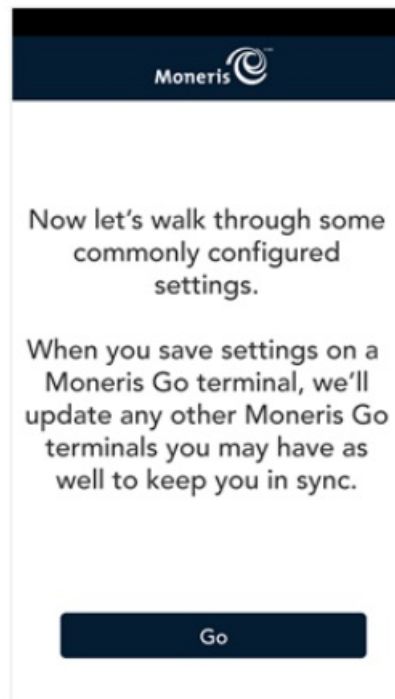
Next

### Review common settings

5. Tap Go to begin configuring your Moneris Go application.

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





6. 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

7. 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 predefined 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 ☒

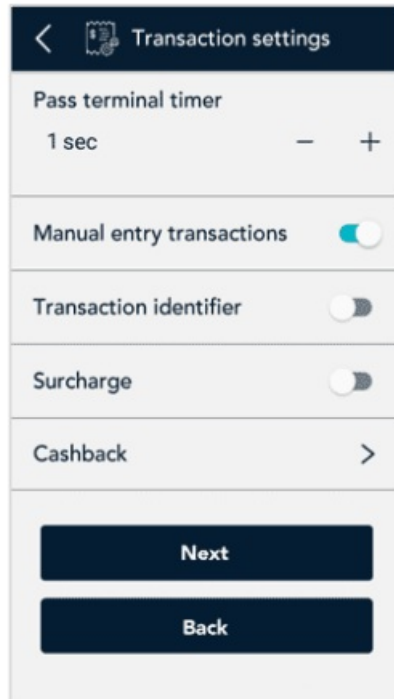
Preset value 20 %

Next

Back

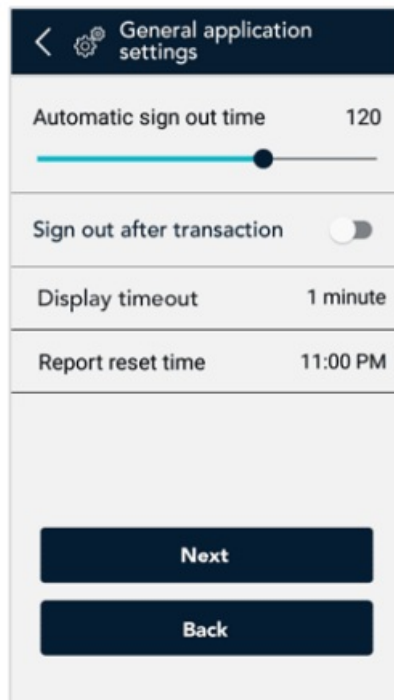
8. Review the Transaction settings screen and choose an action:

- 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:
- 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.

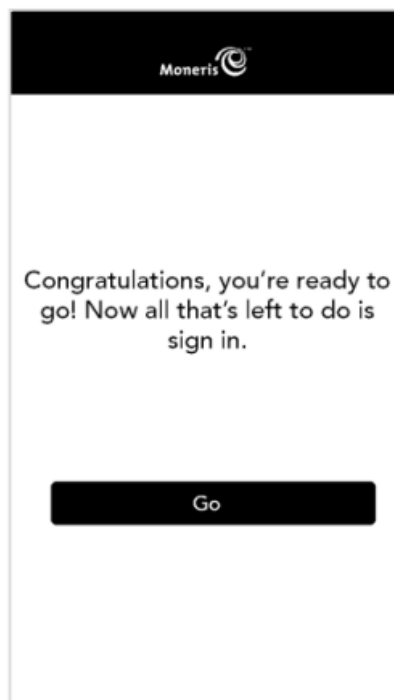


9. Review the General application settings screen and choose an action:

- 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:
- Automatic sign out time. The application will automatically sign you out after 30 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.



10. Tap Go to sign in to the application.



## Sign in

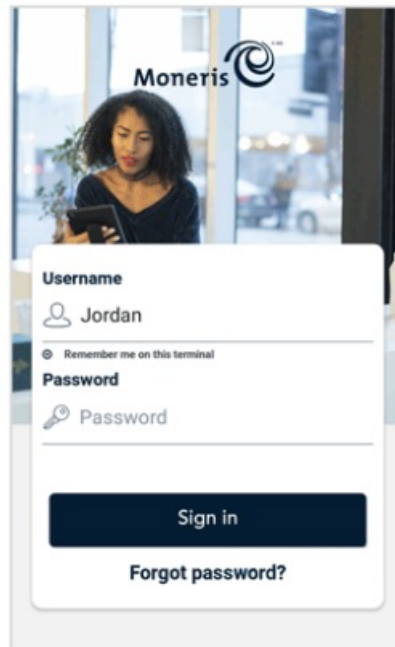
To ensure the security and integrity of your terminal, you must sign in before performing any transactions or other functions.

11. Sign in to the application.

- Tap the Username field and enter your username.
- Tap Remember me on this terminal. The application will remember your user name 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".

- Tap the Password field and enter the Admin user password you set up in step 3.
- Tap Sign in.



12. The application displays the Purchase screen. This is the default screen.

- You are ready to process your first sale.
- Visit [moneris.com/en/support/devices/monerisgo](https://moneris.com/en/support/devices/monerisgo) to download the Using your terminal guide for instructions on using your terminal.

### Wireless Communication: 4G and Wi-Fi

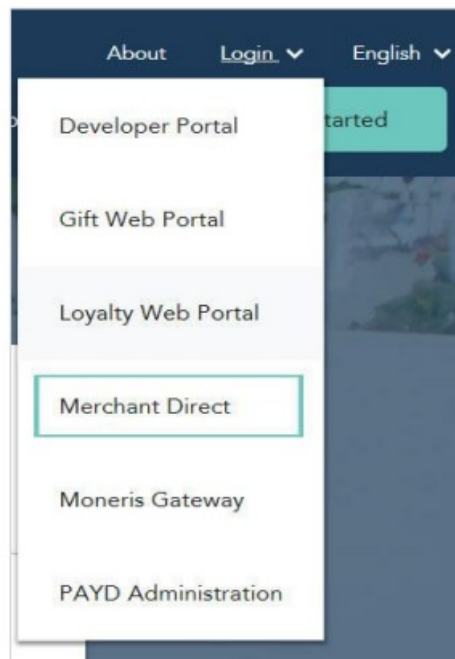
- The terminal is already set up to use long-range cellular communication (4G or 3G) to send and receive information to and from the Moneris host. The terminal communicates via 4G by default for faster communication, and uses 3G as a fallback where 4G is not available.
- If you set up a Wi-Fi network, 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.  
You may have to swipe down again to see the full panel.
  2. Tap Wi-Fi.  
The terminal displays a list of the available Wi-Fi networks.
  3. Tap the network to which you want to connect  
The password screen appears.
  4. Enter the Wi-Fi password and tap Connect.

### 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.



3. Click Create Account.

A screenshot of a 'Sign In' page. It features a dark blue header with the text 'Sign In'. Below the header are two input fields labeled 'User ID' and 'Password'. A dark blue 'Sign In' button with a lock icon is positioned below the fields. A link for 'Forgot User ID or Password?' is located below the button. At the bottom, there is a link 'Don't have an account?' and a 'Create Account' button, which is highlighted with a red rectangular border. A small text block at the very bottom reads: 'Create an account to access Monthly Statements, Reports and Manage your Moneris Account.'

4. Fill in the fields in the online form to complete your enrolment.

A screenshot of an account creation form. At the top, it asks 'Existing user?' with a 'Sign In' button and a link 'to update y'. Below this, the text 'New User? Create an Account.' is highlighted with a red rectangular border. The form is divided into two sections: 'USER DETAILS' and 'MERCHANT DETAILS'. The 'USER DETAILS' section includes input fields for 'Email', 'Confirm Email', 'Full Name', 'User ID', 'Password', and 'Confirm Password'. The 'MERCHANT DETAILS' section includes a 'Merchant Number' field with the prefix '003-0' and a note: 'Your merchant number can be found on y'.

## Troubleshooting

Error message	Problem and solution
<b>Login failed</b>  <b>Whoops! Looks like something went wrong.</b>	<p>Tap <b>OK</b> to clear the message.</p> <p>Enter your username and password exactly as you created them during the Admin user setup.</p>
<b>No connection</b>  <b>Whoops. Looks like you're not connected to the Internet</b>	<p>The terminal cannot establish a connection to Moneris. For a <b>4G</b> connection, follow these steps:</p> <ol style="list-style-type: none"> <li>1. Tap <b>OK</b> 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. Refer to <a href="#">Charge the battery</a> on page <b>4</b>.</li> <li>3. Confirm that your terminal is connected to a 4G/3G network by checking for the presence of "4G" or "3G" 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 <b>Reboot</b>, then tap <b>Reboot</b> again to confirm.</li> </ol> <p>To troubleshoot a <b>Wi-Fi</b> connection, follow these steps:</p> <ol style="list-style-type: none"> <li>1. Tap <b>OK</b> 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. Refer to <a href="#">Charge the battery</a> on page <b>4</b>.</li> <li>3. Ensure the 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 your Wi-Fi network is working. Contact your Internet Service Provider or your network helpdesk as needed.</li> <li>6. Restart your terminal. Press and hold the power button for about 2 seconds until a menu appears. Tap <b>Reboot</b>, then tap <b>Reboot</b> 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/devices/monerisgo](https://moneris.com/en/support/devices/monerisgo) to download additional copies of this guide and to access other Moneris Go resources, including:
- Videos for setting up and using your terminal



- The Using Your Terminal guide
- The Gift Card Program Reference guide
- The Moneris Go 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.

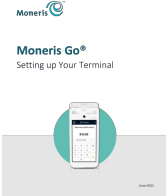
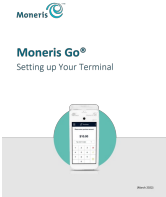
### **Can't find what you are looking for?**

- 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).

## **ABOUT COMPANY**

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## **Documents / Resources**

	<p><a href="#"><u>Moneris Go Portable Payment Solutions</u></a> [pdf] User Manual</p> <p>Go Portable Payment Solutions, Go, Portable Payment Solutions, Payment Solutions</p>
	<p><a href="#"><u>Moneris Go Portable Payment Solutions</u></a> [pdf] Instruction Manual</p> <p>Go Portable Payment Solutions, Portable Payment Solutions, Payment Solutions, Solutions</p>

References

- [☎ Moneris: Debit and Credit Card Payment Processing](#)
- [☎ Merchant Direct - Sign In](#)
- [☎ Shop.moneris.com](#)
- [☎ Business Tools & Resources | Moneris Insights](#)
- [☎ Merchant Direct - Sign In](#)
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