

# USING MONERIS PAYD<sup>®</sup> ADMINISTRATION





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**BE PAYMENT READY**

For more information  
and assistance:

**Web:** [getpayd.com/support](https://getpayd.com/support)

**Email:** [info@getpayd.com](mailto:info@getpayd.com)

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

Record your Moneris® merchant ID here:

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# Contents

- Introduction ..... 4
- Before you get started ..... 5
- Activating your PAYD Pro/PAYD store ..... 6
  - Ready to use PAYD Administration? ..... 7
- Signing in/signing out ..... 8
  - Signing into PAYD Administration ..... 8
  - The home page ..... 9
    - The menu bar ..... 9
  - Signing out of PAYD Administration ..... 9
  - Changing the default display language for your session ..... 10
  - Need to reset your password? ..... 11
- Managing your own employee/user profile ..... 12
  - Viewing your session activity ..... 12
  - Changing your name information ..... 12
  - Changing your employee ID/username ..... 13
  - Changing your password ..... 13
  - Changing your security question/answer ..... 14

Changing your notification settings	15
Changing your address information	16
<b>Managing the profiles of other employees/users .....</b>	<b>17</b>
Adding a new employee/user profile	17
Deleting an employee/user profile	19
Changing another employee/user's role (permissions)	21
Changing an employee/user profile's activity status	23
Changing an employee ID/username	25
Changing an employee/user's password	27
Changing an employee/user profile's notification settings	29
Changing an employee/user's address information	31
<b>Changing your store's contact information .....</b>	<b>33</b>
Changing your store's business name	33
Changing your store's address information	34
Changing your store's phone and email address information	34
<b>Transaction reports .....</b>	<b>36</b>
Generating a filtered transaction report	36
Generating an unfiltered transaction report	38
Exporting or printing a filtered transaction report	39

Printing an unfiltered transaction report	40
Viewing, emailing, or printing a transaction's details	41
<b>Audit logs .....</b>	<b>42</b>
View change logs	42
View employee/user login logs	43
<b>Merchant support.....</b>	<b>44</b>

# Introduction

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 on PAYD Administration.*

# Before you get started

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 "Useful Information" Email 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](https://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 email [info@getpayd.com](mailto:info@getpayd.com).
4. Determine your setup requirements:
  - If your store is not yet activated, proceed to *Activating your PAYD Pro/PAYD store* (page 6).
  - If your store is already activated, proceed to *Ready to use PAYD Administration?* (page 7).

# Activating your PAYD Pro/PAYD store

1. Visit [getpayd.com/activate](https://getpayd.com/activate).
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. 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 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. Click on **Save**.
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 *Ready to use PAYD Administration?* (page 7).

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



## Ready to use PAYD Administration?

1. To learn about PAYD Administration and the available features, read the sections listed here:
  - To sign into/sign out of PAYD Administration, see pages 8 to 11.
  - To change your own employee/user profile settings, see pages 12 to 16.
  - To manage other employee/user profiles, see pages 17 to 31.
  - To change your store's contact information see pages 33 to 34.
  - To view transaction reports, see pages 36 to 41.
  - To view audit logs, see pages 42 to 43.
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 44).

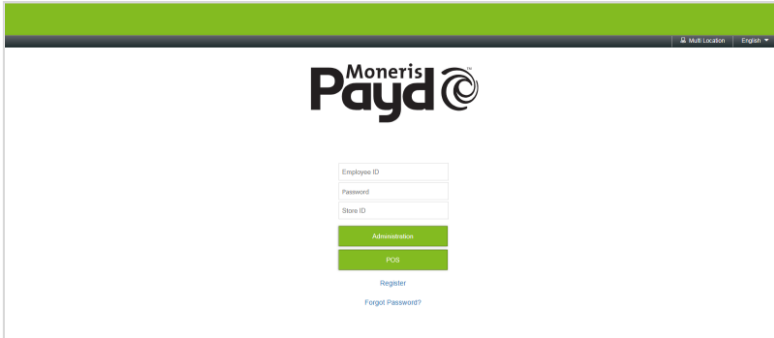
# Signing in/signing out

## Signing into PAYD Administration

Starts your session on PAYD Administration.

1. Visit [my.getpayd.com](https://my.getpayd.com).
2. Wait for the PAYD Administration sign-in page to display:

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



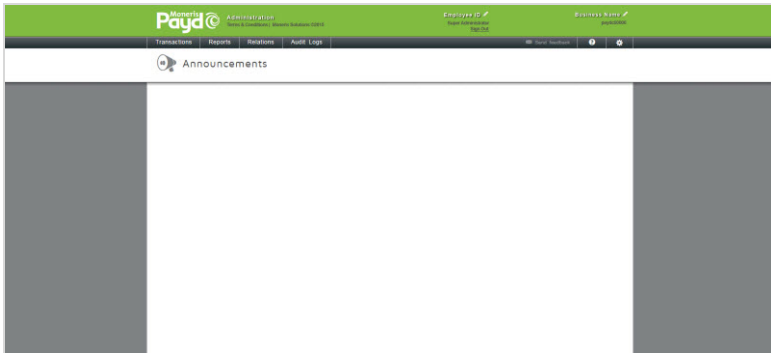
3. Enter your credentials in the sign-in fields: **Employee ID** (username), **Password**, and **Store ID**.

**Note:** If you do not have a PAYD Pro or PAYD account, please visit [getpayd.com](https://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 PAYD Administration home page displays (see page 9), you have successfully signed in.

## The home page

Once you have signed in, the 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 PAYD Administration features are accessible from the grey menu bar.



- For a list of available features and functions, see *Ready to use PAYD Administration?* (page 7).

## Signing out of PAYD Administration

Ends your sign-in session on PAYD Administration.

1. Click on **Sign Out** (displays under your displayed employee ID/username at the top of the page).
2. When the PAYD Administration sign-in page displays (see page 8), it means you have successfully ended your session and signed out.

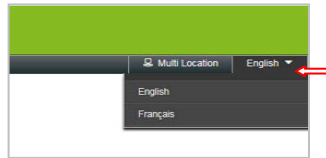
**Note:** The statement "You were successfully logged out" displays for several seconds above the sign-in fields.

# 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 PAYD Administration, you must sign out first (see page 9).*

1. Start on the PAYD Administration sign-in page (see page 8).
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 PAYD Administration sign-in page (see page 8).
2. Click on **Forgot password?** (displays 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 PAYD Administration sign-in page displays.

**Note:** The statement "A link to reset your password was sent to your account" displays above the sign-in fields.

5. Wait for a "Password reset" email (from getpayd.com) to be sent to the address that is registered to your PAYD user profile.
6. Open the email, and click on the **Reset my password** link.
7. Wait for the "New Password" page to display on PAYD Administration.
8. In the **New password** and **Confirm password** fields, enter a new password, and click on **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).

9. 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.

# Managing your own employee/user profile

## Viewing your session activity

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

1. Click on your **Employee ID/Username** (displays 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 PAYD Administration profile.

1. Click on your **Employee ID/Username** (displays 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**" displays (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 PAYD Administration and the PAYD App.

1. Click on your **Employee ID/Username** (displays 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**" displays (near the top of the page), the operation is complete.

# Changing your password

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

1. Click on your **Employee ID/Username** (displays 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**" displays (near the top of the page), the operation is complete.

## Changing your security question/answer

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

1. Click on your **Employee ID/Username** (displays 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**" displays (near the top of the page), the operation is complete.



# Changing your notification settings

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

1. Click on your **Employee ID/Username** (displays 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 email 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 email address nor any phone numbers registered to your profile.*

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

**Note:** *You must have an email address registered. If you ever need to have your password reset, a password reset link 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**" displays (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** (displays 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**" displays (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:
  - a. Ensure the **Status** drop-down indicates **Active**.
  - b. In the **First Name** and **Last Name** fields, enter the new employee/user's first name and last name.
  - c. From the **Role** drop-down list, select the permissions level for the new employee/user (see table below).

Role	Permissions
<b>Super Administrator</b>	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.
<b>Administrator</b>	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".
<b>Manager</b>	Can access all transaction reports. Cannot access audit logs, add/delete/modify another employee/user profile, or modify the store information.
<b>Cashier</b>	No access to PAYD Administration.

3. 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 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 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 email 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. Click on the **Save** button.
10. When "**<First/Last name>'s profile was updated successfully**" displays (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 23.

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 displays, click on the **OK** button to close the window.
7. When "**The employee was deleted successfully**" displays (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
<b>Super Administrator</b>	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.
<b>Administrator</b>	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".
<b>Manager</b>	Can access all transaction reports. Cannot access audit logs, add/delete/modify another employee/user profile, or modify the store information.
<b>Cashier</b>	No access to PAYD Administration.

- Click on the **Save** button.
- When "**<First/Last name>'s profile was updated successfully**" displays (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 19.

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
<b>Active</b>	User can perform transactions based on their assigned role level.
<b>Inactive</b>	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**" displays (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**" displays, 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**" displays, the operation is complete.

# Changing an employee/user profile's notification settings


Configures if and how the employee/user receives system notifications issued by 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 email 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 email address nor any phone numbers registered to the profile.*

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





**Note:** *The employee/user must have an email 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**" displays (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**" displays (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 displays on any transaction receipt sent from your store (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** (displays 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**" displays (near the top of the page), the operation is complete.

## Changing your store's address information

Changes the address that displays at the top of any transaction receipt sent from your store (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** (displays 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**" displays (near the top of the page), the operation is complete.

## Changing your store's phone and email address information

Changes the phone number and email address that display at the top of any transaction receipt sent from your store (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** (displays 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 display in transaction receipts.)
4. In the **Email** field, enter the email address that you want to display in transaction receipts.

5. In the **URL** field, the full Web address that you want to display in transaction receipts.
6. Click on the **Save** button.
7. When "**Saved successfully**" displays (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 39.
    - To view the transaction details for a specific transaction record, see page 41.

## 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 36).
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 38).
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, emailing, or printing a transaction's details

1. Generate the report (for options, see pages 36 to 38).
2. Click on the 4-digit numeric **Order ID** displayed for the transaction.

**Note:** The 4-digit order ID displayed on 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 on 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 on PAYD Administration.

## To email the transaction details (receipt):

- a. Click on the **Email Receipt** button.
- b. When the "Email" window opens, enter the email address of the recipient to whom you want to send the transaction receipt.
- c. Click on the **Send** button.
- d. When "**Email sent successfully**" displays (near the top of the page), the operation is complete.

## 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 39.

# 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 39.

## 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 39.

# 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 [getpayd.com/support](https://getpayd.com/support) to:
  - Consult the FAQs on how to set up and use PAYD Administration.
  - Download PAYD and PAYD Pro guides to assist with getting started, configuration, and usage instructions.
- Visit [shop.moneris.com](https://shop.moneris.com) to purchase point-of-sale supplies and accessories.
- Visit [moneris.com/insights](https://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](mailto: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.
- 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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