

TD Mobile Pay

Installation Guide

Before you start the installation process, you must:

- receive your Welcome email,
- receive and charge the Card Reader with the included charging cord,
- ensure Location Services are enabled on your mobile phone and set to Canada otherwise you will be unable to process transactions; this also includes any VPN (virtual private network) services that you may connect to with your mobile phone,
- ensure Bluetooth® is enabled on your mobile phone — TD Mobile Pay® uses Bluetooth Low Energy (BLE) to connect your mobile phone to the Card Reader,
- disconnect all Bluetooth connections on your mobile phone, and
- avoid performing the installation process near the following devices as they use the same frequency as Bluetooth: microwaves, WiFi devices (routers, VoIP phones, wireless cameras), fluorescent office lighting, and some cordless phones and baby monitors.

Once the above have been completed you can now validate your Welcome email.

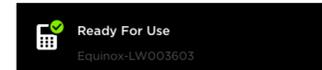
Step 1 - Validate your Welcome email

1. Locate the email with the subject **Welcome to TD Mobile Pay**. Select the **Verify Your Email** link in the body of that email. If you have already verified your email, continue to **Step 2 - Download the application and use the Wizard to activate and bond your Card Reader**.
2. Create a **password** for your account. Your password must contain:
 - 8 - 16 characters
 - at least 1 upper case character
 - at least 1 lower case character
 - at least 1 number
3. Select your **Multi-Factor Authentication (MFA) Preference**. Your options are a text sent to your mobile phone number or a code generated on your selected authenticator application. This is how the website will verify your identity.

Step 2 - Download the application and use the Wizard to activate and bond your Card Reader

Note: Ensure that your Card Reader is charged before starting this step.

1. Go to your mobile phone's application store (App Store or Google Play™ store), **download** the **TD Mobile Pay** app, and launch it. You will be prompted to allow the app to use your location data. You **must** agree to this to use the app. You can set this to **Allow while using app**.
2. Enter your **email address** and the **password** you just created in **Step 1 - Validate your Welcome email**.
3. Press **Sign In**. The **New Sale** screen will appear.
4. Press  to power on your Card Reader if it is not already.
5. Press the **Menu** icon . You will see **Action Required** in the top-left corner of the screen (see right).
6. Press the **Connection Manager** icon  and the **Connection Manager** screen will appear.
7. Press the **Scan** button and select your **Card Reader** when it is displayed. This will start the bonding process and the **Wizard Start** screen will appear.
8. Press **Start** to launch the Wizard. You will be prompted to allow the app to use your phone's Bluetooth and you **must** agree to this in order to use the app. When you see the status change to **Ready for Use** in the top-left corner of the screen, your solution is ready to process payments (see right). If the Wizard fails to start, or complete the setup process, go to **Step 2a - Manually activate and bond your Card Reader** and follow the instructions.



Step 2a - Manually activate and bond your Card Reader

If the Wizard failed to start or complete the setup process, follow these steps to manually bond and activate your Card Reader. Bonding is like Bluetooth Pairing, but only occurs between your Card Reader and your TD Mobile Pay app. You **must** bond your Card Reader through the TD Mobile Pay app, not through your mobile phone's Bluetooth pairing menu.

Note: In this process you may be required to restart your Card Reader's Bluetooth connection. To do this on the Card Reader press: **Menu** → **BLE Configuration** → **BLE Restart**.

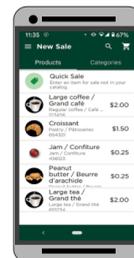
On the Card Reader:



1. Press **Menu** and then press **Settings**.
2. Enter your **passcode** and press . The passcode is the last four digits of the serial number located on the back of the Card Reader (e.g. LW#####).
3. Press **BLE Configuration**.
4. Press **BLE Bonding**.
5. Press . Your Card Reader will now show **Ready for Bonding - Please initiate bonding on phone**.

You may now perform the steps on your mobile phone.

On your mobile phone:



1. Press the **Connection Manager** icon , press **Connection Manager** and select your displayed Card Reader. The passkey should now display on the Card Reader. If the passkey is not generated, please go to **Troubleshooting and information - How do I generate a passkey?**. Otherwise proceed to the next step.
2. Enter the passkey from the Card Reader and press **Pair**. Your Card Reader is now physically bonded to your phone.
3. The **Activate Card Reader?** screen will appear on your TD Mobile Pay app. Press **Start**.
4. Press **Finish** to close the Card Reader wizard. Your TD Mobile Pay application is now bonded to your card reader — shown by a green check mark on the phone icon in the Connection Manager screen (see image to the left). You are now ready to accept debit and credit card payments! If you don't see the green check mark, go to **Connections Manager** and press your Card Reader to initiate the connection.

Troubleshooting and information

How do I restart my Card Reader's Bluetooth connection?

1. On the Card Reader:
 - a. Press **Menu** → **BLE Configuration** → **BLE Restart**. (Soft reboot)
 - OR
 - b. Press and hold the **Power** key  for 5 seconds. (Hard reboot)

How do I generate a passkey?

1. On the application, verify that the Card Reader appears under the **Connection Manager** (iPhone®: **Devices** or Android®: **Available Devices** or **Bonded Devices**).
 - If it does, proceed to the step 2 below.
 - If it doesn't, restart your Card Reader's Bluetooth connection (see above), and then go to **Step 2a - On the Card Reader** and perform steps 1 through 5.
2. If the Bluetooth icon  appears on the Card Reader icon then:
 - a. Press the **Card Reader name** and the application will attempt to connect to it.
 - b. Restart your Card Reader's Bluetooth connection (see above).
 - c. Go to **Step 2a - On the Card Reader** and perform steps 1 through 5.
3. **On an iPhone:** if the Card Reader device icon is white:
 - a. Restart your Card Reader's Bluetooth connection (see above).
 - b. Go to **Step 2a - On the Card Reader** and perform steps 1 through 5.

On an Android device: if the Card Reader device icon is white, and the card reader is located under **Bonded Devices**:

- a. Swipe left on the Card Reader to **Forget the Password (Passkey)**.
- b. Restart your Card Reader's Bluetooth connection (see above).
- c. Go to **Step 2a - On the Card Reader** and perform steps 1 through 5.

I am still unable to connect to my Card Reader. What do I do?

If you cannot connect your Card Reader to the TD Mobile Pay app after following these instructions, or if you encounter any other issues setting up your TD Mobile Pay solution, please call the TDMS Contact Center at **1-800-363-1163**.

Where is the documentation located?

Your solution has features and functionality, such as the Product Catalog and tax settings, that are explained in our documentation at www.tdmerchantsolutions.com/posresources. We strongly advise that you review it before you perform financial transactions.

How do I access the Merchant Portal?

To access the TD Mobile Pay Merchant Portal go to www.mobilepay.td.com/MerchantPortal/.

