plug n pay
by CIMB BANK

Merchant User Guide

CIMB Bank Berhad (13491-P)

CIMB BANK

CARING FOR YOUR DEVICE

Your Plug n Pay device is battery operated. It is important to keep the device constantly charged. Charge your device at least once every 14 days. When the device displays a “BATTERY LOW” sign, it does not have enough energy to continue operations, and must be charged immediately.

Energy is needed to protect the encryption keys in the device that keep your transactions highly secure. Failure to maintain a charge in the device will cause deletion of the keys, and the device to deactivate, and you will not be able to perform any transactions. When this happens you will need to contact your bank immediately to reactivate the device.

CONTENTS

SECTION A: MERCHANT PORTAL

Account Activation	2-4
Mobile ID Creation	5-6

SECTION B: MOBILE APPS

Mobile Activation (Bluetooth Connection)	7-10
Accepting Card Sales	11-14
Resend e-Receipt	15-16
Voiding Card Sales	17-18
Credit Settlement	19

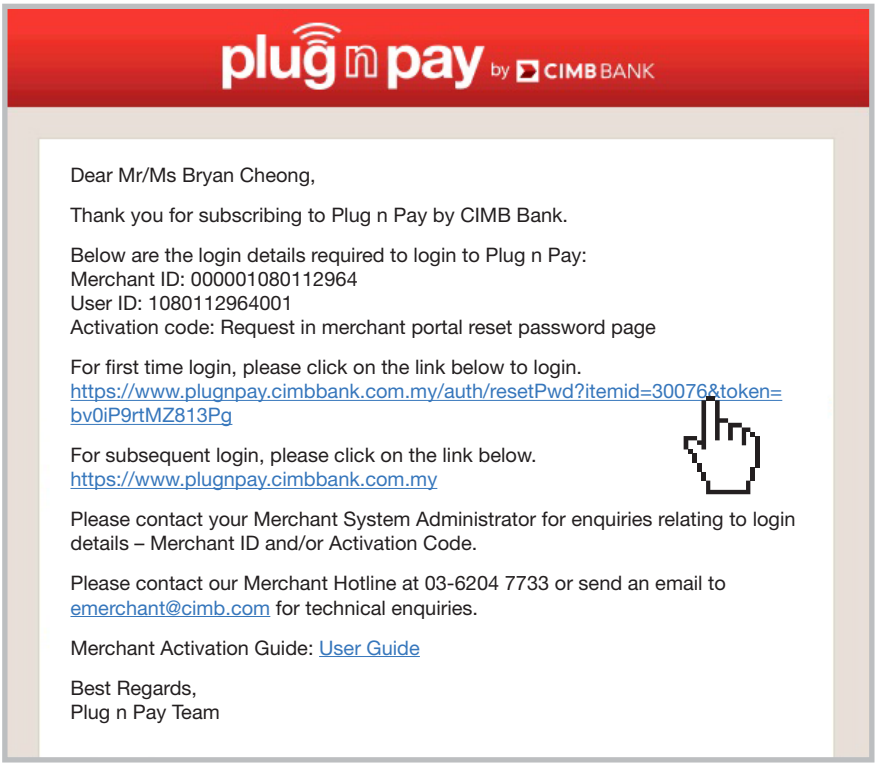
SECTION C:

Reinstate Suspended Mobile User ID	20-22
Reset PIN for Mobile User	23-25
Reset Merchant Portal Password	26

SECTION A: ACCOUNT ACTIVATION

Step 1:

- Merchant will receive an email with an activation link.
- Click the activation link from email.



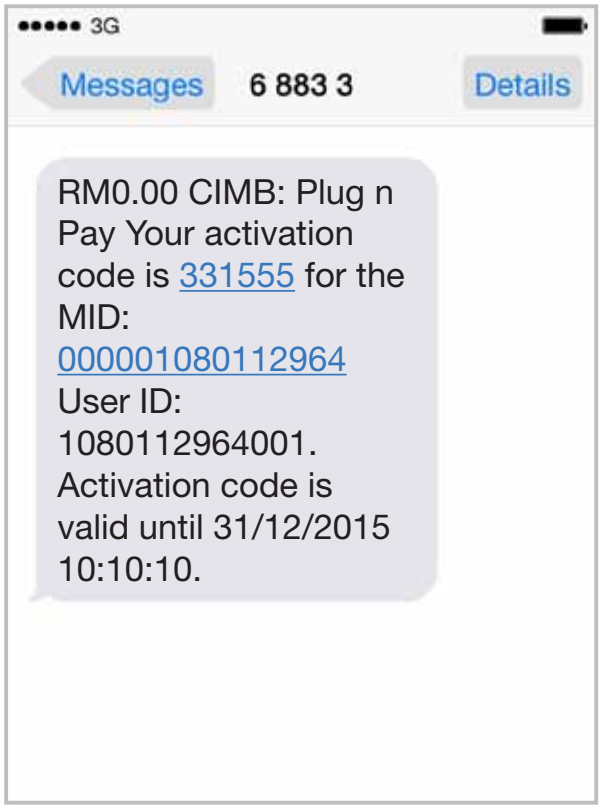
Step 2:

- You will be directed to a reset password page.
- Key in preferred new password twice.
- Click 'Request Activation Code' to get the activation code.

Note: New password must contain 8 alphanumeric characters with at least one upper case and lower case.

Step 3:

- An SMS with activation code will be sent to the user's mobile contact number.



- Key in activation code received via SMS.
- Click 'Submit'.

Step 4:

- Login to the Plug n Pay portal at https://www.plugnpay.cimbbank.com.my
- Enter Login ID stated in notification email and new password.
- Click 'Submit'.

Step 5:

- Once login is successful, you will be directed to the homepage.

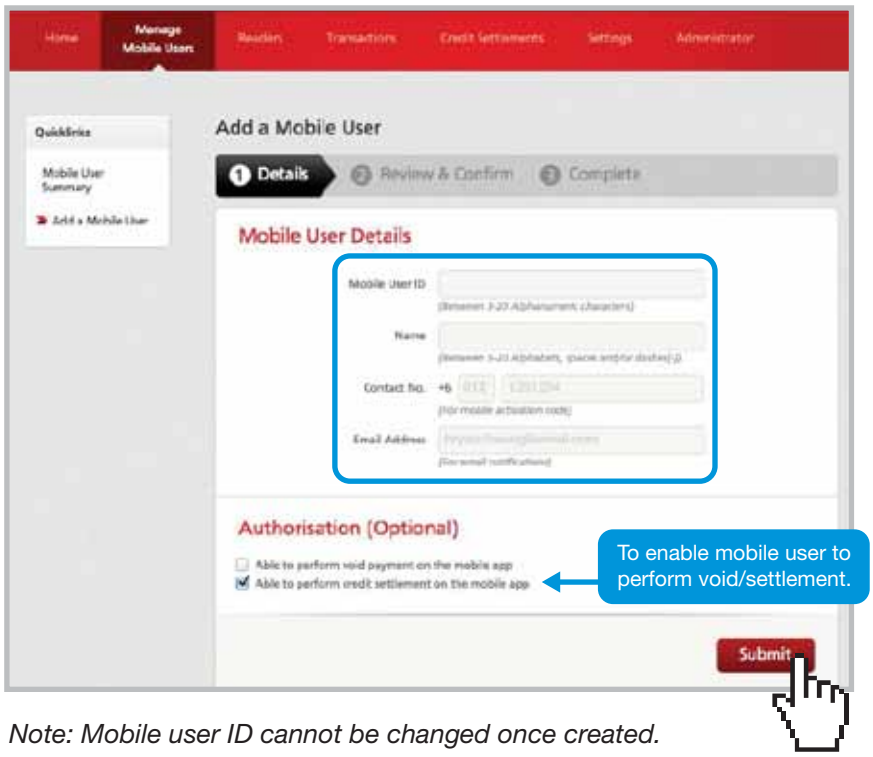
SECTION A: MOBILE ID CREATION

Step 1:

- At portal homepage, go to ‘Manage Mobile Users’ and click on ‘Add a Mobile User’.

Step 2:

- Key in preferred mobile user ID (eg: Company name#1), staff name, contact number and email address of the sales agent that the card reader will be assigned to.
- Upon completion, click 'Submit'.



Note: Mobile user ID cannot be changed once created.

Step 3:

- Once Mobile User creation is completed, a message that says 'Your request is successful' appears.
- A system generated email will be sent to the Mobile User (refer to Section B: Mobile Activation, Step 5, Page 9)

SECTION B: MOBILE ACTIVATION (BLUETOOTH CONNECTION)

Step 1:

- Download the Plug n Pay app from iTunes App Store for iOS or Google Play for Android.
- Enter 'Plug n Pay by CIMB Bank' to search for the app.

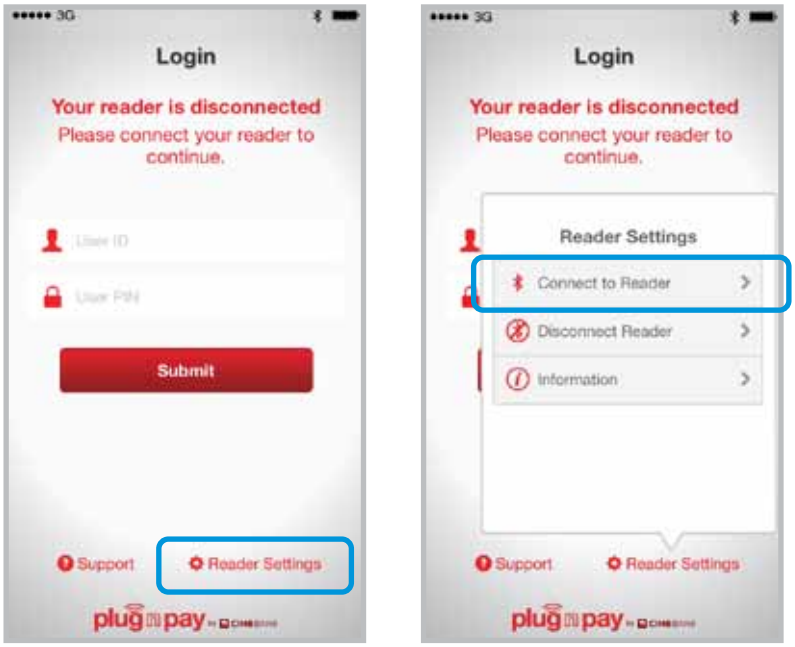
Note: For iPad users, please search for 'CIMB Plug n Pay Apps' from iPhone Apps category.

Step 2:

- Press ⏻ button to turn on card reader.

Step 3:

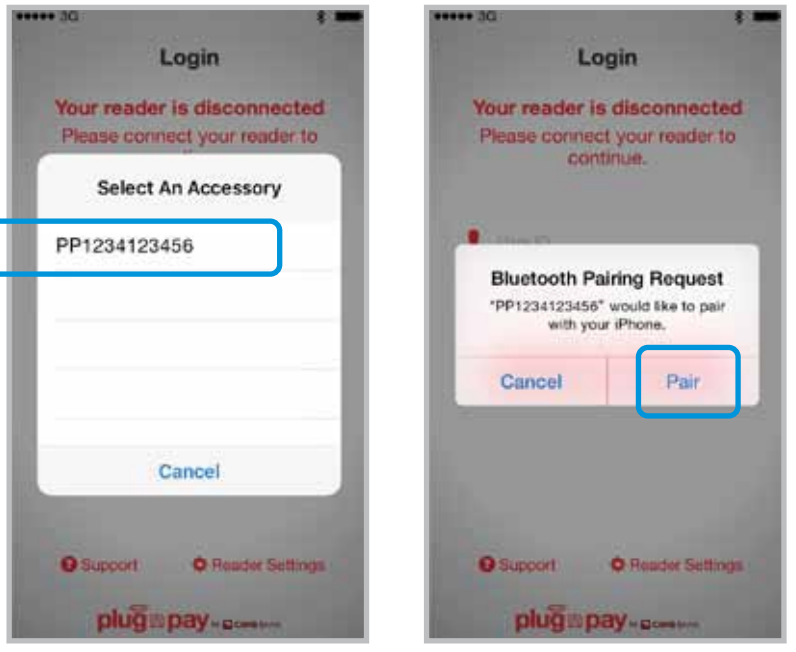
- Launch Plug n Pay app and click on ‘Reader Settings’.
- Next, click on ‘Connect To Reader’.



*Note: **GPS** and **Bluetooth** must be enabled on the smartphone device.*

Step 4:

- Select the reader you want to connect to and click on the Serial Number.
- Click ‘Pair’ to accept pairing.

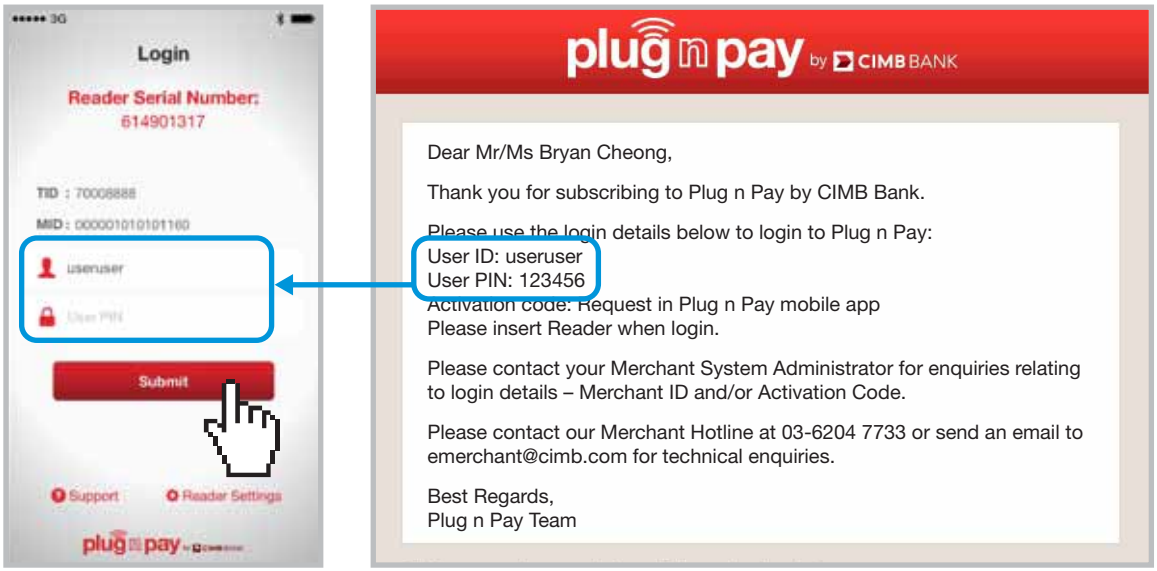


Note: For Android, click ‘Yes’.

SECTION B: MOBILE ACTIVATION (BLUETOOTH CONNECTION)

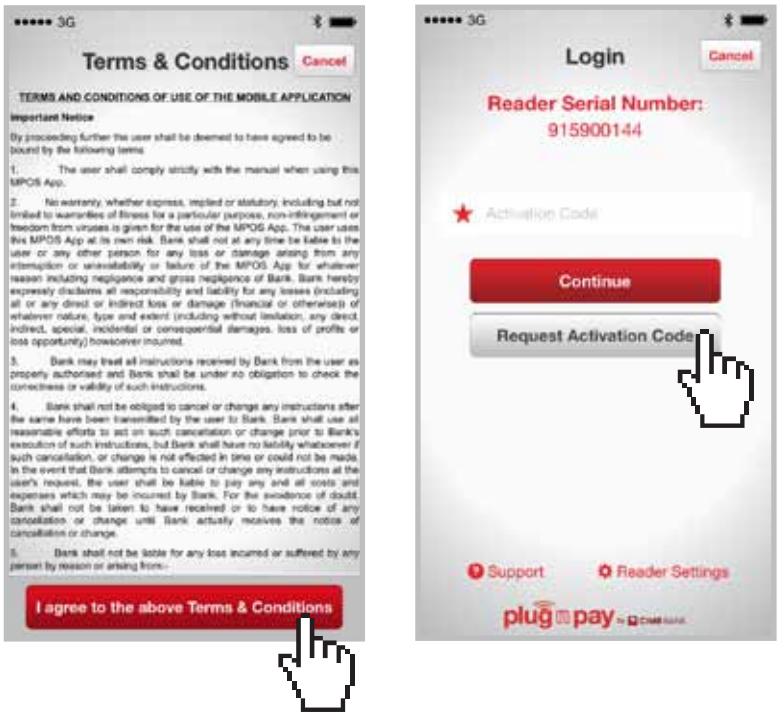
Step 5:

- Login with User ID and User PIN received via email.
- Click ‘Submit’.



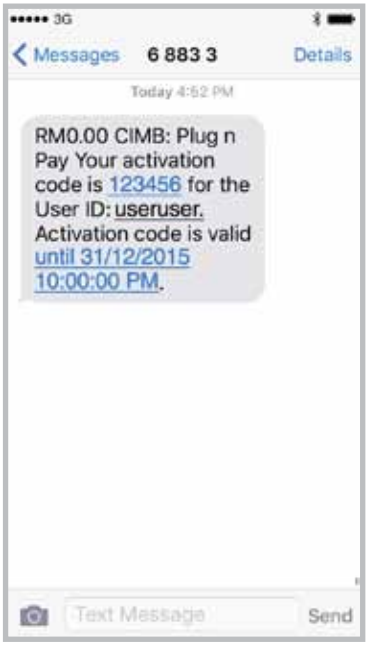
Step 6:

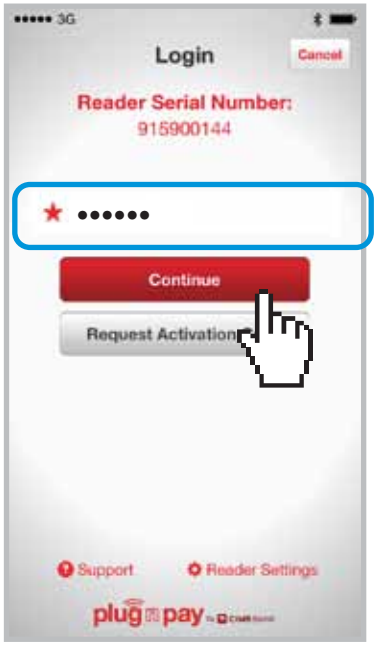
- Click on ‘I agree to the above Terms & Conditions’.
- Click ‘Request Activation Code’ button to get activation code.



Step 7:

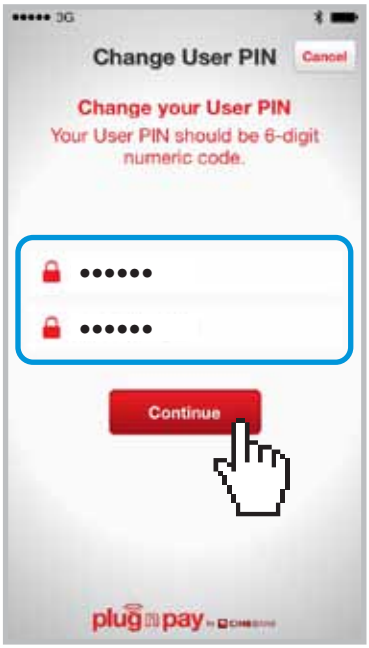
- An SMS with the activation code will be sent to your mobile contact number.
- Enter activation code and click ‘Continue’.





Step 8:

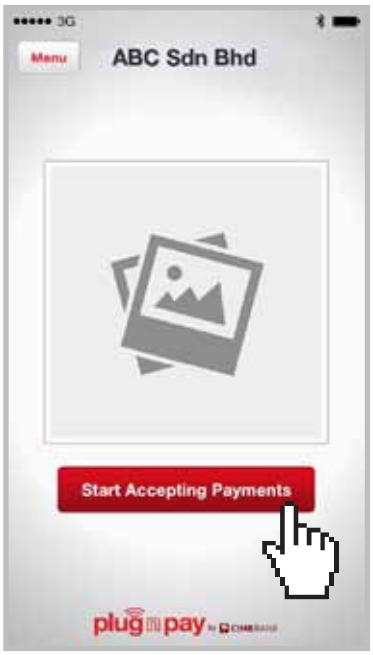
- Key in preferred PIN.
- Re-enter preferred PIN for confirmation.
- Click ‘Continue’.



Note: User PIN must contain a 6-digit numeric code only.

Step 1:

- Click ‘Start Accepting Payments’.
- Enter payment value and sales description.
- Click ‘Pay Now’.

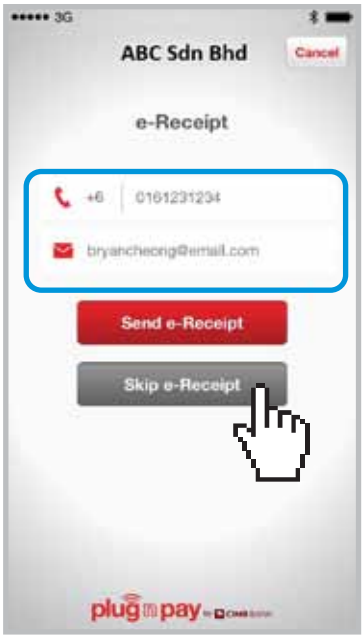


Step 2:

- A message requesting that you insert or swipe a card will be displayed at the card reader screen.
- To charge, insert card into the bottom of the reader or swipe the card at the top of the reader.

Step 3:

- Key in customer's mobile number and/or email address to send e-receipt.
- Click 'Skip e-Receipt' button if customer does not wish to receive e-receipt.



Step 4a:

- Proceed to obtain customer's signature and click 'Continue'.

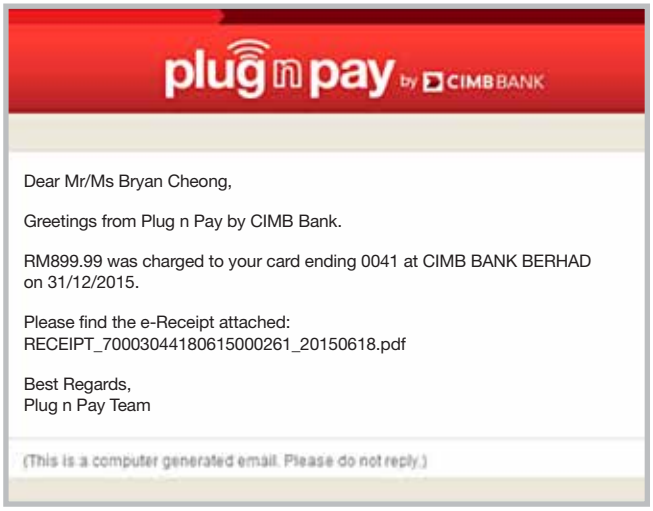
or

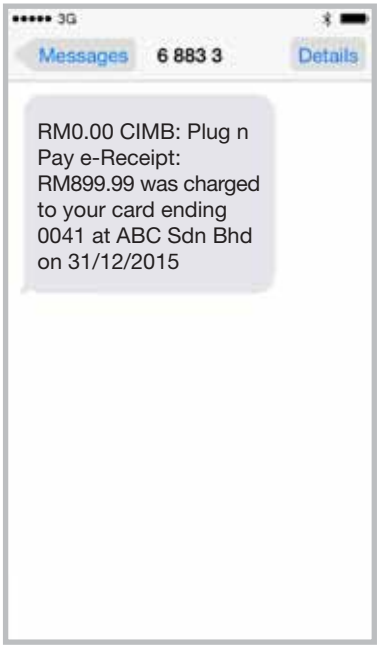
Step 4b:

- Customer keys in PIN verification on card reader and presses 'OK' button.

Step 5:

- An e-Receipt will be sent to the customer via email or SMS.





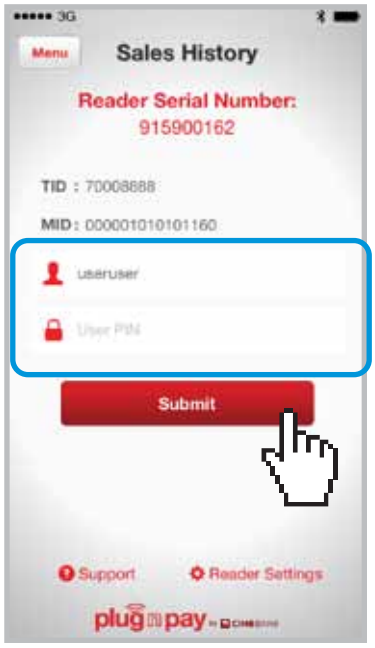
SECTION B: RESEND E-RECEIPT

Step 1:

- At login screen, key in User ID and PIN.
- Press ‘Submit’.
- Click ‘Menu’ button at top left corner.

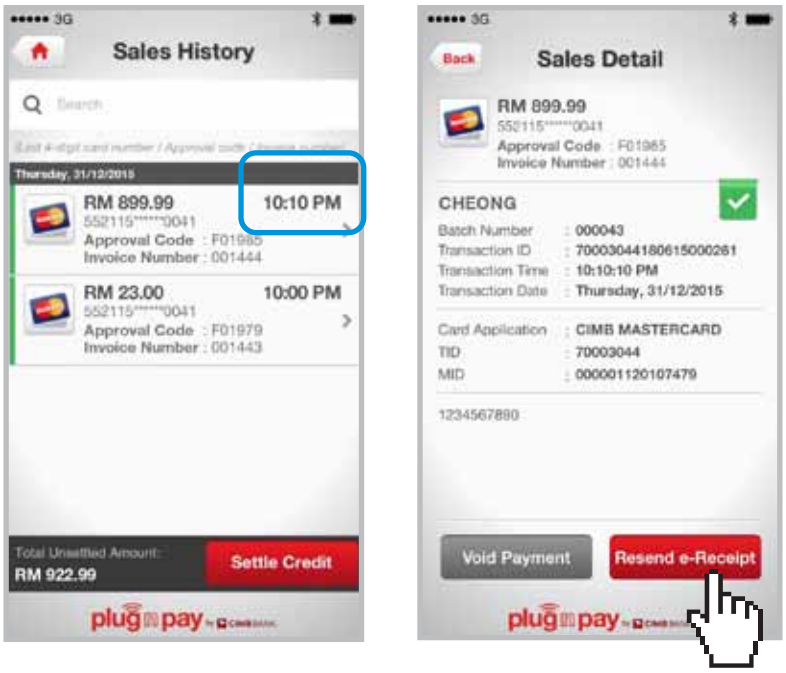
Step 2:

- Select ‘Sales History’ in the dropdown menu list.
- Key in User ID and PIN again.
- Press ‘Submit’.



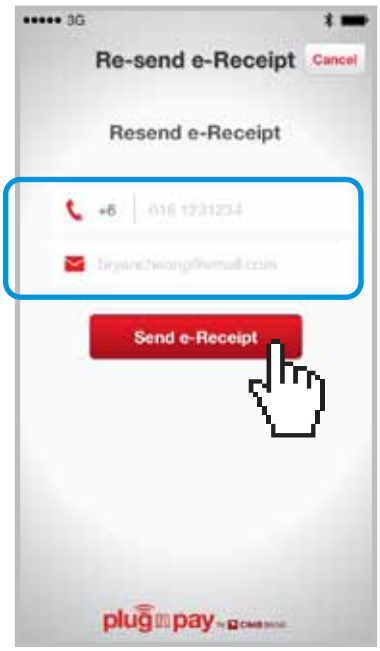
Step 3:

- Click on the selected transaction.
- Check sales details and click on ‘Resend e-Receipt’.



Step 4:

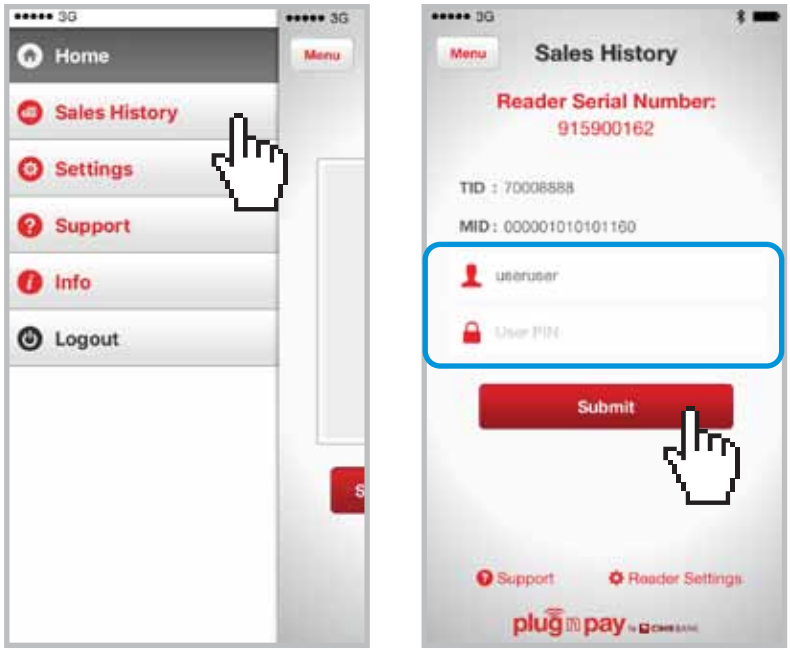
- Key in customer’s mobile number and/or email address.
- Click ‘Send e-Receipt’.



SECTION B: VOIDING CARD SALES

Step 1:

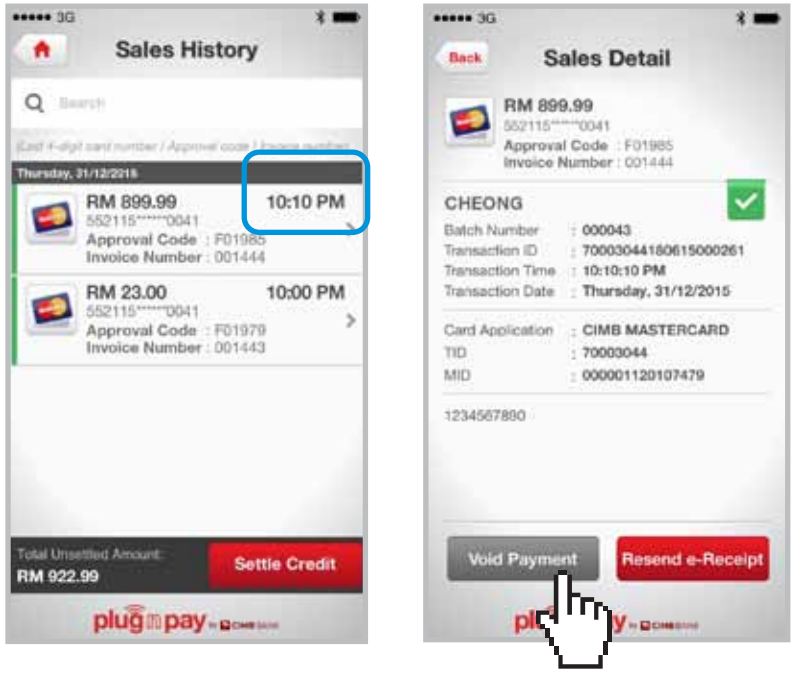
- To void payment, go to ‘Sales History’.
- Key in User ID and PIN again.
- Press ‘Submit’.



Note: Transaction can only be voided before settlement. System performs auto-settlement of mPOS transactions daily at 11pm.

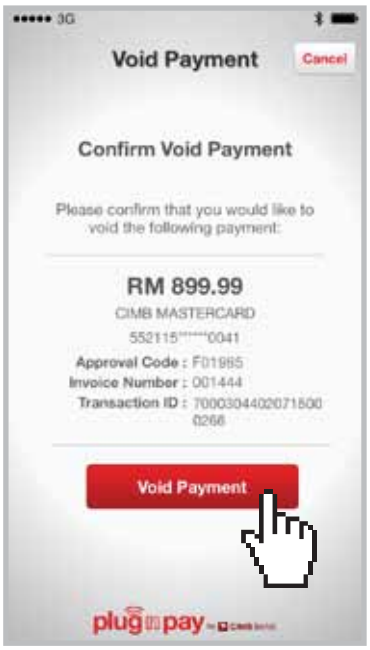
Step 2:

- Select the transaction you wish to void.
- Check the Sales Details of the transaction to be voided and click ‘Void Payment’.



Step 3:

- Verify void payment details and click the 'Void Payment' button.
- To notify customer on successfully voided transaction, click on the 'Send e-Receipt' button.



Step 4:

- Enter customer's mobile number and/or email address.
- Click 'Send e-Receipt' button again.

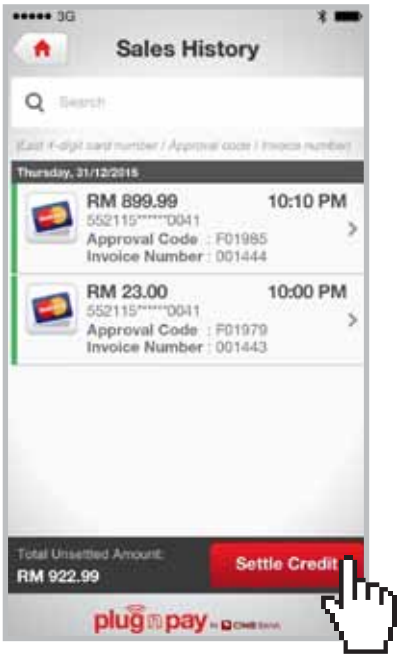
SECTION B: CREDIT SETTLEMENT

Step 1:

- Select ‘Sales History’ from dropdown menu list.
- Key in User ID and PIN again.
- Press ‘Submit’.

Step 2:

- Click on ‘Settle Credit’ button.



SECTION C: REINSTATE SUSPENDED MOBILE USER ID

Step 1:

- Merchant Financial Controller logs in to the Plug n Pay portal at https://www.plugnpay.cimbbank.com.my
- Enter Login ID stated in notification email and new password.
- Click ‘Submit’.

Note: Mobile User ID will be suspended after 3 failed login attempts. Merchant Financial Controller will reinstate mobile user ID through Plug n Pay portal.

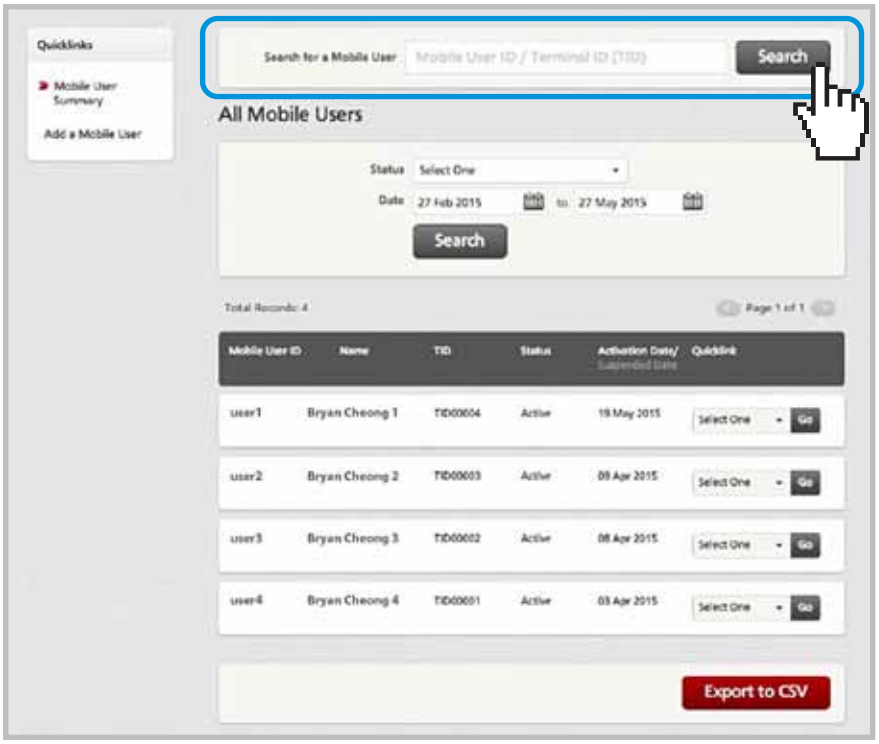
Step 2:

- Once login is successful, you will be directed to the homepage.
- Click on ‘Manage Mobile Users’.

SECTION C: REINSTATE SUSPENDED MOBILE USER ID

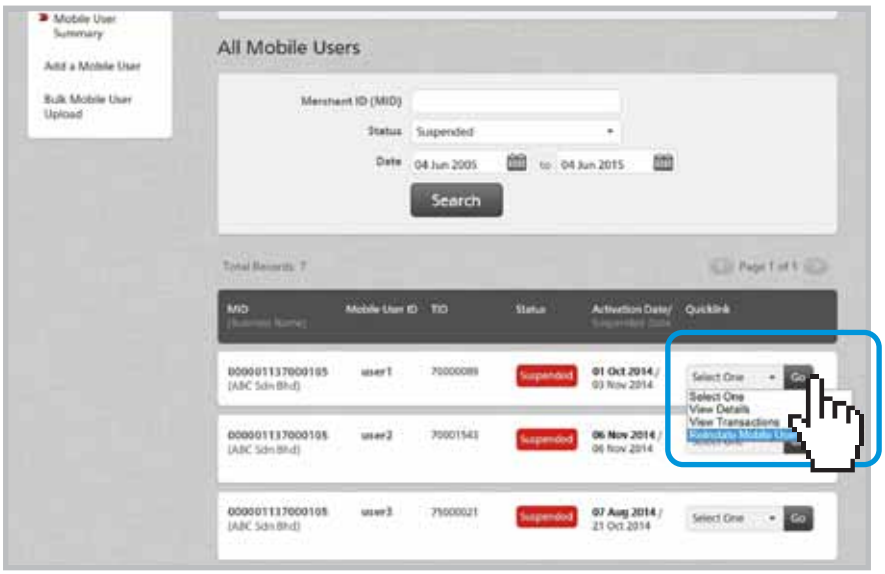
Step 3:

- Click on ‘Mobile User Summary’.
- Search for suspended Mobile User by keying in Mobile User ID or Terminal ID in the search field.
- Click the ‘Search’ button.



Step 4:

- Select ‘Reinstate Mobile User Access’ from the suspended mobile user’s ‘Quicklink’ dropdown box.
- Click ‘Go’.



SECTION C: REINSTATE SUSPENDED MOBILE USER ID

Step 5:

- Select a reinstate reason from the dropbox.
- Key in remark (e.g. reinstate or reset etc.) in the comment box.
- Click 'Submit'.

Step 6:

- A message 'Your request is successful' will be displayed.
- A system generated email will be sent to Mobile User for activation.

SECTION C: RESET PIN FOR MOBILE USER

Step 1:

- Merchant Financial Controller logs in to the Plug n Pay portal at https://www.plugnpay.cimbbank.com.my
- Enter Login ID stated in notification email and new password.
- Click ‘Submit’.

Note: If mobile user has forgotten his PIN or made 2 failed attempts to login, the Merchant Financial Controller may reset the PIN for the mobile user following these steps.

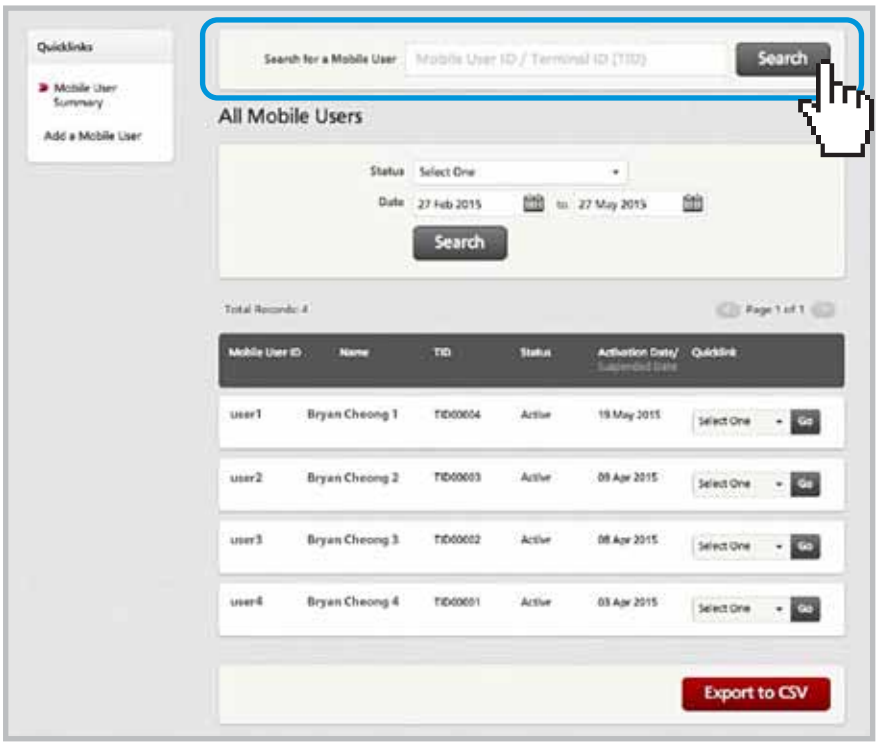
Step 2:

- Once login is successful, you will be directed to the homepage.
- Click on ‘Manage Mobile Users’.

SECTION C: RESET PIN FOR MOBILE USER

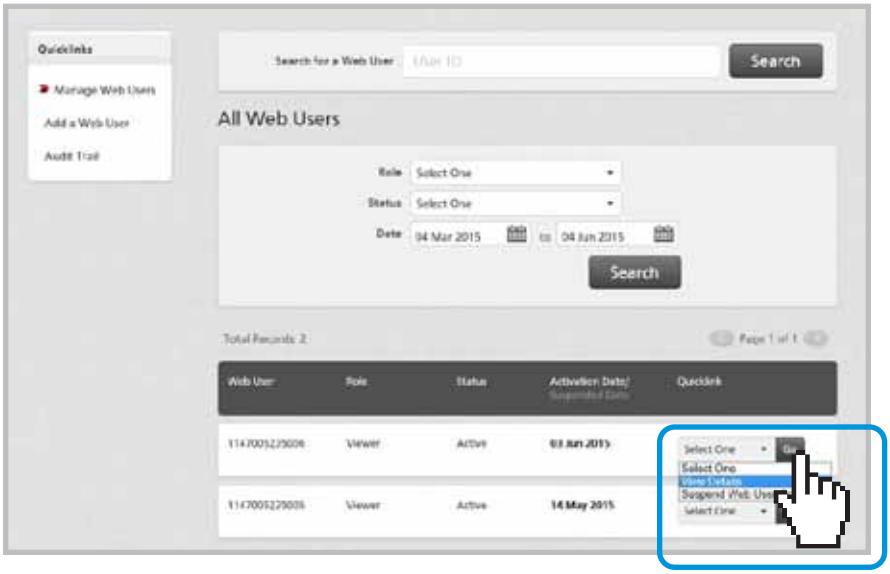
Step 3:

- Click on ‘Mobile User Summary’.
- Key in the Mobile User ID or Terminal ID in the search field to locate Mobile User.
- Click the ‘Search’ button.



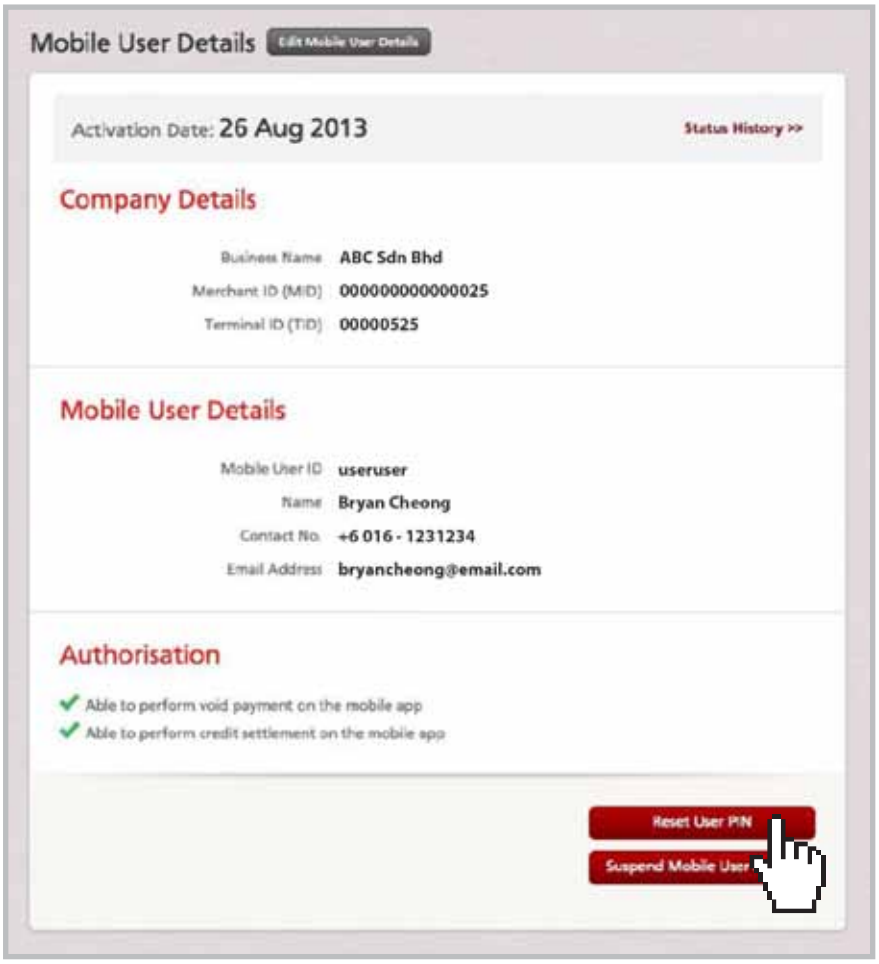
Step 4:

- Go to selected Mobile User‘s ‘Quicklink’ dropbox.
- Select ‘View Details’.
- Click ‘Go’.



Step 5:

- Select ‘Reset User PIN’ button.



- A message ‘Are you sure you want to reset User PIN?’ will be displayed.
- To reset, press ‘Continue’.
- A system generated email will be sent to the Mobile User.

SECTION C: RESET MERCHANT PORTAL PASSWORD

Step 1a (for failed login attempts of not more than 2 times):

- Go to the Plug n Pay portal at https://www.plugnpay.cimbbank.com.my
- Click on 'Forgot Password'.
- A system generated email will be sent to the Merchant Financial Controller with a new password.

Step 1b (for failed login attempts of 3 times or more):

- Email to emerchant@cimb.com to reset the merchant portal password.
- Provide Merchant's registered name and Merchant Account No (MID) in email.
- Merchant Support will reset password and send email to the Merchant Finance Controller.

Please contact our **Merchant Hotline** at **03-6204 7733** or send an email to **emerchant@cimb.com** for any enquires.