

# Merchant User Guide



## 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.

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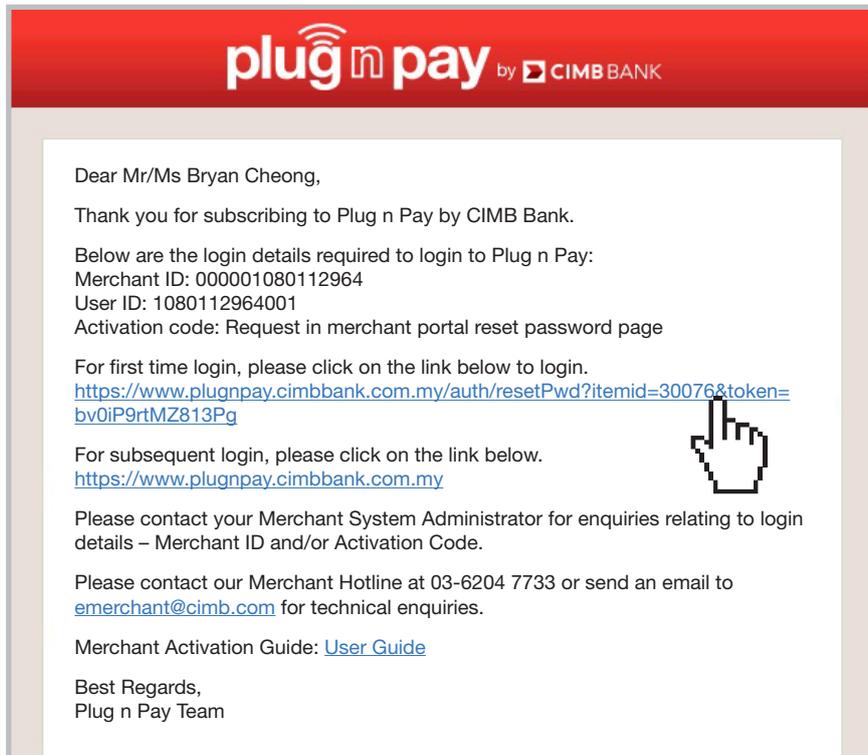
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# SECTION A: ACCOUNT ACTIVATION

## Step 1:

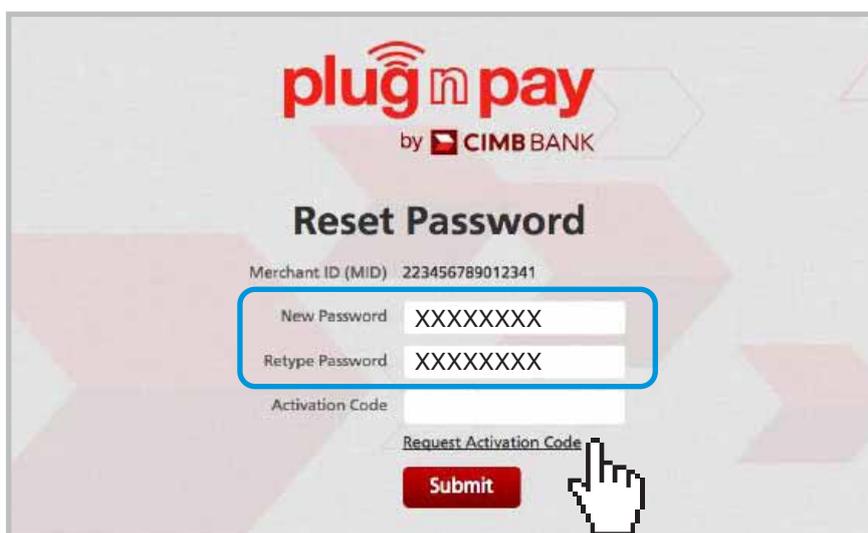
- Merchant will receive an email with an activation link.
- Click the activation link from email.



## 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.*



## SECTION A: ACCOUNT ACTIVATION

### 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'.

A screenshot of the 'Reset Password' form on the 'plug n pay by CIMB BANK' website. The form includes the following fields: 'Merchant ID (MID)' with the value '223456789012341', 'New Password' with 'XXXXXXXX', 'Retype Password' with 'XXXXXXXX', and 'Activation Code' which is highlighted with a blue border. Below the 'Activation Code' field is a link that says 'Request Activation Code'. At the bottom of the form is a red 'Submit' button with a hand cursor pointing to it.

# SECTION A: ACCOUNT ACTIVATION

## 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:

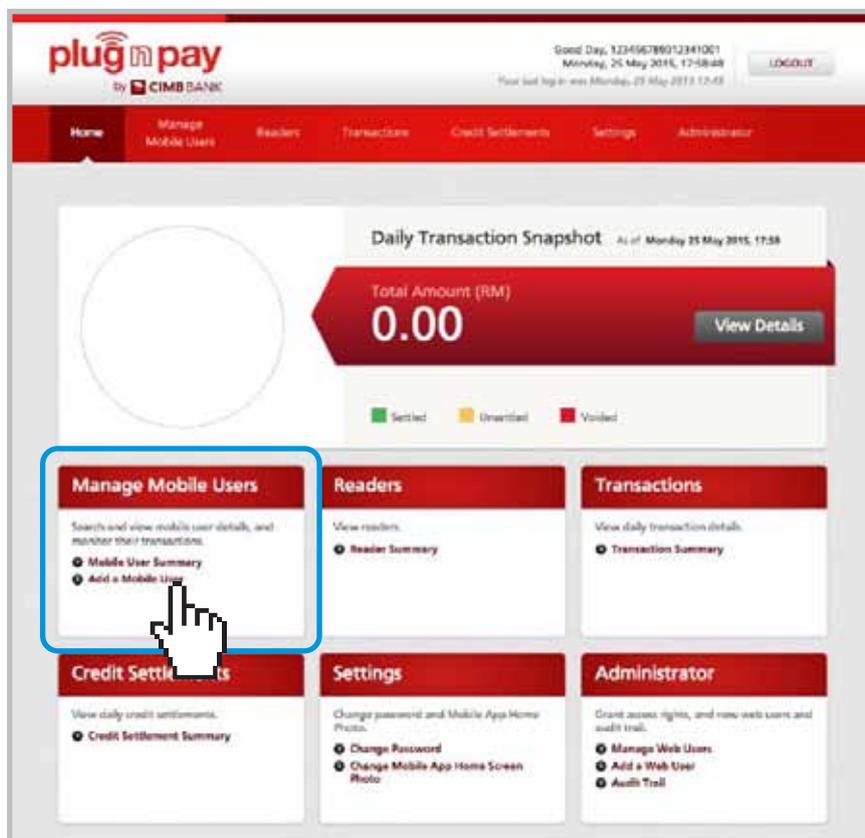
- ▶ Once login is successful, you will be directed to the homepage.



# SECTION A: MOBILE ID CREATION

## Step 1:

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



## SECTION A: MOBILE ID CREATION

### 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'.

Home Manage Mobile Users Readers Transactions Credit Settlements Settings Administrator

Quicklinks  
Mobile User Summary  
➤ Add a Mobile User

Add a Mobile User

1 Details 2 Review & Confirm 3 Complete

Mobile User Details

Mobile User ID (Between 2-20 Alphanumeric Characters)

Name (Between 2-20 Alphanets, space and/or dashes)

Contact No. +6 (011) 1231234 (for mobile activation code)

Email Address (for email notification)

Authorisation (Optional)

Able to perform void payment on the mobile app

Able to perform credit settlement on the mobile app

To enable mobile user to perform void/settlement.

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)

Home Manage Mobile Users Readers Transactions Credit Settlements Settings Administrator

Quicklinks  
Mobile User Summary  
➤ Add a Mobile User

Add a Mobile User

1 Details 2 Review & Confirm 3 Complete

✔ Your request is successful

Mobile User ID : useruser

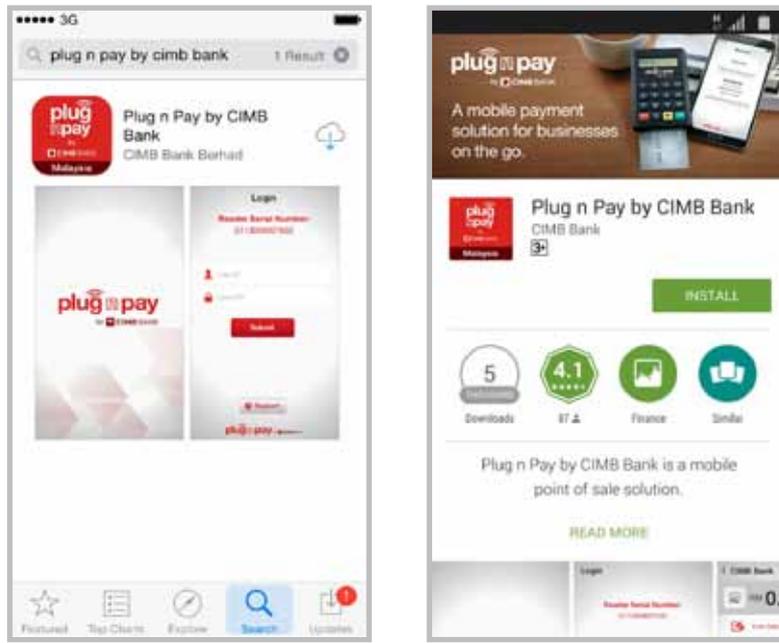
View Mobile User Details Print Email (PDF)

It is recommended that you keep a copy of this confirmation receipt for your records.

## 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:

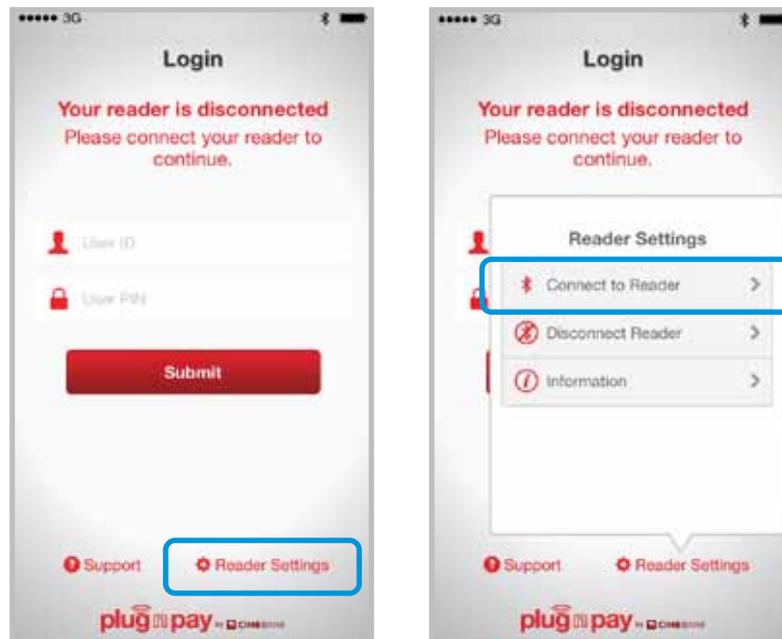
- Press  button to turn on card reader.



## SECTION B: MOBILE ACTIVATION (BLUETOOTH CONNECTION)

### Step 3:

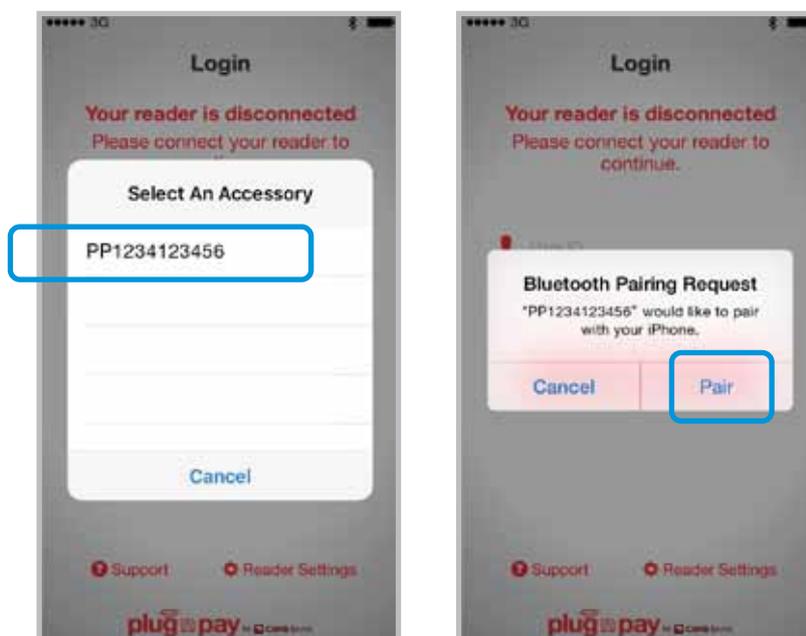
- Launch Plug n Pay app and click on 'Reader Settings'.
- Next, click on 'Connect To Reader'.



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.

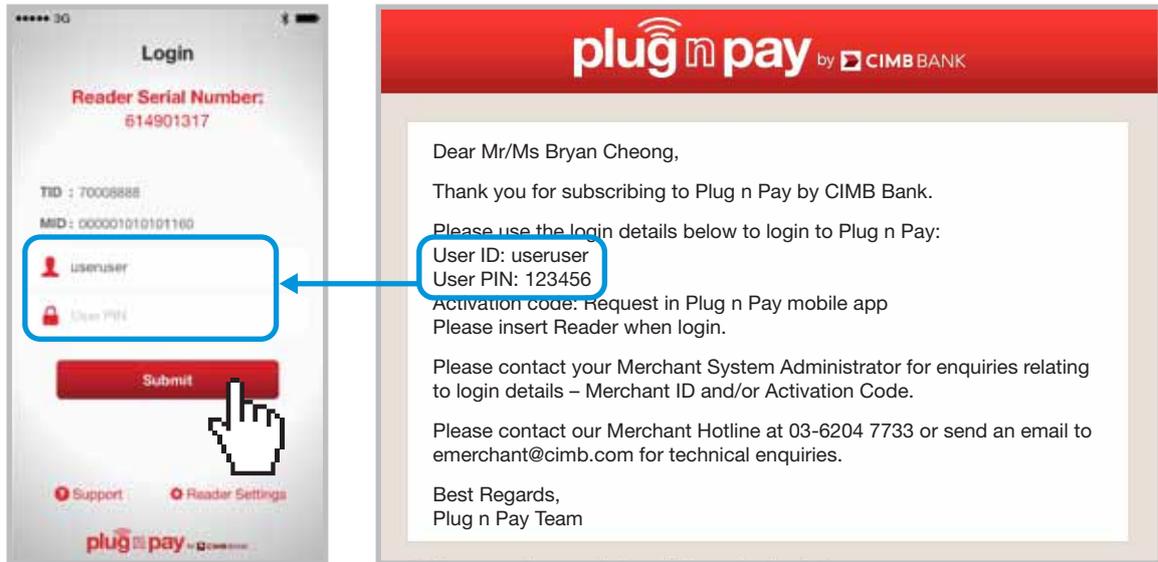


Note: For Android, click 'Yes'.

# SECTION B: MOBILE ACTIVATION (BLUETOOTH CONNECTION)

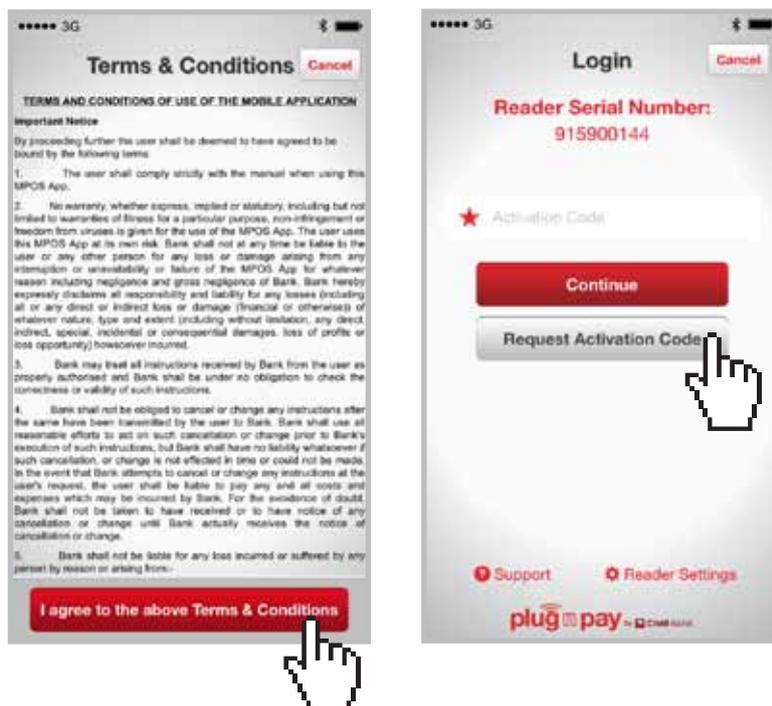
## Step 5:

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



## Step 6:

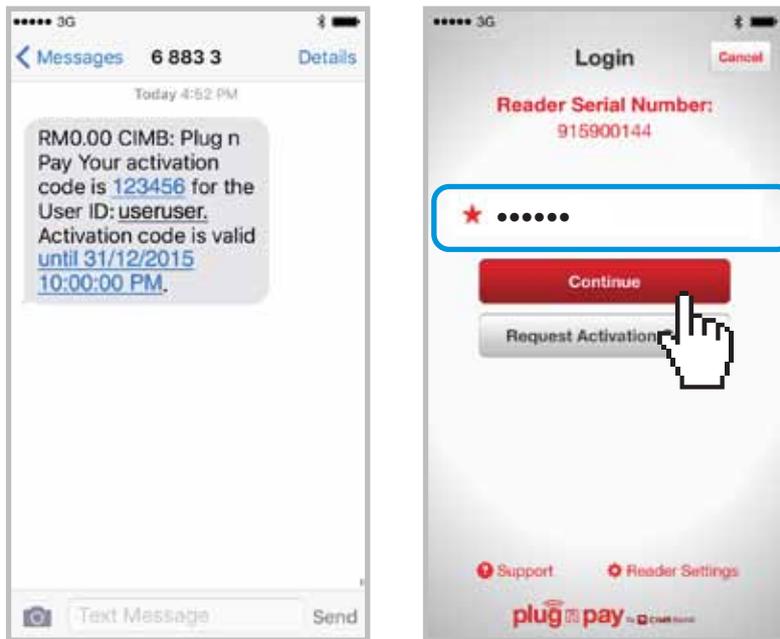
- Click on 'I agree to the above Terms & Conditions'.
- Click 'Request Activation Code' button to get activation code.



## SECTION B: MOBILE ACTIVATION (BLUETOOTH CONNECTION)

### 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'.

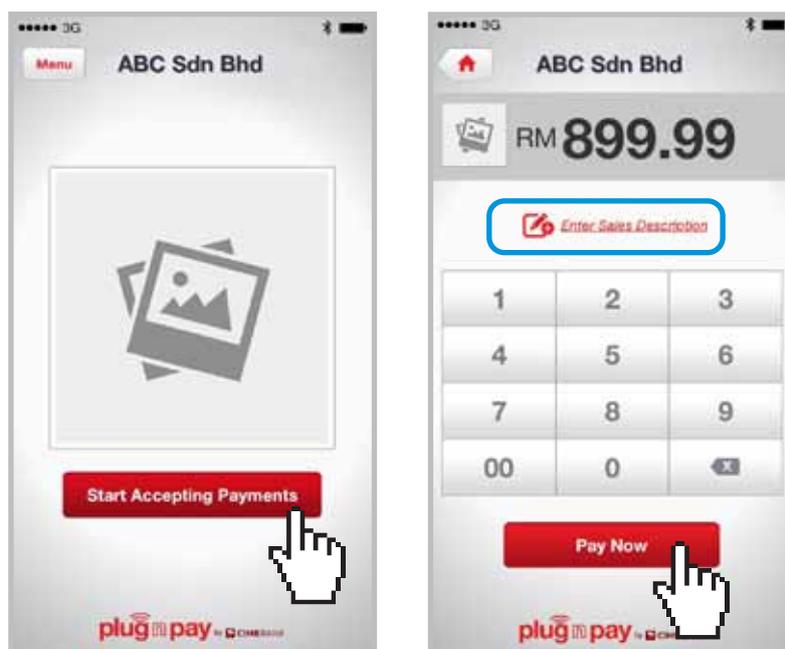


*Note: User PIN must contain a 6-digit numeric code only.*

## SECTION B: ACCEPTING CARD SALES

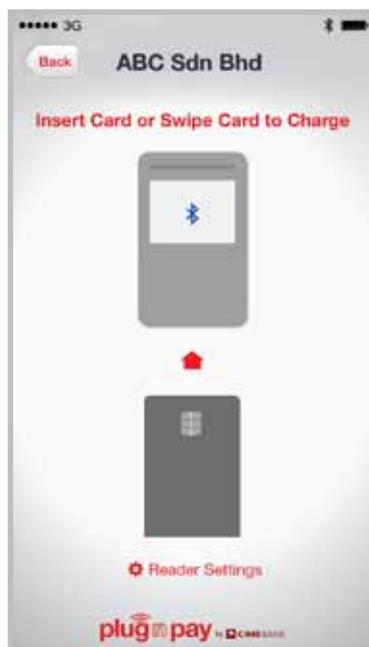
### Step 1:

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



### Step 2:

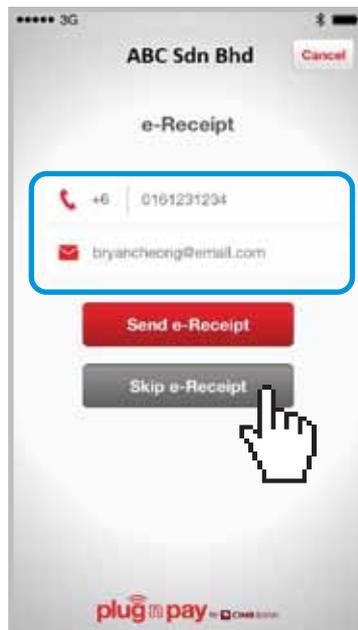
- A message requesting that you insert or swipe a card will be displayed at the card reader screen.
- To charge, insert card into the bottom of the reader or swipe the card at the top of the reader.



## SECTION B: ACCEPTING CARD SALES

### 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.



## SECTION B: ACCEPTING CARD SALES

### Step 4a:

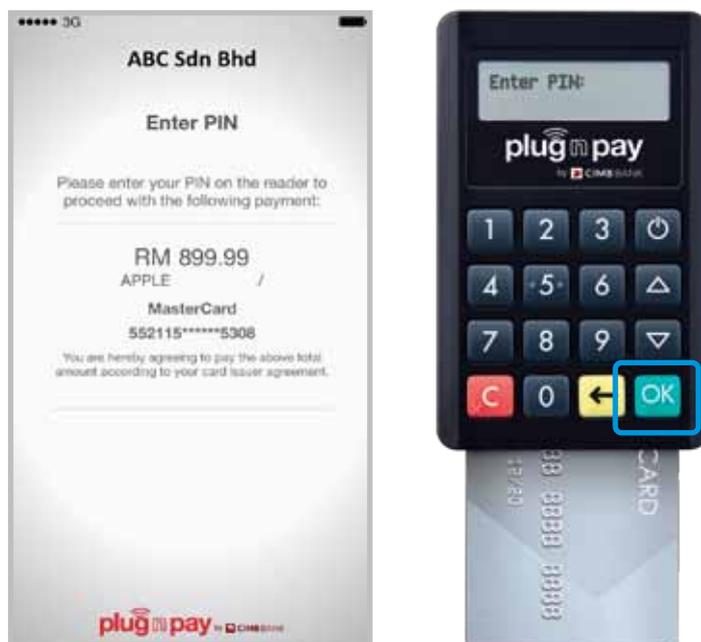
- ▶ Proceed to obtain customer's signature and click 'Continue'.



or

### Step 4b:

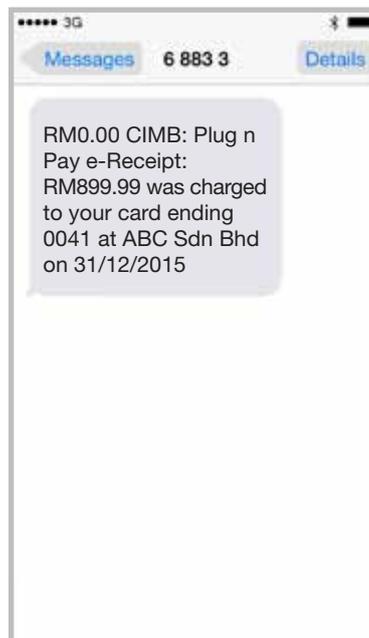
- ▶ Customer keys in PIN verification on card reader and presses 'OK' button.



## SECTION B: ACCEPTING CARD SALES

### Step 5:

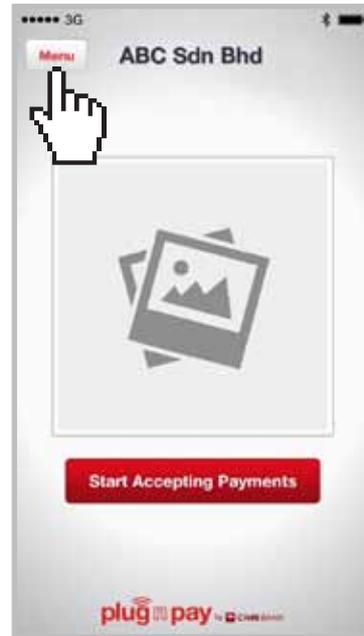
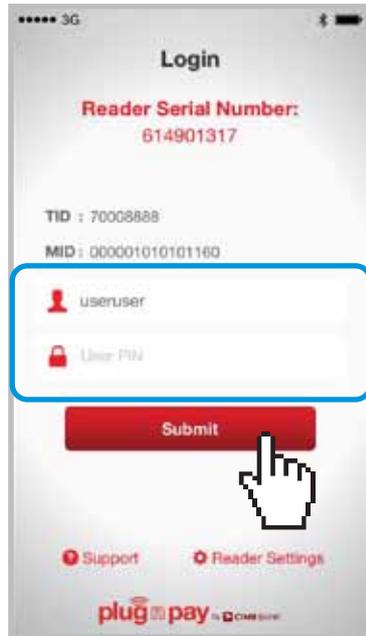
- ▶ An e-Receipt will be sent to the customer via email or SMS.



## SECTION B: RESEND E-RECEIPT

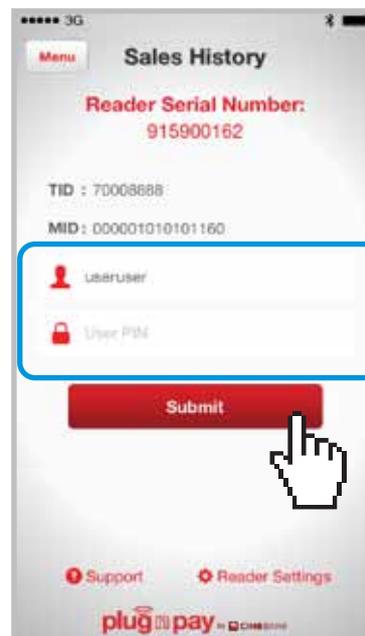
### Step 1:

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



### Step 2:

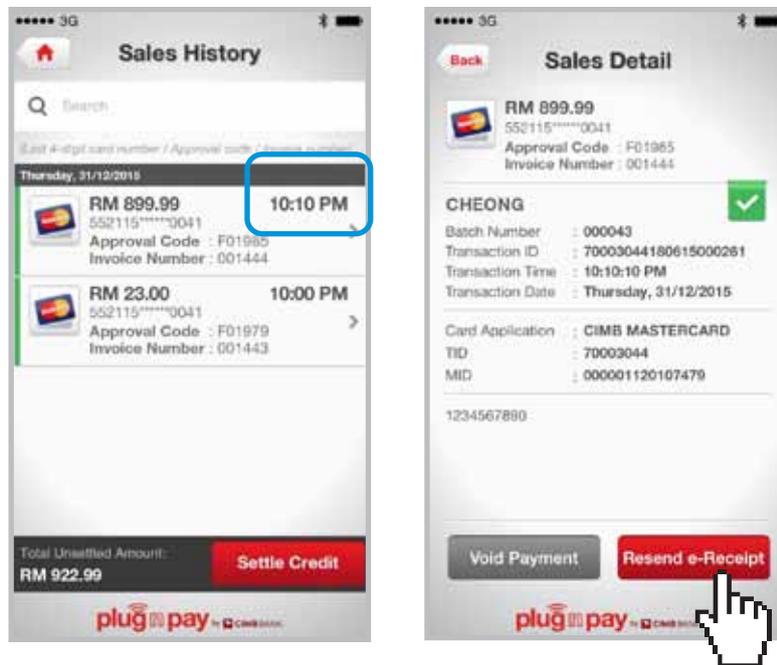
- Select 'Sales History' in the dropdown menu list.
- Key in User ID and PIN again.
- Press 'Submit'.



## SECTION B: RESEND E-RECEIPT

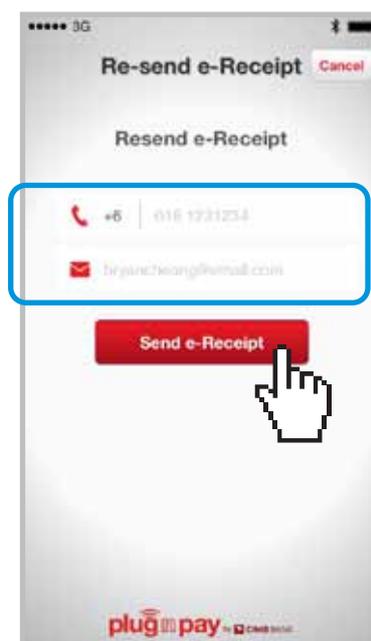
### Step 3:

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



### Step 4:

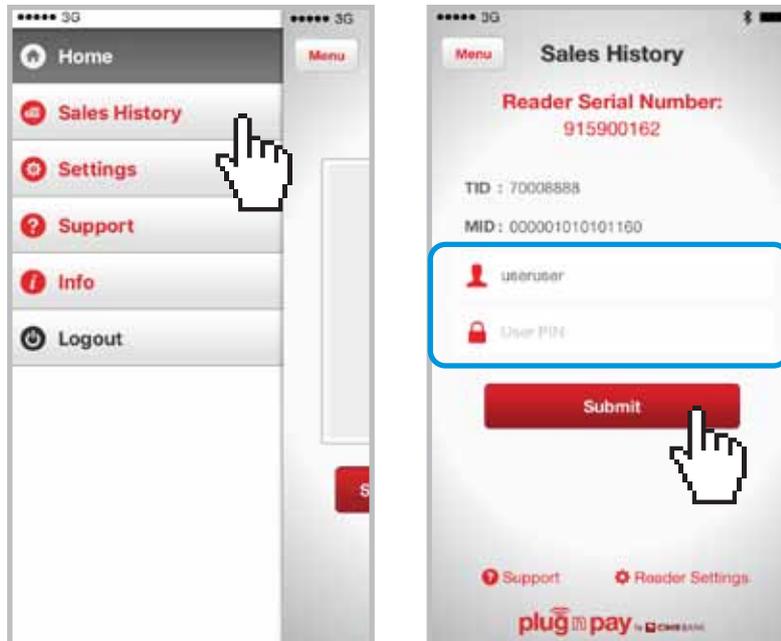
- Key in customer's mobile number and/or email address.
- Click 'Send e-Receipt'.



## SECTION B: VOIDING CARD SALES

### Step 1:

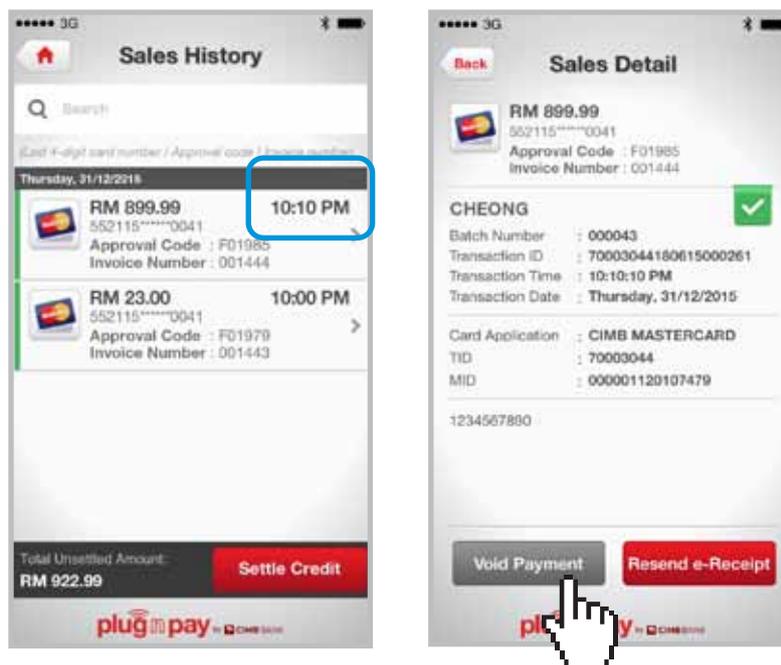
- To void payment, go to 'Sales History'.
- Key in User ID and PIN again.
- Press 'Submit'.



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

### Step 2:

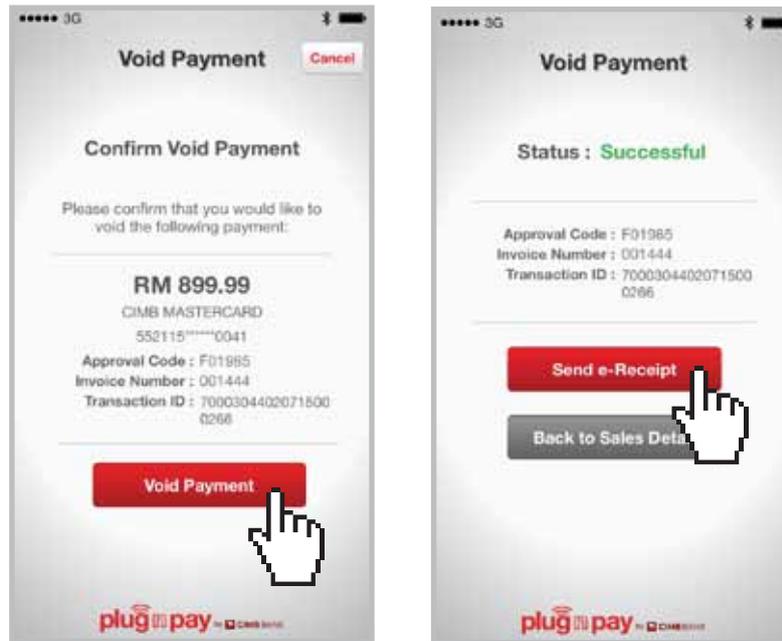
- Select the transaction you wish to void.
- Check the Sales Details of the transaction to be voided and click 'Void Payment'.



## SECTION B: VOIDING CARD SALES

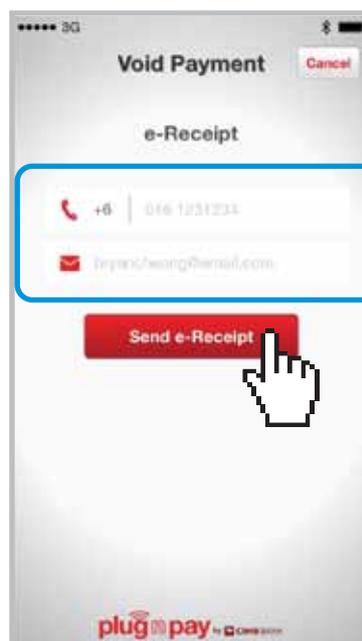
### Step 3:

- 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:

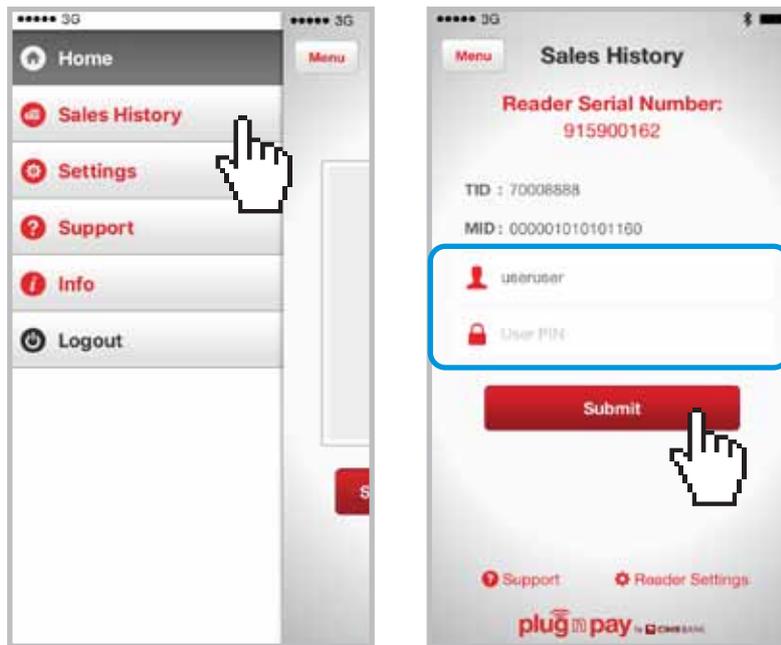
- Enter customer's mobile number and/or email address.
- Click 'Send e-Receipt' button again.



## 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.cimb.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:

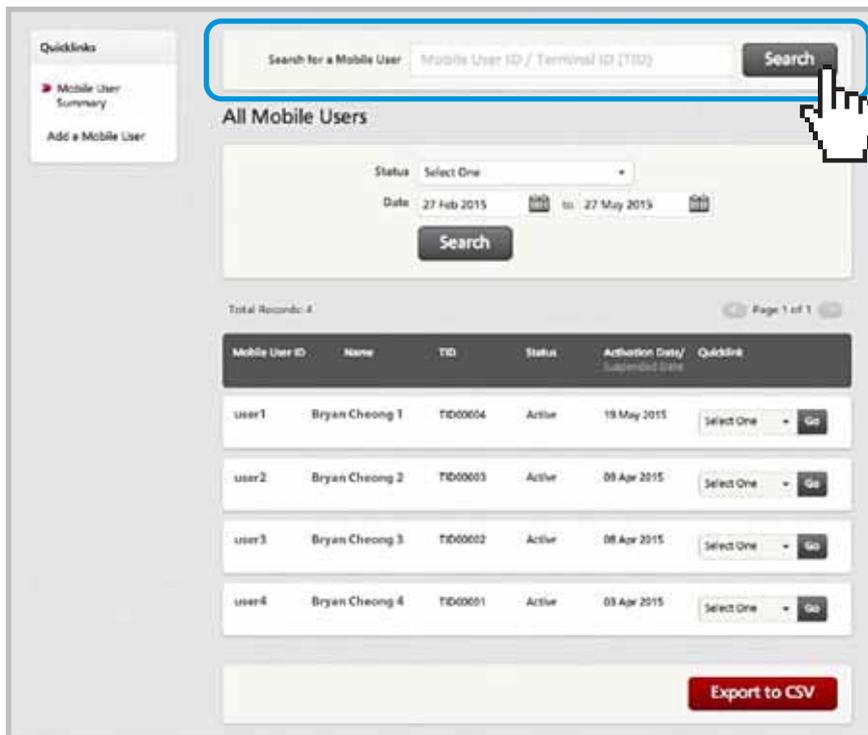
- Once login is successful, you will be directed to the homepage.
- Click on 'Manage Mobile Users'.



## 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.



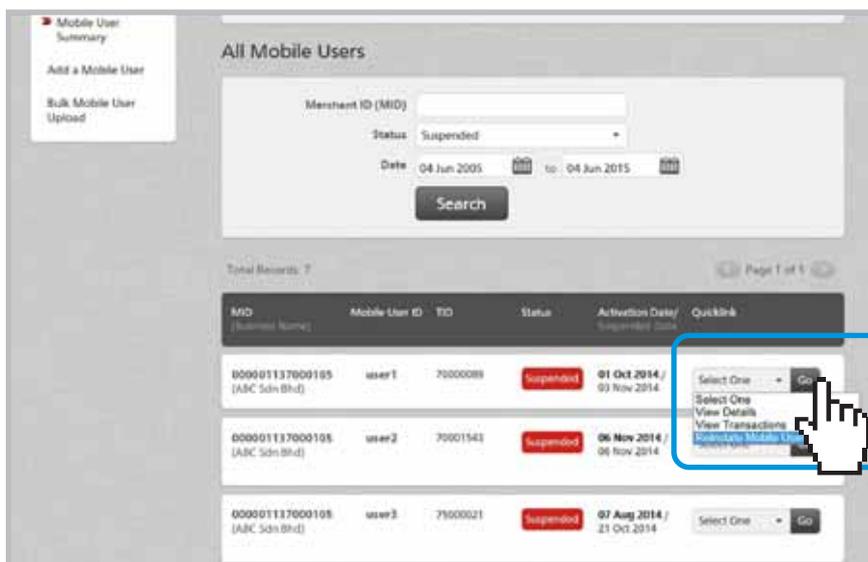
The screenshot shows the 'All Mobile Users' page. At the top, there is a search bar labeled 'Search for a Mobile User' with a placeholder 'Mobile User ID / Terminal ID (TID)' and a 'Search' button. Below the search bar, there are filters for 'Status' (set to 'Select One') and 'Date' (from '27 Feb 2015' to '27 May 2015'). A 'Search' button is located below these filters. The main content area displays a table with 4 records. The table has columns: 'Mobile User ID', 'Name', 'TID', 'Status', 'Activation Date / Suspended Date', and 'Quicklink'. The records are as follows:

Mobile User ID	Name	TID	Status	Activation Date / Suspended Date	Quicklink
user1	Bryan Cheong 1	TID0004	Active	18 May 2015	Select One - Go
user2	Bryan Cheong 2	TID0003	Active	08 Apr 2015	Select One - Go
user3	Bryan Cheong 3	TID0002	Active	08 Apr 2015	Select One - Go
user4	Bryan Cheong 4	TID0001	Active	03 Apr 2015	Select One - Go

At the bottom right of the table area, there is a red button labeled 'Export to CSV'.

### Step 4:

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



The screenshot shows the 'All Mobile Users' page with search filters for 'Merchant ID (MID)', 'Status' (set to 'Suspended'), and 'Date' (from '04 Jun 2015' to '04 Jun 2015'). The table below shows 7 records. The table has columns: 'MID (Business Name)', 'Mobile User ID', 'TID', 'Status', 'Activation Date / Suspended Date', and 'Quicklink'. The records are as follows:

MID (Business Name)	Mobile User ID	TID	Status	Activation Date / Suspended Date	Quicklink
00001137000105 (ABC Sdn Bhd)	user1	7000008	Suspended	01 Oct 2014 / 03 Nov 2014	Select One - Go
00001137000105 (ABC Sdn Bhd)	user2	70001543	Suspended	06 Nov 2014 / 06 Nov 2014	Select One - View Details - View Transactions - Reinstate Mobile User Access - Go
00001137000105 (ABC Sdn Bhd)	user3	75000021	Suspended	07 Aug 2014 / 21 Oct 2014	Select One - Go

A blue box highlights the 'Quicklink' dropdown for the second record (user2), and a hand cursor is pointing at the 'Reinstate Mobile User Access' option.

## 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'.

The screenshot shows the 'Reinstate Mobile User Access' form. At the top, there are two tabs: '1 Details' (active) and '2 Complete'. Below the tabs, the form displays the following information:

- Mobile User ID: **useruser**
- Effective Date: **25 Aug 2013**
- Reason: A dropdown menu with 'Reinstate' selected.
- Comment box: A text area containing 'Reinstate'.
- Character count: 'Max characters: 250 241 remaining'.
- Submit button: A red button labeled 'Submit' with a mouse cursor pointing to it.

### Step 6:

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

The screenshot shows the 'Reinstate Mobile User Access' form in the 'Complete' step. At the top, there are two tabs: '1 Details' and '2 Complete' (active). Below the tabs, the form displays the following information:

- Success message: A green checkmark icon followed by the text 'Your request is successful'.
- Summary box: A grey box containing the following details:
  - Mobile User ID: **useruser**
  - Effective Date: **26 Aug 2013**
  - Reason: **Reinstate**
  - Reason: **Reinstate**
- Buttons: 'Print' and 'Email (PDF)' buttons.
- Footer: A note stating 'It is recommended that you keep a copy of this confirmation receipt for your records.'

## SECTION C: RESET PIN FOR MOBILE USER

### Step 1:

- Merchant Financial Controller logs in to the Plug n Pay portal at <https://www.plugnpay.cimb.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:

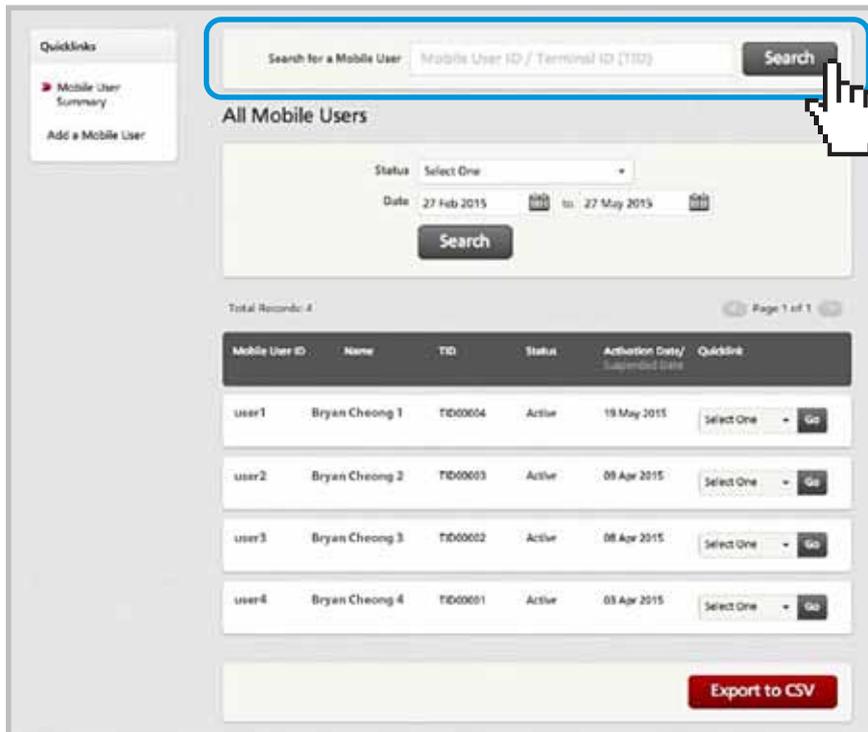
- Once login is successful, you will be directed to the homepage.
- Click on 'Manage Mobile Users'.



## 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.



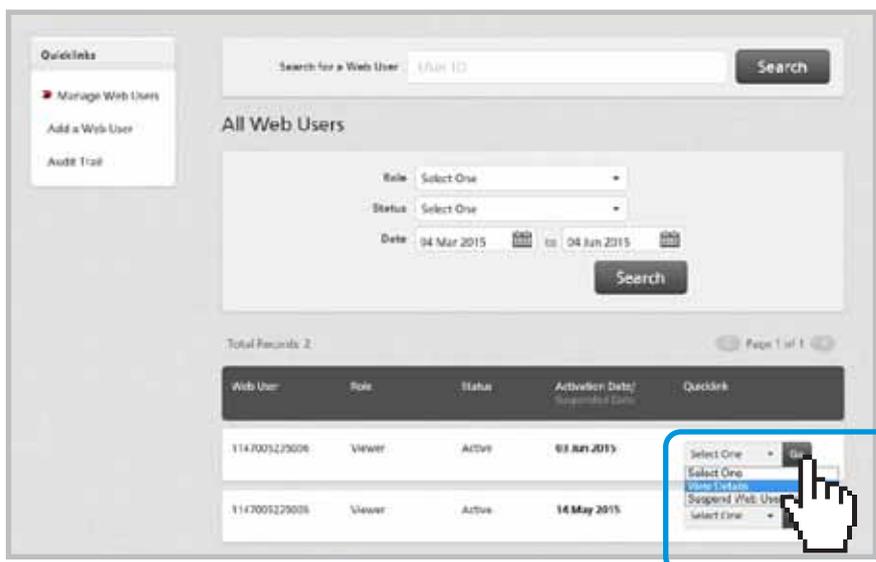
The screenshot shows the 'Mobile User Summary' page. At the top, there is a search bar labeled 'Search for a Mobile User' with the placeholder text 'Mobile User ID / Terminal ID (TID)'. A blue box highlights the search bar and the 'Search' button. Below the search bar, there are filters for 'Status' (Set to 'Select One') and 'Date' (Set to '27 Feb 2015' to '27 May 2015'). A 'Search' button is located below these filters. The main content area displays a table of mobile users with the following data:

Mobile User ID	Name	TID	Status	Activation Date/ Suspended Date	Quicklink
user1	Bryan Cheong 1	TID0004	Active	19 May 2015	Select One - Go
user2	Bryan Cheong 2	TID0003	Active	09 Apr 2015	Select One - Go
user3	Bryan Cheong 3	TID0002	Active	08 Apr 2015	Select One - Go
user4	Bryan Cheong 4	TID0001	Active	03 Apr 2015	Select One - Go

At the bottom right of the table area, there is a red button labeled 'Export to CSV'.

### Step 4:

- Go to selected Mobile User's 'Quicklink' dropdown.
- Select 'View Details'.
- Click 'Go'.



The screenshot shows the 'All Web Users' page. At the top, there is a search bar labeled 'Search for a Web User' with the placeholder text 'USER ID'. Below the search bar, there are filters for 'Role' (Set to 'Select One'), 'Status' (Set to 'Select One'), and 'Date' (Set to '04 Mar 2015' to '04 Jun 2015'). A 'Search' button is located below these filters. The main content area displays a table of web users with the following data:

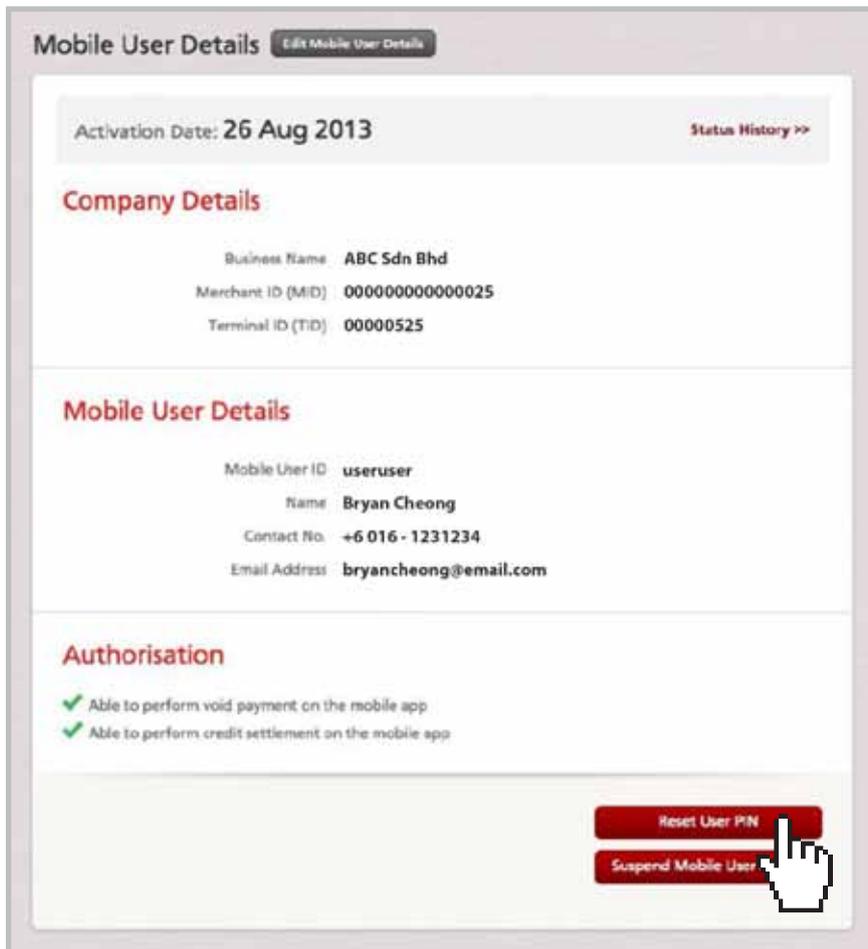
Web User	Role	Status	Activation Date/ Suspended Date	Quicklink
114700129006	Viewer	Active	03 Jun 2015	Select One - Go
114700129005	Viewer	Active	14 May 2015	Select One - Go

A blue box highlights the 'Quicklink' dropdown menu for the first user, which is open and showing the following options: 'Select One', 'View Details', 'Suspend Web User', and 'Select One'. A mouse cursor is pointing at the 'View Details' option.

## SECTION C: RESET PIN FOR MOBILE USER

### Step 5:

- Select 'Reset User PIN' button.



The screenshot shows the 'Mobile User Details' page. At the top, it displays 'Activation Date: 26 Aug 2013' and a 'Status History >>' link. Below this is the 'Company Details' section with the following information:

Business Name	ABC Sdn Bhd
Merchant ID (MID)	000000000000025
Terminal ID (TID)	00000525

The 'Mobile User Details' section contains:

Mobile User ID	useruser
Name	Bryan Cheong
Contact No.	+6 016 - 1231234
Email Address	bryancheong@email.com

The 'Authorisation' section shows two green checkmarks:

- ✓ Able to perform void payment on the mobile app
- ✓ Able to perform credit settlement on the mobile app

At the bottom right, there are two red buttons: 'Reset User PIN' and 'Suspend Mobile User'. A mouse cursor is pointing at the '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.



The screenshot shows a confirmation dialog box with the title 'Are you sure you want to reset User PIN?'. Below the title is a horizontal line and a note: 'If you continue, an activation email will be sent to ms.002580025.com'. At the bottom, there are two red buttons: 'Cancel' and 'Continue'. A mouse cursor is pointing at the 'Continue' button.

## 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.cimb.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](mailto: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](mailto:emerchant@cimb.com)** for any enquires.