

# TD Generation

## Merchant Guide: Givex Gift Cards



### For the TD Generation

- Portal 2 with PINpad



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**MERCHANT INFORMATION**

**Merchant Name** .....

**Merchant Number** .....



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# Who would use this guide?

You would use this guide if you perform transactions during the course of your daily business that offer Givex® gift cards. The information covered in this guide is exclusive to Givex transactions. For further information on your terminal capabilities, please refer to the TD Generation Portal 2 Merchant Guide online at [www.TDMerchantSolutions.com/ResourceCentre](http://www.TDMerchantSolutions.com/ResourceCentre).

- Please note, there has been some changes to the terminal hardware. The new hardware version has a much larger touchscreen versus the previous version which had a touchscreen with a numeric touch pad below. If you have the previous hardware version, please ensure that you download the correct documentation for TD Generation Portal with PINpad.

## Givex Gift Cards

You must sign up in order to offer gift cards to your customers. If you currently don't offer gift cards and would like to, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163**.

## Financial Transactions

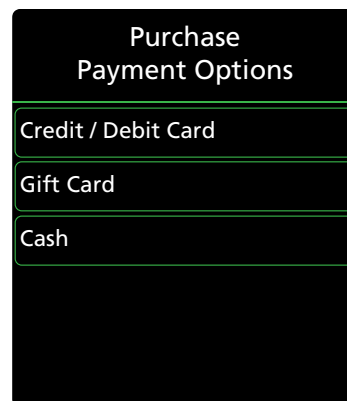
The TD Generation Portal 2 terminal can perform the following gift card transactions:

Transactions	Explanation	Administration	Explanation
Cancel	Void	Activation	Activate new gift card
Forced Cashback	Full or partial cashback	Balance Adjustment	Adjust existing gift card
Forced Pre-Auth	Pre-authorization	Balance Inquiry	Current gift card balance
Gift Card Redeem	Purchase	Balance Transfer	Transfer one gift card to another
Post Auth	Pre-authorization completion	Gift Certificate Register	Create paper gift certificate
		Increment	Increase gift card balance
		Terminal Registration	Register your terminal
		Transaction Cashout	Print cashout report

Depending on your terminal settings, you may be required to enter a supervisor ID and password to proceed with any transaction.

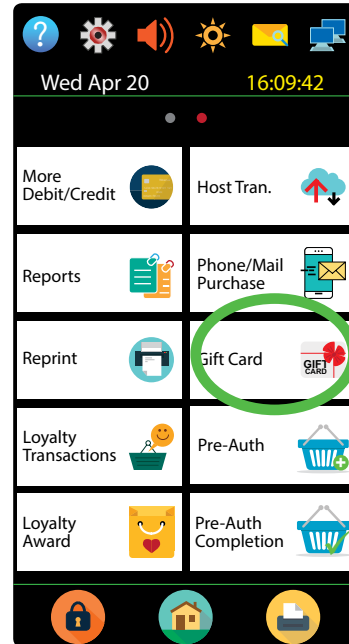
## Payment selection options

Once gift cards are activated on your terminal, you will see a new screen that reflects gift card as well as all other available payment options. The above is just an example as there may be other options available to you due to your individual set up.



## Gift card icon


To perform a gift card transaction you must use the appropriate icon to ensure that it is processed correctly. The gift card icon may not appear in this location on your terminal screen.



## Activate a gift card

This transaction creates an account and loads an amount onto the card.

- Ensure that you offset the cost of the gift card with a financial transaction (i.e. debit, credit card or cash).
- This transaction cannot be used to add more money to an already activated gift card – only a new, previously unactivated gift card.

1. Tap the  / **Home** key → Gift Card → Activation.
2. Enter the **dollar amount** you want to add to the gift card and tap **OK**.
3. Select one of the following payment methods: **Swipe** or **Manual Entry**.

### Swipe card


- a) Swipe the gift card. Go to step 4.

### Manually enter card

- a) Enter the gift card **account number** and tap **OK**. Go to step 4.
4. The receipt prints showing new balance of the gift card.
5. You can **REPRINT** the receipt or **FINISH** the transaction.

## Redeem a gift card

This is a purchase transaction that allows a customer to pay for goods or services with the funds available on an accepted gift card.

1. Tap the  / **Home** key → Gift Card → Gift Card Redeem.
2. Enter the **dollar amount** you want to remove from the gift card and tap **OK**.
3. Select one of the following payment methods: **Swipe** or **Manual Entry**.

### Swipe card


- a) Swipe the gift card. Go to step 4.

### Manually enter card

- a) Enter the gift card **account number** and tap **OK**. Go to step 4.
4. The screen shows that the transaction is completed with an authorization number or approved message.
5. You can **REPRINT** the receipt or **FINISH** the transaction.

## Void

This option allows you to void a gift card transaction that was done in error.

1. Tap the  / **Home** key → Gift Card → Cancel.
2. Enter the **trace number** from the receipt of the transaction that you want to void and tap **OK**.
3. Enter the gift card information: **Swipe** or **Manual Entry**.

### Swipe card


- a) Swipe the gift card. Go to step 4.

### Manually enter card

- a) Enter the gift card **account number** and tap **OK**. Go to step 4.
4. Confirm that the info entered is correct: **NO** or **YES**.
5. The transaction is now voided and receipts print.
6. You can **REPRINT** the receipt or **FINISH** the transaction.

## Balance inquiry

This transaction allows a cardholder to check the balance on their gift card.

1. Tap the  / **Home** key → Gift Card → Balance Inquiry.
2. Select one of the following payment methods: **Swipe** or **Manual Entry**.

### Swipe card

- a) Swipe the gift card. Go to step 3.


### Manually enter card

- a) Enter the gift card **account number** and tap **OK**. Go to step 3.
3. The receipt prints showing balance of the gift card.

## Increase gift card balance

This transaction allows you to increase the dollar value on a gift card. This transaction is used to make a manual adjustment to a gift card value.

- Ensure that you offset the cost of the gift card with a financial transaction (i.e. debit, credit card or cash) when adding funds.
- This transaction does not work with gift certificates.

1. Tap the  / **Home** key → Gift Card → Increment.
2. Enter the **dollar amount** the customer want to add to the gift card and tap **OK**.
3. Select one of the following payment methods: **Swipe** or **Manual Entry**.

### Swipe card

- a) Swipe the gift card. Go to step 4.

### Manually enter card


- a) Enter the gift card **account number** and tap **OK**. Go to step 4.

4. The receipt prints showing new balance of the gift card.
5. You can **REPRINT** the receipt or **FINISH** the transaction.

## Cash out gift card

This transaction allows the cardholder to receive cash for an available value on the gift card.

This transaction does not work with gift certificates.

1. Tap the  / **Home** key → Gift Card → Forced Cash Back.
2. Select how much of the gift card balance they want to receive in cash: **ALL** or **AMOUNT**.

### All

- a) Go to step 3.

### Amount


- a) Enter the **dollar amount** tap **OK**.
- b) Customer confirms that the amount is correct: **NO** or **YES**. Go to step 3.

3. Select one of the following payment methods: **Swipe** or **Manual Entry**.
  - a) Swipe the gift card. Go to step 4.
  - b) Enter the gift card **account number** and tap **OK**. Go to step 4.
4. The receipt prints showing new balance of the gift card after the forced cash back. Provide the cash to the customer and the transaction is now complete.
5. You can **REPRINT** the receipt or **FINISH** the transaction.



## Adjust gift card balance

This transaction allows you to adjust the dollar value on a gift card. This transaction is used to make an adjustment to a gift card value without a corresponding sale.

1. Tap the  / **Home** key → Gift Card → Balance Adjustment.
2. Select how you want to adjust the gift card balance: Increase or Decrease.
3. Enter the **dollar amount** the customer want to add/remove from the gift card and tap **OK**.
4. Select one of the following payment methods: **Swipe** or **Manual Entry**.

### Swipe card

- a) Swipe the gift card. Go to step 5.


### Manually enter card

- a) Enter the gift card **account number** and tap **OK**. Go to step 5.

5. The receipt prints showing new balance of the gift card.
6. You can **REPRINT** the receipt or **FINISH** the transaction.

## Transfer gift card balance

This transaction allows a cardholder to transfer the balance from one gift card to another.

1. Tap the  / **Home** key → Gift Card → Balance Transfer.
2. Enter the information for the gift card that will be transferred: **Swipe** or **Manual Entry**.

### Swipe card

- a) Swipe the gift card. Go to step 3.

### Manually enter card

- a) Enter the gift card **account number** and tap **OK**. Go to step 3.

3. Enter the information for the gift card that will receive the transferred money: **Swipe** or **Manual Entry**.

### Swipe card

- a) Swipe the gift card. Go to step 4.

### Manually enter card


- a) Enter the gift card **account number** and tap **OK**. Go to step 4.

4. The receipt prints showing new balance of the gift card.
5. You can **REPRINT** the receipt or **FINISH** the transaction.

## Pre-authorizations

### Open pre-authorization

This transaction allows you to place a hold on available funds on the gift card. This essentially creates a pre-authorization on a gift card.

1. Tap the  / **Home** key → Gift Card → Forced Pre-auth.
2. Enter the **dollar amount** to be reserved on the gift card and tap **OK**.
3. Enter the gift card information for the gift card that will have funds reserved: **Swipe** or **Manual Entry**.

### Swipe card


- a) Swipe the gift card. Go to step 4.

### Manually enter card

- a) Enter the gift card **account number** and tap **OK**. Go to step 4.
4. The transaction is completed and receipts print. The customer must sign the merchant's receipt. The balance of the gift card is displayed on the customer's receipt.
5. You can **REPRINT** the receipt or **FINISH** the transaction.

### Complete pre-authorization

This transaction charges the final amount after reserving funds on a gift card.

1. Tap /Home → Gift Card → Post-auth.
2. Enter the **trace number** from the receipt of the transaction that you want to void and tap **OK**. This is located on the signed receipt created by reserving the funds.
3. Enter the **dollar amount** to be paid from the gift card and tap **OK**. This is the final amount for the transaction (including tip) that the customer signs for on the receipt from the initial pre-authorization.
4. Confirm that the amount is correct: **NO** or **YES**.
5. The transaction is completed and receipts print. The customer must sign the merchant's receipt.
6. You can **REPRINT** the receipt or **FINISH** the transaction.


- If you have partial authorizations enabled on your terminal, you can charge more than is available on the gift card and have an outstanding balance. Ensure that you offset the outstanding balance a financial transaction (i.e. debit, credit card or cash).

## Gift Certificates

### Create a gift certificate


This transaction allows you to create a gift card account without a physical gift card.

- Ensure that you offset the cost of the gift card with a financial transaction (i.e. debit, credit card or cash).
- This transaction cannot be used to add more money to an already activated gift card.

1. Tap the  / **Home** key → Gift Card → Gift Certificate Register.
2. Enter the **dollar amount** you want to add to the gift card and tap **OK**.
3. Customer confirms that the amount is correct: **NO** or **YES**.
4. The receipt prints showing the account number and balance of the gift certificate.
5. You can **REPRINT** the receipt or **FINISH** the transaction.

## Transactions cash out

This transaction allows you to withdraw monies from an existing gift card.

1. Tap the  / **Home** key → Gift Card → Transactions Cash Out.
2. Confirm that you wish to perform a transactions cash out: **NO** or **YES**.
3. The receipt prints showing the cash out transactions.

## Receipts

Each transaction has a different receipt and most of the information is purely for record keeping. There are some points of **important information** you need to be aware of to ensure that your transactions have completed correctly.

### Important information

<b>Trace #</b>	The trace number associated with the transaction.
<b>Inv #</b>	The invoice number associated with the transaction.
<b>Auth #</b>	The authorization number associated with the transaction.
<b>Signature</b>	The card issuer determines when a signature is required for a transaction so ensure that the client signs these merchant receipts.
<b>Card balance</b>	This information is only displayed on the customer's receipt. The merchant copy will not have this.
<b>Tip</b>	This is where the customer would enter the tip amount on a pre-authorization.
<b>Approved</b>	Always ensure that the transaction was approved as it could be <b>Declined</b> .

## Reporting

### Gift card reports

The following gift card reports are available.

Tap the  / **Home** key → Gift Card Reports → and select a report.

Report	Instructions	Provides...
Business Day Subtotals	<b>DISPLAY</b> or <b>PRINT</b> your report.	...transactions by operator ID and for the current business day.
Terminal Detail	<b>DISPLAY</b> or <b>PRINT</b> your report.	...transactions by operator ID and for the current business day.
Operator Detail	Select whether the report is for an individual ID ( <b>Operator ID</b> ), or tap the <b>0</b> key for all IDs, and tap <b>OK</b> . <b>DISPLAY</b> or <b>PRINT</b> your report.	...transactions by card type (including gift card totals and details) operator ID and for the current business day.
Terminal Balancing	<b>DISPLAY</b> or <b>PRINT</b> your report.	...transactions by operator ID and for the current business day.
Operator Balancing	Select whether the report is for an individual ID ( <b>Operator ID</b> ), or tap the <b>0</b> key for all IDs, and tap <b>OK</b> . <b>DISPLAY</b> or <b>PRINT</b> your report.	...transactions by operator ID and for the current business day.
Host Totals	Select which batch you want to review ( <b>PREV</b> or <b>CURRENT</b> ). <b>DISPLAY</b> or <b>PRINT</b> your report.	...transaction details for current or previous batch.
Host Details	Select which batch you want to review ( <b>PREV</b> or <b>CURRENT</b> ). <b>DISPLAY</b> or <b>PRINT</b> your report.	...transaction details for current or previous batch.
Customized Totals	Enter the <b>start date</b> and <b>end date</b> . <b>DISPLAY</b> or <b>PRINT</b> your report.	...transaction details by transaction type for a maximum of 45 business days
Customized Details	Enter the <b>start date</b> and <b>end date</b> . <b>DISPLAY</b> or <b>PRINT</b> your report.	...transaction details for a maximum of 10 business days



# Call Centre Information

Please call the TD Merchant Solutions Help Desk at **1-800-363-1163**. We would be happy to answer any questions you may have.

## **Authorization:**

24 hours a day, seven days a week

## **Terminal Inquiries:**

24 hours a day, seven days a week

## **General Merchant Inquiries:**

Monday – Friday, 8 a.m. – 8 p.m. ET

## **Printer / Stationery Supplies:**

Monday – Friday, 8 a.m. – 5 p.m. ET

# Documentation Portal

This Guide covers the most commonly used information in order to get you started. Your terminal has more features and functionality to explore on our documentation portal at [www.TDMerchantSolutions.com/ResourceCentre](http://www.TDMerchantSolutions.com/ResourceCentre)

