TD Generation

Merchant Guide: Givex Loyalty Cards

For the TD Generation

- Portal 2 with PINpad

MERCHANT INFORMATION

Merchant Name . . . .

Merchant Number . . . .

Contents

Who would use this guide?

You would use this guide if you perform transactions during the course of your daily business that offer Givex® loyalty 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*.

> 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 Loyalty Cards

You must sign up in order to offer loyalty cards to your customers. If you currently don't offer loyalty 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 loyalty card transactions:

Transactions	Explanation
Award	Give Givex loyalty awards.
Balance Inquiry	Full or partial cashback
Cancel	Void a Givex loyalty transaction.
Redemption	Spend Givex loyalty awards.

Loyalty icon

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

Loyalty Award

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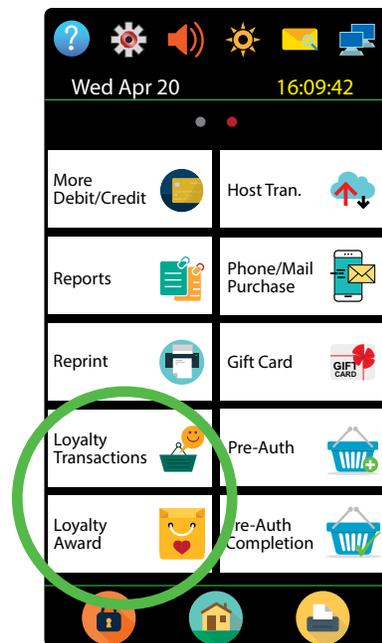
> Depending on your terminal settings, you may be required to enter a supervisor ID and password to proceed with any transaction.

Award loyalty

This transaction allows a merchant to assign rewards to a customer in the form of points or dollar value depending on the program you are enrolled in.

1. Tap the ⬆ / **Home** key → Loyalty Transactions → Award

   or

   Tap the ⬆ / **Home** key → Loyalty Award

2. Enter the pre-tax amount of the purchase and tap **OK**.

3. Enter the **promotion code** or **number of units purchased** and tap **OK**.

4. Select one of the following payment methods: **Swipe** or **Manual Entry**.

   Swipe

   a) Swipe the loyalty card. Go to step 5.

   Manual entry

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

5. The screen shows that the transaction is completed with an authorization number or approved message.

6. You can **REPRINT** the receipt or **FINISH** the transaction.

Redeem a loyalty card

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

1. Tap the ⬆ / **Home** key → Loyalty Transactions → Redemption.

2. Enter the **dollar amount** or **number of points** to be redeemed and tap **OK**.

3. Select one of the following payment methods: **Swipe** or **Manual Entry**.

   Swipe

   a) Swipe the loyalty card. Go to step 4.

   Manual entry

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

4. Enter the **number of points** to be redeemed and tap **OK**.

5. The screen shows that the transaction is completed with an authorization number or approved message.

6. You can **REPRINT** the receipt or **FINISH** the transaction.

Void

This option allows you to void or cancel a loyalty card transaction that was done in error.

1. Tap the ⬆ / **Home** key → Loyalty Transactions → Cancel.

2. Enter the **trace number** from the receipt of the transaction that you want to void and tap **OK**.

3. Enter the loyalty card information: **Swipe** or **Manual Entry**.

   Swipe

   a) Swipe the loyalty card. Go to step 4.

   Manual entry

   a) Enter the loyalty 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 loyalty card.

1. Tap the 🏠 / **Home** key → Loyalty Transactions → Balance Inquiry.

2. Select one of the following payment methods: **Swipe** or **Manual Entry**.

   Swipe

      a) Swipe the loyalty card. Go to step 3.

   Manual entry

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

3. The receipt prints showing balance of the loyalty card.

4. You can **REPRINT** the receipt or **FINISH** the transaction.

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	
Trace #	The trace number associated with the transaction.
Inv #	The invoice number associated with the transaction.
Auth #	The authorization number associated with the transaction.
Card balance	This information is only displayed on the customer's receipt. The merchant copy will not have this.
Approved	Always ensure that the transaction was approved as it could be **Declined**.
Approved Amount	This is the approved redemption / transaction amount.
Accrued Award	This is the amount added to the customer's loyalty card.

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*