

# TD Generation

Merchant Guide: More Rewards



## 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 More Rewards® cards. The information covered in this guide is exclusive to More Rewards 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.

## More Rewards Cards

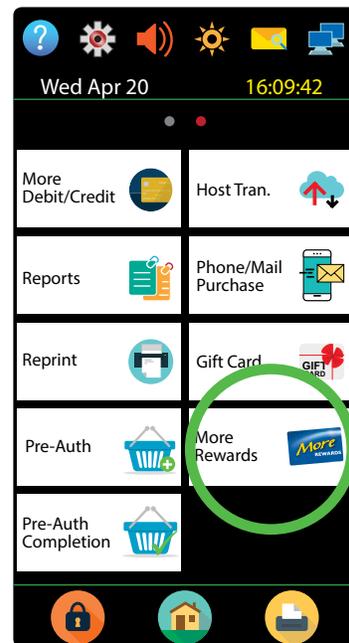
You must sign up in order to accept More Rewards cards from your customers. If you would like to, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163**.

### More Rewards icon

To perform a More Rewards 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.



More Rewards



# Financial Transactions

The TD Generation Portal 2 terminal can perform the following More Rewards transactions:

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

## Purchase (credit, debit, cash)

This transaction flow is used for credit card purchases where the credit card is present. If the purchase is via phone or mail, use the *Phone or mail purchase* instructions. If you use the incorrect purchase transaction you could incur extra charges.

1. Tap the  / **Home** key → Purchase.
2. Enter the **total dollar amount** on the terminal and tap **OK**.
3. Enter the More Rewards card information: **Swipe, Manual Entry** or tap **Skip**.  
If you tap **Skip**, you will follow the regular transaction flow.

### Swipe

- a) The customer swipes their More Rewards card on the PINpad. Go to step 4.

### Manual entry

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

4. Select the payment method: **Credit / Debit** or **Cash**.

### Credit or debit

- a) Follow the standard transaction flow for any credit or debit card transactions.

### Cash

- a) Confirm the amount: **Back arrow** or **YES**.
- b) Collect the cash for the purchase.  
If you collect the exact amount tap **FINISH** and go to step 5.  
If you collect more than you need tap **CHANGE** and go to step c.
- c) Enter the amount paid and tap **OK**.
- d) Confirm the amount entered: **BACK** or **OK**.
5. The screen shows that the transaction is completed with an approved message. If the credit card was manually entered or swiped, the customer **must** sign the receipt.
6. You can **REPRINT** the receipt or **FINISH** the transaction.

## Phone or mail purchase

- These instructions are used for purchases where the card is **not** present. If the card is present at purchase, see *Credit card purchase*. If you use the incorrect purchase transaction you could incur extra charges.
- There are risks performing transactions when the credit card is not present. Ensure that you perform all of the available security checks for phone / mail purchases.

1. Tap the  / **Home** key → Phone / Mail Purchase.
2. Enter the **total dollar amount** on the terminal and tap **OK**.

3. Enter the More Rewards card information: **Manual Enter** or tap **Skip**.
4. Enter the **More Rewards account number** and tap **OK**.
5. Enter the **account number** on the PINpad and press **OK**.
6. Enter the **expiry date** on the PINpad and press **OK**.
7. Enter the **CVD number** on the terminal and tap **OK**.
8. The screen shows that the transaction is approved and the receipts print.
9. You can **REPRINT** the receipt or **FINISH** the transaction.

## Force post purchase

This option is only used due to communication problem or that the force post is requested via the terminal.

Before you perform this transaction you must call the TD Merchant Solutions Help Desk at **1-800-363-1163** and receive an authorization number.

1. Tap the  / **Home** key → Force Post Purchase.
2. Enter the **dollar amount** and tap **OK**.
3. Enter the More Rewards card information: **Swipe, Manual Entry** or tap **Skip**.  
If you tap **Skip**, you will follow the regular transaction flow.

### Swipe

- a) The customer swipes their More Rewards card on the PINpad. Go to step 4.

### Manual entry

- a) Enter the **More Rewards account number** and tap **OK**. Go to step 4.
4. Then enter / spell the authorization number and tap **OK**.
5. Select one of the following payment methods: **Insert, Swipe,** or **Manual**.

### Insert

- a) Insert the card into the PINpad. Go to step 6.

### Swipe

- a) Swipe the card on the PINpad. Go to step 6.

### Manual

- a) Enter the **account number** and press **OK**.
- b) Enter the **expiry date** and press **OK**.
- c) Enter the **CVD number** on the terminal and tap **OK**. Go to step 6.
6. The screen shows that the transaction is approved and the receipts print.
7. You can **REPRINT** the receipt or **FINISH** the transaction.

## Void

There are no More Rewards screen prompts for voided transactions as all information will be updated via the trace number.

# Refund

Perform a refund transaction when a reimbursement must be performed for the customer.

Debit refunds are disabled by default. If you wish to activate debit refunds on your terminal please call the TD Merchant Solutions Help Desk at **1-800-363-1163**.

1. Tap the  / **Home** key → Refund.

OR

Tap the  / **Home** key → Cash transactions → Cash Refund.

2. Enter the **dollar amount** and tap **OK**.
3. Enter the More Rewards card information: **Swipe, Manual Entry** (credit card only) or tap **Skip**.  
If you tap **Skip**, you will follow the regular transaction flow.

### Swipe

- a) The customer swipes their More Rewards card on the PINpad. Go to step 4.

### Manual entry

- b) Enter the **More Rewards account number** and tap **OK**. Go to step 4.

4. Select one of the following payment methods: **Insert / Swipe, Contactless** or **Manual Entry** (credit card only).

### Insert / swipe credit or debit card

- a) The customer **inserts** or **swipes** their card. Go to step 5.

### Contactless credit or debit card

- a) The customer **taps** their contactless-enabled card on the screen. Go to step 5.

### Manual credit card

- a) Enter the **account number** on the PINpad and press **OK**.
  - b) Enter the **expiry date** on the PINpad and press **OK**.
  - c) Is this refund for a **phone / mail purchase (NO or YES)**?  
If you selected **NO**, continue below.  
If you selected **YES** got to step 5.
  - d) A manual imprint of the credit card is required. Do you wish to continue (**NO** or **YES**)?  
If you selected **NO**, the transaction will be cancelled.  
If you selected **YES**, make an imprint of the card and go to step 5.
5. The screen shows that the transaction is completed with an approved message and the receipts print.
  6. You can **REPRINT** the receipt or **FINISH** to complete the refund.

# More Rewards points

Customers can check their points balance at [morewards.ca](http://morewards.ca).

# Receipts

## Receipt examples

The only difference between a regular receipt and a More Rewards receipt is the MORE REWARDS label and masked account number. Otherwise, the receipts are identical.



# Administration and Configuration

## Transaction Upload

The following new feature allows you to manually upload your More Rewards transactions. This function is normally performed during your day close transactions.

1. Tap the  / **Home** key → More Rewards.
2. Select **Transaction Upload**. All the stored More Rewards transactions will now be sent for processing.

# Troubleshooting

Error Codes	Explanation	Action Required
<error code> <b>MORE REWARDS Transaction Upload Not Completed!</b>	Your terminal had a problem uploading the More Rewards information.	Perform a Transaction Upload.
<error code> <b>MORE REWARDS Transaction Upload Not Completed! Try Again From Menu</b>	A problem occurred during the More Rewards upload during the End of Day process.	Perform a Transaction Upload.
<b>Limit Reached! Upload MORE REWARDS From Menu!</b>	The terminal can hold a maximum of 1500 More Rewards transactions before an upload is required.	Perform a Transaction Upload.
<b>No Transactions Found</b>	The terminal has no More Rewards transactions to upload.	--



# 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)

