TD Desk 5000 and TD Move 5000

Pre-authorizations Guide

For the TD Desk 5000

- Standalone and Semi-Integrated terminals
- With or without PINpad (iPP315 or Desk 1500)

For the TD Move 5000

- Standalone and Semi-Integrated terminals
- iPay@Table solution

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Who would use this guide?

You would use this guide if you perform pre-authorizations during the course of your daily business.

Financial Transactions

The TD Desk 5000 and TD Move 5000 terminals can perform the following pre-authorization transactions: Pre-authorization (Create Pre-Authorization, Pre-Auth Completion).

- Depending on your terminal settings, you may be required to enter a supervisor ID and password to proceed with any transaction.
- Pre-authorizations can only be performed with credit cards.
- If the receipt has a signature line on it, the customer **must** sign it.
- If pre-authorizations are not already enabled on your terminal, you can contact the TD Merchant Solutions Contact Centre at **1-800-363-1163** to have them enabled.

Pre-authorization icons

To start a pre-authorization you must use the appropriate icon to ensure that it is processed correctly.

Transaction	TD Desk 5000, TD Move 5000
Pre-Authorization	
Pre-Authorization Completion	

Open a pre-authorization

Use this option to confirm that the pre-authorized amount is available on the credit card and then place a hold on it.

1. Tap the **Pre-Auth** icon.
2. Enter the **amount** and press **OK**.
3. Select the payment method.

   If you have enabled credit surcharge on the terminal, the customer will see a message informing them that a surcharge will be applied. For more information on credit surcharge, please see the ***Configuration and Troubleshooting Guide***.

   Tap

   a) The customer **taps** their contactless-enabled credit card on the contactless card reader. Go to step 4.

   Insert card

   a) Enter the **PIN** and press **OK**. Go to step 4.

Swipe card

a) Indicate if the card is **<Other Card>** or **UnionPay** press **OK**.

If you selected UnionPay, enter the **PIN** and press **OK**. Go to step 4.

Manually enter credit card

a) Enter the **card number** and press **OK**.

b) Enter the expiry day (**MMYY**) and press **OK**.

c) Indicate if the card was present for the transaction: **Yes** or **No**.

d) Enter the **CVD** number and press **OK**. Go to step 4.

4. The transaction is approved and no receipt is printed at this time.

Close a pre-authorization

Use this option to release the pre-authorized amount on the credit card so that the customer can now use that amount to pay their bill.

1. Tap the **P-A Comp.** icon.
2. Select the desired search method to locate the pre-authorization.
3. Enter the information you wish to use to search for a transaction and press **OK**. The transaction is displayed will all the information. Press **OK** to complete this transaction.

   If multiple transactions are displayed, use the arrow keys on the screen to scroll to the desired one and press **OK**.
4. Confirm this selection (**Yes** or **No**).
5. Confirm the sale amount (**Accept** or **Change**).

   If you select change, enter the new amount and press **OK**. This amount cannot be higher than the pre-authorization amount.

   - You cannot charge more than the original amount. To charge more than the original you must void the existing pre-authorization and then create a new pre-authorization for the new higher amount.
   - If you currently complete Pre-Authorization transactions that include a Tip, you should use the Purchase transaction type with tips enabled.
6. The transaction is approved and the receipts print.

We also recommend the following:

- Complete all Pre-authorization transactions daily or as frequently as your business allows.
- If you do not complete Pre-Authorization transactions daily, we recommend that you print open Pre-authorization reports once a day.

Reporting

Business day reports

Open-Pre-Auth report

This report shows open pre-authorizations by card type and operator ID.

1. Press the **OK** key → Reports → Open-Pre-Auth.
2. Determine how you wish to access the report: **Print** or **Display**.
3. Determine how you want to sort the information: **Date/Time**, **Invoice #**, or **Card Type**.

Customizing the day close report

The Open Pre-Auth Report can be enabled or disabled for automatic printing during the **Day Close** transaction. To do this, you must contact the TD Merchant Solutions Contact Centre at **1-800-363-1163**.

Configuration

There are no options for pre-authorizations that you can enable via the terminal's control panel. Please call the TD Merchant Solutions Contact Centre to do the following:

- enable pre-authorizations and display pre-authorizations on your terminal
- password protect the following: opening pre-authorizations, completing pre-authorizations, and accessing the Open-Pre-Auth Report
- change the number of days that a pre-authorization can remain open before it must be closed (default is 30 days)

Troubleshooting

Error Codes	Explanation	Action Required
Amount exceeds card balance	If a pre-paid card is used for a pre-authorization and the amount on it is insufficient to cover the entire amount.	Customer must use a different payment method.
Exceeds amount authorized	Displays if Pre-Authorization Completion amount exceeds the original pre-authorized amount.	Enter an amount that is equal to or less than the original pre-authorized amount.
Pre-auth limit reached. Post or Void pre-auths to open more	You have reached the maximum of 100 open pre-authorizations.	Complete or void and existing pre-authorization to make room.
Pre-auth existing	A function has been attempted that requires pre-authorizations must be closed such as entering demo mode or changing a parameter.	Delete the open pre-authorization or perform a **Pre-auth Completion**.

Contact Centre Information

Please call the TD Merchant Solutions Contact Centre 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 which you can find at www.tdmerchantsolutions.com/posresources.