TD Generation

Givex Gift Card Guide

For the TD Generation:

- All-in-One, HSPA, WiFi
- Portal with PINpad
- Portal 2 with PINpad

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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.

Givex gift cards

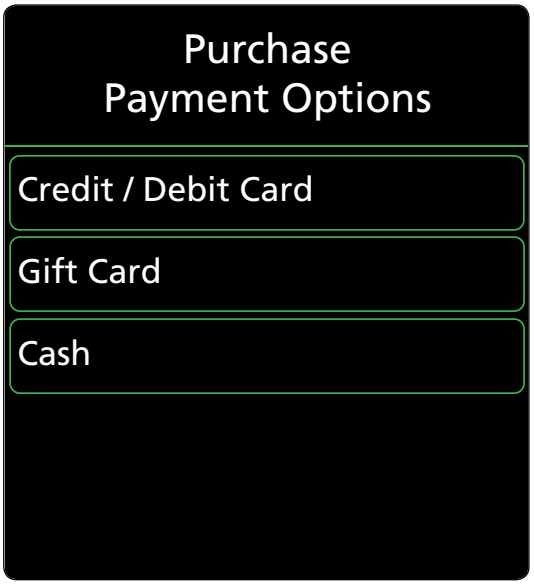
You must sign up in order to offer gift cards to your customers. If you currently don't offer gift cards and would like to, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163**.

To perform a gift card transaction you must select the appropriate icon to ensure that it is processed correctly. Depending upon which TD Generation terminal you are using, the gift card icon may appear different.

Icon	All-in-One, HSPA, Wi-Fi, and Portal with PINpad	Portal 2 with PINpad
Gift Card		

Payment 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. To the right is an example as there may be other options available to you based on your set up.



Financial Transactions

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

Transactions	Explanation
Cancel	Void
Forced Cashback	Full or partial cashback
Forced Pre-Auth	Pre-authorization
Gift Card Redeem	Purchase
Post Auth	Pre-authorization completion

Administration	Explanation
Activation	Activate new gift card
Balance Adjustment	Adjust existing gift card
Balance Inquiry	Current gift card balance
Balance Transfer	Transfer one gift card to another
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.
- If the customer's receipt has a signature line on it, the customer **must** sign it.
- Manual gift card number entry can be disabled to enhance your business' security while remaining active for the Balance Inquiry and Activation functionality. Please call the TD Merchant Solutions Help Desk to modify these settings.

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. Select the **Gift Card** icon → Activation.
2. Enter the **dollar amount** you want to add to the gift card and select **OK**.
3. Select one of the following payment methods.
   a) Swipe the gift card. Go to step 4.

   or

   a) Manually enter the gift card **account number** and select **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. Select the **Gift Card** icon → Gift Card Redeem.
2. Enter the **dollar amount** you want to remove from the gift card and select **OK**.
3. Select one of the following payment methods.
    a) Swipe the gift card. Go to step 4.

    or

    a) Manually enter the gift card **account number** and select **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. Select the **Gift Card** icon → Cancel.
2. Enter the **trace number** from the receipt of the transaction that you want to void and select **OK**.
3. Select one of the following payment methods.
    a) Swipe the gift card. Go to step 4.

    or

    a) Manually enter the gift card **account number** and select **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. Select the **Gift Card** icon → Balance Inquiry.
2. Select one of the following payment methods.
    a) Swipe the gift card. Go to step 3.

    or

    a) Manually enter the gift card **account number** and select **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. Select the **Gift Card** icon → Increment.
2. Enter the **dollar amount** the customer want to add to the gift card and select **OK**.
3. Select one of the following payment methods.
    a) Swipe the gift card. Go to step 4.

    or

    a) Manually enter the gift card **account number** and select **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. Select the **Gift Card** icon → Forced Cash Back.
2. Select how much of the gift card balance they want to receive in cash: **ALL** or **AMOUNT**.
    a) If **All** is selected, go to step 3.

    or

    a) If **Amount** is selected, enter the **dollar amount**, and select **OK**.

    b) Customer confirms that the amount is correct: **NO** or **YES**. Go to step 3.
3. Select one of the following payment methods.
    a) Swipe the gift card. Go to step 4.

    or

    a) Manually enter the gift card **account number** and select **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 a sale.

1. Select the **Gift Card** icon → 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 select **OK**.

4. Select one of the following payment methods.
    a) Swipe the gift card. Go to step 5.

    or

    a) Enter the gift card **account number** and select **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. Select the **Gift Card** icon → Balance Transfer.
2. Enter the information for the gift card that will be transferred.
    a) Swipe the gift card. Go to step 3.

    or

    a) Manually enter the gift card **account number** and select **OK**. Go to step 3.
3. Enter the information for the gift card that will receive the transferred money.
    a) Swipe the gift card. Go to step 4.

    or

    a) Manually enter the gift card **account number** and select **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. Select the **Gift Card** icon → Forced Pre-auth.
2. Enter the **dollar amount** to be reserved on the gift card and select **OK**.
3. Select one of the following processing methods:
    a) Swipe the gift card. Go to step 4.

    or

    a) Manually Enter the gift card **account number** and select **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. Select the **Gift Card** icon → Post-auth.
2. Enter the **trace number** from the receipt of the transaction that you want to void and select **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 select **OK**. This is the final amount for the transaction (including tip) that the customer signs for on the receipt from the initial pre-authotization.
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. Select the **Gift Card** icon → Gift Certificate Register.
2. Enter the **dollar amount** you want to add to the gift card and select **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. Select the **Gift Card** icon → 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	
Trace #	The trace number associated with the transaction.
Inv #	The invoice number associated with the transaction.
Auth #	The authorization number associated with the transaction.
Signature	The card issuer determines when a signatures is required for a transaction so ensure that the client signs these merchant receipts.
Card balance	This information is only displayed on the customer's receipt. The merchant copy will not have this.
Tip	This is where the customer would enter the tip amount on a pre-authorization.
Approved	Always ensure that the transaction was approved as it could be **Declined**.

Reporting

The following gift card reports are available.

1. Select the **Gift Card Reports** icon → and select a report.

Report	Instructions		Provides...
Business Day Subtotals	2.	**DISPLAY** or **PRINT** your report.	...transactions by operator ID and for the current business day.
Terminal Detail	2.	**DISPLAY** or **PRINT** your report.	...transactions by operator ID and for the current business day.
Operator Detail	2.	Select whether the report is for an individual ID (**Operator ID**), or select the **0** key for all IDs, and select **OK**.	...transactions by card type (including gift card totals and details) operator ID and for the current business day.
	3.	**DISPLAY** or **PRINT** your report.	
Terminal Balancing	2.	**DISPLAY** or **PRINT** your report.	...transactions by operator ID and for the current business day.
Operator Balancing	2.	Select whether the report is for an individual ID (**Operator ID**), or select the **0** key for all IDs, and select **OK**.	...transactions by operator ID and for the current business day.
	3.	**DISPLAY** or **PRINT** your report.	
Host Totals	2.	Select which batch you want to review (**PREV** or **CURRENT**).	...transaction details for current or previous batch.
	3.	**DISPLAY** or **PRINT** your report.	
Host Details	2.	Select which batch you want to review (**PREV** or **CURRENT**).	...transaction details for current or previous batch.
	3.	**DISPLAY** or **PRINT** your report.	

Report	Instructions	Provides...
Customized Totals	2. Enter the **start date** and **end date**. 3. **DISPLAY** or **PRINT** your report.	...transaction details by transaction type for a maximum of 45 business days.
Customized Details	2. Enter the **start date** and **end date**. 3. **DISPLAY** or **PRINT** your report.	...transaction details for a maximum of 10 business days.

Contact 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 which you can find at www.tdmerchantsolutions.com/posresources.