TD Generation

Givex Loyalty 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® loyalty rewards. The information covered in this guide is exclusive to Givex transactions.

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**.

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

Transaction	All-in-One, HSPA, WiFi, and Portal with PINpad	Portal 2 with PINpad
Loyalty Award icon		
Loyalty Transactions icon		

Financial Transactions

The TD Generation terminals 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.

- 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 loyalty card number entry can be disabled to enhance your business' security while remaining active for the **Balance Inquiry** functionality. Please call the TD Merchant Solutions Help Desk to modify these settings.

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. Select the **Loyalty Transactions** icon or the **Loyalty** icon → Award
2. Enter the pre-tax amount of the purchase and select **OK**.
3. Enter the **promotion code** or **number of units purchased** and select **OK**.
4. Select one of the following payment methods.
    a) Swipe the loyalty card. Go to step 5.

    or

    a) Manually enter the loyalty card **account number** and select **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. Select the **Loyalty Transactions** icon or the **Loyalty** icon → Redemption.
2. Enter the **dollar amount** or **number of points** to be redeemed and select **OK**.
3. Select one of the following payment methods.
    a) Swipe the loyalty card. Go to step 4.

    or

    a) Manually enter the loyalty card **account number** and select **OK**. Go to step 4.
4. Enter the **number of points** to be redeemed and select **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. Select the **Loyalty Transactions** icon or the **Loyalty** 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 loyalty card. Go to step 4.

    or

    a) Manually enter the loyalty 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 loyalty card.

1. Select the **Loyalty Transactions** icon or the **Loyalty** icon → Balance Inquiry.
2. Select one of the following payment methods.
    a) Swipe the loyalty card. Go to step 3.

    or

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

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.