TD Generation

Valuelink Gift Cards 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 Valuelink® gift cards. The information covered in this guide is exclusive to Valuelink transactions.

Valuelink gift cards

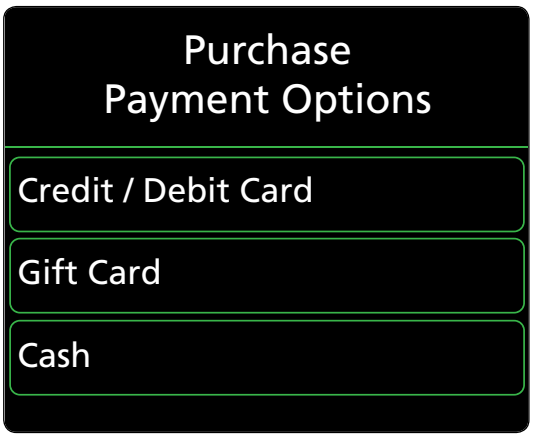
You must sign up in order to offer gift cards to your customers. If you currently don't offer gift cards and would like to, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163**.

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.

Transaction	All-in-One, HSPA, WiFi, and Portal with PINpad	Portal 2 with PINpad
Gift Card		

Payment selection 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 terminals can perform the following Valuelink gift card transactions:

Transaction	Explanation
Activation	Activate new gift card
Balance Adjustment	Increase or decrease the amount on a gift card
Balance Cash Out	Redeem the remaining balance on the card as cash
Balance Inquiry	Current gift card balance
Balance Lock	Lock an amount on a gift card. To access the money you must use Redemption Unlock
Balance Merge	Combine the balance on two gift cards onto one
Gift Card Redeem	Redeem an amount less than or greater than the amount on the gift card
Redemption	Redeem an amount less than the total amount on the gift card
Redemption Unlock	Redeem from a locked gift card
Reload	Add an amount to an activated gift card
Replacement	To transfer the balance of a damaged card to a new one
Report Stolen/Lost	Electronically lock the gift card so that it can no longer be used
Void	Void a transaction

- 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 gift card.

> Ensure that you offset the cost of the gift card with a financial transaction (i.e. debit, credit or cash) when adding funds.

1. Select the **Gift Card** icon → Activation.
2. Is the card denominated: **NO** or **YES**? If no go to step 3. If yes, go to step 4.

   Denominated cards have a pre-defined amount attached to them, while a non-denominated card allows the merchant to enter an amount determined by the customer.
3. Enter the **dollar amount** you want to add to 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) Manually enter the gift card **account number** and select **OK**. Go to step 5.
5. The receipt prints showing new balance of the gift card. You can **REPRINT** the receipt or **FINISH** the transaction.

Adjust a gift card balance

This transaction allows you to increase or decrease the dollar value on a gift card. This transaction is used to make a manual adjustment to a gift card value and values cannot be adjusted outside the minimums or maximums decided on by ValueLink. This transaction is normally used as an administration task to correct a balance issue rather than reload the gift card. If you wish to reload the gift card, please follow the steps in ***Reload a gift card***.

1. Select the **Gift Card** icon → Balance Adjustment.
2. Select one of the following: **Increase** or **Decrease**.
3. Enter the **dollar amount** the customer want to add to or remove from the gift card and select **OK**.
4. 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.
5. The receipt prints showing new balance of the gift card. 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.

Lock an amount on a gift card

This transaction allows a cardholder to lock a partial or the full balance of their gift card. This is like a pre-authorization transaction so that the amount cannot be redeemed until the ***Redemption Unlock*** transaction is performed. See ***Redeem - Locked funds on a gift card*** to redeem locked funds.

1. Select the **Gift Card** icon → Balance Lock.
2. Select one of the following payment methods: **FULL** or **PARTIAL**.

   If you select **FULL**, go to step 4. If you select **PARTIAL**, go to step 3.
3. Enter the **dollar amount** you want to 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) Manually enter the gift card **account number** and select **OK**. Go to step 5.
5. The receipt prints showing the amount locked on the gift card.

Merge gift card balances

This transaction allows a cardholder to transfer the balance from one gift card to another.

1. Select the **Gift Card** icon → Balance Merge.
2. Select one of the following payment methods.
   a) Swipe the gift card you want to transfer. Go to step 3.

      or

   a) Manually enter the gift card **account number** of the card you want to transferand select **OK**. Go to step 3.
3. Swipe the new gift card that you want to have the amount transferred to.
4. The receipt prints showing new balance of the gift card. You can **REPRINT** the receipt or **FINISH** the transaction.

Redeem - Balance of gift card as cash

This transaction allows the cardholder to receive cash for the balance on the gift card.

1. Select the **Gift Card** icon → Balance Cash Out.
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. Confirm that the balance is to cashed out: **NO** or **YES**.
4. The receipt prints showing a zero balance of the gift card and the amount that must be provided to the customer in cash. Provide the cash to the customer. You can **REPRINT** the receipt or **FINISH** the transaction.

Redeem - Balance owing outstanding

This allows a customer to redeem all or part of the value of an existing card. If the full amount of the transaction cannot be redeemed from the card, the transaction will be authorized for the amount remaining on the card. The merchant must make arrangements with the cardholder to pay for the outstanding balance with another payment method.

1. Select the **Gift Card** icon → Gift Card Redeem.
2. Enter the **dollar amount** to be reserved on the gift card and select **OK**.
3. 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. The receipt prints. You can **REPRINT** the receipt or **FINISH** the transaction.

Redeem - Locked funds on a gift card

This allows a merchant to redeem (or decrement) all or part of the value of an existing card, if all or part of the balance was locked with the transaction Balance Lock. If this transaction is attempted on a card that does not have an amount locked, it will be declined and another type of redemption should be used.

1. Select the **Gift Card** icon → Redemption Unlock.
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. You can **REPRINT** the receipt or **FINISH** the transaction.

Redeem - Partial balance of a gift card

This allows a customer to pay for goods or services with the funds available on an accepted gift card. If the full amount of the transaction cannot be redeemed from the card, the transaction will be declined for insufficient funds.

1. Select the **Gift Card** icon → Redemption.
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. The receipt prints. You can **REPRINT** the receipt or **FINISH** the transaction.

Reload a gift card

This transaction allows you to increase the dollar value on a gift card. For denominated cards, if a reload is allowed, the total value of the card cannot be more than the original value loaded onto the card.

> Ensure that you offset the cost of the gift card with a financial transaction (i.e. debit, credit or cash) when adding funds.

1. Select the **Gift Card** icon → Reload.
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. You can **REPRINT** the receipt or **FINISH** the transaction.

Replace a gift card

This transaction allows a cardholder to transfer the balance from a damaged gift card to a new, functional one.

1. Select the **Gift Card** icon → Replacement.
2. Select one of the following payment methods.
   a) Swipe the gift card you want to transfer. Go to step 3.

   or

   a) Manually enter the gift card **account number** of the card you want to transferand select **OK**. Go to step 3.
3. Swipe the new gift card that you want to have the amount transferred to.
4. The receipt prints showing balance of the new gift card. You can **REPRINT** the receipt or **FINISH** the transaction.

Report a lost or stolen gift card

This is transaction electronically locks a gift card with Valuelink so that it cannot be used. To reactivate the card, the customer must contact Valuelink.

1. Select the **Gift Card** icon → Report Lost/Stolen.
2. Enter the gift card **account number** and select **OK**. Go to step 4.
3. The screen shows that the transaction is completed with an authorization number and balance.
4. You can **REPRINT** the receipt or **FINISH** the transaction.

Void a gift card transaction

This option allows you to void a gift card transaction that was done in error.

1. Select the **Gift Card** icon → Void.
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. 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.
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.
Approved	Always ensure that the transaction was approved as it could be **Declined**.

Reporting

The following gift card reports are available.

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

Report	Instructions	Provides...
Terminal Detail	2. **DISPLAY** or **PRINT** your report.	...transactions broken down by details for the current batch.
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**. 3. **DISPLAY** or **PRINT** your report.	...transactions by card type (including gift card totals and details) operator ID and for the current business day.
Terminal Balancing	2. **DISPLAY** or **PRINT** your report.	...transactions broken down by card types done for the current batch.
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**. 3. **DISPLAY** or **PRINT** your report.	...transactions totals for the current batch.
Host Totals	2. Select which batch you want to review (**PREV** or **CURRENT**). 3. **DISPLAY** or **PRINT** your report.	...transaction details for current or previous batch.
Host Detail	2. Select which batch you want to review (**PREV** or **CURRENT**). 3. **DISPLAY** or **PRINT** your report.	...transaction details for current or previous batch.
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 Detail	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.