TD Luxe 6200m

Givex Gift Card Guide

For the TD Luxe 6200m:

- Wired
- Standalone (4G LTE and WiFi) and Semi-integrated (WiFi)

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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 use Givex® gift cards. The information covered in this guide is exclusive to Givex transactions.

Givex gift cards

You must have an existing Givex account and then sign up with TDMS in order to offer gift card transactions on your terminal. Please contact the TD Merchant Solutions Help Desk at **1-800-363-1163** for more information.

To perform a gift card transaction you must select the appropriate icon to ensure that it is processed correctly.

Icon	Luxe 6200m	
Purchase		You can select this icon when the gift cards are only used as a payment method much like a debit card, credit card, or cash. It has no gift card specific features or functionality. These transactions are covered in the ***Quick Start Guide***.
Gift Card		With this icon you can perform tasks that are specific to gift cards. It allows you to perform administrative features such as: adding money to the gift card, determining a gift card's balance, etc. See below for the available transactions and functionality for your Givex gift cards.

Financial Transactions

The following transactions are gift card specfic on the TD Luxe 6200m terminal:

Financial Transaction	Explanation
Cancel	This voids a transaction that has not been submitted for settlement.
Forced Cashback	The customer receives all or a partial amount in cash from the gift card balance.
Forced Pre-Auth	This creates a pre-authorization transaction.
Gift Card Redeem	This initiates a gift card purchase transaction.
Post-Auth	This closes an existing pre-authorization transaction.

Administration	Explanation
Activation	This activates a new gift card.
Balance Adjustment	This adjusts the existing gift card balance.
Balance Inquiry	This provides current gift card balance.
Balance Transfer	This transfers one gift card balance to another.
Gift Certificate Register	This creates paper gift certificate that acts like a gift card.
Increment	This increases a gift card's balance.
Terminal Registration	This registers your terminal with the gift card network.
Transaction Cashout	This performs a batch close for gift card transactions only.

- 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 a new 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 – only a new, previously unactivated gift card.

1. From the Desktop screen → **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 processing methods.
   a) Swipe the gift card. Go to step 4.

   OR

   b) Select **Manual**, 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.

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. From the Desktop screen → **Gift Card** icon → Gift Card Redeem.
2. Enter the **dollar amount** you want to remove from the gift card and select **OK**.
3. The customer confirms the amount: **back arrow** or **OK**.
4. <u>Tip (optional)</u>

   This option will only appear if tips are enabled on your terminal.
   a) The customer selects / enters one of the **tip options** offered on screen.
   b) The customer confirms the amount. Go to step 5.
5. Select one of the following processing methods.
   a) Swipe the gift card. Go to step 6.

   OR

   b) Select **Manual**, enter the gift card **account number** and select **OK**. Go to step 6.
6. The screen shows that the transaction is completed with an authorization number or approved message. You can **REPRINT** the receipt or **FINISH** the transaction.
7. If there were insufficient funds on the gift card to pay the full amount, you will be prompted for another payment method (credit, debit, cash) to cover the balance.

Void

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

1. From the Desktop screen → **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 processing methods.
    a) Swipe the gift card. Go to step 4.
    OR
    b) Select **Manual**, enter the gift card **account number** and select **OK**. Go to step 4.
4. Confirm that the info entered is correct.
5. The transaction is now voided and receipts print. 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. From the Desktop screen → **Gift Card** icon → Balance Inquiry.
2. Select one of the following processing methods.
    a) Swipe the gift card. Go to step 3.
    OR
    b) Select **Manual**, 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. From the Desktop screen → **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 processing methods.
    a) Swipe the gift card. Go to step 4.
    OR
    b) Select **Manual**, 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.

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. From the Desktop screen → **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. Go to step 3.
3. Select one of the following processing methods.
   a) Swipe the gift card. Go to step 4.

   OR

   b) Select **Manual**, 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. 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.

If the value is increased, ensure that you offset the cost of the gift card with a financial transaction (i.e. debit, credit card or cash) .

1. From the Desktop screen → **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 processing methods.
   a) Swipe the gift card. Go to step 5.

   OR

   b) Select **Manual**, 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.

Transfer gift card balance

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

1. From the Desktop screen → **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
    b) Select **Manual**, 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
    b) Select **Manual**, 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.

Pre-authorizations

Open pre-authorization

This transaction creates a pre-authorization on a gift card which places a hold on a set amount of funds on the gift card.

1. From the Desktop screen → **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
    b) Select **Manual**, 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. 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. From the Desktop screen → **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.
5. The transaction is completed and receipts print. The customer must sign the merchant's receipt. You can **REPRINT** the receipt or **FINISH** the transaction.

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. From the Desktop screen → **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.
4. The receipt prints showing the account number and balance of the gift certificate. You can **REPRINT** the receipt or **FINISH** the transaction.

Transactions cash out

This transaction allows you to close the gift card batch without performing a day close.

1. From the Desktop screen → **Gift Card** icon → Transactions Cash Out.
2. Confirm that you wish to perform a transactions cash out.
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. If a signature line is present, the customer **must** sign.
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. For a regular purchase, the tip amount entered by the customer would printed on the receipt.
Approved	Always ensure that the transaction was approved as it could be **Declined**.

Reporting

The following gift card reports are available.

1. From the Desktop screen → **Reports** icon → Gift Card Reports → 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 Details	2.	**DISPLAY** or **PRINT** your report.	...transactions by operator ID and for the current business day.
User Details	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.
User 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.	
Customized Totals	2.	Enter the **start date** and **end date**.	...transaction details by transaction type for a maximum of 45 business days.
	3.	**DISPLAY** or **PRINT** your report.	
Customized Details	2.	Enter the **start date** and **end date**.	...transaction details for a maximum of 10 business days.
	3.	**DISPLAY** or **PRINT** your report.	

Troubleshooting

Error codes are explained in the online ***Configuration and Troubleshooting Guide*** at www.tdmerchantsolutions.com/posresources.

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.

Below is a list of the available Luxe 6200m documentation:

- Quick Start Guide
- Configuration and Troubleshooting Guide
- Pre-authorization Guide
- Givex Gift Card Guide
- More Rewards Guide
- UnionPay Guide
- and more