



**RMS-TD Bridge
Givex
User's and Setup Guide**

v2.9.9

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Part I

RMS-TD Bridge – Givex Setup Guide



Overview: Before you begin....

This guide assumes that the RMS-TD Bridge has already been set up for TD Merchant services. Refer to the RMS-TD Bridge User's and Setup Guide for installation and setup information.

You should have the following information from Givex before you begin the setup process:

- User ID
- Password
- IP Address
- Port Number
- Fallback IP Address
- Fallback Port Number

You should also have:

- A functioning receipt printer
- A working internet connection
- The ability to log on as the computer administrator

The following steps will need to be performed:

- Step 1: RMS-TD Bridge installed (see the RMS-TD Bridge setup guide)
- Step 2: Create Givex items
- Step 3: Configure RMS-TD Bridge software (at each PC)
- Step 4: Configure Merchant Connect Multi software (at each PC)

The cashier number of the cashier that is logged into RMS will be used as the Operator ID when Givex transactions are performed. Givex requires numeric Operator ID's. If the cashier that is logged on at the time of the transaction does not have a completely numeric ID number, the register number will be used as the Operator ID for the transaction.

If using Givex within the RMS-TD Bridge application, all other Givex applications must be uninstalled. Failure to uninstall other Givex applications may result in double processing of Givex cards.

Changes Required in RMS

In order to activate Givex gift cards, a minimum of 2 items must be created in RMS. One item will be used to activate new cards and the other is used to increment existing, already activated cards. Two exact amount items for \$50.00 and \$20.00 may also be created. A tender type must also be created in order to redeem Givex gift cards.

The following item properties must be set for these items.

Card Activation Item

Variable Card Activation

Item Lookup Code:

GIVEXACT

Item Type:

Non Inventory

Options:

- Must enter price at POS: Check On
- Quantity entry at POS not allowed: Check On
- Item not discountable at POS: Check On

Item lookup code:	GIVEXACT
Description:	Givex Activate
Item type:	Non-Inventory

Item Properties: Givex Activate - GIVEXACT		
Commission	General	Inventory
Voucher	Substitutes	Special
Aliases		
Options		
<input checked="" type="checkbox"/> Must enter price at the POS.		
<input type="checkbox"/> Accept food stamps for this item.		
<input checked="" type="checkbox"/> Quantity entry at POS not allowed.		
<input checked="" type="checkbox"/> Item is not discountable at the POS.		
<input type="checkbox"/> Item is available on the website.		
<input type="checkbox"/> Item is inactive.		
<input type="checkbox"/> May not be placed on purchase order.		

\$50.00 Card

Item Lookup Code:

GIVEXACT50

Item Type:

Non Inventory

Price:

\$50.00

Options:

- Quantity entry at POS not allowed: Check On
- Item not discountable at POS: Check On

\$20.00 Card

Item Lookup Code:

GIVEXACT20

Item Type:

Non Inventory

Price:

\$20.00

Options:

- Quantity entry at POS not allowed: Check On
- Item not discountable at POS: Check On

Card Increment Item

Item Lookup Code:

GIVEXINC

Item Type:

Non Inventory

Options:

- Must enter price at POS: Check On
- Quantity entry at POS not allowed: Check On
- Item not discountable at POS: Check On

Redeeming Cards Setup

Tender Setup

A tender type must be created to redeem Givex cards.

Tender Description: GIVEX (the description must contain "GIVEX"
In upper or lower case)
Tender Code: TD-GX
Allow multiple entries: Checked

Tender Type Properties: GIVEX - TD-GX

General | Verification | Vouchers

General Settings

Description: GIVEX
Tender code: TD-GX
Tender type: Other
Currency: Default Currency
Tender type is inactive:
Denominations...

Register Settings

Display order: 90
Scan code: 0
Round to value: \$0.00
Prevent cashier overtendering:
Pop cash drawer:
Require signature:
Allow multiple entries:
(Extra lines will be added on the tender screen when a partial amount is entered)

OK Cancel Help

Givex Settings

Click on the



button.

Select File → Setup → Givex

Check the Givex Enabled box to enable Givex activation or redemption.

Setup Version:

General Settings Pin Pad Receipt Layout **Givex**

Givex Enabled

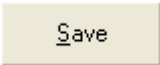
Givex Settings

Givex settings must be updated directly in Merchant Connect Multi. Follow the instructions below, or consult your manual.

1. Right-click the Multi icon in the system tray then select Restore
2. Highlight your Terminal ID
3. Right-click then choose 'Show Configuration'
4. Select the 'Gift Card' tab
5. Choose 'Givex' in the Host field
6. Type in the Operator ID (usually set to 1)
7. Type in the User ID (provided by Givex - usually 5 digits)
8. Type in the Password ID (provided by Givex - usually 4 digits)
9. Type 30 into the Timeouts field
10. Choose 'TCP/IP SSL' in the Line Type/Protocol field
11. Type in the IP Address (provided by Givex - usually dc-ca1.givex.com)
12. Type 50020 in the TCP Port
13. Leave the Fall Back fields blank
14. Click 'File', then 'Save' in the upper left
15. Click 'File', then 'Exit'
16. Minimize Multi to restore it to the tray

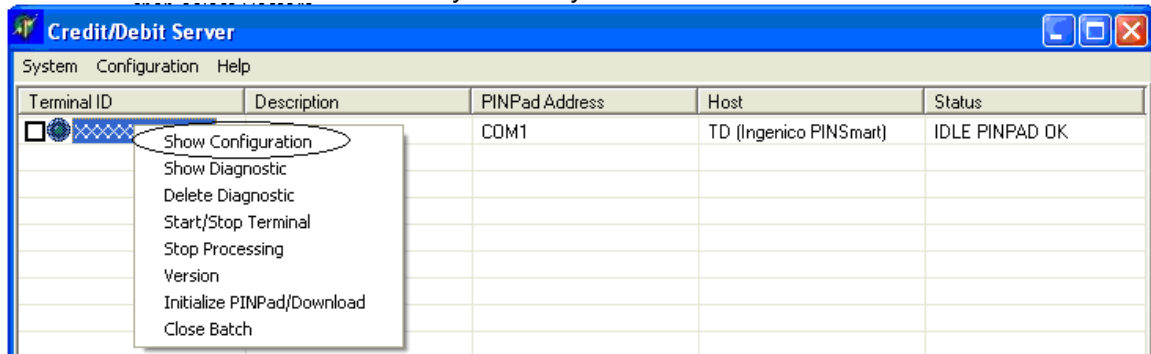
If this is a new Givex installation, you will also need to follow the instructions in the manual to add a Givex button in POS. Please consult your documentation.

Cancel Save

Press the  button to save and exit.

All Givex settings must be entered in the Merchant Connect Multi program.

Double-click on the Multi icon in the System Tray. 



Right-click on the Terminal ID in the main Window, select Show Configuration.

Select the Gift Card tab

Host: Select Givex

Enter 1 as the Operator ID
Enter your User ID and
Password provided for your
Givex account.

Timeouts: Enter 20

Select **TCP/IP SSL** in the
Line Type/Protocol.

Enter the IP address
(dc-ca1.givex.com or dc-ca2.givex.com is usually recommended)
The Port should be 50020 unless directed to use a different port.

You can leave the Fallback IP Address and Fallback Port blank or enter the Fallback information provided by Givex.

The screenshot shows a configuration window with the following fields and values:

Field	Value
Host	Givex
Operator ID	1
User ID	XXXXXXXX
Password	XXXXXX
Timeouts	20
Line Type/Protocol	TCP/IP SSL
IP Address	dc-ca1.givex.com
TCP Port	50020
Fallback IP Address	dc-ca2.givex.com
Fallback TCP Port	50020

When all fields have been entered, select the File menu then Save and Exit.

The screenshot shows the 'File' menu with the following options:

- Open
- Save
- Save As
- Save and Exit
- Exit

Minimize the Credit/Debit Server window.

The screenshot shows the 'Credit/Debit Server' window with the following table:

Terminal ID	Description	PINPad Address	Host	Status
☑ [blurred]		COM1	TD (Ingenico PINSmart)	IDLE PINPAD OK

It is important that the Credit/Debit Server window is never closed - only minimized.

Custom Button Setup

In order to request card balances, reports, cash outs and administration, custom buttons must be created in Store Operations Manager. These custom buttons are optional.

If upgrading from an installation that used an interface directly from Givex, the buttons that were previously created for the Givex integration must be changed to these RMSTDBridge buttons.

In Store Operations Manager → Database → Registers, select Custom POS Buttons then press



button to create the new POS buttons.

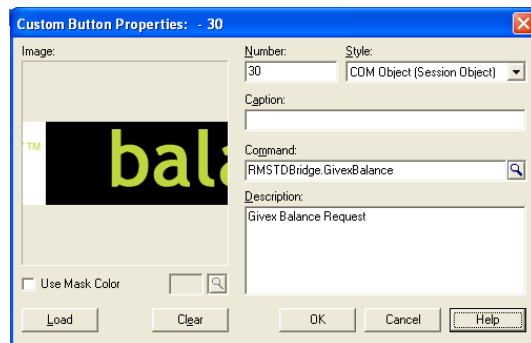
Card Balance


Enter the logical number of the button. This is the numeric order that the custom buttons will appear on the POS screen.

Select the style COM Object (Session Object).

In the command field, type
RMSTDBridge.GivexBalance

In the Description field, type: Givex Card
Balance Request



Press the  button. Navigate to the C:\MCMulti folder and select the file givexbalance.bmp

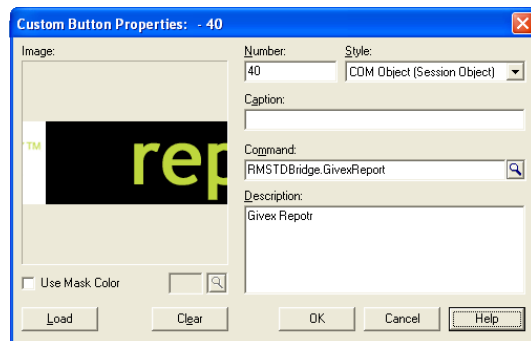
Report

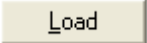
Enter the logical number of the button. This is the numeric order that the custom buttons will appear on the POS screen.

Select the style COM Object (Session Object).

In the command field, type
RMSTDBridge.GivexReport

In the Description field, type: Givex Report



Press the  button. Navigate to the C:\MCMulti folder and select the file givexreport.bmp


CashOut

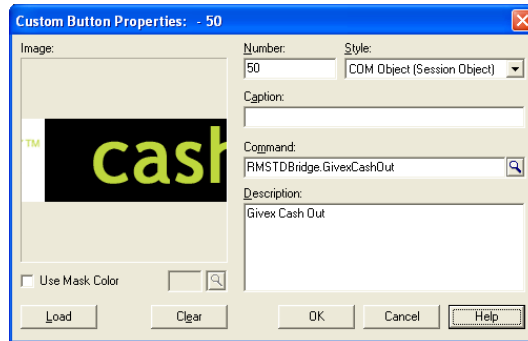
Enter the logical number of the button. This is the numeric order that the custom buttons will appear on the POS screen.

Select the style COM Object (Session Object).

In the command field, type
RMSTDBridge.GivexCashOut

In the Description field, type: Givex Cash Out

Press the  button. Navigate to the C:\MCMulti folder and select the file givexcashout.bmp



Administration


This option will only be available if the admin functions have been previously set up with Givex.

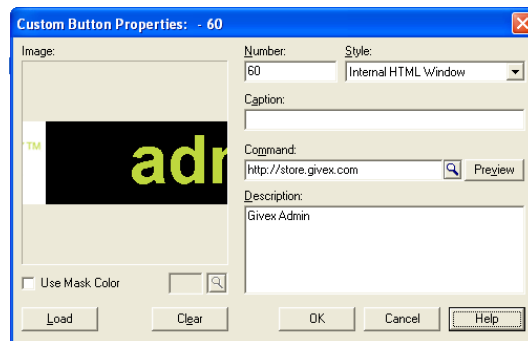
Enter the logical number of the button. This is the numeric order that the custom buttons will appear on the POS screen.

Select the style Internal HTML Window to display in a full screen internet screen or HTML Window to display in a window inside the POS screen.

In the command field, type <http://store.givex.com>

In the Description field, type: Givex Admin

Press the  button. Navigate to the C:\MCMulti folder and select the file givexadmin.bmp



Part II

RMS-TD Bridge – Givex User's Guide



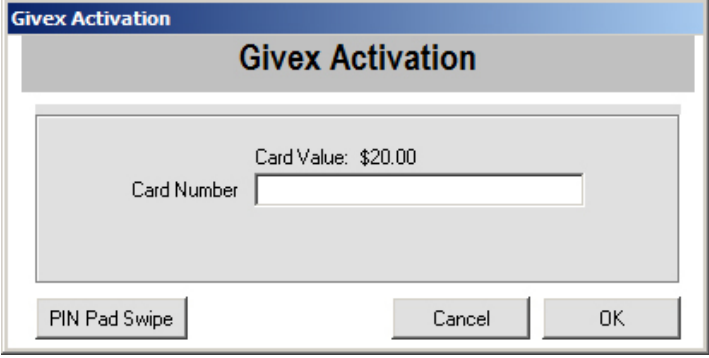
Activating Cards

Sell a GIVEXACT, GIVEX20 or GIVEX50 item in POS.
Tender the transaction with the appropriate tender type.

Prior to completing the sale, an authorization window will be displayed. The card may be entered manually, swiped on a card reader other than the pin pad or scanned.

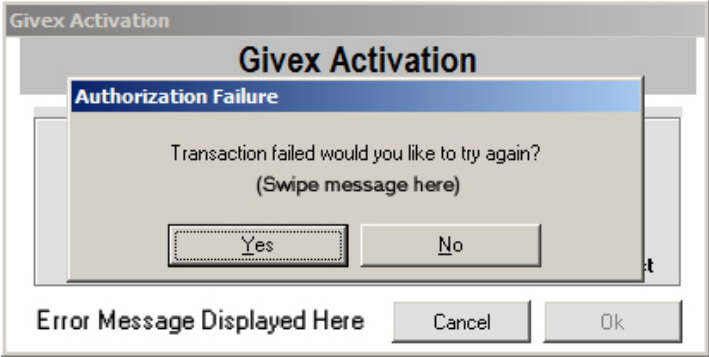
Enter the card number then press the Ok button (if swiped or scanned there is no need to press the button).

To swipe the card on the PIN Pad, press the PIN Pad Swipe button. You will be prompted on the PIN Pad to swipe the card.



If the card is authorized, the tender process will continue.

If an error occurs, a screen similar to the one on the right will be displayed when the transaction is approved. The message to let you know the reason for the card not to be authorized will be displayed in the lower left corner. Press the Yes button to try again or the No button to cancel. If the Yes button is pressed, you will be prompted again to enter the card number. If the No button is pressed, the authorization will be canceled and you will be prompted again at the tender window.



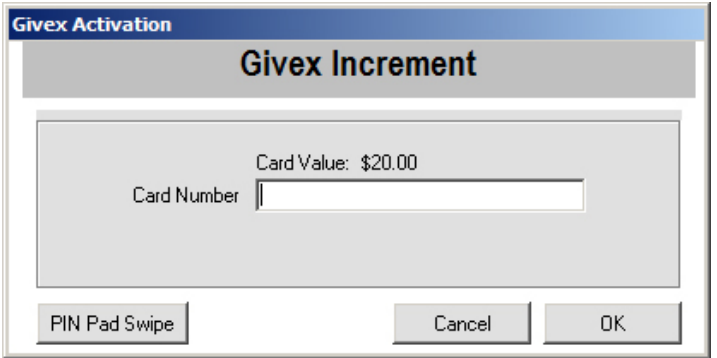
Incrementing Cards

Sell a GIVEXINC item in POS.
Tender the transaction with the appropriate tender type.

Prior to completing the sale, an authorization window will be displayed

The card may be entered manually, swiped on a card reader other than the pin pad or scanned. Enter the card number then press the Ok button (if swiped or scanned there is no need to press the button).

To swipe the card on the PIN Pad, press the PIN Pad Swipe button. You will be prompted on the PIN Pad to swipe the card.



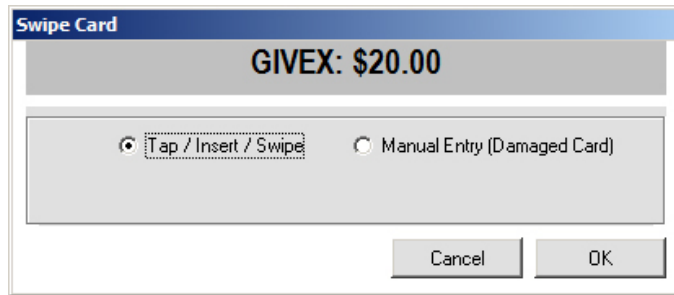
The tendering process will continue the same as when activating cards.

Redeeming Cards: Swipe, Scan or Manual Entry

On the tender window, choose the GIVEX card from the payment menu. (Either type in the amount, or press the '+' key.)

You will see a window like the one on the right.

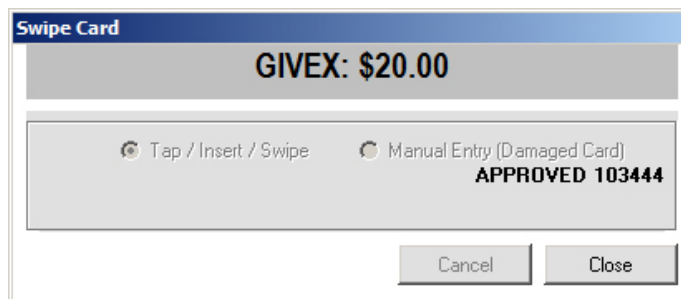
Press Enter or Ok to proceed to swipe the customer's Givex card on the PIN Pad.



The screenshot shows a window titled "Swipe Card" with a blue header. Below the header, the text "GIVEX: \$20.00" is displayed in a grey box. Underneath, there are two radio button options: "Tap / Insert / Swipe" (which is selected) and "Manual Entry (Damaged Card)". At the bottom right, there are two buttons: "Cancel" and "OK".

To swipe on an alternate card reader or to manually enter the card number, select the Manual Entry (Damaged Card) option then scan, enter or swipe the card number.

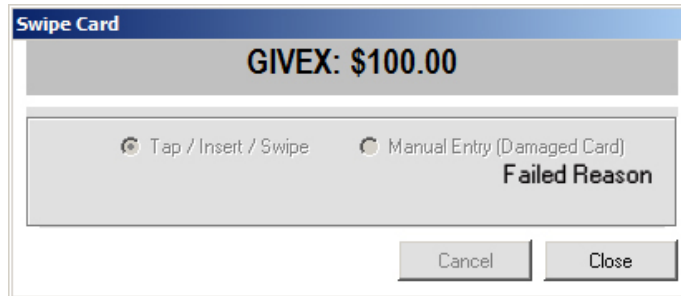
The screen to the right will be displayed when the transaction is approved. Press the Enter key or Close button to clear this window and completely end the transaction.



The screenshot shows the same "Swipe Card" window after approval. The text "GIVEX: \$20.00" is still present. Below it, the text "APPROVED 103444" is displayed in a grey box. The radio button options "Tap / Insert / Swipe" and "Manual Entry (Damaged Card)" are still present. At the bottom right, there are two buttons: "Cancel" and "Close".

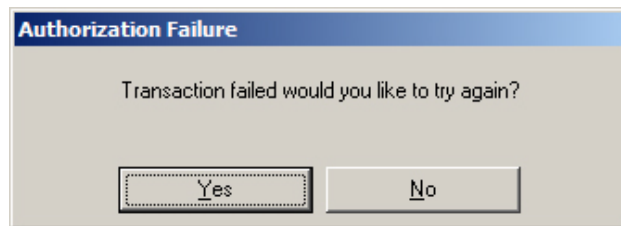
Redeeming Cards: Failed Transactions

If the transaction is not authorized, a window similar to the right will be displayed with the reason that the card was not authorized. Press the Close button to continue.

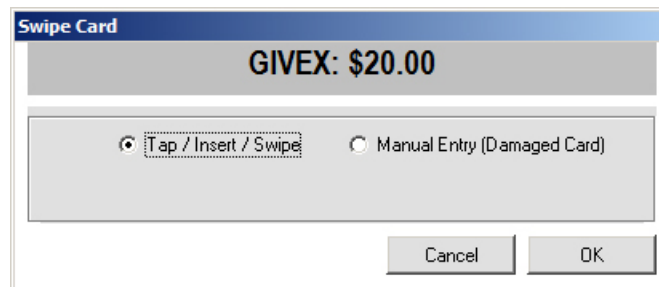


Based on the error, you can decide if you would like to try again. Choosing "Yes" will bring you back to the "Follow the Pin Pad Instructions" prompt.

Choosing "No" will return you to your transaction to select a different form of payment.



Choosing "Yes" will return you to your card entry window to attempt the authorization again.



Card Balance

givex balance

To request the balance of an existing card, press the button.

A screen will be displayed for you to enter the card number to check.

The card number may be swiped (on the 'other reader', scanned or manually entered).

To swipe the card on the PIN Pad, press the PinPad Swipe button and follow the prompts on the PIN Pad.

The screenshot shows a window titled "Givex Balance Request" with a header bar. Below the header, there is a text input field labeled "Card Number". At the bottom of the window, there are three buttons: "PinPad Swipe", "Cancel", and "OK".


If the card number entered is a valid activated card, a screen similar to the one on the right will be displayed, showing that card number and the balance on the card. A receipt will also be printed for the customer to show the balance.

The screenshot shows the same "Givex Balance Request" window. The "Card Number" field is now filled with a masked number (XXXXXXXXXXXXXXXXXXXX). To the right of the field, the balance "50.00" is displayed. The "PinPad Swipe" button is highlighted with a dashed border. The "Cancel" and "OK" buttons are also visible.

Messages, other than an actual balance, will be displayed in the same area of the screen as a balance. A card that has not yet been activated may produce a message similar to 'Cert not exist'.

The screenshot shows the same "Givex Balance Request" window. The "Card Number" field is filled with a masked number. To the right of the field, the word "Message" is displayed instead of a balance. The "PinPad Swipe" button is highlighted with a dashed border. The "Cancel" and "OK" buttons are also visible.


Report

To obtain a report of activity since the last Close Out, pres the  button.

A report of activity will be printed on your receipt printer.

```
YOUR COMPANY NAME
Dec 01 2007 03:30 pm Trans#1
TRANSACTION RECORD
TR Terminal # : XXXXXXXXXXXX
Operator      : 1
Invoice #    : 1
Account Type : GIFT CARD
Trans Type   : TOTALS REPORT
Terminal #   : XXXXX
Type         CNT      TOTALS      UNITS
              : 1
ACTIVATION   3      300.00      0
INCREMENT    1       50.00      0
REDEMP      3     -125.95      0
***** TRANSACTION APPROVED *****
07/12/01 15:30:24 : Auth #
```


Cash Out

To obtain a report of activity since the last Close Out, pres the  button.

Your report will print first, followed by the cash out report.

```
YOUR COMPANY NAME
Dec 01 2007 03:30 pm Trans#1

TRANSACTION RECORD
TR Terminal # : XXXXXXXXXXXX
Operator      : 1
Invoice #    : 1
Account Type : GIFT CARD
Trans Type   : TOTALS REPORT
Terminal #   : XXXXX

Type          CNT    TOTALS    UNITS
                AMOUNT
Operator      : 1
ACTIVATION    3     300.00    0
INCREMENT     1     50.00     0
REDEMPY       3    -125.95    0

***** TRANSACTION APPROVED *****

07/12/01 15:30:24 : Auth #
```

```
YOUR COMPANY NAME
Dec 08 2007 03:52 pm Trans#1

TRANSACTION RECORD
TR Terminal # : XXXXXXXXXXXX
Operator      : 1
Invoice #    : 1
Account Type : GIFT CARD
Trans Type   : CASH OUT
Card Number  : *****
User ID      : XXXXXX


***** TRANSACTION APPROVED *****

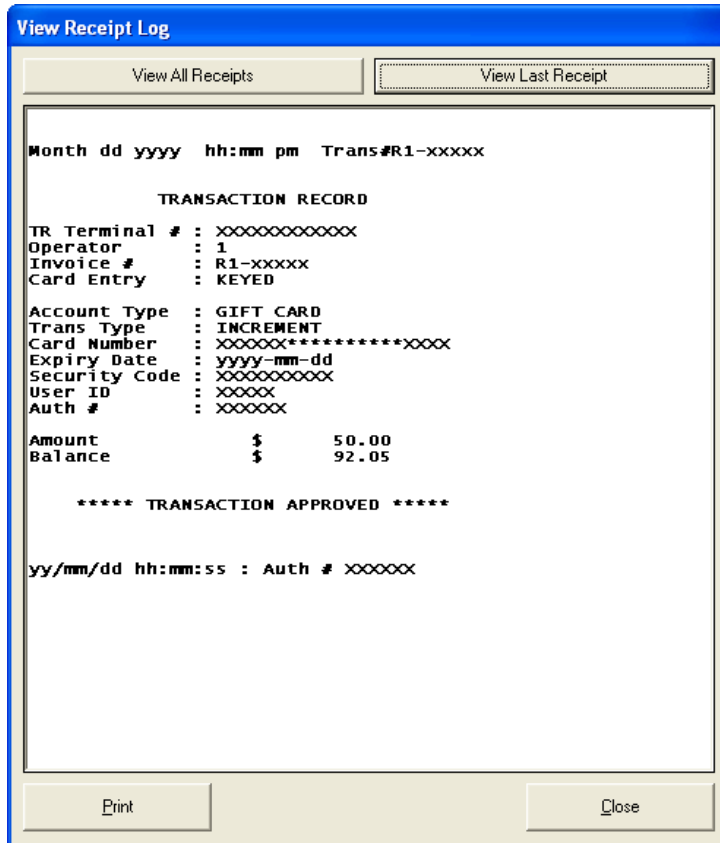
07/12/08 15:52:04 : Auth #
```

Reprinting a Givex Receipt


Click the  button.

At the top of the page, click View Receipt Log.

Click the  button to view and or print the last receipt.



If the last authorized receipt printed was a credit or debit card, use the View All Receipts button.

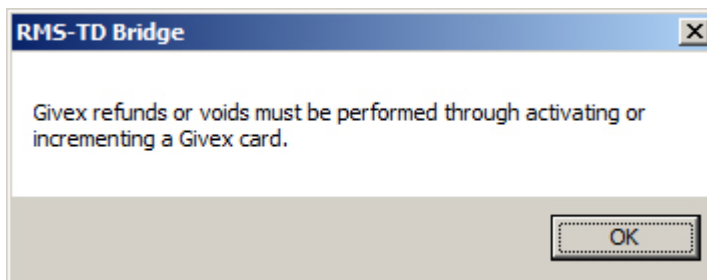
Click the  button to select from a list of transaction dates and choose the date that corresponds with the receipt you would like to print. The format of the date is YYYYMMDD. Once you have selected a date, the receipts will be displayed in the window. Highlight the receipt you wish to reprint before clicking print. This receipt file contains receipts from TD transactions as well as all Givex receipts.

Transaction Exceptions

Recalling a transaction for void or refund

Givex redemptions cannot be refunded or voided after the transaction has been processed and approved. Once a transaction has been completed with Givex card redemption the transaction cannot be reversed.

If void or refund of a previous Givex redemption is attempted, a screen similar to this will be displayed.



There are two ways to correct a Givex redemption transaction that has already been processed.

1. Return to a miscellaneous (non-inventory) item with a Givex activation or increment
 - Perform a return in a transaction for a miscellaneous item for the value of the Givex redemption.
 - Sell a new GIVEXACT item for a new card or increment a GIVEXINC item for the same value as the redemption.
 - The net result of the sale will be zero and can be tendered to any tender type.

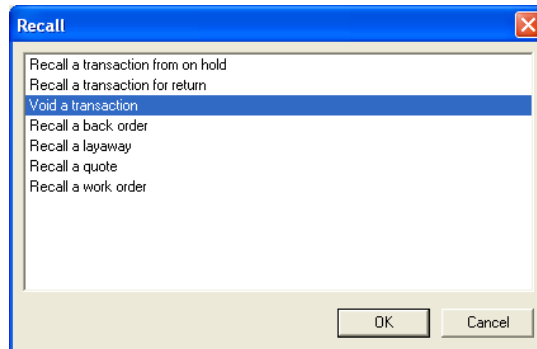
Item Lookup Code	Description	Quantity	Price	Extended	Tax	Rep
MISC	MISC ITEM	-1	\$10.00	(\$10.00)		<input type="checkbox"/>
GIVEXINC	Givex Increment	1	\$10.00	\$10.00		<input type="checkbox"/>
Sub Total			\$0.00			
Sales Tax			\$0.00			
Total			\$0.00			

2. Log on to the Givex web site to perform the correction

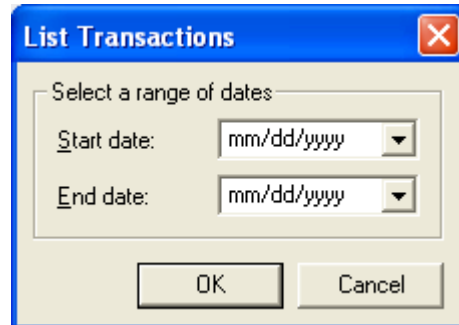
Void or Return of Givex activation or increment

At the main Point Of Sale screen press F11 Recall. Select **Void a transaction** to void or **Recall a transaction for return**.

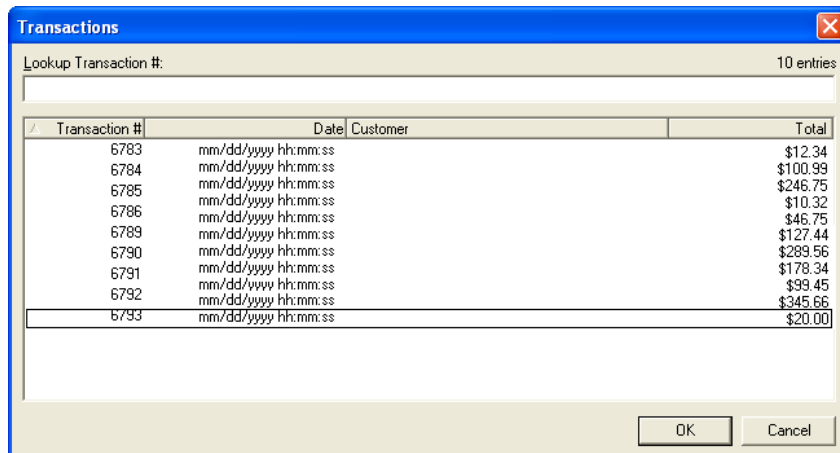
Both void and return will reverse the original Givex card activation or increment.



Select the date of the original transaction.



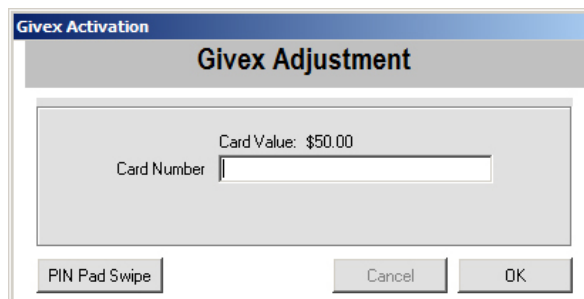
Highlight the transaction to void then select OK.



If performing a return, other items in the transaction (non Givex) may have to be removed prior to tendering

Select the appropriate tender type that was used for the original transaction then press +. If more than one tender type was used, type the appropriate values in each. When the tender information has been entered, you will be prompted for the card number for the adjustment.

Enter the Givex card number then press Ok. The card will be reversed. The card number entered must be a card that has already been activated or incremented. To swipe the card on the PIN Pad, press the PIN Pad Swipe button and follow the prompts on the PIN Pad.




A previously activated Givex card can also be adjusted by performing a return in a transaction.

Press Ctrl-F4 Return at the main POS screen.



F4: Return

This will put in POS in return mode, indicated by the icon  in the status bar at the top of the screen.

Enter the GIVEXINC item, enter the adjustment value then press Enter. Both the quantity and price will be negative.

Press F12 Tender to complete the transaction.

Select the appropriate tender type that was used for the original transaction then press +. If more than one tender type was used, type the appropriate values in each. When the tender information has been entered, you will be prompted for the card number for the adjustment.

Enter the Givex card number then press Ok. The card will be reversed. The card number entered must be a card that has already been activated or incremented.

Alternatively, you may also log on to the Givex web site in order to make these corrections. This administrative access must already be set up with Givex.

Part III

RMS-TD Bridge
Additional Information

Important Phone Numbers

Givex Client Services: [1-800-962-4935](tel:1-800-962-4935)

Other Important Contact Numbers
