



Getting Ready for Event Day

Auctionpay Card Readers

Today I will provide a brief overview of the set up and use of the Auctionpay Card Readers during your fundraising event.



Event Day Training Agenda



1. Pre-event preparations
2. Running reports for guest registration
3. Overview of registration procedures
4. Entering winning bids
5. Correcting mistakes
6. Checking out
7. Post-event procedures and wrap-up

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This session will last about 15 minutes. The training today will cover a number of topics. I will provide suggestions for preparing for your event and setting up your equipment. I will also cover some recommended reports for expediting guest registration. I will walk you through the registration procedure using the Auctionpay Card Readers, and then we will discuss the data entry portion: entering winning bids and correcting mistakes. Then I will cover the check-out and cashing and provide suggestions to make check-out more efficient. Finally, I'll discuss some post-event reports and walk you through wrapping up your fundraising event.



Questions After the Training?



- ▶ Email: support@greatergiving.com
or call Client Services at: **1-866-269-8151**
- ▶ Email questions are answered within one business day.
- ▶ Client Services is available Monday-Friday, 6:30 am – 5:00 pm PT.

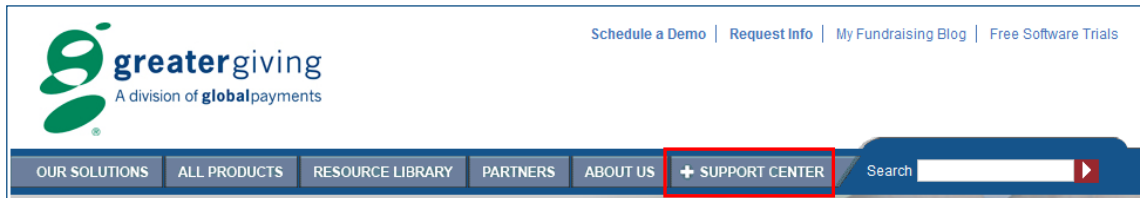
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If you have any questions during or after the training, please feel free to call Client Services at 1-866-269-8151 or send an email to support@greatergiving.com. Questions sent via email are answered within one business day. Phone support is available Monday through Friday from 6:30 AM to 5:00 PM Pacific Time.

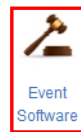
Event Software PC Download



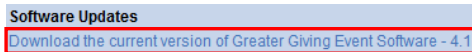
1. Go to www.greatergiving.com and click **Support Center**



2. Click the **Event Software icon**



3. Click **Download the current version of Greater Giving Event Software – 4.1**



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To download the latest version of Event Software PC, in your web browser go to www.greatergiving.com. Click the Support Center button. Click the Event Software icon. Click Download the current version of Greater Giving Event Software 4.1.



Software Download Login



Auctionpay Event Software: Login for Software Downloads

Welcome to the downloads area for Auctionpay Event Software. Customers can use this area to stay up-to-date on the latest version of Auctionpay Event Software and look up their most recent registration codes.

The latest release version of Auctionpay Event Software is 4.1.2.5. Please log in to proceed to the downloads page. You may use either your Auctionpay Event Software login and password or the registration code that came with your software purchase.

Method 1, Using your Auctionpay Event Software login

login *orgname.username*

password *case-sensitive*

Method 2, Using your software registration code

regcode *12 letters/digits*

To request your registration code or online login, please contact support at softwaresupport@auctionpay.com or call 1-866-269-8151.

auctionpay

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To access the software, you will need to enter your login and password information, which can be found in the registration materials we provided for you. I recommend saving the downloaded setup file to a removable device, such as a thumb drive, so you can install the software directly to each computer.



Pre-Event Preparations



Install the Event Software PC on each computer that will be in use at the event.

*Greater Giving does not provide support for network setup or technical issues. Please consult an IT professional for assistance.



- This is a sample computer network for an auction event using the **Auctionpay Card Readers**.
- You will need **1 computer per card reader**, and you may use a card reader with the server computer. You may have as many **Network Clients** as you need, even without a card reader.

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To use the Auctionpay Card Readers, you will need one computer per card reader at your event. To start, make sure Event Software PC is installed on each of the computers that will be in use. Your network needs one server computer, or a data center, hosting your event database. The other computers will be clients, which read the data from your server computer. Both server and client computers may be used with the card reader, and you may have as many additional computers as you like with no card reader attached. These machines can assist with data entry, but not registration or cashiering.



Pre-Event Preparations



Tips for setting up before your event

- **Bring a printer** to your event so you can print reports and receipts. (Bring more printers for more computers.)
- **Test your network** before your event using test bidders.
- **Test each card reader** and call technical support if you run into any problems.



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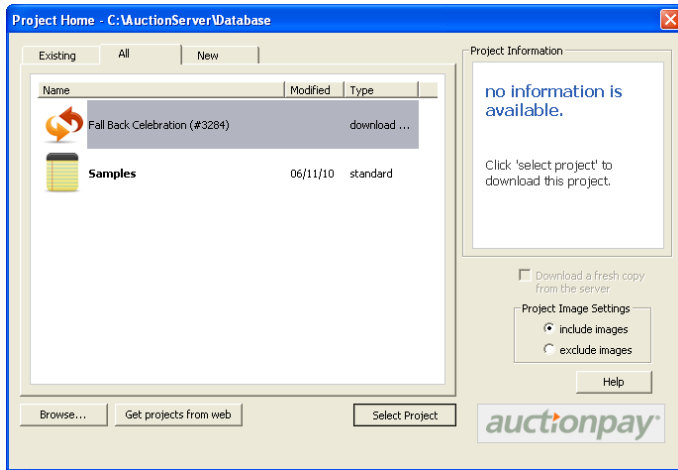
Here are some tips for making sure your event goes smoothly. Bring a printer to your event so you can print pre-event reports and guest receipts. I recommend having one printer for every one to two computers, to avoid a bottleneck during check-out. Also be sure to test your network ahead of time. You can do this by entering a test bidder on one computer and viewing the bidder on each of the other computers on the network. Finally, test each card reader device at least one day prior to your event in case you need to contact technical support. I will discuss testing in just a moment.



Pre-Event Preparations



Download your Greater Giving Online database.



1. In the **File** menu, click **Project Home**.
2. Click the **All** tab.
3. Click **Get projects from web**.
4. Enter a Event Software Online username and password with **organization admin** rights.
5. Highlight the project and click **Select Project**.
6. You can overwrite an existing (open) database or download the online project as a new database.

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For Event Software Online users, you can download your online database directly from Event Software PC for use at your event from the window shown here. To download your database, go to **File** and click **Project Home**. Go to the **All** tab and click **Get Projects from Web**. Enter your Greater Giving Online username and password. This login must have organization administrator rights in order to download the database. All available online projects will appear with a red and yellow arrow icon as shown here; select the database you wish to open and click **Select Project**. You may choose to overwrite an open database or open it as a new database. Please be aware that you can download a fresh copy of your online database (and overwrite any changes made offline) at any time by checking **Download a fresh copy** on the right. Once you have downloaded your final event database the morning of your event, please do not make additional online changes.

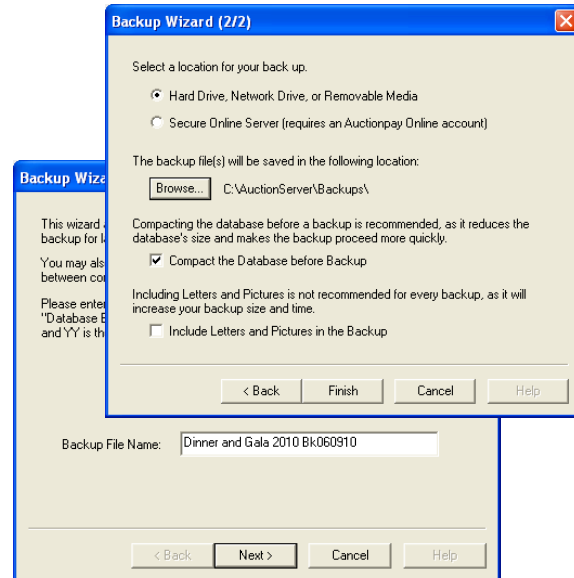


Pre-Event Preparations



To move from an office computer to an event computer, make a back-up of your database to a memory stick or other removable storage device.

1. In the **Utilities** menu, click **Backup Database**.
2. Give the backup file a memorable name like "Dinner and Gala 2010 BK060910." Click **Next**.
3. Choose **Hard Drive or Removable Media**.
4. Click **Browse** and navigate to your removable media. Click **Finish**.



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If you are working from a home or office computer and cannot download directly to the server machine you'll be using at your event, you will need to back up your database for transporting via removable media such as a flash drive or memory stick. To back up, make sure all grid, form and letter views are closed and go to **Utilities**, then click **Backup Database**. Name your backup file and click **Next**. I recommend keeping the date appended to the file name to keep track of when you last backed up your database. Choose **Hard Drive, Network Drive or Removable Media** and click **Browse** to navigate to your memory stick or other removable media. Click **Finish** to save a backup of the database to the selected media.

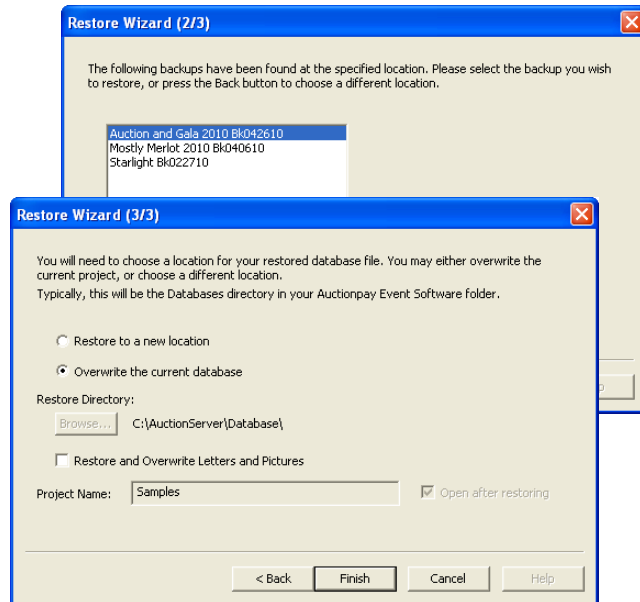


Pre-Event Preparations



At the event, you will need to restore the auction database to the server computer.

1. In the **Utilities** menu, click **Restore Database**.
2. Choose **Hard Drive or Removable Media**.
3. Click **Browse** and navigate to your removable media. Click **Next**.
4. Choose your backup from the list and click **Next**.
5. Choose **Overwrite the current database** and click **Finish**.



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Restore the database to the server computer at your event. To restore, plug in your removable media and open Event Software PC. Go to **Utilities** and select **Restore Database**. Choose **Hard Drive, Network Drive or Removable Media** and click **Browse**. Navigate to your removable media, click **OK**, and click **Next**. Choose the correct backup from the list and click **Next**. Choose **Overwrite the Current Database** and click **Finish**.

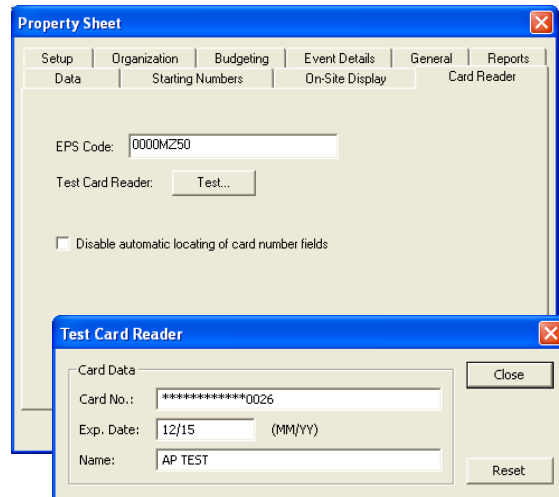


Pre-Event Preparations



Configure the software for the **Auctionpay Card Readers.**

1. Plug the card reader into the USB port.
2. In the **File** menu, click **Properties.**
3. Click the **Card Reader** tab.
4. From your event preparation materials, find the EPS/EPCR code and enter it into the **EPS Code** field.
5. Press **Test** to test the card reader with an Auctionpay test card or any credit card. This card will not be saved.
6. Click **Close**, and click **OK.**



Run the test on **each** computer, with **each** card reader.

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Next you'll need to configure each computer for your Auctionpay Card Readers using your unique event code, called an EPS code or EPCR code. It's helpful to configure the server computer before moving on to the client machines. I also recommend testing each computer and each card reader on the network before going live at registration to ensure everything is configured properly. You can perform the configuration process multiple times on multiple machines, so please feel free to test the card readers when they arrive on a home or office computer and please call Greater Giving technical support if you experience any difficulties. Plug the card reader into a USB port on the computer being configured. Go to **File** and **Properties**, then choose the **Card Reader** tab, and enter the code in the **EPS Code** box. You can find your EPS code in your event confirmation email as well as the event materials shipped to you with the equipment. Click **Test** to open the **Test Card Reader** dialog. You can use one of the test cards shipped with the card readers or a personal credit card for testing. No data will be saved here. Swipe the card and the card data will be populated in the appropriate fields. Click **Close** when finished and click **OK** or **Apply** to save your changes.



Running Reports for Guest Registration



The following are some of the most useful reports for handling registration:

- **BID-01: Guest listing** – Provides a detailed guest list.
- **BID-02: Guest listing (2-column)** – Provides a concise guest list.
- **GRP-01C: Group listing** – Lists guests by table group.
To access this report, in the **View menu**, click **Grid Views** then click **Groups**.
- **UTL-05: Utility – Blank bidder registration forms**
You can find all utility forms in the **File menu**, click **Print General Report**.

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Here are some useful reports for making guest registration quick and painless: The **Guest listing** report provides a detailed guest list, including information like meal choice, table, group, mailing address, admission information, and more. The **Guest listing (2-column)** report is a more concise guest listing. The **Group Listing** report is accessible from the **Bidder** tab or the **Group** view, and lists your guests by table group. Finally, the **Blank bidder registration forms** report is useful for collecting information for guests who did not pre-register. You can find more blank forms under **File** and **Print General Reports**.



Running Reports for Guest Registration



Item	Donor	Package	Staff
Bidder	Table	Sale	Payment
Bid #: _____ to _____			
Bidder Name Contains: _____			
Last Attend: ____/____/____ to ____/____/____			
Group Name Contains: _____			
Table: _____ to _____			
Bidder Purchases:			
Pkg #: _____			
MultiPkg: _____			
\$ Spent: _____ to _____			
Admt. Typ: _____			
Affiliate: _____			
Meal: _____			
Include only bidders who: _____			
Related Views		Reset	Query

Use reports to streamline registration.

- To run a report, choose the appropriate tab in the **Query Bar**. (e.g., bidder reports from the **Bidder** tab or package reports from the **Package** tab.)
- Filter your report using the fields and click **Query**.
- In the **File** menu, click **Print Report**.

Use Reset to clear all fields before querying.

Select Report Output Type

- BID-01: Guest listing
- BID-02: Guest listing (2 column)
- BID-03: Sales listing by supporter
- BID-04: Sales listing by bid # without bidder names or amount
- BID-05: Payment totals by bidder
- BID-06: Receipts with settings dialog
- BID-06a: Receipts with presets
- BID-07: Receipt listing
- BID-08: Bidder mailing labels
- BID-09: Bidder registration labels
- BID-10: Bidder name tags
- BID-11: Bid cards
- BID-12: Bidder place cards 2 per page
- BID-13: Bidder place cards 6 per page
- BID-14: Admittance receipt

Additional sales reports are accessible through the bidder and package grid views.

Report Title: BID-01: Guest listing

Print Only Selected Records Print All Records in the Grid

Print...
Preview...
Text Output...
Cancel

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Now I will discuss some recommended reports for streamlining guest registration at your event. To run a report, such as the **Guest Listing** report, choose the appropriate tab. For example, to run the **Guest listing** report, choose the **Bidder** tab on the **Query** bar. Filter your report using the fields and click **Query** when finished. For the Guest Listing, I recommend using the **Include only bidders who** filter bar. Choose **Have Seats Used** and click **Query** to search for all bidders attending your event. If your results do not come up as you expect, try clicking **Reset** before applying your filters. Finally, go to **File** and **Print Report**, and choose the appropriate report from the list.

Guest Registration

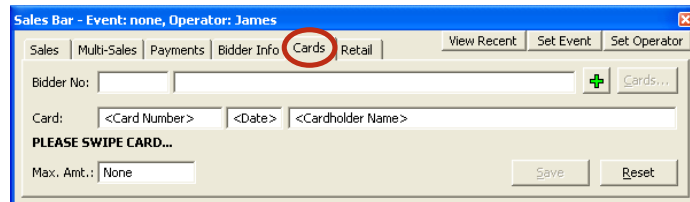


Auctionpay Card Readers allow you to quickly and securely capture credit card information.

- Press **F8** on your keyboard to open the **Sales Bar** on any PC with a card reader.
- Click the **Cards** tab.
- Swiping a bidder's credit card marks that bidder as **ExpressPay**.



Cards will *not* be saved unless entered through the **Cards** tab.



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Your computer network is plugged in and ready to go, and each of your volunteers have a guest list in hand. To register bidders and use the Auctionpay card readers to securely capture credit card information, press **F8** on the keyboard to access the **Sales Bar** and choose the **Cards** tab. Each computer swiping bidder cards will need to be on the **Cards** tab in order to save card information; any card data swiped to another location will be lost. All bidders with saved credit card information are marked as **ExpressPay**, indicating you have already collected payment for anything they purchase at your event.

Guest Registration



1.

Offer to swipe your guest's credit card for convenience at the event.

- If you swipe a card before choosing a bidder, the software will try to match the card to an existing bidder.

Bidder No: Cards...

Card:

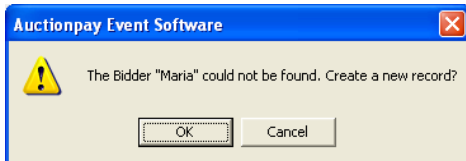
PLEASE SWIPE CARD...

Max. Amt.:

2.

Enter your guest's bidder number or name and press **Enter** to auto-populate.

- To add a new bidder, click the **+** button.
- OR, simply enter the new bidder's name and press **Enter**.



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Begin the registration process by offering to swipe your guest's card for convenience at the event. Many regular charitable event goers are already familiar with ExpressPay and will be glad to swipe a card ahead of time; others can wait until the end of the night to pay if they choose. You can enter a bidder's name or number into the fields and press **Enter** as shown in Step 2, or swipe the credit card and the software will attempt to match the cardholder name to a bidder in the database. If there is a match, the bidder's information will be populated in the fields. If the software cannot find a match, you can add a new bidder record by clicking **OK** at the prompt. Optionally, enter the new bidder's name in the bidder name field and press **Enter** on the keyboard, or you can click the green plus icon shown.



Guest Registration



3.

After entering bidder information, swipe your guest's card and click **Save** to save the credit card *and the bidder will be marked as ExpressPay.*

To manually key in a card, just type the card number, expiration date and cardholder name as it appears on the card.

The screenshot shows a web form with the following fields and controls:

- Bidder No.: 101
- Bidder Name: Hilda Bergland
- Card: *****0026 | 12/15 | JOAN H BERGLAND
- Section: CONFIRM WITH BIDDER
- Max. Amt.: None
- Buttons: Save, Reset
- Additional controls: A pencil icon and a "Cards..." button are visible next to the bidder name field.

Your guests can always return at the end of the night for cashiering, so registering for ExpressPay is not mandatory.

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Swiping a credit card in the **Cards** tab will populate the Card fields as shown in step 3. When all bidder and card information is filled out, click **Save** to save the credit card and mark the bidder as ExpressPay. If you encounter an error swiping a card, you can manually enter the card number, expiration date, and cardholder name (as it appears on the card). Remember, if your guest chooses not to ExpressPay, he or she can return at the end of the night and swipe a credit card at that time instead.



Entering Winning Bids



As your auctions close, enter the winning bid information in the **F8 Sales Bar** in the **Sales** tab.

Enter the package number or name and press **Enter**. This auto-populates the package information here.

Sales Bar - Event: none, Operator: James

Sales | Multi-Sales | Payments | Bidder Info | Cards | Retail | View Recent | Set Event | Set Operator

Package No: 101 | Men's exercise clothes and a duffle to carry them

Bidder No: |

Sale Price: 50

Sell | Reset

Package No: 101 | Men's exercise clothes and a duffle to carry them

Bidder No: 128 | Arnold & Peggy Jensen

Sale Price: 50

Sell | Reset

Enter the winning bidder (by name or number), the final sale price and click **Sell**.

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Registration is over and your silent auction rooms have started to close. To enter the winning bid information, also known as the data entry phase, open the **F8 Sales Bar** and choose the **Sales** tab. Using the bid sheet, enter the package number or name and press **Enter**. This automatically fills in the rest of the package information. Then enter the winning bidder number and press **Enter** to populate the bidder information. Type the final sale price and click **Sell**. You can use **Enter** or **Tab** to move from field to field anywhere in the **Sales Bar**.



Entering Winning Bids



You can also sell **multi-sale packages** such as raffle tickets, walk-in admission, and more.

1. In the **F8 Sales Bar**, click the **Multi-Sales** tab and select the multi-sale package you wish to sell.

Sales Bar - Event: none, Operator: James

Sales **Multi-Sales** Payments Bidder Info Cards Retail View Recent Set Event Set Operator

MS Package: Raffle Tickets Sales Price: \$10

Bidder No: 101 Hilda Bergland

Quantity: Sale Price: Sell Reset

2. Enter the bidder number or name and press **Enter** to populate.

3. Enter the quantity sold and press **Enter** to calculate the sale price.

4. Click **Sell**.

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A multi-sale package can be sold multiple times. Multi-sale packages have a set sale price instead of a minimum bid. If you have sold any multi-sale packages at your event, such as raffle tickets, walk-in admission, or t-shirts, enter them in the **Multi-Sale** tab of the **F8 Sales Bar**. From the **MS Package** drop-down list, select the package to sell. Enter the bidder information and press **Enter**, then enter the quantity, press **Enter** again, and click **Sell**. Using **Enter** will automatically calculate the total sale price. You can always override the sale price manually. This is helpful if you sell your multi-sale packages in bulk at a discounted price, for example: 3 raffle tickets for \$15.

Making a Multi-Sale Package



Package Form

Pkg No.: Assign Section: Class:

Name: Multi-Sale Package Multi-Sale Addendum

Value: (Items Tot Val): Value Type: Estimable

Restrictions: More...

Description: (HTML codes like affect formatting only and do not show when printed)

Image:

Bid Sheet Values:

Override Calculated Defaults

Min. Bid: 1 Min. Raise: 1

Price: 150

Bid #	Name	Qty.	Price

Name	#	Value

Total Sales \$: Qty. Sold: Description Add... Remove

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If you haven't already created your Multi-Sale packages, in the **Data** menu, click **New Package**. Fill in the package number, the package name, make sure to click the **Multi-Sale** box. Finally go to the **Bid Sheet Values** area and check the box to override bid sheet values and update the **Price** field to the price that you would like to charge per sale. Once set up, press **F10** to save or **F11** to save and create another multi-sale package.



Checking Out



Speed up your check-out process by printing batch receipts.

Bidder Purchases:
Pkg #:
MultiPkg:
\$ Spent: 1 to
Admt Typ:
Affiliate:
Meal:
Include only bidders who:
Related Views Reset Query

We only want to print receipts for bidders with purchases.

1. To print receipts for all bidders that made purchases at your event, in the Query Bar, click the **Bidder** tab.
2. Enter **1** into the first box next to **\$ Spent**.
3. Click **Query**.
4. In the **File** menu, click **Print Report**. (Optionally use **CTRL + P** or click the printer icon.)

You can filter any report this way.

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We have entered all our sales and now we will start discussing check out. You have two options for printing bidder receipts. You can print all of them at one time using batch mode printing, or you can print receipts for each bidder when they check out. First we will discuss how to print all receipts in a batch. Printing bidder receipts before check-out begins is a great way to streamline cashiering at the end of the night. To print receipts for all bidders that made purchases at your event and avoid printing receipts with no sales, choose the **Bidder** tab of the **Query** bar on the left-hand side. If the **Query** bar is hidden, press **F7** to display it. Enter the number 1 in the first box next to **Dollars Spent** and click the **Query** button. With the bidder grid displayed, go to **File** and **Print Report**. Remember that you can filter any report this way.



Checking Out



Speed up your check-out process by printing batch receipts.

- From the **Select Report Output Type** dialog, choose the **BID-06: Receipts with settings dialog**.
- Once you've set up your receipt once, you can choose **BID-06a: Receipts with presets** to skip the questions.

Any bidders that are not marked **Express Checkout** will need to swipe a card or provide an alternative form of payment.

- EXPRESS CHECKOUT -

507

The Strong Community Foundation

Auctionpay
Summer Vacation
May 17, 2009

Receipt for Hilda Berglund
Bidder #: 101 Table #: 1

Hilda Berglund
1350 205 Garden Place
Portland OR 97223

Purchases:				
Package	Package Name	Value	Qty. Tax	Sale Price
1	Hilly Pitt for the Children	\$135	1	\$206
<i>This package contains 2 certificates and 2 items to pick up</i>				
303	Headliner's Collection Edition Card	\$100	1	\$130
397	Compassion	\$20	1	\$15
398	Compassion Ink Hand Donation	\$0	1	\$500
399	Raffle Tickets	\$0	5	\$50
				Purchases:
				Tax
				Buyer's Premium:
				Tax
				Total:
				\$2165

Payment:			
Date	Payment Type	Check/Card Ref	Amount
11/4/2007	Check	1588	\$1165
			Total Payment:
			\$2165
Total Due:			
\$0			

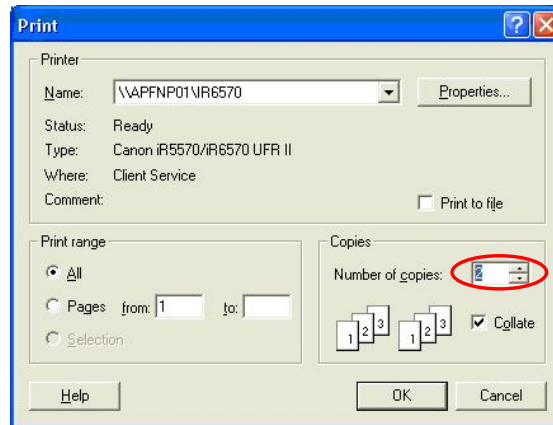
The amount of any contribution that is tax-deductible is limited to the excess of any money over the value of goods or services provided. The above values are estimations by the donor and do not necessarily reflect the fair market value of the items at the time of sale. Tax ID: 54-0816466

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In the report dialog, choose the **Receipts with settings dialog** report the first time you run your receipt to set up your receipt preferences. Next time you choose to print a receipt, the **Receipts with presets** report will remember your settings. Click **Print** to print a copy of the receipt for each bidder in the grid. Any bidders that are not marked Express Checkout on the receipt will need to provide some form of payment at cashiering. Anyone marked for Express Checkout can bypass cashiering and go directly to pick up their items since you have already collected a form of payment from them.

Printing All Receipts at One Time



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If you need more than one copy of each bidder receipt when you print them in batch mode, you just need to indicate that on the **Print** dialog box that opens when you click **Print**. This dialog box opens and under **Number of copies** enter the number of copies that you would like to print.



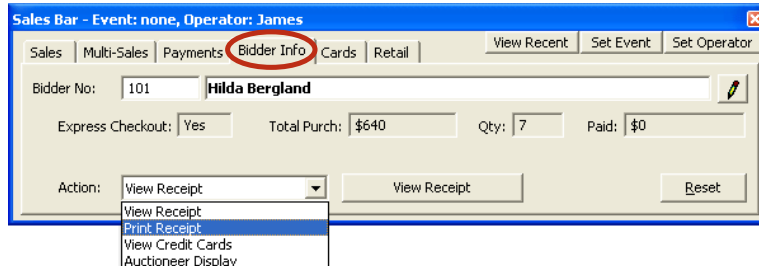
Checking Out



Printing individual bidder receipts

1. In the **F8 Sales Bar**, click the **Bidder Info** tab.

2. Click **Print Receipt** to print the receipt, or click **View Receipt** to view the **Bidder Purchases Form** before printing.



To change the number of receipt copies printed by the software, in the **File menu**, click **Properties** and then click **Reports**. (The default is 2.)

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You can also print receipts for individual bidders using the **Bidder Info** tab of the **F8 Sales Bar**. Enter the bidder number or name and press **Enter**. Next to **Action**, select **Print Receipt** and click the action button (which now reads **Print Receipt**) to send a paper copy of the receipt directly to the printer. Select **View Receipt** from the action menu to view a list of purchases, payments and credit cards on file. To change the number of copies of the receipt that print from the **Bidder Info** tab, go to **File, Properties**, and choose the **Reports** tab. It defaults to 2 copies: one for you and one for your guest. You will want to ask the guest to sign the merchant copy of the receipt to authorize the payment.



Checking Out



Entering other forms of payment

For guests who choose to pay by cash or check, in the **F8 Sales Bar**, click the **Payments** tab.

Sales Bar - Event: none, Operator: James

Sales | Multi-Sales | **Payments** | Bidder Info | Cards | Retail | View Recent | Set Event | Set Operator

Date: 06/11/2010 Bid #: 101 Hilda Bergland

Payment Type: Check Amount: 640.00 Due: \$640

Check No: 4116 Transfer No: [] [Pay] [Reset]

DO NOT enter payments for credit card charges submitted through the software. These are automatically generated during the banking process.

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It's time to collect payments. For guests who choose to pay by cash or check, choose the **Payments** tab of the **F8 Sales Bar**. Enter all cash, check, and other non-credit card payments in this tab. Simply fill out the bidder number, payment type, dollar amount, and click **Pay**. Remember: Do not enter payments for credit cards here, even during cashiering. Payments for credit cards are automatically generated during the banking process. If you manually enter credit card payments, the associated cards will not be charged correctly.



Checking Out



Cashiering is simple.

Click here to view cards on file for any bidder.

REMEMBER: Cards swiped outside the **Cards** tab will NOT be saved.

To cashier bidders, click the **Cards** tab and swipe a credit card, clicking **Save** as usual. They will be marked as **Express Checkout** and billed along with your pre-swiped bidders.

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Cashiering bidders that are paying by credit card is simple, and identical to the registration process. On the **F8 Sales Bar**, open the **Cards** tab. Enter the bidder information, swipe the credit card, and click **Save**. Bidders that swipe after the event are marked ExpressPay along with bidders that swiped before the event, and they will all be submitted to the bank together. Remember that cards swiped anywhere besides the **Cards** tab will not be saved, and thus cannot be billed for the amount due. If a bidder would like to swipe a new credit card, you can view cards already on file by clicking the **Cards** button. I'll come back to split pays in a moment.



Correcting Mistakes



Replace, modify, or delete sales from the **F8 Sales Bar**.

1. To replace a sale, click the **Sales** tab and enter the sold package number or name. Press **Enter**.
2. Enter a new bidder number and sale price and click **Sell**.

Sales Bar - Event: none, Operator: James

Sales | Multi-Sales | Payments | Bidder Info | View Recent | Set Event | Set Operator

Package No: 5 Give Your House a New Look!

Bidder No: 123 Carl & Louise Hays

Sale Price: 300

Sell Reset

Auction Warning

Package number 5, "Give Your House a New Look!" has already been sold to Carl & Louise Hays (Bidder Number 123). Do you want to replace the previous sale, or continue and add a second sale?

Replace Continue Cancel

- To modify a sale, enter a new sale price and click **Sell**.
- To delete a sale, simply delete the bidder number and click **Sell**.

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After printing a bidder receipt, your guest may find errors or have questions about purchases listed on the receipt. To replace a sale of a package, or sell the package to a different bidder, choose the **Sales** tab of the **F8 Sales Bar**. Enter the package number and press **Enter**. The **Sales Bar** will fill in the winning bidder that was previously entered. To replace the sale, change the bidder number, press **Enter**, correct the sale amount if necessary and click **Sell**. The software will prompt you to replace the existing sale or add a new one. You may sell packages to more than one bidder. You can split a package between bidders this way or sell the same item multiple times if you have more than one. If you would like to modify the sale price of an existing sale, bring up the sale the same way, change the sale price and click **Sell**, then click **Replace** to remove the old price and enter the new one. To delete a sale, enter the package number and press **Enter** to view the current purchaser. Delete the bidder number from the box and click **Sell**. The software will prompt you to delete the sale. Click **Continue** to remove the sale.



Correcting Mistakes



You can also view and delete sales from the **Bidder Purchases Form**.

- In the **F8 Sales Bar**, click the **Bidder Info** tab and click **View Receipt** to view the **Bidder Purchases Form**.
- To delete a sale, select the sale under **Purchases** and press the **Delete** key.
- View credit cards a bidder has on file here.

Package	Name	Qty.	Value	Sale Price
3	Help For the Gardener	1	\$235	\$200
303	Handmade Collectors Edition C	1	\$300	\$330
999	Raffle Tickets	5		\$50

Payment Type	Date	Amount

Card	Amount
Visa ****0026	\$640

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Additionally, you can view and delete sales from the **Bidder Purchases Form**. From the **F8 Sales Bar**, choose the **Bidder Info** tab. Next to **Action**, choose **View Receipt**, and click the action button to bring up the **Bidder Purchases Form**. Here you can add or delete sales listed in the **Purchases** grid or payments listed in the **Payments** grid using the **Insert** and **Delete** keys on your keyboard. Credit card payments pending submission are listed in the **Credit Card Charges to be Submitted** grid. To view or edit credit cards on file, click the **View Edit Cards** button.



Correcting Mistakes



Manage cards on file and perform split pays with **View/Edit Cards**.

- Move cards up and down on the list to determine in what order they will be billed.
- For **Split Pays**, enter the first card's billable amount as the **Max. Amt.** and move it to top position on the list.
- You can swipe and save any additional cards by clicking **Add** in the **Bidder Credit Cards Form**.

The image shows two overlapping software windows. The top window is titled "Bidder Credit Cards Form" and contains the following fields and table:

Bidder: 101 Hilda Bergland
Group: Bergland Table: 1
Seats Purch: 0 Seats Used: 1

Priority	Card	Name on Card	Status	Active	Max. Amt
1	Visa ****0026	AP TEST	New	Yes	None

The bottom window is titled "Swipe Card" and contains the following fields:

Bidder No.: 101 Hilda Bergland
Card: PLEASE SWIPE CARD...
Max. Amt.: 200.00 Active
Card Data:
Card No.: 4047000000001234
Exp. Date: 01/10 (MM/YY)
Name: Hilda Bergland

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You can manage credit cards on file and perform split pays using the **View Edit Cards** button in the **Bidder Purchases Form**. Use the **Move Up** or **Move Down** buttons to determine in what order the credit cards on file will be billed. If there are no **Maximum Amounts** entered, the total amount will be billed to the first card on file. To perform a split pay, add a **Max Amount** by double-clicking on the card in the **Bidder Cards Form**. Put all cards with **Maximum Amounts** first on the list. The remainder will be billed to the cards that appear lower on the list. Click **Add** to swipe and save any additional credit cards.

How to Split Pay



The screenshot shows a software window titled "Bidder Credit Cards Form". At the top, there are fields for "Bidder:" (4000) and "Hilda Bergland". Below that, "Group:" is set to "Bergland", "Table:" is "1", "Seats Purch:" is "0", and "Seats Used:" is "1".

The main section is titled "Credit Cards on File:" and contains a table with the following data:

Priority	Card	Name on Card	Status	Active	Max. Amt
1	Visa ****4200	Hilda Bergland	New	Yes	\$500
2	Visa ****0026	AP TEST	New	Yes	None

At the bottom of the window, there are buttons for "Add...", "Move Up", "Move Down", "Activate / Deactivate", and "Delete". A red circle highlights the "Active" column header and the "Yes" value in the first row.

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Here is an example of a completed record for split pay. Notice the **Max Amount** is filled out for the top card on file. The remaining balance will be charged to the card below. This process can be done multiple times if the client wishes to split the amounts among more than two cards.



Event Wrap-up



Back up your database and run final event reports.

- At the end of your event, in the **Utilities** menu, click **Backup Database** to secure all of your event data and remove it from the event site.
- Here are some common post-event reports:

BID-03: Sales listing by supporter – Details purchases by bid number.

PKG- 03: Sales listing by package with buyers – Lists package sales by package number.

PAY-02: Payment totals by type – Event revenue.

SUM-13: Summary – sales totals by pkg. sorted by amount and **SUM-14: Summary – sales totals by bidder sorted by amt.** rank highest-grossing bidders and packages.

You can find all **SUM** reports in the **File** menu, click **Print General Reports**.

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Your event is over and your guests have gone home. Now it's time to back up your database, run some final event reports to congratulate yourself on a job well done, and head home as well. To back up your database to your removable media, such as a memory stick, close all open grid views and go to **Utilities**, then select **Backup Database**. Some common event reports are the **Sales listing by supporter**, which details all purchases by bidder number; the **Sales listing by package with buyers**, which lists package sales by package number; the **Payment totals by type**, which displays your event revenue by payment type; and the **Summary sales totals by package sorted by amount** and the **Summary sales totals by bidder sorted by amount** reports rank your highest-grossing bidders and packages. Summary reports are accessible by going to **File** and **Print General Report**. The summary reports are also helpful during your event to stir up excitement by capitalizing on high-bidding guests and luxurious packages.



Event Wrap-up

Submitting to the bank



Credit Card Charges Form

Charges Summary				
	Approved	Declined	Remaining	Total
Number	0	0	2	2
Amount			\$1260.27	\$1260.27

Charges to be Submitted:

Bid #	Name	Card	Amount	Name on Card
101	Hilda Bergland	Visa ****0026	\$640	AP TEST
144	Jonathan Hardy	Visa ****2046	\$620.27	Jonathan Hard

Submit Charges Decline Resolution
 Upload Card Data There are no declines to resolve. View Declines

Submitted Charges:

Bid #	Name	Card	Amount	Status

- Run the **BID-18: Charges to be submitted** report for all ExpressPay bidders with an outstanding balance, listing the amounts to be submitted.
- When you're ready to submit, in the **Data** menu, click **Submit Credit Card Charges**. You can review the list once more before submitting.
- Click **Submit Charges** and enter your Event Software PC username and password.
- This process automatically generates a payment for each of your submitted charges.

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After getting a good night's sleep and double-checking your data entry, it's time to send your credit card charges to the bank. Run the **Charges to be submitted** report for a list of all bidders with a credit card on file, detailing the card type and the amount to be transmitted. When you are ready to submit, go to **Data** and **Submit Credit Card Charges**. You can view the charges again under the **Charges to be Submitted** grid, and click **Submit Charges** when everything looks good. You will need your Event Software PC username and password to authorize this process. Submitting your charges automatically generates a payment upon approval for each of the transmitted amounts. You can view these payments on the **Query** bar, under the **Payments** tab. Look here for approval codes or other detailed transaction information.



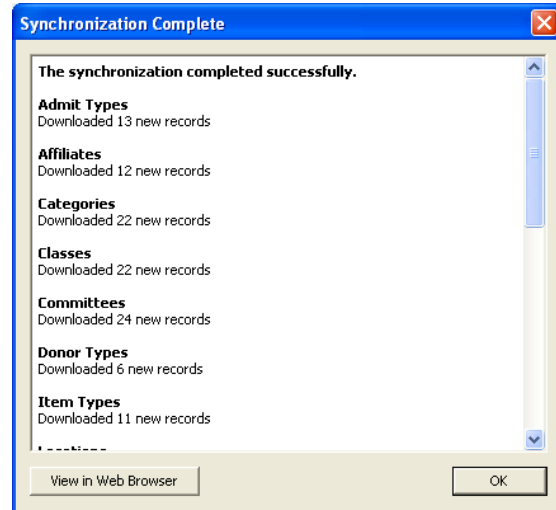
Event Wrap-up



Synchronizing your database with Greater Giving Online

- Once all outstanding balances are resolved, in the **Data** menu, click **Synchronize with Online Project** to send your event information up to Event Software Online.
- After the sync, a summary of uploaded data appears.

The synchronization will fail if you have any credit card charges awaiting submission.



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For those users that originally downloaded the event night database from Event Software Online, you can upload your new data back online using the synchronization tool. Once all outstanding credit card charges are submitted, go to **Data** and select **Synchronize with Online Project**. After the synchronization is complete, a summary of uploaded data will appear. Keep in mind that the synchronization will fail if you have any credit card charges to be submitted.



Greater Giving Support



- ▶ Call Client Services at: **1-866-269-8151**
Monday-Friday: 6:30 am – 5:00 pm PT
After-hours support is available for **event night only** at the same number.
- ▶ Email: support@greatergiving.com
Questions are answered within 1 business day.
- ▶ Visit our website at www.greatergiving.com

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If you have any questions, feel free to give us a call at 1-866-269-8151 or email us at support@greatergiving.com. Emailed questions are answered within one business day. Our phone support line is available for general inquiries Monday through Friday, 6:30 AM to 5:00 PM Pacific Time. After-hours support is available for organizations on event night only. For resources regarding the card readers or Event Software PC, visit www.greatergiving.com and click on the Support Center. Thank you.



End of Presentation

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