Event Day Using Auctionpay Terminals

Welcome, and thank you for taking the time to listen to today's training session. The purpose of today's training is to help you get started using Greater Giving Event Software PC and prepare for your Event Day. Let's get started.

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

The training today will cover a number of topics. I'll provide suggestions for preparing for your event and using your credit card equipment. I will also cover some recommended reports for expediting guest registration. I'll walk you through the registration procedure using the Auctionpay Terminals, and then we will discuss the data entry portion, entering winning bids and correcting mistakes. Then I'll cover the check-out and cashiering 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.

greatergiving

Preparing for your Event

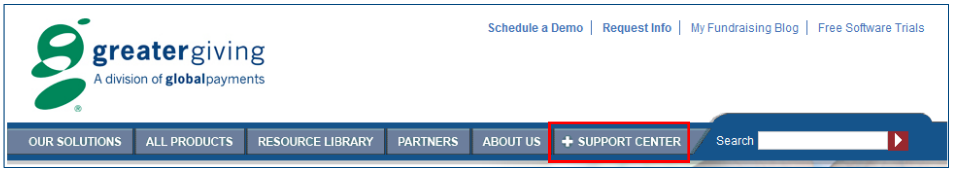
Dedicated to Nonprofit Fundraising Success

Up until the day before your event, or even Event day, if you have been working in Event Software Online, you will need to install Event Software PC.

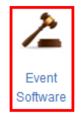
Installing your Software

Where to find the software

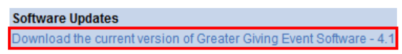
1. Go to www.greatergiving.com and click **Support Center**



2. Under Project Support and Training Center click the **Event Software** icon



3. On the **Resources** tab, **click Download the current version of Greater Giving Event Software – 4.1**

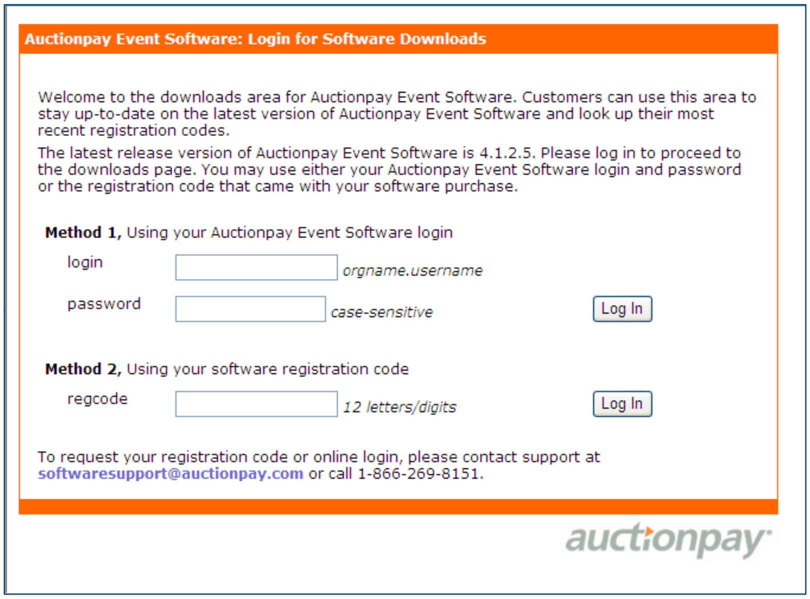


Dedicated to Nonprofit Fundraising Success

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

greatergiving


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* Log In

Method 2, Using your software registration code

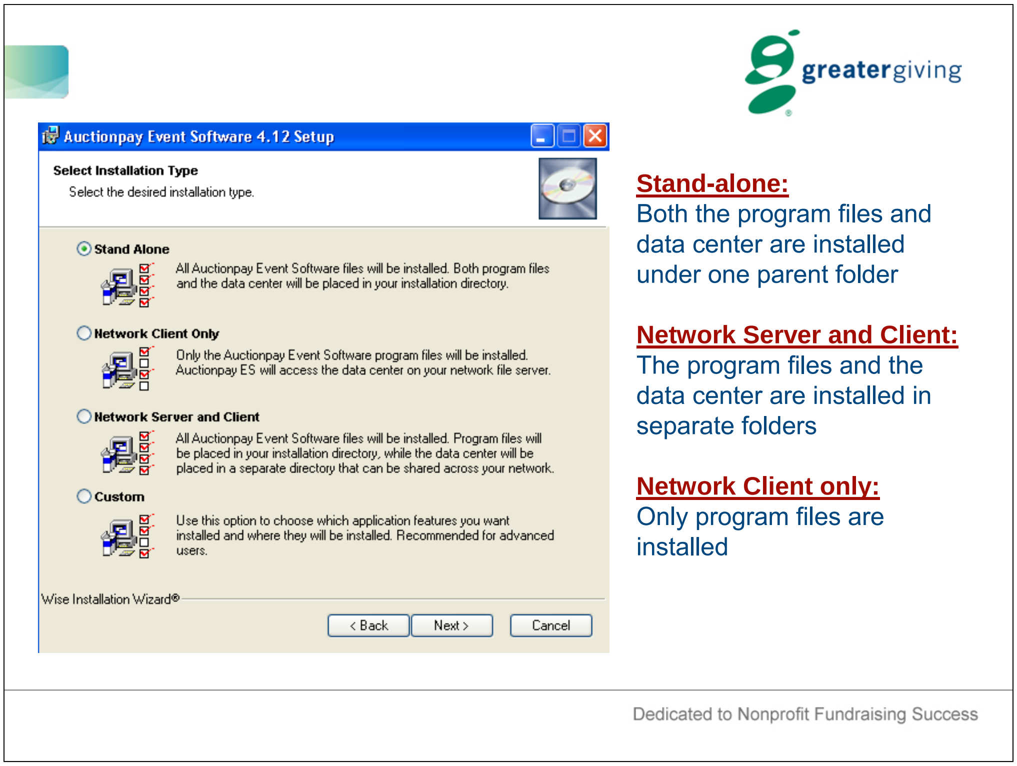
regcode *12 letters/digits* Log In

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

auctionpay

Dedicated to Nonprofit Fundraising Success

To access the software, you'll 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.



If you are going to be using the software on one computer at your home or office, you would need to install the Stand-alone version. Network Server and Client and Network client only is for event day, when you need to set up a PC network to run your event.

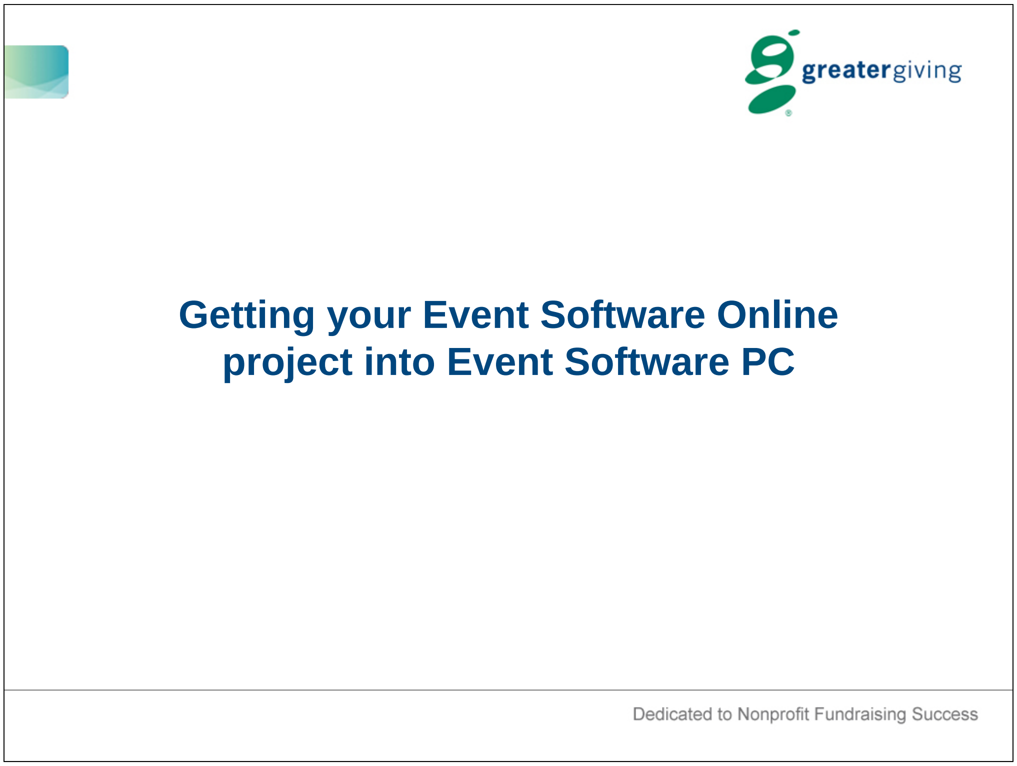
This is an example of a network installation. The first computer is installed at the "Network Server and Client" and the subsequent computers are installed as "Network Client Only".

Support Facts:

Greater Giving provides support for all software related questions & needs. For all computer hardware questions & needs, please consult an IT professional for assistance.

Dedicated to Nonprofit Fundraising Success

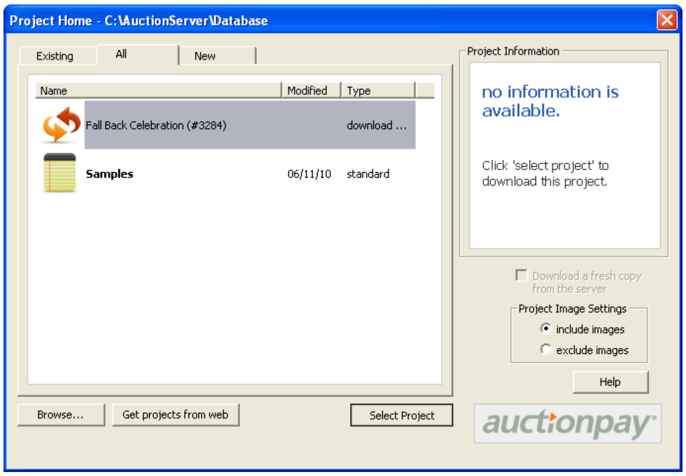
This is an example of a network installation. The first computer is installed as the Network Server and Client and the subsequent computers are installed as Network Client Only.



Once the software is installed, Next, you will need to download your database into Event Software PC. This is only for the Event Software Online users.

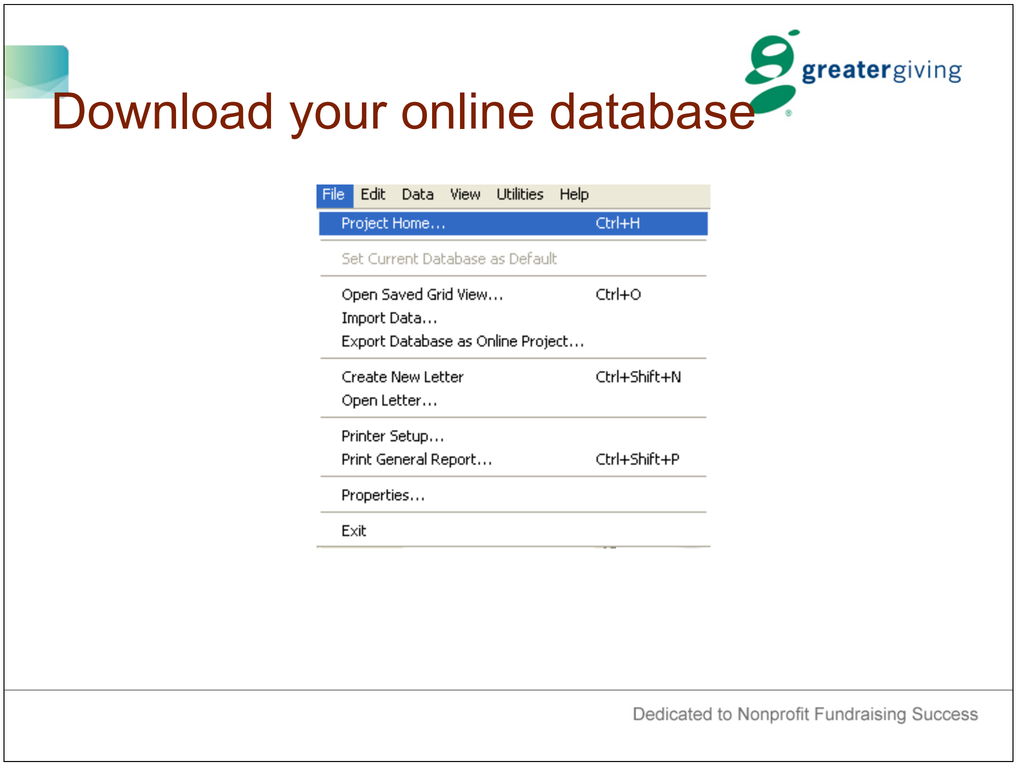
Pre-Event Preparations

Download your Event Software Online project.

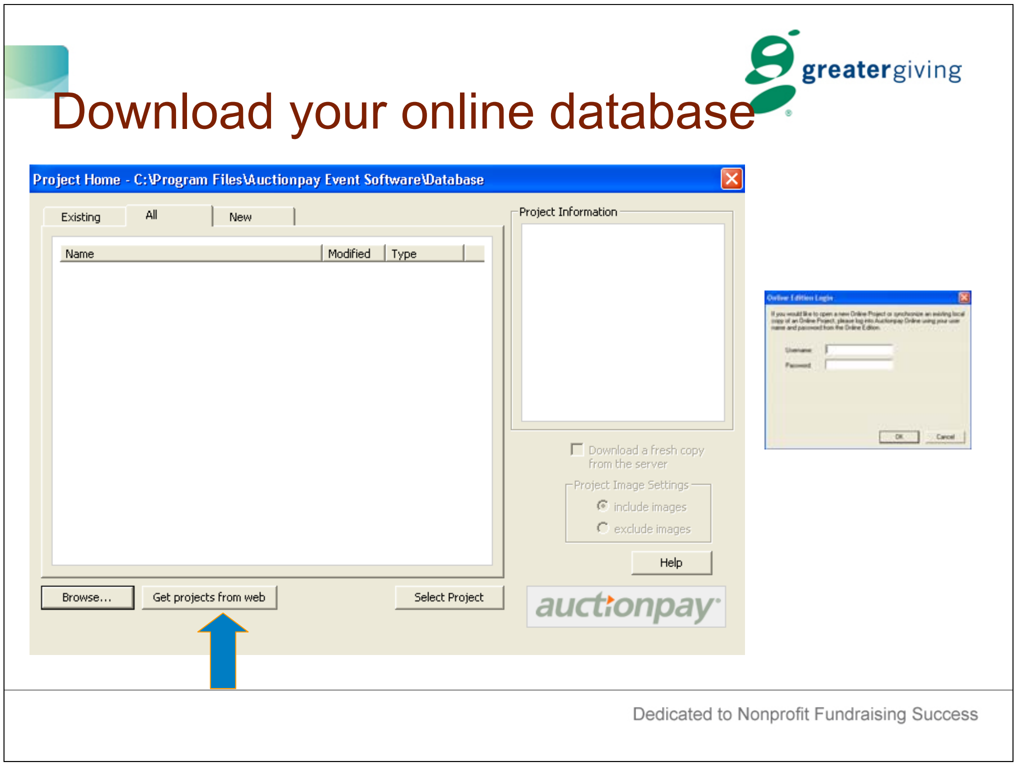


1. In the **File** menu, click **Project Home**.
2. Click the **All** tab.
3. Click **Get projects from web**.
4. Enter a Event Software Online username and password with organization admin rights.
5. Highlight the project and click **Select Project**.
6. You can overwrite an existing project or download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

For Event Software Online users, you can download your online database directly from Event Software PC for use at your event using the window shown here.

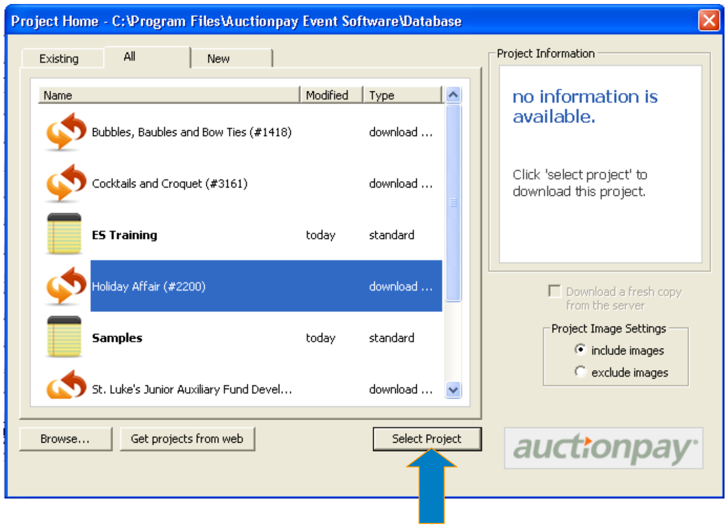


We will walk through those steps. To download your database, go to **File** and click **Project Home**.



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.

Download your online database

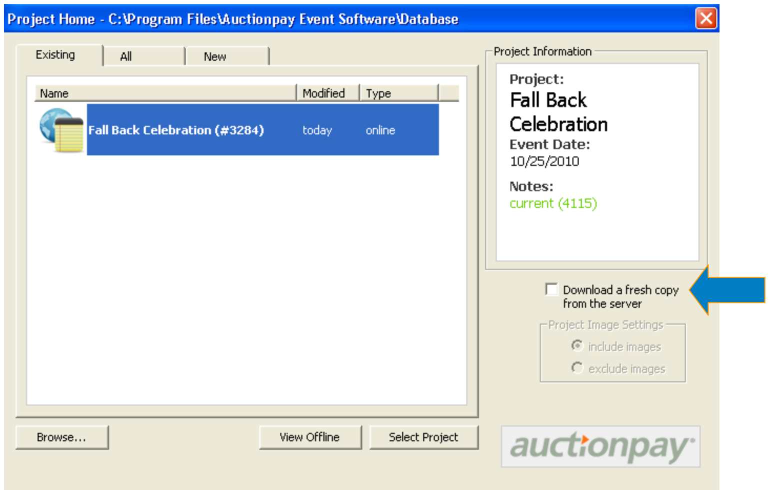


Dedicated to Nonprofit Fundraising Success

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**.

greatergiving

Bringing down again – no merging



Dedicated to Nonprofit Fundraising Success

You may choose to overwrite an open database or open it as a new database. Just to note, if you bring a copy down to train with or for testing, 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.

Terminals vs. Card Readers

Dedicated to Nonprofit Fundraising Success

We offer two options for taking credit cards at your event. Terminals or Card Readers.

greatergiving

Terminals

Requirements:

- Each device needs to have its own power source (2 amps each)
- If using with Software, must install the USB Driver (included in the box that we send terminals)
- Must have an analog phone line to submit payments

Benefits:

- Can be used with or without software (laptops)
- Can print its own receipt

Dedicated to Nonprofit Fundraising Success

Terminal Requirements: Each device needs to have its own power source of 2 amps each. You will need to install the USB Driver that will be included in the box of terminals we send. And you will need an analog phone line to submit payments after your event. The benefits of using terminals: Can be used with or without software or computers. Can print its own receipt.

Card Readers

Requirements:
- The most up-to-date Event Software PC on all computers
- Networked computers (server and client)
- One USB port needed to connect Card Reader to your PC
- At least 1 printer at the event (since the only copy of receipt must be printed)
- New EPS/EPCR Code for each event

Benefits:
- No additional power source needed
- All information for event is held in 1 place
- Payment submission is through the internet

Dedicated to Nonprofit Fundraising Success

Card Reader Requirements: The most up-to-date Greater Giving Event Software on all computers. Networked computers (server and client). One USB port needed to connect Card Reader to your PC. At least 1 printer at the event. You can only print receipts from the software. New EPS EPCR Code for each event. The benefits of using Card Readers: No additional power source is needed. All information for your event is stored in one place. Payment submission is through the internet.

greatergiving

Best Practices

Recommended:

1 device per 100 guests (either Card Readers or Terminals)

Card Readers – need to combine registration and check out areas

Card Readers – only 1 Card Reader per PC

Terminals – Separate registration and check out areas (registration on the first floor & check out on the second floor) – you will not need to move and re-networking computers.

Dedicated to Nonprofit Fundraising Success

Best Practices that we recommend: One device per 100 guests. With Card Readers, you need to combine registration and check out areas and you can only have 1 card reader per computer. If you are having separate areas for registration and check out, for instance registration on the first floor and check out on the second floor, we recommend you use terminals so you will not need to move and re-network your computers.

Next, I will go over the Registration and Check-in process.

Running Reports for Guest Registration

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

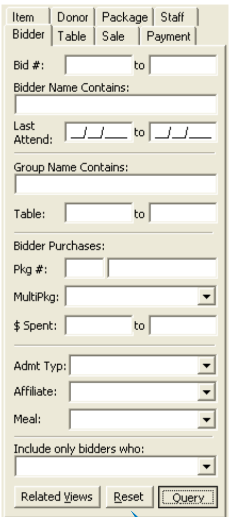
- **BID-01: Guest listing** – Provides a detailed guest list.
- **BID-02: Guest listing (2-column)** – Provides a concise guest list.
- **GRP-01C: Group listing** – Lists guests by table group.
  To access this report, go to **View > Grid Views > Groups**.
- **UTL-05: Utility – Blank bidder registration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

Dedicated to Nonprofit Fundraising Success

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

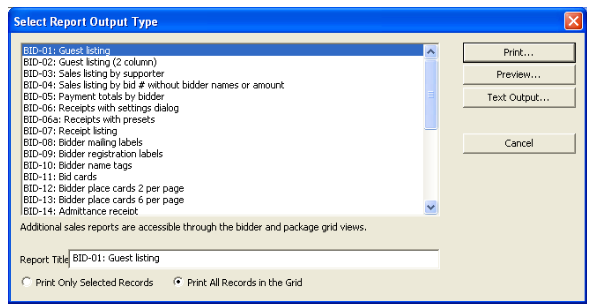
greatergiving



Use reports to streamline registration.

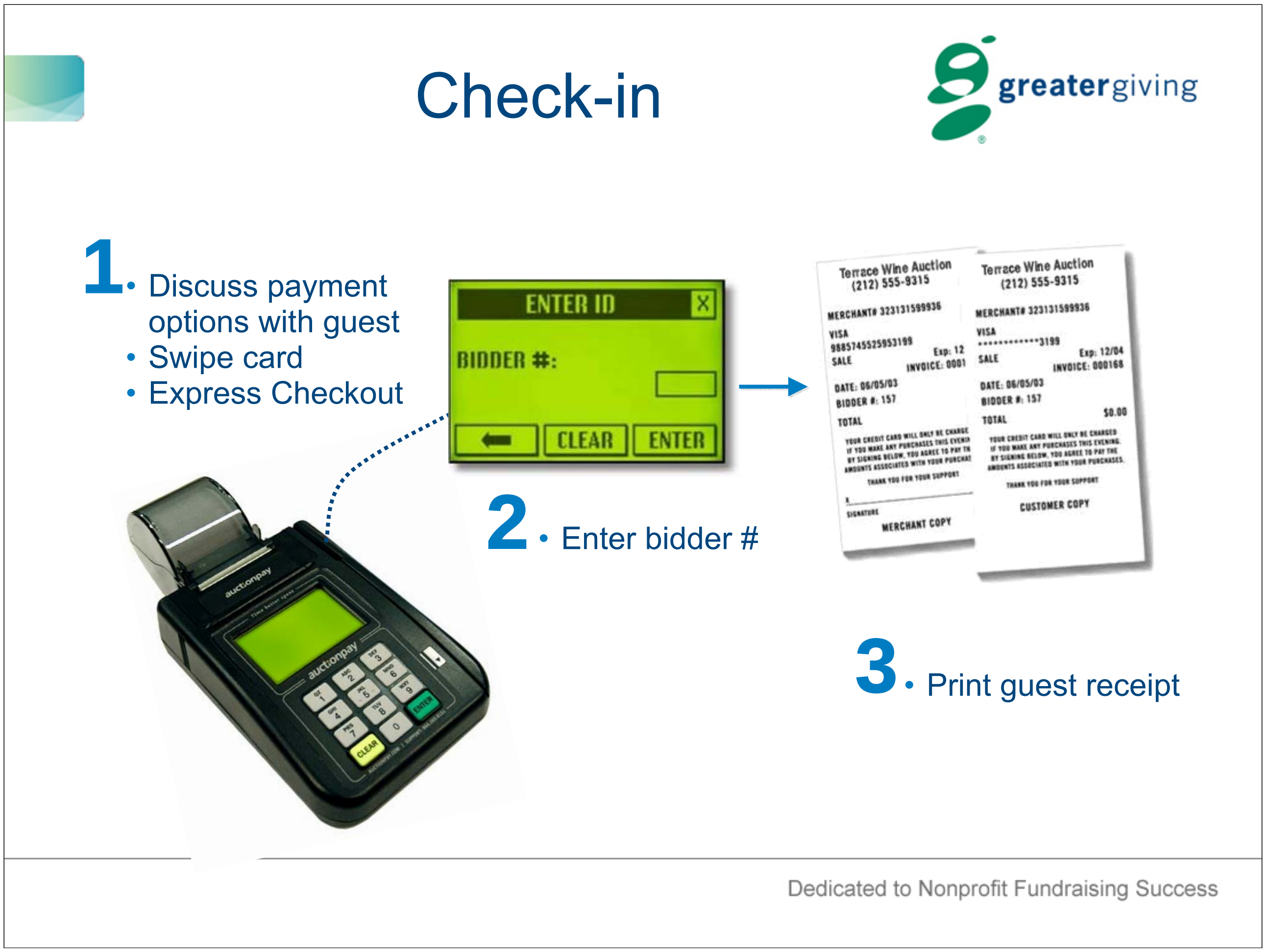
- To run a report, choose the appropriate tab in the **Query Bar**. (e.g., bidder reports from the **Bidder** tab or package reports from the **Package** tab.)
- Filter your report using the fields and click **Query**.
- In the **File** menu, click **Print Report**

Use **Reset** to clear all fields before querying.



Dedicated to Nonprofit Fundraising Success

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.

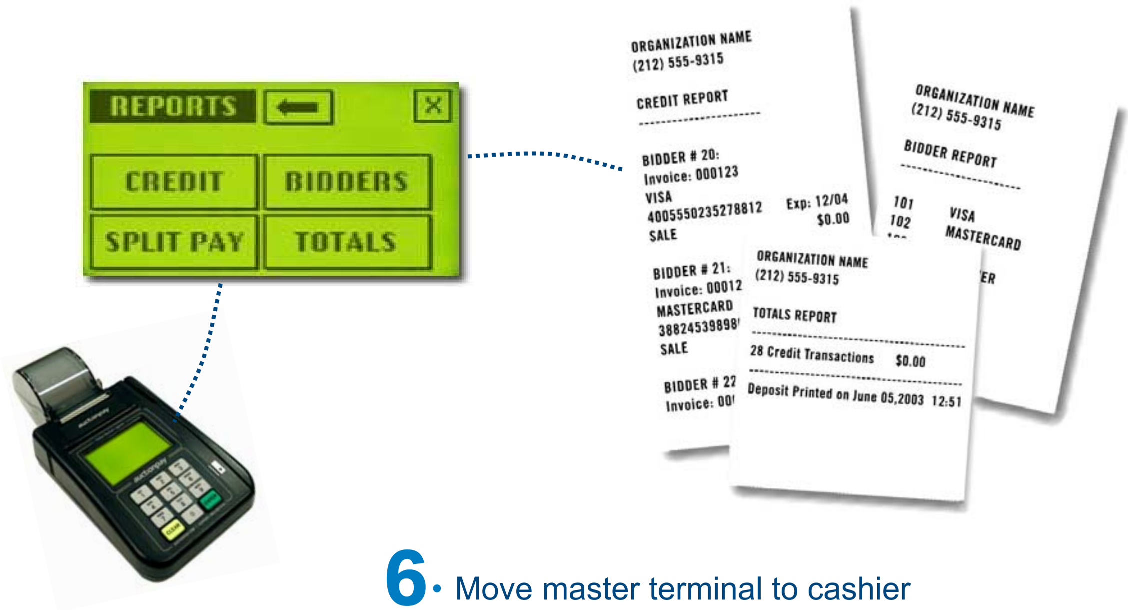


Auctionpay terminals are set up near or at the check-in or registration tables. Begin the registration process by offering to swipe your guest's card for convenience at the event. Many regular charitable event goers are already familiar with Express Pay and will be glad to swipe a card ahead of time. Others can wait until the end of the night to pay if they choose. After the guest's card is swiped, you will enter the bidder number twice, for verification purposes. This links the credit card data to the bidder number. Then the terminal prints 2 receipts, a merchant copy and a customer copy. The guest signs the first receipt, the merchant copy. Note the balance shows zero dollars because they have not purchased anything yet. And the detail on the receipt explains, "Your credit card will only be charged if you make any purchases. By signing below, you agree to pay the amounts associated with your purchases." The guest signs a receipt and receives a copy, eliminating the need to see the Cashier at the end of the event. All credit card information is securely stored in the Auctionpay terminals. Once everybody is checked in, you can now close registration and run some valuable reports.

After Check-in

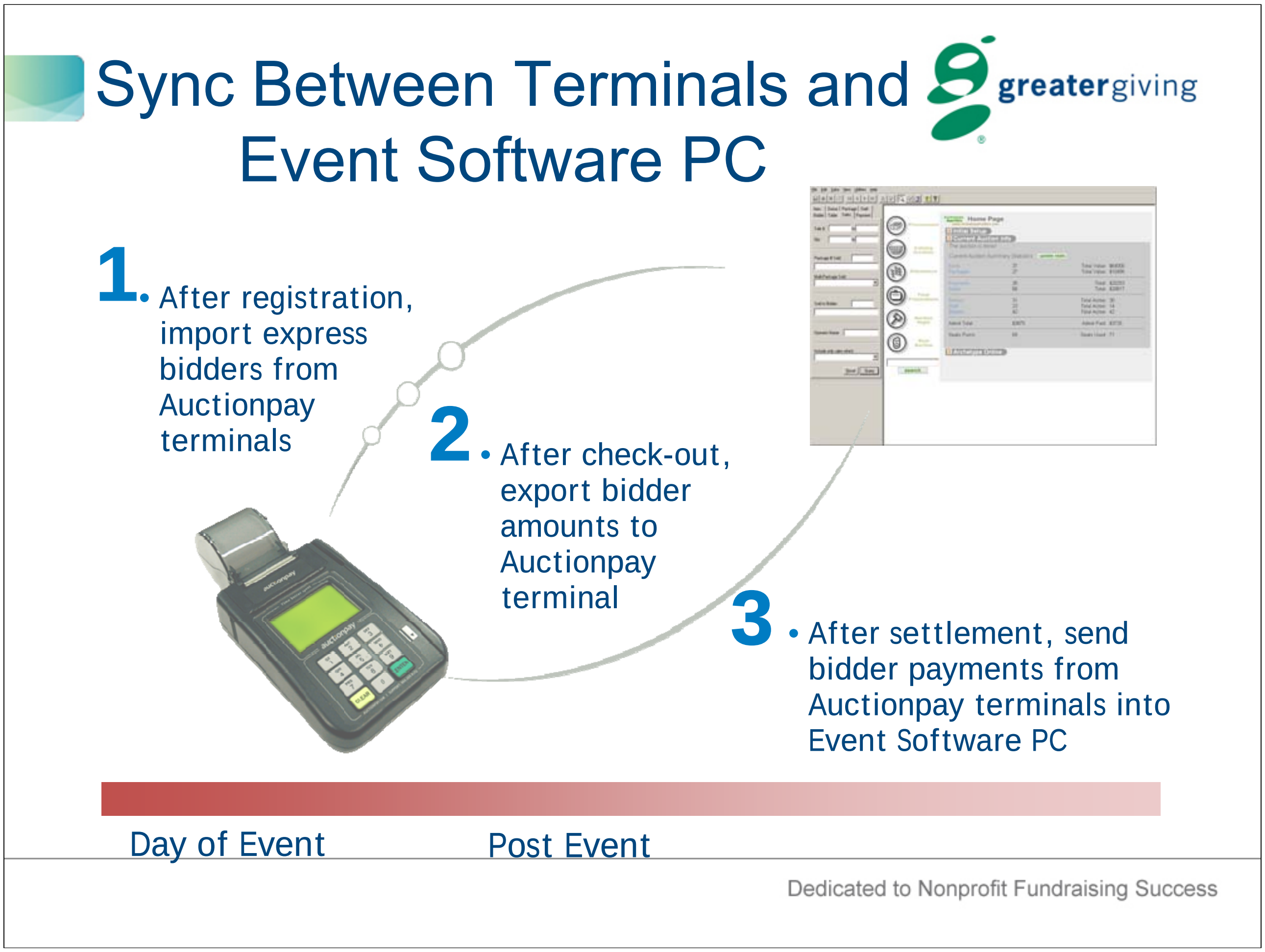
4 • Run credit, totals and bidder reports

5 • Print and review reports

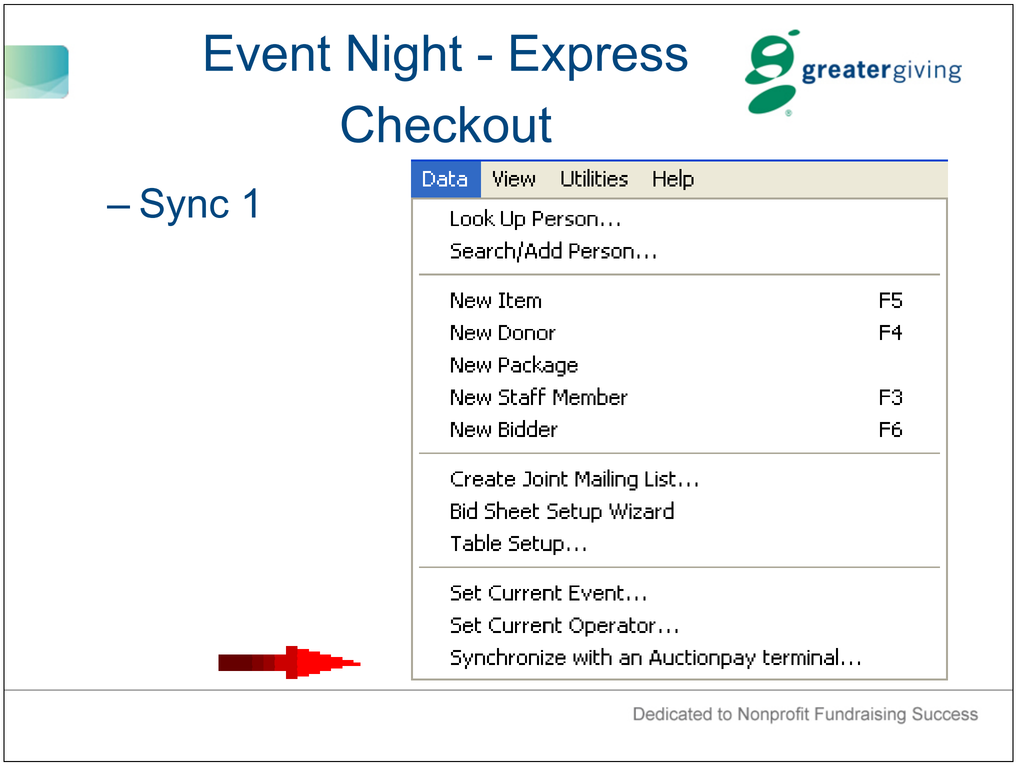


6 • Move master terminal to cashier

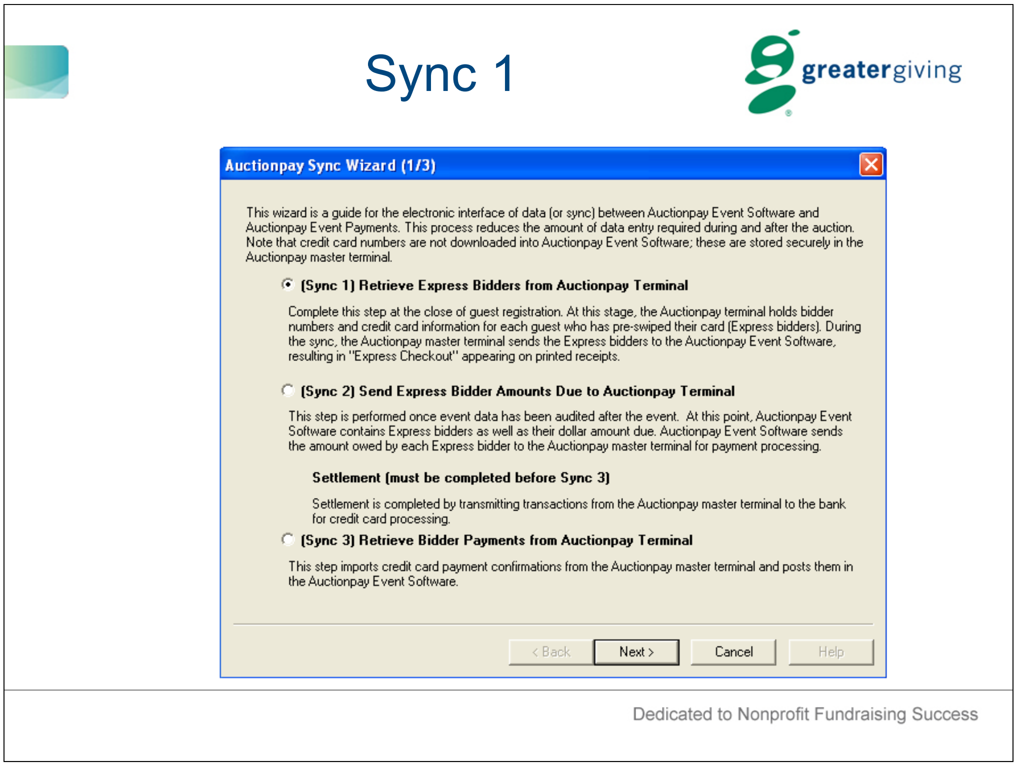
At the close of registration, we recommend that you print and review 3 reports from the Auctionpay terminal: credit, bidder, and totals. The Credit Report is a paper back-up that shows the guest's name, credit card number and bidder number, and should be placed in a safe and secure location, like a cash box. The Bidder Report identifies who has pre-swiped their card. The Totals Report is a double check of information. It can be run after Registration to confirm the number of guests who have pre-swiped their credit card. Once you've reviewed all the necessary reports from registration, you would then move the master Auctionpay terminal to cashiering.



There are three easy steps to sync between the event software and the Auctionpay terminals. Sync 1: After swiping cards at registration, plug in and pass information to Event Software PC. Enter winning bids into Event Software PC during the event. Collect final payments and print receipts to finish the night out. Sync 2 and 3 happen after the event, back at the office. For Sync 2, plug-in to sync winning bid amounts with credit cards. Credit cards are now assigned amounts to send to the bank. For Sync 3, reconcile with the bank and transfer final payment information back to your database to close out all your bids. Credit cards that did not go through will be flagged.



First, we will walk through sync one, which should happen after the registration and check-in portion of your event is over. Install the USB driver CD that was included in the box of terminals and reboot your computer. We recommend doing this before your event gets started. After registration closes, connect the Master terminal to the server computer using the sync cable provided, making sure to also disconnect from the network of terminals. Ensure the Master terminal is on the main screen. From the Event Software PC menu bar, select **Data**, then **Synchronize with an Auctionpay terminal**.

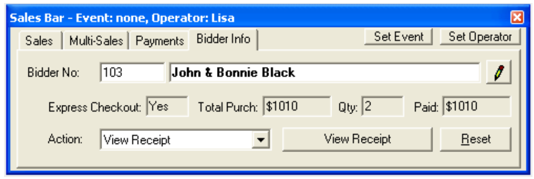


When the Sync Wizard dialog box displays, select **Sync 1**, then click **Next, Next, and Finish**. Once the import is complete, remove the sync cable from the terminal and reconnect the Master terminal to the network of terminals to use at cashiering. Notice that Sync 1 can be performed as many times as needed.

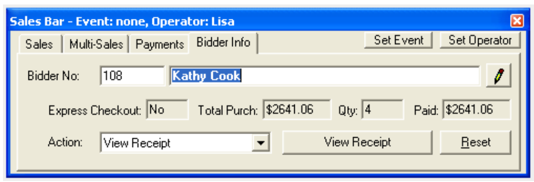
Sync 1

After running sync 1:

Express Checkout: YES



Express Checkout: NO



After completing sync one, if a bidder has pre-swiped a credit card on the bidder info tab, it will show Express Checkout Yes. If they have not pre-swiped, it will show Express Checkout No.

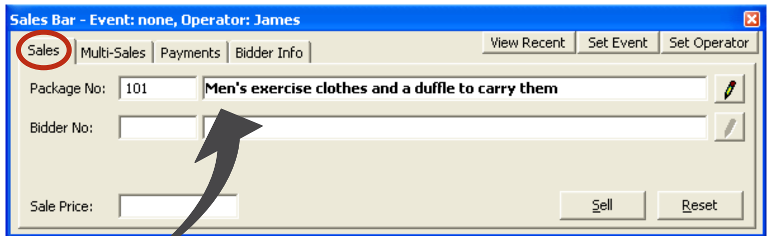
Data Entry / Sale Entry

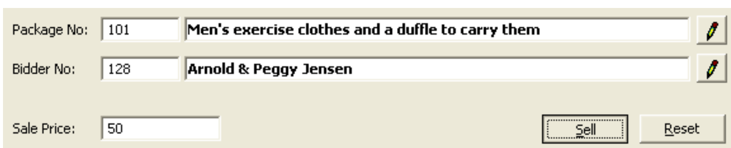
Entering Winning Bids

greatergiving

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

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





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

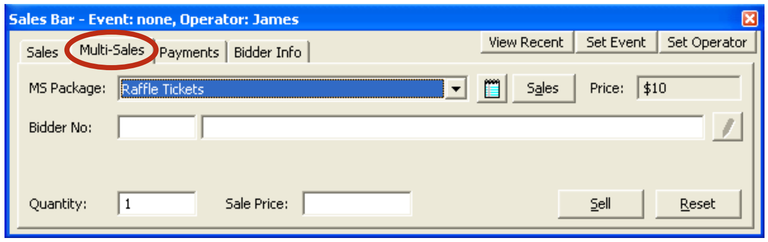
Dedicated to Nonprofit Fundraising Success

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

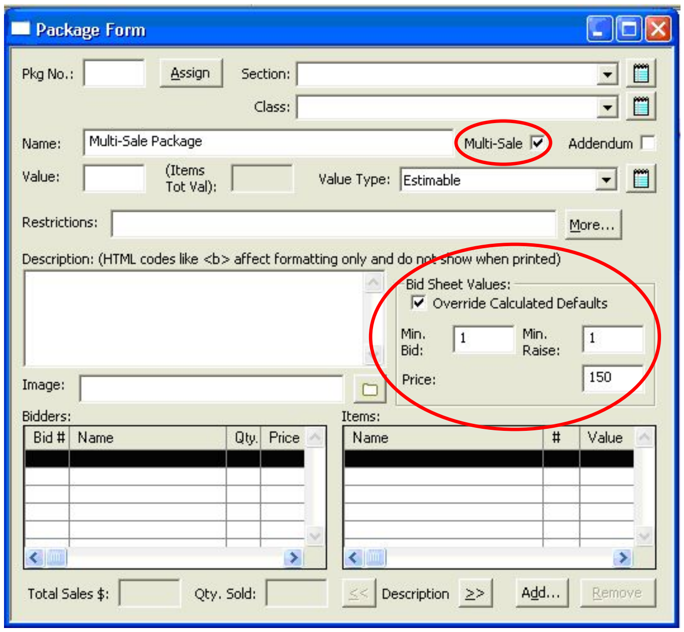


3. Enter the quantity sold and press **Enter** to calculate the sale price.
4. Click **Sell**.

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

greatergiving



Dedicated to Nonprofit Fundraising Success

If you haven’t already created your Multi-Sale packages, in the **Data** menu, click **New Package**. Fill in the package number, and 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.

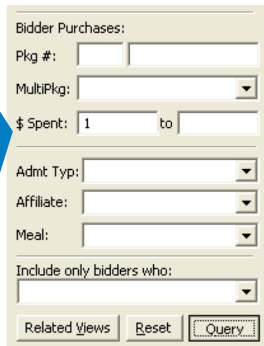
greatergiving

Cashiering / Check Out

Dedicated to Nonprofit Fundraising Success

Checking Out

Speed up your check-out process by printing all receipts at one time.



We only want to print receipts for bidders with purchases.

1. To print receipts for all bidders who made purchases at your event, in the **Query Bar**, click the **Bidder** tab.
2. Enter **1** in 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.

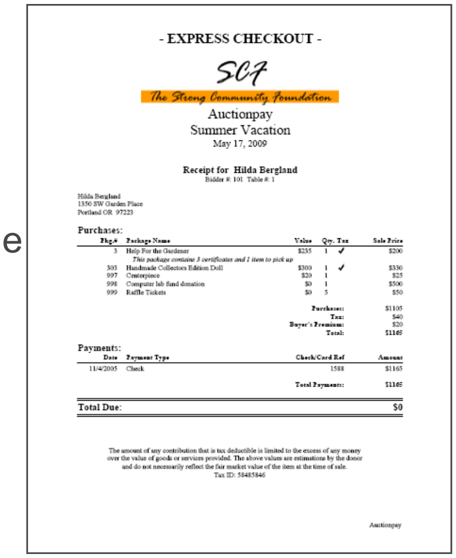
Dedicated to Nonprofit Fundraising Success

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 all receipts at one time.

- From the **Select Report Output Type** dialog, choose the **BID-06: Receipts with settings dialog**.
- Once you've printed your receipts the first time, you can choose **BID-06a: Receipts with presets** to skip the questions.


- EXPRESS CHECKOUT -

SCF

The Strong Community Foundation

Auctionpay

Summer Vacation

May 17, 2009

Receipt for Hilda Bergland

Bidder #: 101 Table #: 1

Hilda Bergland
1350 SW Garden Place
Portland OR 97223

Purchases:

Pkg.#	Package Name	Value	Qty.	Tax	Sale Price
3	Help For the Gardener *This package contains 3 certificates and 1 item to pick up*	$235	1	✓	$200
303	Handmade Collectors Edition Doll	$300	1	✓	$330
997	Centerpiece	$20	1		$25
998	Computer lab fund donation	$0	1		$500
999	Raffle Tickets	$0	5		$50

Purchases:	$1105
Tax:	$40
Buyer's Premium:	$20
Total:	$1165

Payments:

Date	Payment Type	Check/Card Ref	Amount
11/4/2005	Check	1588	$1165
		Total Payments:	$1165

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 item at the time of sale.
Tax ID: 58485846

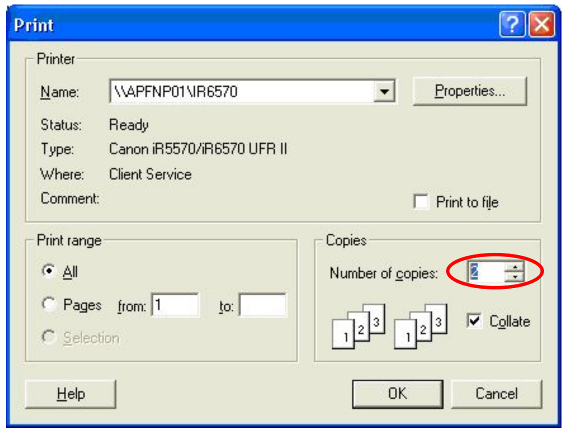
Auctionpay

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

Dedicated to Nonprofit Fundraising Success

In the report dialog, choose the **Receipts with settings dialog** report the first time you run your receipt to set up your receipt preferences. The 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 because you have already collected a form of payment from them.

Printing All Receipts at One Time



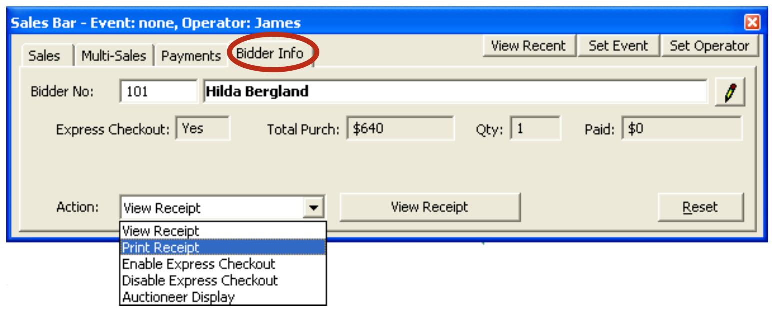
Dedicated to Nonprofit Fundraising Success

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.)

Dedicated to Nonprofit Fundraising Success

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 and payments. 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.

Checking Out

greatergiving

Entering other forms of payment

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

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

Dedicated to Nonprofit Fundraising Success

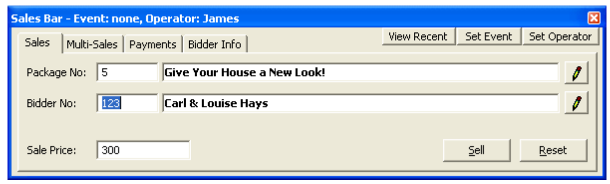
It’s time to collect payments. For guests who choose to pay by cash or check, choose the **Payments** tab of the **F8 Sales Bar**. Enter all cash and check payments in this tab. Simply fill out the bidder number, payment type, dollar amount, and click **Pay**. Remember, do not enter payments for credit 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.

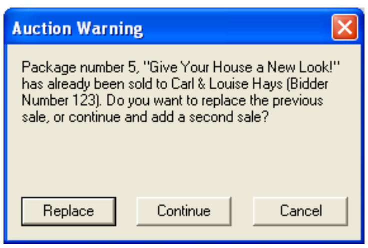
Correcting Mistakes

greatergiving

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

1. To replace a sale, go to 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**.





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

Dedicated to Nonprofit Fundraising Success

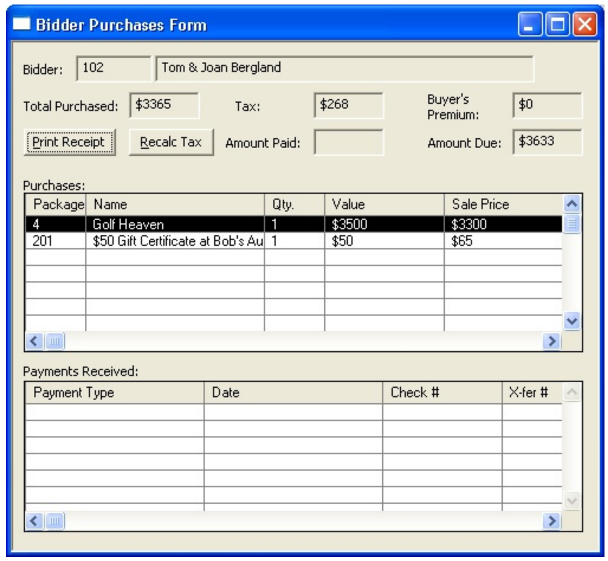
After printing a bidder receipt, your guest may find errors or have questions about purchases listed on the receipt. To replace a sale of a package, or sell the package to a different bidder, choose the **Sales** tab of the **F8 Sales Bar**. Enter the package number and press **Enter.** The **Sales Bar** 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

greatergiving

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 Receipts** to view the **Bidder Purchases Form**.
- To delete a sale, select the sale under **Purchases** and press the **Delete** key on your keyboard.



Dedicated to Nonprofit Fundraising Success

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.

Event Wrap-up

greatergiving

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 access **SUM** reports: in the **File** menu, click **Print General Reports.**

Dedicated to Nonprofit Fundraising Success

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. 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.

Sync Between Terminals and Event Software PC

1. • After registration, import express bidders from Auctionpay terminals

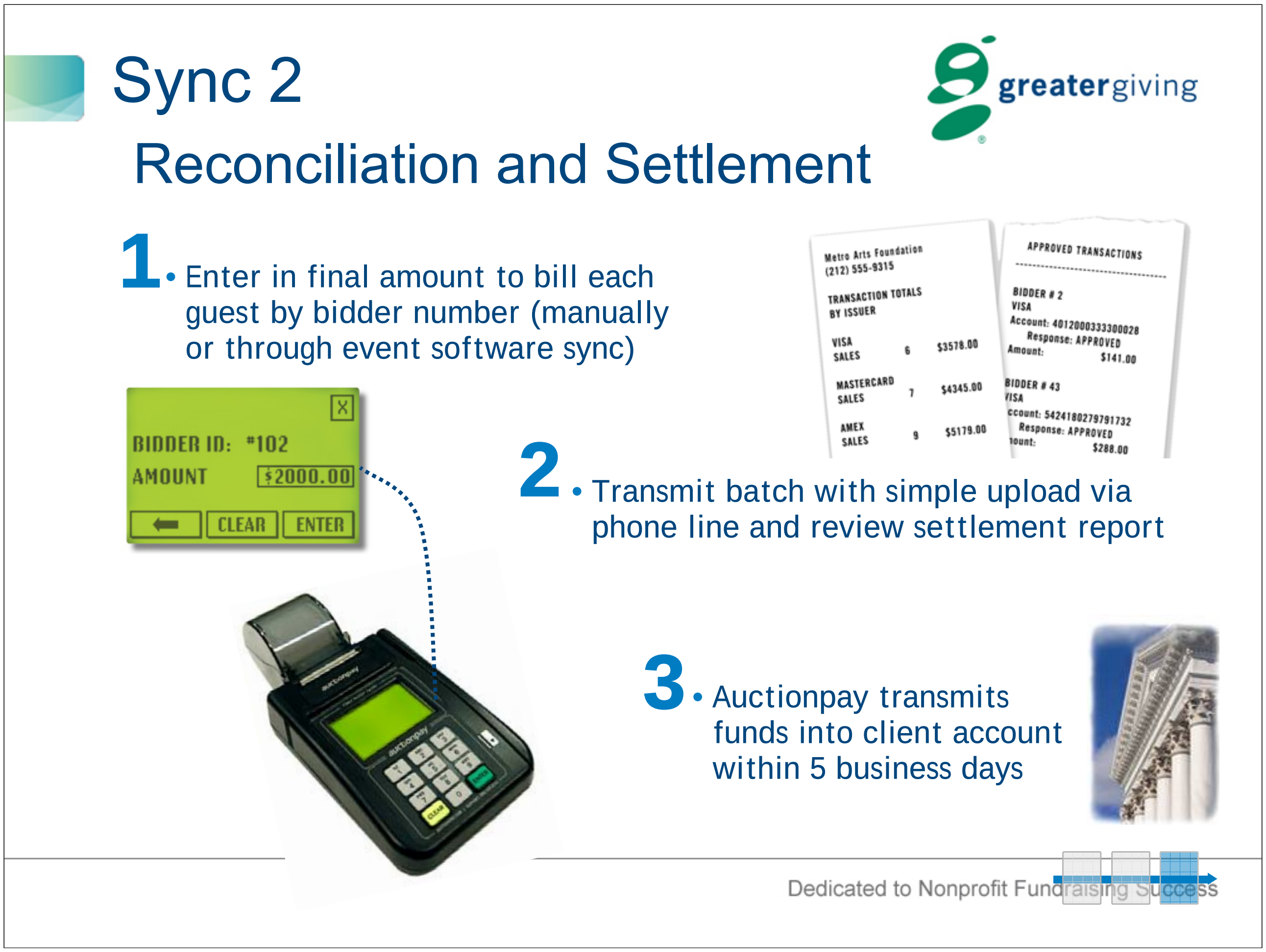
2. • After check-out, export bidder amounts to Auctionpay terminal

3 • After settlement, send bidder payments from Auctionpay terminals back to Event Software PC

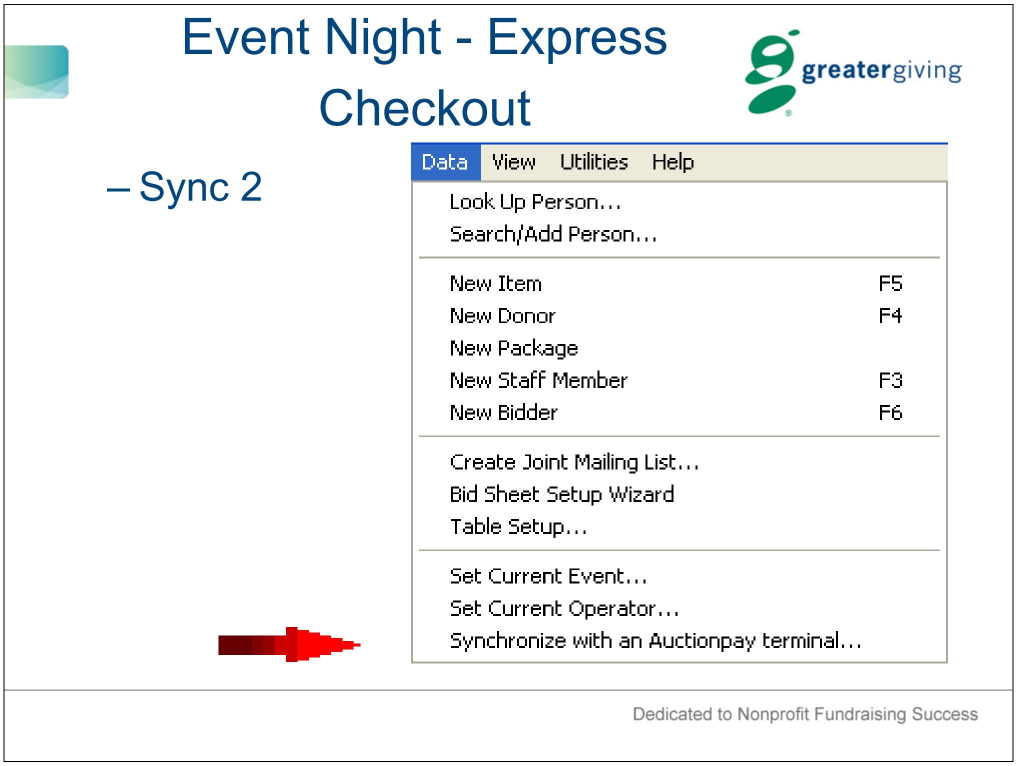
Day of Event   Post Event

Dedicated to Nonprofit Fundraising Success

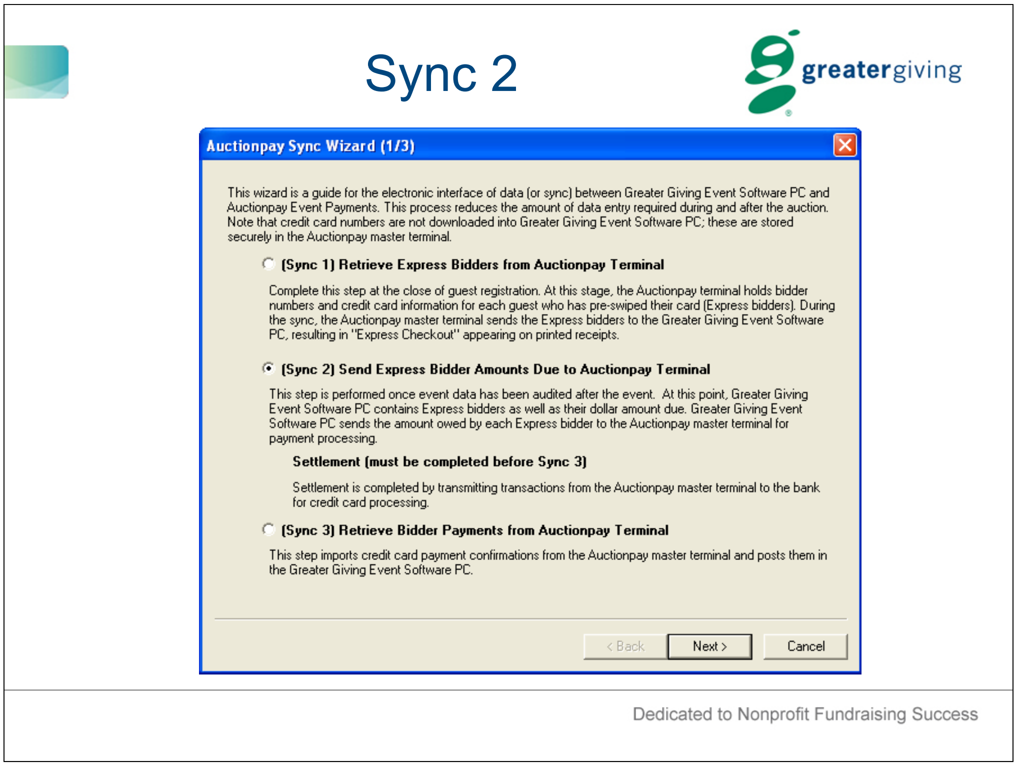
After the event, most likely back at the office the next day, you will need to complete a Sync 2. Connect the master terminal to the server computer to sync winning bid dollar amounts with credit cards. Credit cards are now assigned amounts to send to the bank.



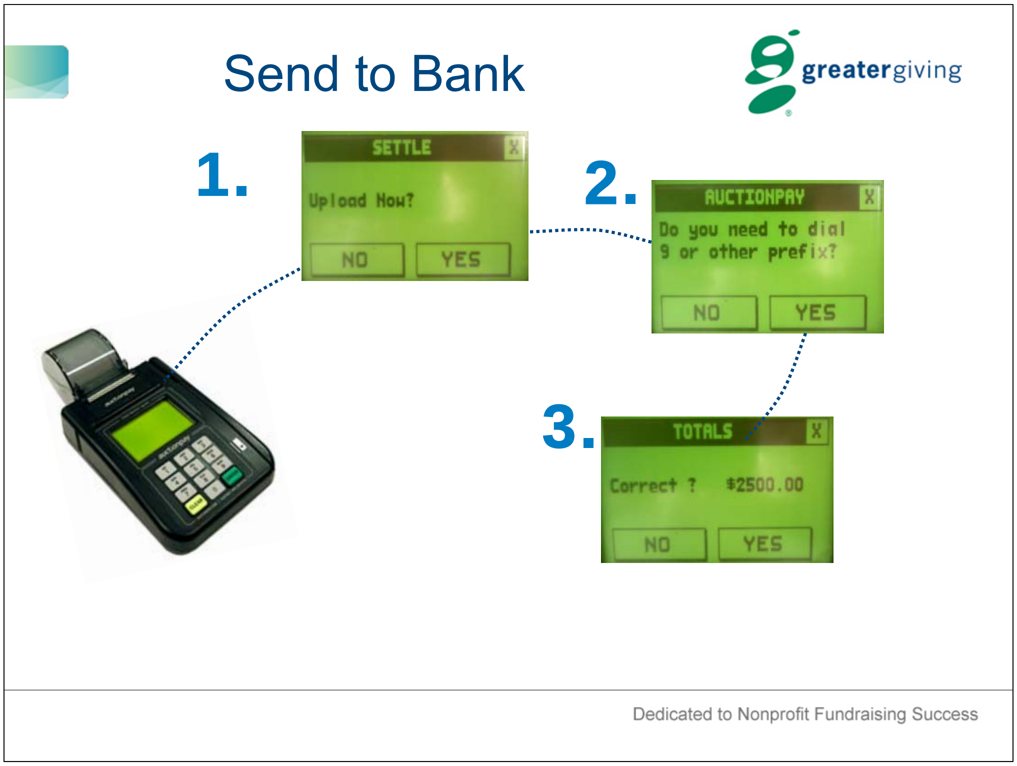
Settlement with Auctionpay is very straight-forward. Our goal is to get your funds into your account as quickly as possible! Here's how it works. We recommend doing this the next business day. Double check all entered winning bids for errors in the software, comparing against bid sheets and runner sheets. When you agree with everything that was entered in the software, it is time to Run Sync 2.



Ensure all winning bids are posted, and cash and check payments are entered into the software prior to performing Sync 2. No card payments should be entered into the software. This will be done during Sync 3. First, power up and connect the master terminal to the computer with the sync cable provided. From the Event Software PC menu, select **Data**, then **Synchronize with an Auctionpay terminal**.



In the Sync Wizard dialog box, select **Sync 2**, then click **Next, Next, and Finish**. Ensure the final purchase amounts are correct by auditing the bidder totals. This can be done by comparing a **Credit Report** from the Master terminal to the "**BID-03: Sales listing by bidder"** report run from the bidder grid in the software. If a dollar amount needs to be changed in the Master terminal, this can be corrected with the Adjustment function before sending charges to the bank. Notice that Sync 2 can be performed multiple times as needed.



Charges are sent from the Auctionpay Master terminal to the bank for processing by using the **Send to Bank** function. Power up the Master terminal. Insert the provided phone cord into the LINE port in the back of the Master terminal. Insert the other end of the phone cord into a dedicated analog phone line. On the terminal press **Tools, More, and Send to Bank. For** “Upload Now?” press **Yes. For** “Do you need to dial 9 or other prefix?”, press **Yes** or **No** as appropriate and follow the prompt. The terminal will next prompt “Correct?” with the total amount to be transmitted. Press **Yes** or **No** as appropriate. If **No** is selected because the total is incorrect, the charges will not be sent to the bank. Upon selecting **Yes**, the terminal will begin transmitting payment transactions. Once the transmission is complete, the terminal will generate a Banking report showing all approved and declined charges.

Sync Between Terminals and Software

greatergiving

1. After registration, import express bidders from Auctionpay terminals

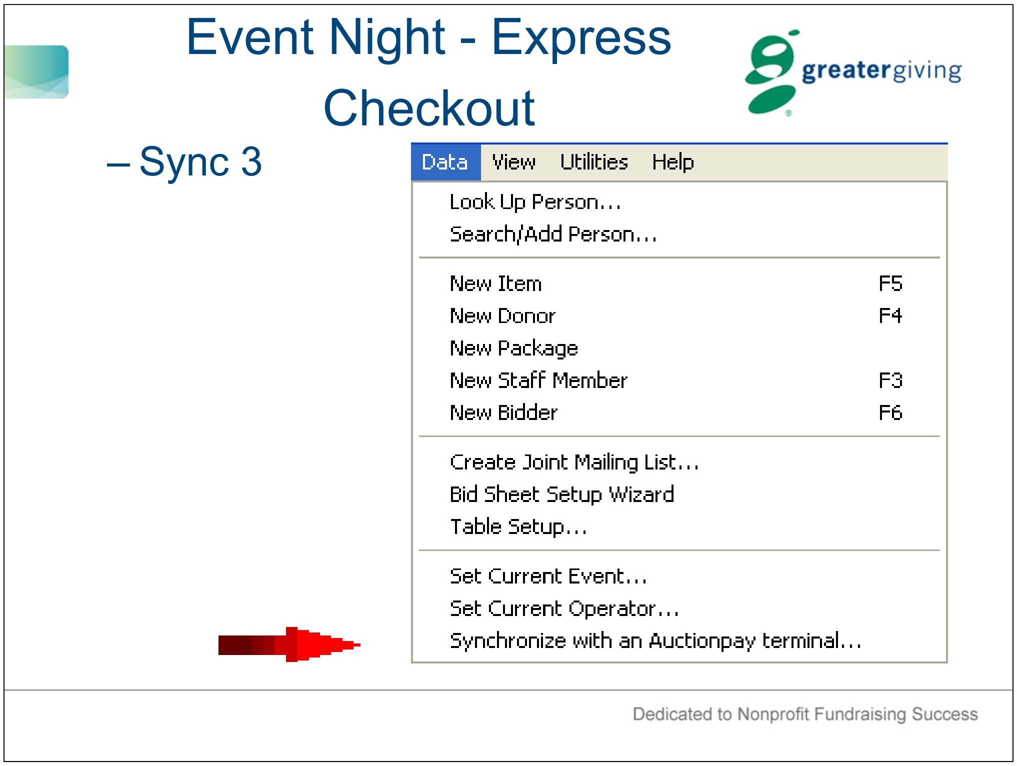
2. After check-out, export bidder amounts to Auctionpay terminal

3. After settlement, send bidder payments from Auctionpay terminals back to Event Software PC

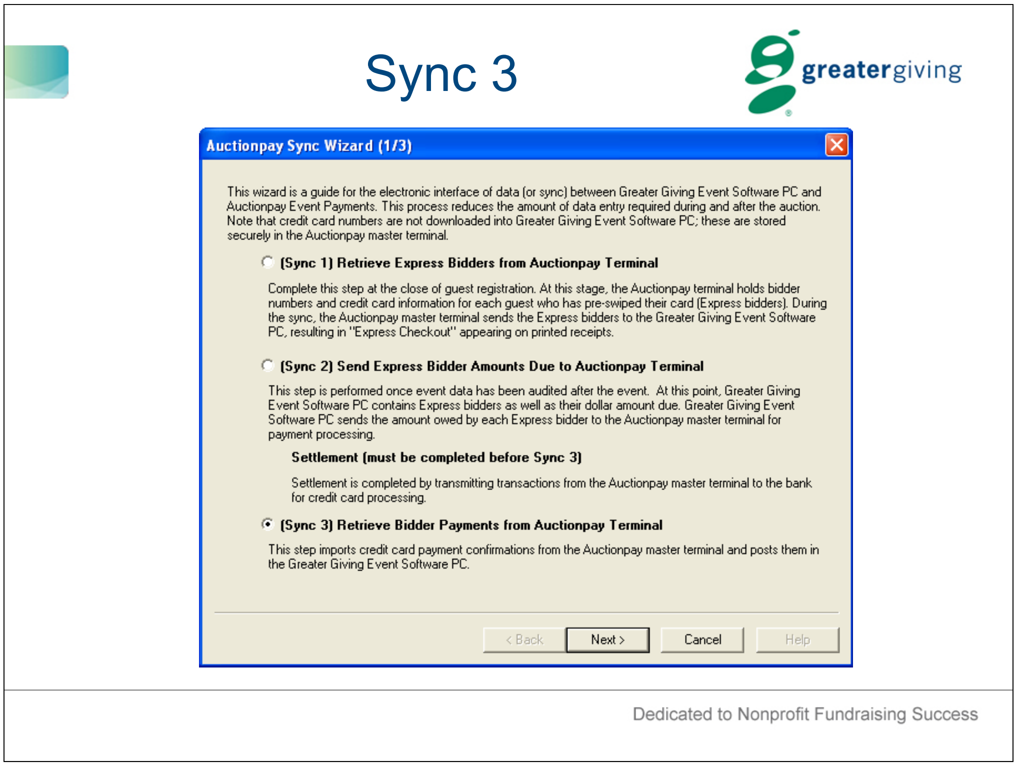
Day of Event | Post Event

Dedicated to Nonprofit Fundraising Success

After the terminal generates the Banking report showing all approved and declined charges, it is time to run sync 3. Yes, you need to run sync 3 before dealing with any declined charges. Remember Sync 3 transfers the final payment information back to your database to close out all your bids. Credit cards that did not go through will be flagged.



Power up and connect the Master terminal to the server computer with sync cable provided. From the Event Software PC menu, select **Data**, then **Synchronize with an Auctionpay terminal**.



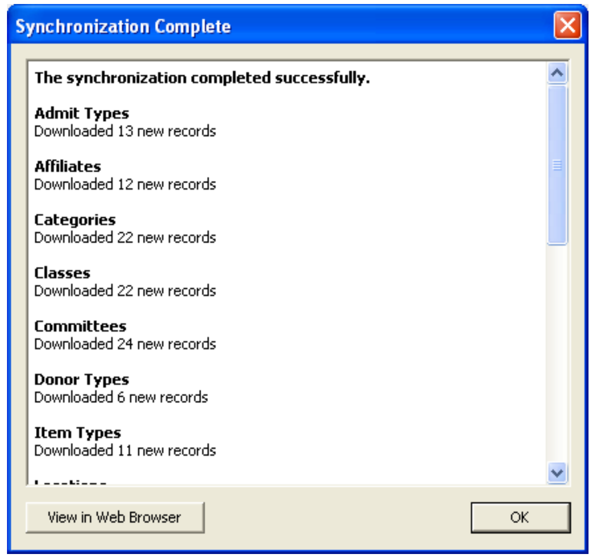
In the Sync Wizard, select **Sync 3**, then **Next, Next, and Finish**. Note, **Sync 3 can only be performed once** (unless you are syncing with multiple Masters). After completing sync 3, see if you have any declines, which take place when the bank does not approve a charge. There are two options for handling declines. You can resubmit the charge using the method described in your orange quick start guide provided, or you can obtain an alternate form of payment from the guest. Once the batch has been uploaded, Auctionpay transmits funds into your account within 5 business days. You would then return the terminals in the packaging that Auctionpay provides and drop it in the mail.

Event Wrap-up

Synchronizing your database with Event Software Online

- Once all outstanding balances are resolved, in the **Data** menu, click **Synchronize with Online Project** to send your event information 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.



Dedicated to Nonprofit Fundraising Success

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

Dedicated to Nonprofit Fundraising Success

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 terminals or Event Software PC, visit www.greatergiving.com and click on the Support Center. Thank you.