



Auctionpay Terminal Quick Start Guide

Version 1.0

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Auctionpay Terminal Guide

Welcome

Thank you for choosing Greater Giving Auctionpay terminals. Auctionpay allows you to accept credit card payments at your fundraising event, and streamlines the check-in and checkout procedures for efficiency and increased guest satisfaction.

Card Holder Data Security (PCI)

The Payment Card Industry (PCI) Data Security Standards were developed by the major credit card companies as a guideline to help organizations that process card payments prevent credit card fraud and to protect against security vulnerabilities. Greater Giving applies the PCI guidelines rigorously in its terminal and online products and maintains a level 1 certification with annual audits by an accredited 3rd party. When you use Greater Giving solutions to accept credit card payments, you can trust us to keep this information safe and secure to protect your donors.

The Auctionpay products use strong encryption for the storage of credit card information and for the transmission of card information over public networks.

As the operator of Auctionpay terminals, you play an essential role in keeping card information secure. In particular, observe these guidelines:

- Make sure terminals (especially Master terminals) are always attended and store them in a safe place after use at the event.
- Always keep reports showing full credit card numbers in a secure location, preferably a lock box.
- As soon as transactions are submitted and declines are resolved, clear the terminal using the Clear Terminal function (see the Training tab). Destroy any paper records showing full credit card numbers using a paper shredder or other means so that the card numbers are unrecognizable.
- Collect sensitive data only when needed, store it in known locations with limited access, and securely destroy or delete it immediately after use. While the terminal will securely encrypt cardholder information, apply these rules to all other sensitive data.

These steps are absolutely necessary for compliance with PCI Data Security Standards. By complying with PCI, your donors' credit card information is uncompromised, allowing you to focus on your fundraising activities.

The functions in the terminal that provide access to cardholder data or banking functions are protected by a unique user ID and password. This user ID and password are event-specific, and can be found on a separate communication included in the terminal shipment. Store this information in a secure location and do not share it.

This guide is reviewed and updated annually to keep in compliance with PCI Payment Application Data Security Standards.

PCI Requirements for Wireless Implementations

Greater Giving does not recommend nor support use of the terminals in wireless networks at this time but if the terminals should ever be used in a wireless (wifi) network, PCI requires that wireless technology be securely implemented and transmission of cardholder data over wireless networks be secure.

Install and configure perimeter firewalls between wireless networks and systems that store credit card data.

Modify default wireless settings, as follows:

- Change default encryption keys upon installation and anytime anyone with knowledge of the encryption keys leaves the company or changes positions
- Change default service set identifier (SSID)
- Change default passwords or passphrases on access points
- Change default SNMP community strings
- Enable WiFi protected access (WPA and WPA2) technology for encryption and authentication (note that WEP protection is prohibited by PCI)
- Update firmware on wireless access points to support strong encryption and authentication (WPA/WPA2)
- Other security related wireless vendor defaults

For wireless networks transmitting cardholder data or connected to the cardholder data environment, implement industry best practices for strong encryption of data transmission and authentication (for example, IEEE 802.11i).

Equipment

Modes of Operation

Auctionpay terminals are available in three modes of operation: Express Pay, Retail Offline and Retail Online. The terminals have been pre-programmed per your request; press **F4** on the terminal to confirm the mode of operation, and press the red **Cancel/Clear (X)** button to return to the main screen. Instructions in this section are intended for terminals in Express Pay Mode. For instructions on the Retail Offline and Retail Online modes, refer to the Alternate Modes section of this guide.

Event Timeline

Express Pay Mode – At registration or check-in, swipe guest credit cards using bidder numbers. Express Pay mode eliminates the need for cashing at the end of the event. After the event, final purchase amounts are entered into the Master terminal.

Retail Offline Mode – This mode can be used at any time during the event for credit card purchases such as admission or raffle tickets. Bidder numbers are not used in this mode. Retail Offline terminals are stand-alone units that do not require network cables.

Retail Online Mode – In this mode the terminals are connected to a power source and a dedicated analog phone line or internet connection allowing transactions to be immediately authorized. Transactions will remain in the terminal until the batch is settled. Retail Online terminals are stand-alone units that do not require network cables.

This guide is designed to provide step-by-step instructions on using the Auctionpay system before, during, and after the event.

Before the event	During the event	After the event
Set Up – Connecting and powering up the Auctionpay terminals	Check-in – Entering Express Pay transactions during registration	Entering Payments – Entering final purchase amounts
Training – Learning to perform a transaction	Designating Bidders as Express Pay – Electronically marking bidders for Express Pay	Banking – Sending final purchase amounts to the bank
	Checkout – Close of event and collecting payments	Posting Payments – Recording approved transactions
		Processing Declines – Resubmitting transactions that have been declined

Terminal Set Up

To set up your Auctionpay terminals:

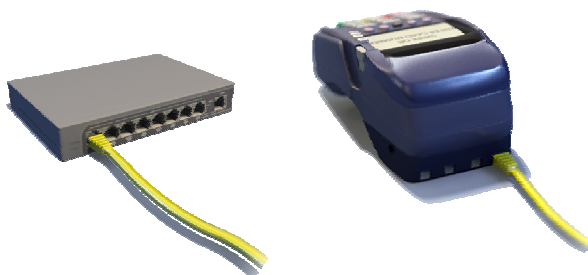
1. Remove all Greater Giving equipment, cords, and power adapters from the box and confirm with included Packing Slip that all equipment is received. Line up the Master terminal, Remote terminals, network cables, power adaptors and Greater Giving network router as shown below.



2. Insert the power adapter marked **"Router"** into the power port on the back of the network router and then into a power outlet. The router is ready when the green **Power** light is steady and the **Test** light (yellow) is off. This may take up to 2 minutes.



3. Insert one provided network cable into the port marked **"10BaseT"** on the back of each terminal in the network. Connect the other end of the network cables to the router as shown, using only ports 1-8.



4. Insert a power adapter marked **"Terminal"** into the power port on the right side of the **Master** terminal and then into a power outlet.



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- Wait for the Master terminal to power on and display the main screen shown below.



- Insert a power adapter marked "**Terminal**" into the power port on the right side of a **Remote** terminal, and then into a power outlet. Wait for the Remote terminal to power on and display the main screen shown below. Once the main screen is displayed on the Remote terminal, repeat the process for the remaining Remote terminals.



- Network setup is complete when the Master and Remote terminals all display the main screen.

Warning: Terminals must be set up in this order in order for them to function properly.



Tip: Greater Giving recommends testing the terminal network each time it is set up to ensure connectivity. Refer to the Training section for testing instructions.

Warning: If any Remote terminal screen displays "**Server Discovery**", disconnect the terminal, remove power, and reconnect. If the problem persists, disconnect all terminals and perform the setup process again.

A unique user name and password has been set for your organization. The first time you set up your terminals, you also have the option to change the banking password, located on the bottom of the Packing List. This password can be changed using the Master terminal, and needs to be 7 or 8 characters long and contain both digits and letters. Password Help - to enter Password "A123456", first press "2", then press the black "ALPHA" key one time. Then enter the remainder of the password (1-2-3-4-5-6) and press Enter.

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Note: Record the user ID and password in a secure location. Both are required to access certain reports and all banking functions and cannot be accessed by anyone but you. If you forget the password, the credit card data in the terminal will not be accessible.

To change the banking password:

1. On the Master terminal, press **F4** for **Menu** > scroll to **Banking** > press **7** to select
2. When prompted for **"User ID"**, enter the unique user ID provided on separate instruction sheet
3. When prompted for **"Password"**, enter the unique password provided on separate instruction sheet
4. Enter your new password twice

Warning: If incorrect username and/or password are entered three times, the terminal will lock the Sales report and Banking functions for 30 minutes. All other terminal functions are unaffected.

Training

Training Resources

Greater Giving recommends training staff and volunteers on using the terminals prior to a fundraising event to ensure they are comfortable with the equipment and processes. A variety of training resources are available, including:

- Training DVD
- Event Quick Reference Sheet at www.greatergiving.com/support
- On-demand training at www.greatergiving.com/support

Entering Test Express Pay Transactions

To enter a test transaction:

1. Swipe the provided test card
2. Key in a test bidder number (such as 999) and press **Enter**
3. Re-key the bidder number and press **Enter**
4. The merchant receipt prints; obtain guest signature
5. At the “**Customer Copy**” prompt, press **Yes** or **No** as appropriate
6. Repeat with each terminal using a different test bidder number to check connectivity

Warning: If a Remote terminal displays “**Comm Error**”, disconnect the terminal, remove power, and reconnect. If the problem persists, disconnect all terminals and perform the setup process again.

Tip: A Best Practices guide is available for download via our website at www.greatergiving.com/resource-library, and offers suggestions for streamlining event check-in and checkout.

Sync Training for Greater Giving Event Software Users

If synchronizing with Greater Giving Event Software, testing the sync interface prior to the event is strongly encouraged. For information, please refer to the Sync instructions provided with your equipment or consult the Greater Giving Event Software help.



(!) Use the scroll keys to scroll through each menu.

(!) Use the key pad to select a menu function.

Clearing Training Transactions

Once training is completed, the terminals must be cleared of training data prior to use at the event. There are two methods for clearing data: the **Void** function clears individual transactions, and the **Clear Terminal** function clears all transactions.

Warning: Only use **Clear Terminal** to clear training data. Once data is cleared, it cannot be restored. Never use this function if there are live credit card transactions in the terminal.

To delete an individual transaction using Void:

1. From the main screen, press **F4** for menu
2. Select **Void**
3. Key in the bidder number and press the green **Enter** button
4. Re-key the bidder number and press the green **Enter** button
5. Press **Yes** to confirm the transaction to be voided
6. The merchant receipt prints
7. At the **"Customer Copy"** prompt, press **Yes** or **No** as appropriate
8. Press the red **Cancel/Clear (X)** button once to return to the main screen

To clear all transaction data in the terminal using Clear Terminal:

1. On the Master terminal, press **F4** for menu
2. Scroll to select **Banking**
3. Key in user ID and press the green **Enter** button
4. Key in password and press the green **Enter** button
5. Scroll to select **Clear Terminal**
6. Press **Yes** to confirm and **"Terminal Clear Successful"** appears
7. Press the red **Cancel/Clear (X)** button once to return to the main screen

Event Check-In

Enter Express Pay Bidders

Express Pay allows guests to swipe a credit card at check-in, eliminating the need for cashing at the end of the event. Receipts for Express Pay guests will reflect a \$0.00 balance. The final purchase amounts for Express Pay guests are entered into the Master terminal after the event via manual entry or Sync 2. For instructions, refer to the Entering Payments tab.

To register a guest for Express Pay:

1. Greet guests and ask if they would like to pre-register a credit card for use at the event
2. From the main screen, swipe the guest's credit card
3. Key in the bidder number and press the green **Enter** button
4. Re-key the bidder number and press the green **Enter** button
5. The merchant receipt prints; obtain guest signature; obtain guest signature
6. At the "**Customer Copy**" prompt, press **Yes** or **No** as appropriate

Tip: Receipts for Express Pay guests will always show \$0.00. To print a receipt showing the final purchase amount, use the Adjustment function. See the Checkout/Cashiering tab for instructions.

Manual Credit Card Entry

If the terminal is unable to read a swiped credit card, the card information can be entered manually.

To enter credit card information manually:

1. On the main screen, use the key pad to key in the full credit card number and press the green **Enter** button
2. Key in the four-digit expiration date in MMY format and press the green **Enter** button
3. At the "**Card Present?**" prompt, select **Yes** or **No** as appropriate
4. Key in the bidder number and press the green **Enter** button
5. Re-key the bidder number and press the green **Enter** button
6. The merchant receipt prints; obtain guest signature
7. At the "**Customer Copy**" prompt, press **Yes** or **No** as appropriate

Note: If the card number is keyed incorrectly, use the yellow backspace button to delete incorrect number(s).

Duplicate Bidder

If a bidder number has already been used, the terminal will prompt "**Duplicate Found Re-enter Bidder Number**". If this occurs, key in the correct bidder number or press the red **Cancel/Clear (X)** button to return to the main screen and start a new transaction.

Print Reports at Close of Check-in

At close of check-in, print the Sales report from the Master terminal. For a list of the available reports, see the Functions tab.

1. On the Master terminal, press **F4** > scroll to select **Reports** > scroll to select **Sales**
2. Enter user ID and password and press the green **Enter** button
3. The Sales report prints. Store the printed report in a secure location
4. Press the red **Cancel/Clear (X)** button twice to return to the main screen

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Note: Reports provide a paper back up of guest credit card information gathered at the event. Keep all reports and signed receipts in a secure place, as some list the guest's full credit card number. Refer to the Functions tab for a complete list of reports.

Designating Bidders as Express Pay or Performing Sync 1

(!) This step is completed between the close of event check-in and the transition to check-out.

To facilitate efficient check-out and cashiering at the end of an event, indicate that a bidder has swiped a card for Express Pay, either on the bidder file or form, or in your event management software. Guests marked as Express Pay have already provided payment and do not need to visit the cashier at the end of the event.

Reminder: Prior to disconnecting terminals for an electronic sync, remember to run reports as a paper backup.

Electronically Marking Express Pay – Sync 1 with Event Software

Sync 1 marks all bidders that swiped a credit card at check-in as Express Pay in event software. Please refer to your event software sync instructions for details.

To electronically mark bidders as Express Pay:

1. Power down the Master terminal and disconnect the network cable from the terminal router
2. Insert the end of the network cable from the master terminal into a free Ethernet port on the local computer network router

Note: If a local computer network router is not available, connect the Event Software server computer directly to the Greater Giving network router using the provided network cable.

3. Power on the Master terminal
4. Press **F4** for menu
5. Scroll to select **Setup**
6. Scroll to select **PC Sync**
7. The Master terminal reads **"Initializing"**
8. When the Master terminal prompts **"EMS Connection"**, use your event software's sync function to perform Sync 1

Note: For step-by-step instructions, please refer to your event software sync instructions.

9. Once the sync is complete, press the red **Cancel/Clear (X)** button until the main screen appears
10. Power down the Master terminal and disconnect the network cable from the PC network router. Reconnect the Master terminal to the Greater Giving network router and power on for check-out

Tip: Leave Remote terminals and network router connected and powered on during the electronic sync process. After the sync, simply reconnect the Master terminal to the network router and power on as usual.

Manually Marking Express Pay

To manually mark bidders as Express Pay:

1. Print a Bidder report
 - On the Master terminal, press **F4** > scroll to Select **Reports** > scroll to Select **Bidder**
2. Mark bidders listed on the report as Express Pay with an indicator such as a stamp, sticker or highlighter on their bidder files.

Note: If using event management software but not syncing, use the appropriate function in the software to designate guests as Express Pay.

Check-out/Cashiering

During Check-out

Check-out or cashiering is typically set up after registration has closed. During check-out, payments are obtained from guests who did not swipe a credit card at the beginning of the event. Express Pay bidders may choose to adjust a previous balance, split a purchase total among multiple credit cards, or change credit cards. If terminals are moved to a new location for check-out, refer to the Set Up section for instructions.

Note: It is not necessary to check out Express Pay guests using the terminal, as final dollar amounts are entered during Sync 2. To show a final dollar amount on a receipt for an Express Pay guest, use the Adjustment function.

To cashier bidders at check-out:

1. From the main screen, press **F1** to enable cashiering. The menu bar changes to read **"Cashiering"**

Note: Press **F1** before each cashiering transaction.

2. Swipe the guest's credit card
3. Key in the bidder number and press the green **Enter** button
4. Re-key the bidder number and press the green **Enter** button
5. Key in the total dollar amount to be charged and press the green **Enter** button
6. The merchant receipt prints; obtain guest signature; obtain guest signature
7. At the **"Customer Copy"** prompt, press **Yes** or **No** as appropriate

To modify a payment amount using the Adjustment function:

Note: The terminal will not add two dollar amounts together; at the prompt, enter the final or total dollar amount to be charged to the bidder. This overwrites the amount currently in the terminal.

1. Press **F4** for menu
2. Select **Adjustment**
3. Key in the bidder number and press the green **Enter** button
4. Re-key the bidder number and press the green **Enter** button
5. Confirm the dollar amount and bidder number. At the **"Enter Amount"** prompt, key in new final purchase amount to be charged and press the green **Enter** button
6. At the **"Consumer Present?"** prompt, press **Yes** or **No** as appropriate
7. The merchant receipt prints; obtain guest signature
8. At the **"Print Customer Copy?"** prompt, press **Yes** or **No** as appropriate
9. Press the red **Cancel/Clear (X)** button once to return to the main screen

Note: If making an adjustment or void to a Split Pay transaction, you will be prompted to select the card to adjust or void using **Select**, **Next**, and **Previous**.

To split payments among multiple credit cards using Split Pay:

1. From the main screen, press **F4** for menu
2. Scroll to select **Split Pay**
3. Key in the bidder number and press the green **Enter** button

Note: The Split Pay function can only be performed on bidder numbers already entered in the terminal.

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4. Re-key the bidder number and press the green **Enter** button
 - If the bidder has a zero dollar balance, the terminal prompts **"Enter Amount"**.
 - Enter the total amount to be charged to that credit card and press the green **Enter** button
5. At the **"Add Card?"** prompt, select **Yes** and swipe or key in the new credit card
6. At the **"Enter Amount"** prompt, key in total dollar amount to be charged to that credit card and press the green **Enter** button
7. The merchant receipt prints; obtain guest signature
8. At the **"Customer Copy"** prompt, press **Yes** or **No** as appropriate
9. Terminal again prompts **"Add Card"**. Select **Yes** or **No** as appropriate and repeat steps for each additional credit card
10. Press the red **Cancel/Clear (X)** button once to return to the main screen

Note: You can make adjustments to a split pay transaction if the amount is incorrect or needs to be modified.

To delete an individual transaction using Void:

1. From the main screen, press **F4** for menu
2. Select **Void**
3. Key in the bidder number and press the green **Enter** button
4. Re-key the bidder number and press the green **Enter** button
5. Press **Yes** to confirm the transaction to be voided
6. The merchant receipt prints
7. At the **"Customer Copy"** prompt, press **Yes** or **No** as appropriate
8. Press the red **Cancel/Clear (X)** button once to return to the main screen

To print a new receipt using Reprint:

1. From the main screen, press **F4** for menu
2. Select **Reprint**
3. Key in the bidder number and press the green **Enter** button
4. The merchant receipt prints; obtain guest signature
5. At the **"Customer Copy"** prompt, press **Yes** or **No** as appropriate
6. Press the red **Cancel/Clear (X)** button once to return to the main screen

Note: When reprinting a **Split Pay** transaction, the terminal automatically prints receipts for each credit card in the split pay.

Print Reports at Close of Check-out/Cashiering

At the close of checkout, print a new Sales report from the Master terminal to generate a paper backup of all transaction details stored in the terminal. For a list of the available reports, see the Functions Tab.

1. On the Master terminal, press **F4** > Scroll to **Reports** > Select **Sales** > Enter your user ID and banking password
2. The Sales report prints. Store the printed report in a secure location
3. Press the red **Cancel/Clear (X)** button twice to return to the main screen

Note: Although the Master terminal stores all transaction information, Greater Giving recommends running a Sales report as a paper back up. Keep all reports and signed receipts in a secure location. Refer to the Functions tab for more information about reports.

Shut Down Terminals

Once the Sales report prints, the terminals can be shut down. The terminals will automatically store all data until the **Clear Terminal** function is performed. However, you can also follow the steps below to shut down the terminals.

To shut down terminals:

1. Press **F4** for menu
2. Scroll to select **Shut Down**
3. Press **Yes** to proceed with shut down
4. At the **"It Is Now Safe to Remove the Power Cable"** prompt, you may remove the power adapter and disconnect any network cables
5. Return equipment to white packing case

Note: If terminals are unplugged or lose power, **all credit card data is automatically saved.**

Entering Payments, or Performing Sync 2

(!) This step is completed after the event.

During this process, final purchase amounts for Express Pay bidders are entered manually or imported electronically into the Master terminal in preparation for sending charges to the bank.

Reminder: Prior to disconnecting terminals for an electronic sync, remember to run reports as a paper backup.

Electronically Entering Payments – Sync 2 with Event Software

Sync 2 exports the amount owed by each Express Pay bidder from the event software server computer to the Auctionpay Master terminal for payment processing. Please refer to your event software sync instructions for details.

Warning: Before performing Sync 2, all winning bids and any cash and check payments must be entered into the software. Do not enter any credit card payments into the event software as this will be done automatically during Sync 3.

To enter bidder payments electronically:

1. Power down the Master terminal and disconnect the network cable from the terminal router
2. Insert the available end of the sync cable from the master terminal into a free Ethernet port on the local computer network router

Note: If a local computer network router is not available, connect the Event Software server computer directly to the Greater Giving network router using a terminal network cable.

3. Power up the Master terminal
4. Press **F4** for menu
5. Scroll to select **Setup**
6. Scroll to select **PC Sync**
7. The Master terminal reads **"Initializing"**
8. When the Master terminal prompts **"EMS Connection"**, use your event software sync function to perform Sync 2
9. Press the red **Cancel/Clear (X)** button twice to return to the main screen

Note: For step-by-step instructions, please refer to your event software sync instructions.

Note: Be sure to plug network cables into master terminal and router before powering up master terminal.

Tip: If performing Sync 2 electronically via a local network router connected to the internet, leave the Master terminal attached to the network and powered on for the Banking process. Use the red Cancel/Clear (X) button to return to the main screen and then skip to Step 5.

Tip: Wireless connection needs to be turned off prior to syncing with Master terminal and PC.

Manually Entering Payments

You will need to manually enter payments only if you are not syncing with Event Software. When using the **Enter Payments** function, terminal will prompt for dollar amounts automatically by bidder number, skipping bidders where amounts have already been entered (e.g., for Adjustments, Cashiering purchases or Split Pay purchases). This process is the same if using Event Software but not syncing.

Warning: To ensure your guests are charged correctly, double check the final purchase amount due for each bidder before entering payments into the terminal or performing Sync 2.

Tip: Any mistakes made while manually entering payments can be corrected with the Adjustment function before sending charges to the bank.

To enter bidder payments manually:

1. On the Master terminal, press **F4** for menu
2. Scroll to select **Enter Payments**
3. At the **"Enter Amount"** prompt, key in the final purchase amount for the bidder number shown
 - If a bidder number does not have any charges, press **Enter** to move on to the next bidder number.
4. Repeat until finished. Once all dollar amounts have been entered or skipped, a **Totals** report prints
5. Press the red **Cancel/Clear (X)** button once to return to the main screen

The Totals report shows 4 totals:

1. **Zero Dollar Tran Count:** The number of bidders with a credit card on file but no charges applied
2. **Unsettled Total Sales:** The number of transactions with entered dollar amounts that have not yet been settled to the bank
3. **Settled Total Transactions:** The number of approved transactions that have been sent to the bank
4. **Decline Total:** The number of declined credit card charges after settling to the bank

Total Transaction Count: The total number of transactions

Banking

Sending Charges to the Bank - After the Event

Greater Giving recommends using an internet connection to transmit the charges to the bank. If an internet connection is not available, Auctionpay terminals support banking via a dedicated analog phone line.

Note: Before sending charges to the bank, ensure guests are charged the correct amount by double-checking the totals due for each bidder. See the Check-out tab for instructions on printing a Sales report.

Warning: When using multiple Master terminals, charges must be sent to the bank on one Master terminal at a time. Sending the charges to the bank simultaneously will result in errors.

Sending Charges to the Bank – Internet Connection (*Recommended*)

To submit charges to the bank using an internet connection:

1. Power down the Master terminal and disconnect the network cable from the terminal network router
2. Insert the available end of the master terminal network cable into an Ethernet port on the local computer network router

Note: If a local internet network router is not available, plug the network cable directly into the internet connection.

3. Power up the Master terminal
4. Press **F4** for menu
5. Scroll to select **Banking**
6. Key in User ID and press the green **Enter** button
7. Key in password and press the green **Enter** button
8. Choose **Internet** as settlement method
9. Select **Send to Bank**
10. At the **"Upload Now?"** prompt, press **Yes**
11. Terminal prompts **"Total Correct?"** Confirm the amount to be submitted and press **Yes** or **No** as appropriate
 - If **No** is selected because the total is incorrect, bidder charges will not be sent to the bank, and the terminal returns to the Banking screen. See troubleshooting below
 - If **Yes** is selected, the terminal transmits credit card charges. Once the transmission is complete, the terminal generates a Banking report showing all approved and any declined transactions
13. Press the red **Cancel/Clear (X)** button twice to return to the main screen

Note: If data transmission fails, ensure the terminal is connected to a network cable with an internet connection. If a connection cannot be established, the terminal will retry 4 times. Proceed to Step 10 below or exit by pressing the red **Cancel/Clear (X)** button.

Sending Charges to the Bank – Dedicated Analog Phone Line

To submit charges to the bank using a dedicated analog phone line:

1. Power down the Master terminal and disconnect the network cable from the terminal
2. Insert provided phone cord into the port on the back of the Master terminal (the port looks like a phone)
3. Insert other end of phone cord into a dedicated analog phone line

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Tip: Typically fax, modem, and home phone lines are dedicated analog lines. Standard office extensions are usually not dedicated analog lines.

4. Power up the Master terminal
5. Press **F4** for menu
6. Scroll to select **Banking**
7. Key in User ID and press the green **Enter** button
8. Key in password and press the green **Enter** button
9. Choose **Phone line** as settlement method
10. Scroll to select **Send to Bank**
11. At the **"Upload Now?"** prompt, press **Yes**
12. If a prefix is required to dial out, select **Yes** at the prompt and enter the dialing prefix (most common is **9**); if a prefix is not required, press **No**
13. Terminal prompts **"Total Correct?"** Confirm the amount to be submitted and press **Yes** or **No** as appropriate
 - If **No** is selected because the total is incorrect, bidder charges will not be sent to the bank, and the terminal returns to the Banking screen. See troubleshooting below
 - If **Yes** is selected, the terminal transmits credit card charges. Once the transmission is complete, the terminal generates a Banking report showing all approved and any declined transactions
14. Press the red **Cancel/Clear (X)** button twice to return to the main screen

Note: If data transmission fails, ensure the terminal is connected to a dedicated analog phone line and try again. If a connection cannot be established, the Master terminal will retry 4 times. Exit by pressing the red **Cancel/Clear (X)** button.

Troubleshooting Tip: If the total amount displayed in the process of sending the charges to the bank does not match your records, the final purchase amounts may not have been correctly entered into the terminal. If this is the case, do not send the charges to the bank. Compare the Sales report to your bidder invoices to find the discrepancy. Once the error is located, use the Adjustment function to enter the correct payment amount, or perform Sync 2 a second time to transmit the correction to the Master terminal.

Tip: If performing Sync 3 electronically with a computer connected to the internet via a local network router, leave the Master terminal attached to the network and powered on after the Banking process. Use the red **Cancel/Clear (X)** button to return to the main screen and then skip to Step 5.

Banking Mode

After charges have been transmitted to the bank, the terminal displays the functions below:

- **Send to Bank** – Allows user to transmit additional credit card charges
- **Banking Report** – A list of approved and declined payment transactions that are automatically printed after charges are transmitted. Each transmission to the bank constitutes a *batch*. After banking multiple times, you can choose to print all transactions or only a specific batch
- **Audit Report** – A more detailed banking report to be used only when instructed by Greater Giving technical support
- **Declines** – Allows user to modify declined credit card charges. In order to resubmit or void a declined charge you must first reauthorize the declined transaction using the **"REAUTH"** function. See the Declines tab for instructions
- **Clear Terminal** – Deletes all transaction data from the Master terminal. This function should only be used once all charges have been sent to the bank, Sync 3 has been done if syncing with event management software, and declines have been resubmitted. Once transactions are deleted they cannot be restored

Posting Payments, or Performing Sync 3

(!) This step is completed after submitting credit card charges.

Posting payments is the final step in the reconciliation process. Event records are updated to show that guests with approved credit card charges have paid for their purchases.

Electronically Posting Payments – Sync 3 with Event Software

Sync 3 imports approved credit card payment transactions from the Auctionpay Master terminal into event software. During Sync 3, the software automatically marks bidders with approved credit card charges as paid.

Electronically posting payments:

1. Power down the Master terminal and disconnect the network cable from the terminal network router
2. Insert the available end of the sync cable from the master terminal into a free Ethernet port on the local computer network router

Note: If a local computer network router is not available, connect the Greater Giving Event Software server computer directly to the Greater Giving network router using the sync cable.

4. Press **F4** for menu
5. Scroll to select **Setup**
6. Scroll to select **PC Sync**
7. The Master terminal reads **"Initializing"**
8. When the Master terminal prompts **"Waiting for EMS Connection"**, use the Event Software sync function from the Event Software to perform Sync 3

Note: For step-by-step instructions, please refer to your Event Software sync instructions.

9. When sync is complete, power down the Master terminal and disconnect any attached network cables
10. Press the red **Cancel/Clear (X)** button to return to the main screen

Manually Posting Payments

Once the Banking report has printed with the approved charges, use this information to update event records to show who has paid.

Note: If using Event Software but not syncing, refer to your software sync instructions for instructions on designating guests as fully paid.

Post Event Information

If declined transactions appear on the Banking report, see the Declines section for further instructions.

After charges have been sent to the bank, payments are posted, and all declined transactions are resolved, the terminals must be cleared and returned to Greater Giving. See the Returning Auctionpay Equipment section for more information.

Declines

Obtaining Approval Codes to Resubmit Declines - After the Event

When a credit card issuer declines to approve one or more submitted charges, the charge(s) will return as **declined**. There are three options for handling declines: resubmit the charge using a Voice Authorization Code, resubmit the charge without a Voice Authorization Code, or obtain an alternate form of payment from the guest.

Information Needed

The following information is required to obtain a Voice Authorization Code:

- The 12-digit Greater Giving merchant account number for Visa and MasterCard is located at the top of each merchant receipt.
 - To obtain a voice authorization on a declined American Express transaction, please contact Greater Giving Client Services
- Bidder number
- Declined credit card number and expiration date
- Cardholder's name as it appears on the card
- Dollar amount
- Bank Code Number – 203600

Tip: Locate declined credit card information on the Banking report.

Obtaining Voice Authorization Codes

Contact the appropriate credit card company and follow the prompts to obtain Voice Authorization Codes.

Visa and MasterCard	American Express	Discover
800-944-1111	800-528-2121	800-944-1111

Reauthorizing and Submitting Declines

Once Voice Authorization Codes are obtained or you are ready to attempt the charge again, resubmit the decline(s) from the Auctionpay Master terminal. If an alternate credit card has been given by the bidder, follow the steps under “Using an alternate credit card to resolve a decline”.

Note: If you have obtained an alternative credit card you will still need to reauthorize the declined transaction with the “**REAUTH**” function in order to perform a void. Once you reauthorize and void the decline, you will be able to process the new credit card.

Reauthorizing and submitting declines

Start by reauthorizing the declined transaction with the “**REAUTH**” function as outlined in the steps below. Once a charge is reauthorized, the amount of the charge can be adjusted if necessary. When finished, send the reauthorized charge to the bank as outlined in the Banking tab.

Note: The declined transaction is **not** sent to the bank during the reauthorization process.

To reauthorize a declined transaction:

1. From the main screen of the Master terminal, press **F4** for menu
2. Scroll to select **Banking**
3. Key in user ID and press **Enter**
4. Key in password and press **Enter**
5. Scroll to select **Reauth Decline**
6. Key in the invoice number shown on the banking report under the declined transaction to reauthorize and press the green **Enter** button
7. At the “**Enter Voice Auth Number?**” prompt, press **Yes** or **No** as appropriate
 - If **Yes**, key in the Voice Authorization Code obtained from the card merchant and press **Enter**
 - If **No**, the decline is reauthorized without a Voice Authorization Code and can be re-settled (may still decline—contact the card merchant for more information)
8. At the “**Reauthorize?**” prompt, confirm dollar amount and bidder number and select **Yes**
9. A copy of the receipt prints
10. Repeat with each declined transaction
11. Press the red **Cancel/Clear (X)** button twice to return to the main screen

To adjust the amount to be charged for the reauthorized transaction (*optional*):

1. From the main screen, press **F4** for menu
2. Select **Adjustments**
3. Key in the bidder number and press the green **Enter** button
4. Re-key bidder number and press the green **Enter** button
5. Key in the new amount to be charged and press the green **Enter** button
6. At the “**Consumer Present**” prompt, press **Yes** or **No** as appropriate
7. The merchant receipt prints; obtain guest signature
8. At the “**Customer Copy**” prompt, press **Yes** or **No** as appropriate
9. Press the red **Cancel/Clear (X)** button to return to the main screen

See the Banking tab for instructions on submitting the reauthorized charge(s) to the bank.

Using an alternate credit card to resolve a decline

To resolve a decline using a different credit card, re-authorize the declined transaction using the “**REAUTH**” function as outlined above. Follow the instructions below to void the original transaction, and enter a new one using the alternate credit card. Finally, submit the new transaction to the bank as outlined in the Banking section.

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To void the declined transaction:

1. From the main screen, press **F4** for menu
2. Select **Void**
3. Key in the bidder number and press the green **Enter** button
4. Press **Yes** to confirm the transaction to be voided
5. The merchant receipt prints
6. At the **"Customer Copy?"** prompt, press **Yes** or **No** as appropriate
7. Press the red **Cancel/Clear (X)** button to return to the main screen

To enter a new credit card transaction:

1. From the main screen, swipe the new credit card
2. Key in the bidder number and press Enter
3. Re-key the bidder number and press Enter
4. The merchant receipt prints; obtain guest signature
5. At the **"Customer Copy"** prompt, press **Yes** or **No** as appropriate

To enter new credit card information manually:

1. On the main screen, use the key pad to key in the full credit card number and press the green **Enter** button
2. Key in the four-digit expiration date in MMY format and press the green **Enter** button
3. At the **"Card Present?"** prompt, select **Yes** or **No** as appropriate
4. Key in the bidder number and press the green **Enter** button
5. Re-key the bidder number and press the green **Enter** button
6. The merchant receipt prints; obtain guest signature
7. At the **"Customer Copy"** prompt, press **Yes** or **No** as appropriate

See the Banking section for instructions on submitting a new transaction to the bank.

Warning: If you have resubmitted a decline and the charge was not approved, please wait 24 hours before trying again.

Note: After the authorization process for declines is completed and all declined transactions are resubmitted and/or voided, any additional charges can be processed on the Master terminal using the **F1 Cashiering** function as outlined on the Checkout tab.

Returning Auctionpay Equipment

After all declined transactions are resolved:

- Clear all transaction data using the **Clear Terminal** function (see the Training section)
- Return all equipment to the white packing case and remove return shipping labels provided by Greater Giving
- Verify that all equipment is in the case by referring to the Packing Slip
- Place the white packing case into the brown cardboard box and tape shut
- Place shipping labels on the outside of the cardboard box
- Follow shipping instructions provided to arrange for pickup or drop off
- Do NOT ship equipment in only the white box. If you cannot locate the original cardboard box, please use an equivalent

Post Event Information:

- Funds will be deposited into your bank account within 5 business days of submitting charges to the bank
- Please return equipment within 4 business days of the scheduled event or late fees may apply
- For financial record keeping, Greater Giving recommends retaining the final Sales report and Banking report for three years in a secure location. In the event that there is a dispute over a guest charge, these receipts may be required for reference. After you have completed all transactions and declines have been resolved, destroy any paper records with full card numbers using a paper shredder or other means so the card numbers become unrecognizable

Alternate Modes

Auctionpay terminals are available in three modes: Express Pay, Retail Online and Retail Offline. The mode is set by Greater Giving prior to shipment.

Retail Modes

Both Retail Offline and Retail Online terminals are stand-alone units that are not connected to other terminals or to a network router, but do require a power source. Retail terminals do not use bidder numbers; instead, each transaction is automatically assigned a unique invoice number. In Retail mode, final purchase amounts are entered for each transaction and printed on the receipt.

RETAIL OFFLINE MODE

In Retail Offline mode, Auctionpay terminals accept credit card transactions without the use of a bidder number. Transactions are stored in the Retail terminal until they are ready to be sent to the bank.

To enter a Retail Offline transaction:

1. From the main screen, swipe the guest's credit card
2. Key in the purchase amount and press the green **Enter** button
3. The merchant receipt prints; obtain guest signature
4. At the "**Customer Copy**" prompt, press **Yes** or **No** as appropriate

To enter credit card information manually:

1. On the main screen, use the key pad to key in the full credit card number and press the green **Enter** button
2. Key in the four-digit expiration date in MMY format and press the green **Enter** button
3. At the "**Card Present?**" prompt, select **Yes** or **No** as appropriate
4. Key in the purchase amount and press the green **Enter** button
5. The merchant receipt prints; obtain guest signature
6. At the "**Customer Copy**" prompt, press **Yes** or **No** as appropriate

To delete a single transaction using Void:

1. From the main screen, press **F4** for menu
2. Select **Void**
3. Key in the invoice number and press the green **Enter** button
4. Press **Yes** to confirm the transaction to be voided
5. The merchant receipt prints
6. At the "**Customer Copy?**" prompt, press **Yes** or **No** as appropriate
7. Press the red **Cancel/Clear (X)** button to return to the main screen

To print a new receipt using Reprint:

1. From the main screen, press **F4** for menu
2. Select **Reprint**
3. Key in the invoice number found on the receipt and press the green **Enter** button
4. The merchant receipt prints; obtain guest signature
5. At the "**Customer Copy**" prompt, press **Yes** or **No** as appropriate
6. Press the red **Cancel/Clear (X)** button to return to the main screen

To modify a payment amount using the Adjustment function:

Note: The terminal will not add two dollar amounts together. At the prompt, enter the final or total dollar amount to be charged to the bidder. This overwrites the amount currently in the terminal.

1. Press **F4** for menu
2. Select **Adjustment**
3. Key in the invoice number and press Enter
4. Confirm the dollar amount and invoice number. At the “**Enter Amount**” prompt, key in new final purchase amount to be charged and press the green **Enter** button
5. At the “**Consumer Present?**” prompt, press **Yes** or **No** as appropriate
6. The merchant receipt prints; obtain guest signature
7. At the “**Print Customer Copy?**” prompt, press **Yes** or **No** as appropriate
8. Press the red **Cancel/Clear (X)** button to return to the main screen

Refer to the Banking tab for more information on sending charges to the bank.

Warning: When using multiple Retail terminals, charges must be sent to the bank on one terminal at a time. Sending the charges to the bank simultaneously will result in errors.

RETAIL ONLINE MODE

Retail Online terminals are stand alone units connected to a power source and a dedicated analog phone line to allow real-time transaction processing. In Retail Online mode, Auctionpay terminals accept credit card transactions without the use of a bidder number. As this Mode is set for real-time authorizations, it is unable to resubmit declines or adjust processed transactions. After all transactions are authorized, charges must be settled to the bank as outlined in the Banking tab.

Note: Adjustments cannot be made to Retail Online transactions. To modify a transaction amount, void the current transaction and enter a new one.

To enter a Retail Online transaction:

1. From the main screen, swipe the guest's credit card
2. Key in the purchase amount and press the green **Enter** button
3. The merchant receipt prints; obtain guest signature
4. At the "**Customer Copy**" prompt, press **Yes** or **No** as appropriate

To enter credit card information manually:

1. On the main screen, use the key pad to key in the full credit card number and press the green **Enter** button
2. Key in the four-digit expiration date in MMY format and press the green **Enter** button
3. At the "**Card Present?**" prompt, select **Yes** or **No** as appropriate
4. Key in the purchase amount
5. The merchant receipt prints; obtain guest signature
6. At the "**Customer Copy**" prompt, press **Yes** or **No** as appropriate

To delete a single transaction using Void:

1. From the main screen, press **F4** for menu
2. Select **Void**
3. Key in the purchase amount
4. Press **Yes** to confirm the transaction to be voided
5. The merchant receipt prints
6. At the "**Customer Copy?**" prompt, press **Yes** or **No** as appropriate
7. Press the red **Cancel/Clear (X)** button to return to the main screen

To print a new receipt using Reprint:

1. From the main screen, press **F4** for menu
2. Scroll to select **Reprint**
3. Key in the invoice number found on the receipt and press the green **Enter** button
4. The merchant receipt prints; obtain guest signature
5. At the "**Customer Copy**" prompt, press **Yes** or **No** as appropriate
6. Press the red **Cancel/Clear (X)** button to return to the main screen

(!) You must settle each terminal for your authorized funds to be processed. Refer to the Banking tab for more information on sending charges to the bank.

Warning: When using multiple Retail terminals, charges must be sent to the bank on one terminal at a time. Sending the charges to the bank simultaneously will result in errors.

Functions

Express Pay Functions

To register a guest for Express Pay
Swipe the guest's credit card
Key in the bidder number and press Enter
Re-key the bidder number and press Enter
The merchant receipt prints; obtain guest signature
At the " Customer Copy " prompt, press Yes or No as appropriate

Express Pay Functions

To enter credit card information manually
From the main screen, use the key pad to key in the full credit card number and press Enter
Key in the four-digit expiration date in MMY format and press Enter
At the " Card Present? " prompt, select Yes or No as appropriate
At the " Enter Bidder Number " prompt, key the bidder number and press Enter
Re-key the bidder number and press Enter
The merchant receipt prints; obtain guest signature
At the " Customer Copy " prompt, press Yes or No as appropriate

Cashiering Functions

To enter a Cashiering transaction
From the main screen, press F1
Swipe the guest's credit card
Key in the bidder number and press Enter
Re-key the bidder number and press Enter
At the " Enter Amount " prompt, key in the total dollar amount to be charged and press Enter
The merchant receipt prints; obtain guest signature showing the final purchase amount
At the " Customer Copy " prompt, press Yes or No as appropriate

Cashiering Functions

Void – Deletes a single transaction
Press F4 for menu > Select Void
Key in the bidder number and press Enter
Re-key the bidder number and press Enter
Confirm the dollar amount and bidder number. Press Yes or Enter to void the transaction
The merchant receipt prints
At the " Customer Copy " prompt, press Yes or No as appropriate

Cashiering Functions

Adjustments – Replaces dollar amount currently in the terminal and with a new amount
Press F4 for menu > Select Adjustment
Key in the bidder number and press Enter
Re-key the bidder number and press Enter
At the " Enter Amount " prompt, key in new final purchase amount to be charged and press Enter
At the " Consumer Present? " prompt, press Yes or No as appropriate
The merchant receipt prints; obtain guest signature
At the " Print Customer Copy? " prompt, press Yes or No as appropriate

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Cashiering Functions

Reprints – Prints a duplicate receipt for a transaction currently in the terminal
From the main screen, press F4 for menu > Select Reprint
Key in the bidder number and press Enter
The merchant receipt prints; obtain guest signature
At the “ Customer Copy ” prompt, press Yes or No as appropriate

Cashiering Functions

Split Pay – Split payments among multiple credit cards for one bidder number
From the main screen, press F4 for menu > Select Split Pay
Key in the bidder number and press Enter
Re-key the bidder number and press Enter
If the bidder has a zero dollar balance, the terminal prompts “ Enter Amount ”. Enter the total amount to be charged to the credit card currently in terminal and press Enter . Otherwise terminal proceeds to new card
Receipts print
At the “ Add Card? ” prompt, select Yes
If Yes , swipe or key in new credit card
At the “ Enter Amount ” prompt, key in total dollar amount to be charged to that credit card and press Enter
Receipts print
Terminal again prompts “ Add Card ”. Select Yes or No as appropriate and repeat steps for each additional credit card

Reports

Note: The following functions can only be performed on the Master terminal. Remotes should be idle while running reports.

Bidder Report – A list of bidder numbers in numerical order with the type of credit card registered. <i>Not available in Retail modes.</i>
Press F4 for menu > Select Reports > Select Bidder

Reports

Sales Report – A list sorted by bidder number including: cardholder name, credit card type, full card number, expiration date and dollar amount.
Press F4 for menu > Select Reports > Select Sales > Enter user ID and password

Reports

Split Pay Report – A list of split pay guests sorted by bidder number including: credit card type, last 4 digits of the card number, dollar amount and bidder subtotal. <i>Not available in Retail modes.</i>
Press F4 for menu > Select Reports > Select Split Pay

Reports

Totals Report – A list of totals including Zero Dollar Transaction Count, Unsettled Total Sales, Settled Total Sales, Declined Total and Total Transaction Count. <i>Not available in Retail modes.</i>
Press F4 for menu > Select Reports > Select Total

Reports

Banking Report – A list of approved and declined payment transactions. The Banking report can be reprinted from the Banking screen. This report will automatically print after transmitting charges to the bank.
Press F4 for menu > Select Banking > Enter user ID and password > Select Banking Report

Reports

Audit Report – A more detailed banking report that can be printed from the Banking screen. This report should only be used at the recommendation of Greater Giving technical support.

Press **F4** for menu > Press **7** to select **Banking** > Enter user ID and password > Select **Audit Report**