



Recommended Network Setup

Setting up the computer network for your event is an integral part of event preparations and we have some recommendations to ensure that your event goes as smoothly as possible. Greater Giving Event Software (ES) uses Windows File Sharing to allow multiple computers to work on the same database within your network. There are a variety of ways that computers can be networked but in order for the credit card terminals to sync with your software we recommend using the following guidelines. Also, if you are using just one computer then there is no need for networking.

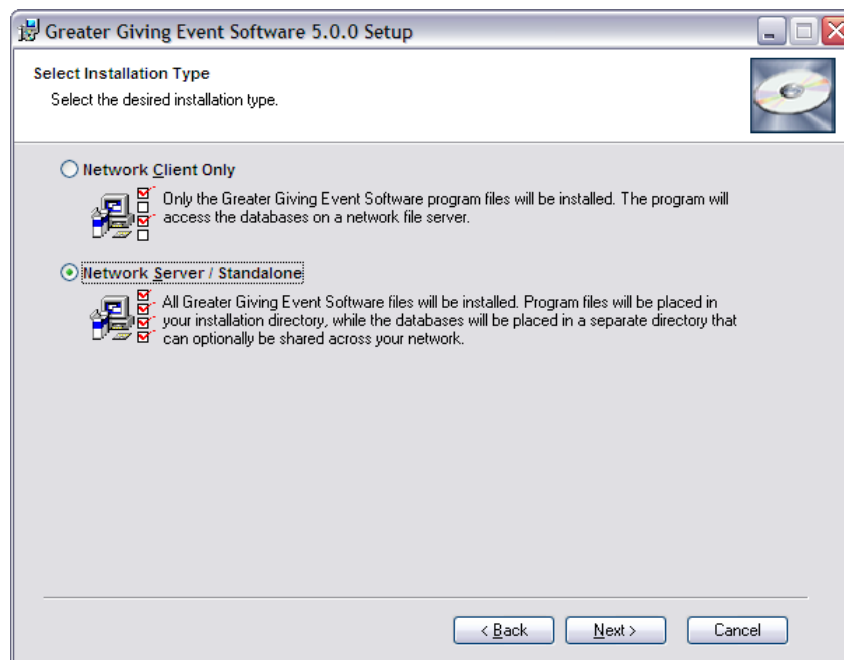
This document uses Windows XP as the default platform for instruction and screenshots. If you would like assistance with Windows Vista or Windows 7 please see the additional information found on page 8.

1. We strongly suggest hiring or consulting with an IT professional for assistance with your computer network. We are able to assist with some of the basics but an IT professional should be able to set up the network for you. If you choose to hire a network professional, please ensure that they read this document as well.
2. Wireless networks are NOT supported and will likely cause your data to become corrupted. Due to this, we strongly recommend using a “hard-wired” network with a router to connect the computers. We also recommend disabling your wireless network adapter while using the software to speed up the sync process.
3. We recommend setting up your network dynamically using a router to assign IP addresses automatically for your computers and devices.
 - Note: Routers vs. Switches/Hubs: There are different pieces of equipment that can be used to connect your computers together. Routers are the recommended piece of equipment as this can act as the DHCP server on your network and automatically assign IP addresses to each computer and device on the network. This is the key to successfully syncing the Greater Giving terminal with your Greater Giving ES.
 - Switches and hubs will work with the software for sharing the database on your network but they will not assign the IP Addresses for your computers and other devices. With this setup you will need to use the instructions beginning on page 19 to configure your network in order to be able to sync your terminals with your software.
4. Make sure the router you choose to use has enough available LAN ports for all of your computers and devices plus one for the master terminal in order to sync with the software.

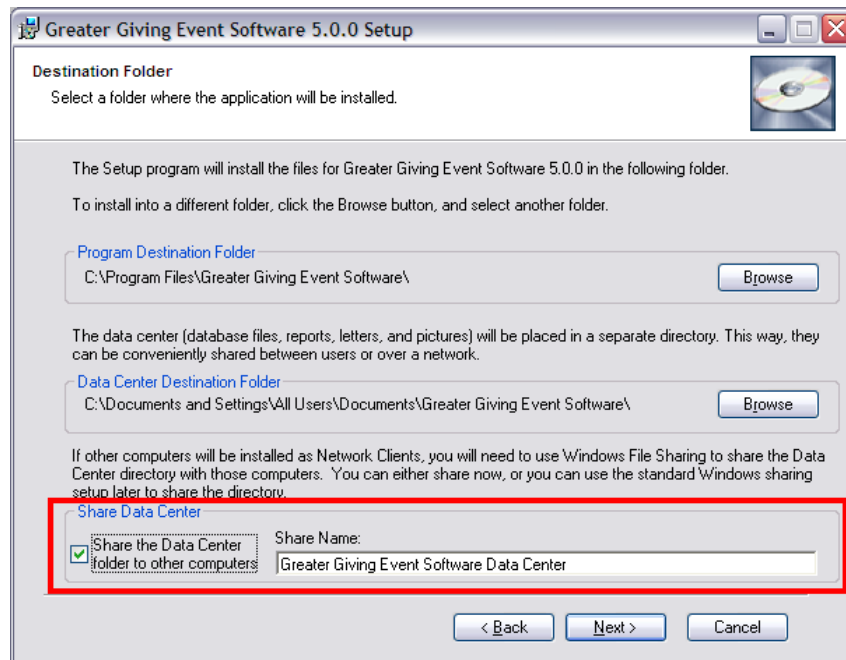
5. When setting up your network in Windows, make sure the computers are on the same Workgroup. You can set this up by going to Start > Control Panel > System and selecting the Computer Name tab. Here you can see the computer name (needed to find the correct computer when mapping your network drives later) and the workgroup name. If the computer is setup for a domain you can leave it as is and the router will still assign the IP for this computer.
6. Ensure the Data Center folder on the Network Server computer is shared with everyone and that they have full read/write privileges for that directory.
7. Map Network drives on each of the Network Client Only computers to the Data Center folder on the Network Server.

Proper Installation of Greater Giving Event Software

When installing the software on your computers it is important to choose the correct installation types for your network to function properly. First you need to pick one of the computers to act as the “Server”. This will be the main computer and will host the Data Center. This installation type is “Network Server / Standalone” and will allow you to share the Data Center during the install.



To share the Data Center, check the box highlighted below during the install process. After clicking next the software will finish installation and the Server computer will be ready to go.



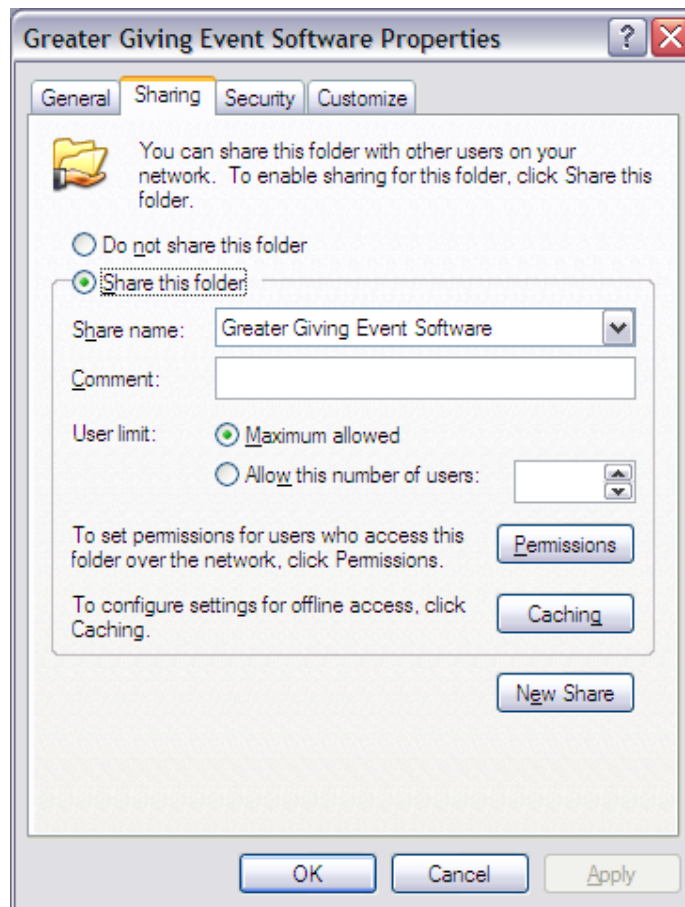
If you did not share the folder during installation then you can still share that directory using the following instructions.

Note: You must share the entire Data Center folder and all sub-folders. If you share only the Database folder, or the database file, the client computers will not be able to access the reports, upgrades, or help, and the program will not operate correctly. The Data Center folder is installed at C:\Documents and Settings\All Users\Documents\Greater Giving Event Software by default.

To manually enable file sharing using Windows Explorer, locate and right click on the Data Center folder and select Sharing. Depending on what version of Windows XP you have installed, the window that appears may look different (if you have Windows Vista or Windows 7 installed, go to page 3).

You will want to share the folder and give it a name. Note that this does not change the actual name of the Data Center folder; you are only changing the "shared as" name of the folder. Once you are finished click OK.

Below is an example of Sharing in Windows XP:

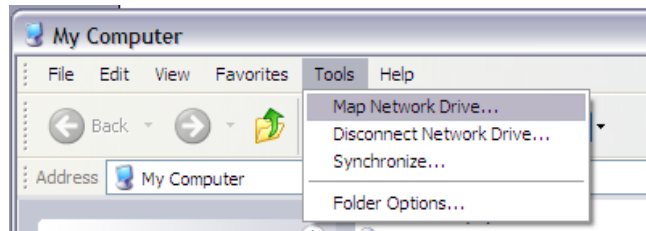


Mapping a Network Drive on the Client Computers

After the Data Center folder has been shared, you will now need to map the network drive on the client computers. To do this, you must first have two pieces of information, the name of the server computer and the name that was assigned to the shared Data Center folder on the server computer.

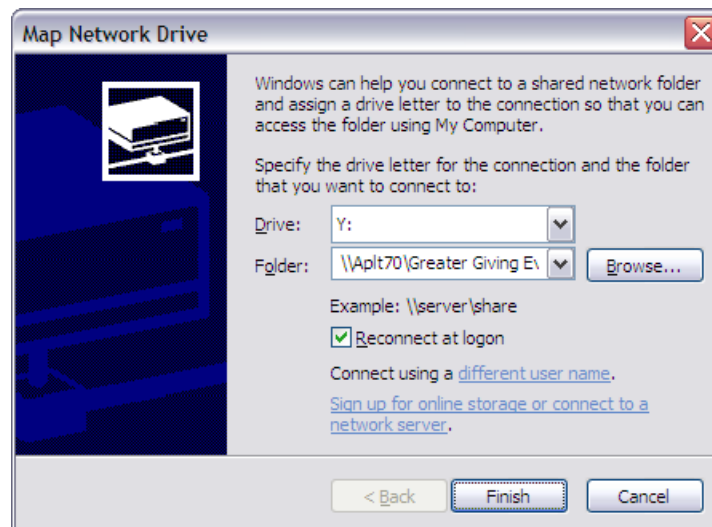
To find the name of the server computer, go to Control Panel (on the server computer) and select System and then the Computer Name tab.

If you don't know the name that was given to the shared Data Center folder on the server computer, go to My Computer (on the server computer), double click on the C: drive, navigate to the Data Center folder and right click on it, select Sharing and Security, and read the Share Name. You now have all the information you need to map the network drive on the client computers.



On the client computer double click on My Computer or Windows Explorer and then click on Tools on the menu and then Map Network Drive. Select a drive letter and in the Folder drop down box type “\\”, the name of the server computer, “\”, and then the name of the shared folder. For example “\\Apl70\Greater Giving Event Software”, where “Apl70” is the name of the server computer and Greater Giving Event Software is the name of the Data Center Folder.

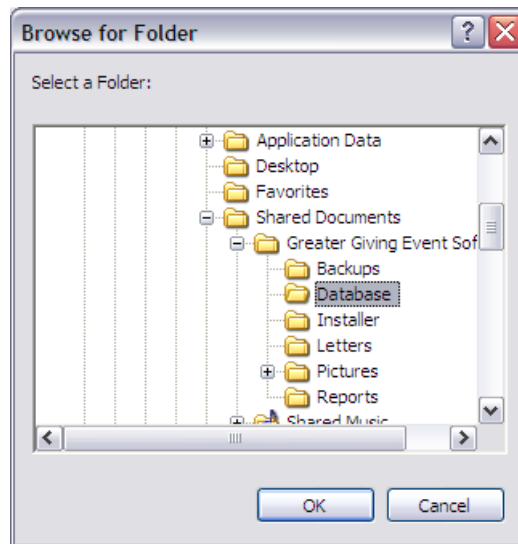
Alternately, you can click on the browse button and navigate to the folder you would like to share.



Click on the Finish button. Repeat this procedure on all of the client computers. Now you can open Greater Giving ES on the client computers and open the database on the mapped drive to the server computer.

Accessing the Database on the Client Computer

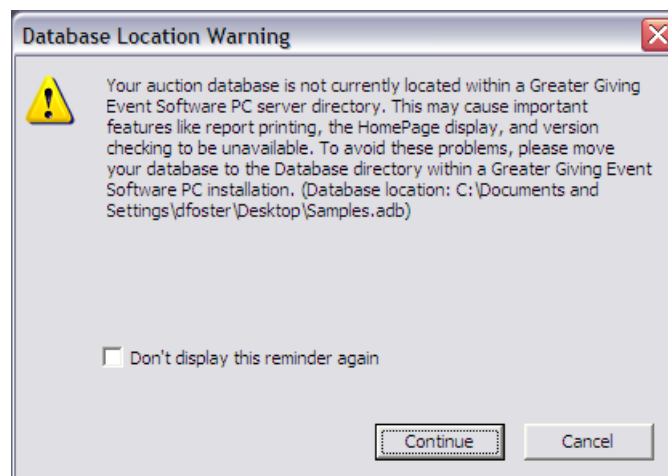
On the client computer open Greater Giving ES. Typically, the client computers will open directly to the Open Project window. Click on the browse button in the lower left hand corner of the Open Project window and browse to the database folder located on the Mapped Network Drive created on each client.



The bar at the top of Greater Giving ES screen displays the location of the current database. Check the bar to confirm that you are indeed working in the database that is located on the server.

In order for Greater Giving ES to function correctly, the default database must be in the correct location. Greater Giving ES uses the default database to locate the Data Center. If the default database is not in the correct location, Greater Giving ES will not be able to locate the files needed to function properly.

At startup, Greater Giving ES will check the existence and accessibility of the Data Center folders and post a warning if it detects a problem.

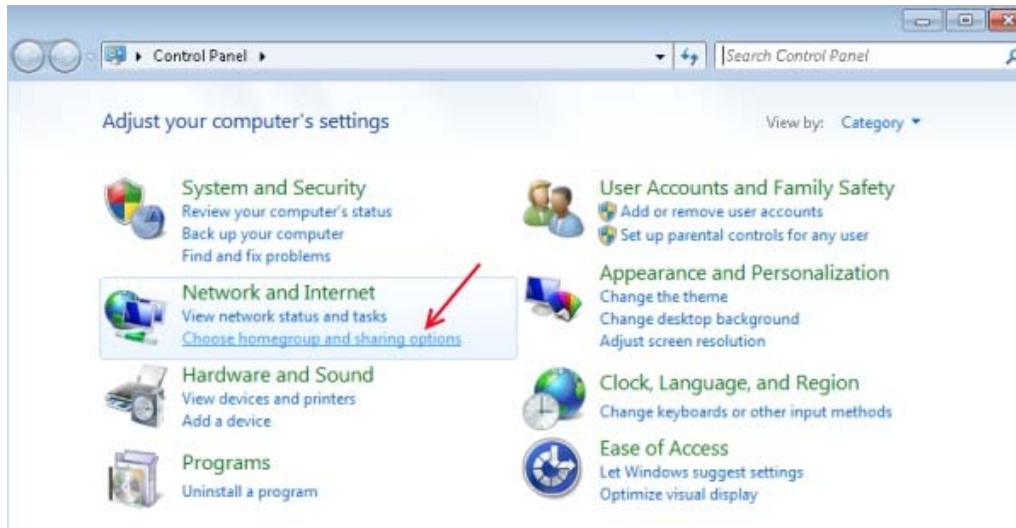


This message indicates the default database is not in a Database folder or there is no Reports folder alongside the Database folder. If this occurs please place the database file in the proper Database folder within the Data Center and double click on the database to open it once moved. After the software opens, click on File and then Set Current Database as Default. This will redirect the software to use the correct path to locate the data center. If the option to Set Current Database as Default is grayed out this means that the database is already the default and there is no need to set it again.

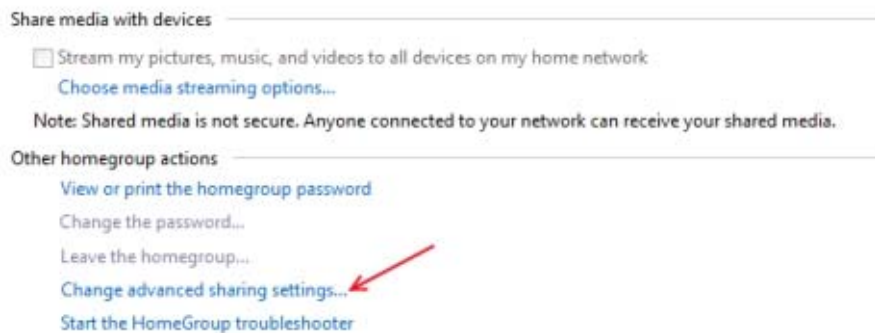
Networking in Windows Vista & Windows 7

Turning Off Password Protected Sharing

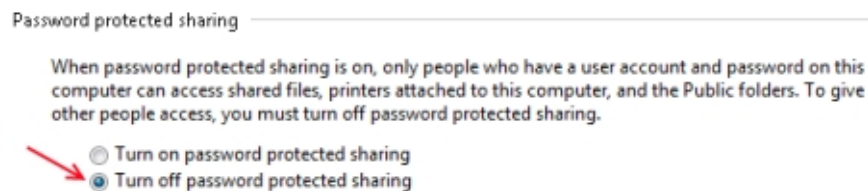
Before mapping the network drive in Windows Vista and Windows 7, it is important to turn off the Password Sharing option. You can access this by going to Control Panel and then choose homegroup and sharing options.



On the next screen, select Change advanced sharing settings



Select Turn off password protected sharing



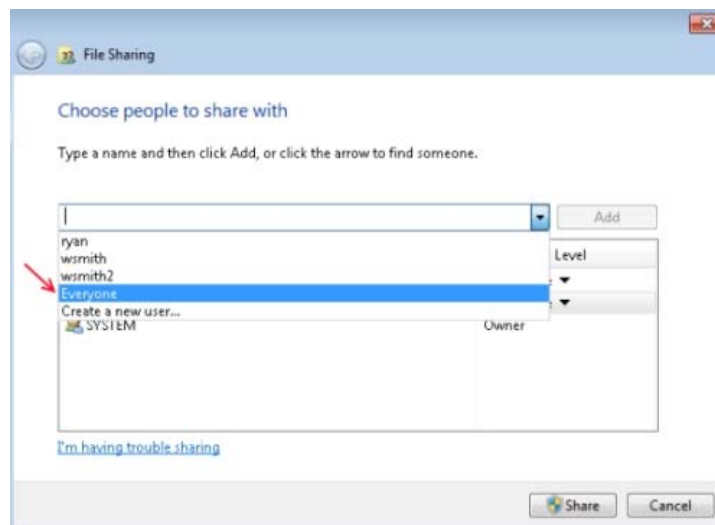
Sharing the Data Center Folder

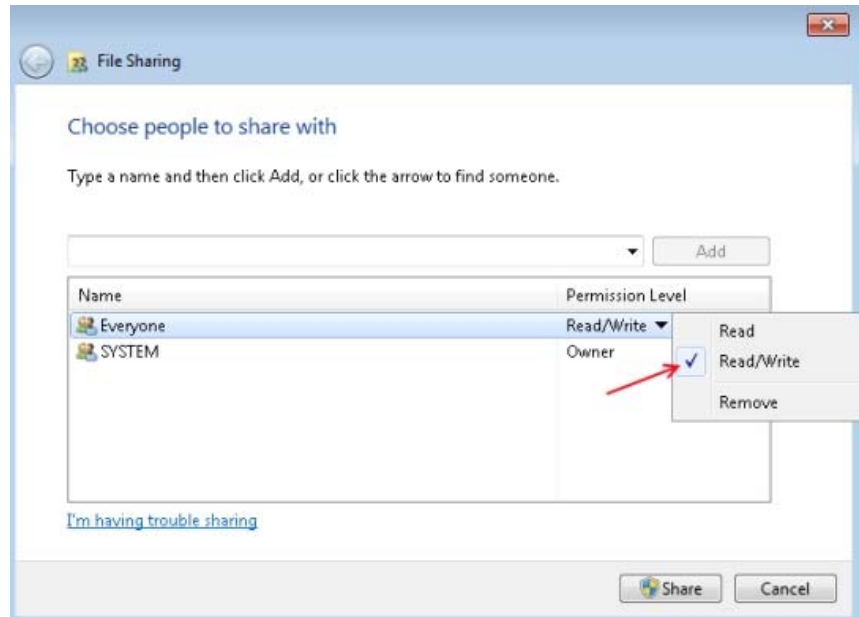
Once those settings have been saved, you can share the Data Center by right clicking on it and selecting Share. If you do not see an option to share on the right click menu, select Properties and the Sharing tab.

Next click on the Share button as seen below:



Select everyone to share with and make sure the permissions are set for Read/Write. If it's only set for read, you will get an error when opening the database on the client computers.





Once the Data Center folder is shared, you can map the network drive on the client computers following the instructions on page 4.

Sync Guide

Sync Overview

Syncing is an electronic transfer of data between Greater Giving ES and the Auctionpay Master terminal.

Sync Timeline:

Before the Event

Setup – Connecting the terminal and computer
 Sync Test – Pre-event confirmation of connectivity

During the Event

Sync 1 – Marking Express Checkout guests in the software

After the Event

Sync 2 – Entering payment amounts from the software into the terminal
 Send Charges to the Bank
 Sync 3 – Posting approved transactions from the terminal into the software
 Resubmit Declines

Equipment:

				
Master Terminal	Server Laptop	Computer Router	Terminal Adapter	Ethernet Cable

Process Terminology

Sync Test - Performed prior to the event day, this is a brief test that confirms the connectivity between the Master terminal and the computer(s) and/or computer network.

Sync 1 - After registration, during the event, the Master terminal marks the guests that pre-swipe their card as Express Checkout in the Greater Giving ES.

Sync 2 - After the event, the Greater Giving ES exports the amounts owed by each Express Checkout guest to the Master terminal for payment processing.




Sync 3 - After sending charges to the bank, the Master terminal imports approved payment transactions into the Greater Giving ES.

Setup - connecting the Master terminal to your computer network using your network router

Equipment Needed:

- Computer Network connected with Router
- Master terminal
- Terminal A/C Adapter
- Ethernet Cable(s)

Instructions:

	<p>1. Connect the Ethernet cable to the Master terminal using the 10bBaseT port on the back of the terminal.</p>
	<p>2. Connect the Ethernet cable in the Master terminal to the computer network router in any available LAN port.</p>
	<p>3. Plug the A/C Adapter into the port on the right side of the Master terminal and then into the power outlet.</p>

Test Sync 1

Once there is a corresponding bidder number in the Master terminal, Sync 1 can be tested.

1. Plug the terminal's Ethernet cable into an empty LAN port on the computer router.
2. Power up the master terminal and wait for the home screen to appear.
3. On the master terminal hit the F4 button, then option 8 for the setup menu, and finally option 7 for the PC Sync. Wait for screen to read "EMS Connection" then proceed.
4. In the Greater Giving ES choose a database with a bidder number that matches the test transaction.
5. Click on Data then choose Synchronize with an Auctionpay Terminal. Choose Sync 1 and click next.



6. Select the second option “Syncing with a VeriFone Terminal” and click Locate Terminal IP.

Note: If you receive the message “Unable to locate an Auctionpay VeriFone terminal on your local network using a fast terminal search. Continue with a slow terminal search?” Click OK.

7. Once the terminal is found, click OK and then next on the Sync Wizard menu.

Note: If the Greater Giving ES is unable to find the terminal you may be using a switch or hub rather than a router. Please see the Appendix for the proper steps to network using a complete Sync 1 in this instance.

8. When finished you will see the message “Sync 1 has been successfully completed” in the Sync wizard. This indicates that the sync was performed and you can now click Finish in the wizard.

Confirm the Sync was Successful

1. In the software, from the top tool bar select Views, then Grid Views. Select Bidders to open the Bidder Grid.

2. Double click on the test bidder to open the bidder record. In the lower left hand corner of the record there should be a checkmark in the Express Checkout box.

3. To reset the record for the event, uncheck the box and then press F10 on your keyboard to save.

Clear the Auctionpay Terminal

1. Press F4

2. Press option 7 for Banking.

3. Enter the User ID and Password included with your equipment.

4. Press option 7 for Clear Terminal.

5. Press Yes on the terminal to confirm.

Note: This will clear ALL transactions currently stored on the terminal and should only be done prior to your event to clear test cards and post event, after submitting your charges to the bank in order to clear out the terminals prior to shipping them back.



During Sync 1, the Master terminal sends the Express bidders to the Greater Giving ES, resulting in "Express Checkout" appearing on printed receipts.

1. After registration closes, run a bidder report and a sales report from the master terminal (See Quick Start Guide for instructions)
2. Power down the master terminal
3. Disconnect the master terminal's Ethernet cable from the terminal router
4. Move the master terminal along with the power adapter and Ethernet cable to a location near the computer router
5. Plug the master terminal's Ethernet cable into an empty LAN port on the computer router
6. Power up the master terminal and wait for the home screen to appear
7. On the master terminal press the F4 button
8. Then select option 8 for the Setup menu
9. Then select option 7 for the PC Sync
10. Wait for screen to read "EMS Connection" then proceed
11. In the Greater Giving ES click on Data from the toolbar
12. Next choose Synchronize with an Auctionpay Terminal
13. Choose Sync 1 and click next.
14. Select the second option "Syncing with a VeriFone Terminal"
15. Click the button "Locate Terminal IP"

Note: If you receive the message "Unable to locate an Auctionpay VeriFone terminal on your local network using a fast terminal search. Continue with a slow terminal search?" Click OK.

16. Once the terminal is found, click ok and then next on the Sync Wizard menu.

Note: If the Greater Giving ES is unable to find the terminal you may be using a switch or hub rather than a router. Please see the Appendix for the proper steps to network using a complete Sync 1 in this instance.

17. When finished you will see the message "Sync 1 has been successfully completed" in the Sync Wizard. This indicates that the sync was performed and you can now click Finish in the Wizard.



Notes: If for any reason you are unable to perform Sync 1 using the automated process during your event, you will be able to manually mark the bidders in the Greater Giving ES using the bidder report from the master terminal.

- a. Print a bidder report from the master terminal - press F4, option 5 for reports, option 1 for bidder.
- b. In the Greater Giving Event Software, from the toolbar, select Views - Grid Views - Bidders.
- c. Hold the Ctrl key down on your keyboard and click on the rows which correspond with the bidder numbers on the bidder report from the master terminal. When complete, all of the records you have clicked on should be highlighted on the grid.
- d. Select Grid from the toolbar on the Greater Giving Event Software, select Enable Express Checkout and click Ok to confirm.

Sync 2

During Sync 2, Greater Giving ES exports the amounts owed by each Express Checkout guest into the Auctionpay master terminal.

1. Ensure all winning bids are posted in the Greater Giving Event Software. All cash and check payments received by bidder need to be posted into the software prior to performing Sync 2. Credit Card payments should not be entered into the software; this will be done during Sync 3
2. Connect the master terminal to an available LAN port on your network router
3. Power up the master terminal
4. On the master terminal press the F4 button
5. Then select option 8 for the setup menu
6. Then select option 7 for the PC Sync
7. Wait for screen to read "EMS Connection" then proceed
8. In your Greater Giving ES click Data from the toolbar
9. Next select Synchronize with an Auctionpay Terminal
10. Choose Sync 2 and click next
11. Select VeriFone terminal and verify the terminal IP is in place
12. Click next again



13. Click finish once complete.

Note: If you are using the same computer network you used at the event then the terminal IP should already be in place. If this is a new computer network then you should delete the existing IP and click on Locate Terminal IP before proceeding.

14. Ensure the final purchase amounts are correct by auditing the bidder totals. This can be done by comparing a Sales Report printed from the master terminal to the BID-03 report. This report will list by bidder the total amount due.

15. 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. (see the Auctionpay QSG for assistance)

16. Sync 2 can be performed multiple times as needed.

Note: Charges must be transmitted to the bank via the internet or an analog phone line before Sync 3. For instructions on sending charges to the bank, see the Banking section in the Quick Start Guide.

Sync 3

During Sync 3, the master terminal exports approved transactions as payments into the Greater Giving ES. This sync is done after sending charges to the bank.

1. Connect the master terminal to an available LAN port on your network router
2. Power up the master terminal
3. On the master terminal press the F4 button
4. Then select option 8 for the setup menu
5. Then select option 7 for the PC Sync
6. Wait for screen to read "EMS Connection" then proceed
7. In Greater Giving ES select Data from the toolbar
8. Select Synchronize with an Auctionpay Terminal
9. Choose Sync 3 and click next
10. Select VeriFone terminal
11. Verify the terminal IP is in place



Note: If you are using the same network you used at the event then the terminal IP should already be in place. If this is a new network then you should delete the existing IP and click on Locate Terminal IP before proceeding.

12. Click next

13. Click finish once complete

14. Sync 3 can only be performed once (unless syncing with multiple masters).

Networking and Syncing with a Switch

Although we recommend networking your event night computers using a router and dynamic IP addresses, we recognize that some clients may still choose to use a switch and static IP addresses on their network. With that in mind we do have some basic information that will assist you in making sure you are still able to connect your Master terminal to your computer network in order to perform the sync process.

Note: If you choose to use static IP addresses with a switch for your network configuration you will have to know how to assign those manual IP addresses on each of the computers. We provide you with these IP settings with the expectation that you are able to set this network up without our support.

Network IP Settings:

Default Gateway (Terminal Router): 192.168.16.1

Subnet Mask: 255.255.255.0

Master Terminal: 192.168.16.100

Remote Terminals: 192.168.16.101-107

Server Computer: 192.168.16.10

Client Computers: 192.168.16.11-19

When setting up your computers you will need to assign each one an IP address as well as a Default Gateway and Subnet Mask. To be able to sync the Master terminal with the Greater Giving ES you will need to use the provided IP addresses for your computer and network setup. After each computer has been properly setup they should be able to connect to each other across the switch.

Once the computers are able to communicate with each other and you are able to successfully run the software, you should test the sync process to ensure that the terminal is able to speak to the software by performing a sync test.

In order to sync the Master terminal to your Greater Giving ES you will need to connect the terminal router to the switch with an Ethernet cable. This must connect to a LAN port on both the router and the switch. Next, ensure that the Master terminal is connected to the router and is powered up and also that the server computer is connected to the switch and the software is open.



You will also need to put a test transaction in the terminal using an existing bidder number from the database you are testing with.

Once all of the above steps have been completed you can perform the sync test.

On the Master terminal press F4, option 8 for settings, and then option 7 for PC Sync. Once you see the message "EMS Connection" on the terminal it is ready.

Next click data on the tool bar in the Greater Giving ES and select Synchronize with an Auctionpay Terminal.

Select Sync 1 and click next. On this next screen you will need to choose VeriFone Terminal and enter in the IP address listed above for the Master Terminal and click next again.

This should take a moment to communicate and then tell you that the sync was successful. At this point click finish and the sync test is complete.

Once a successful sync test has been completed, your network setup with a switch is ready to be used at your event. For the remaining sync steps please follow the sync guide included with your terminals. The only difference when syncing with a switch is that you will have to manually type in the terminal IP address in the software during the sync and also that you need to connect the terminal router (with the Master terminal connected) to the computer network switch prior to completing the sync.