

## auctionpay

### Event Night – Card Reader



There are three possible scenarios at event check-in:

1. **Pre-registered Guests:** Bidders who have registered for the event in advance, including on-line registrations.
2. **New Bidders - New Admissions:** Walk-ins or bidders who have not pre-registered. They may or may not already be in the supporter list.
3. **New Bidders - Guest Admissions:** Guests of another person whom purchased the admissions. These guests may or may not have been pre-registered and/or show up in your supporter list.

### Pre-Registered Guests:

Sales Bar - Event: none, Operator: Volunteer 1

Press F8 to Hide/Unhide the Sales Bar. View Recent   Set Event   Set Operator

Check In | Sales | Multi-Sales | Payments | Checkout

Bidder #: 102   Name: Tom & Joan Bergland Cards...   Reset

→  Check-In All

Bidder#	Name	Meal	Table	Group	Checked	Purchaser	Package
102	Tom Bergland	chicken	1	Bergland	No	Tom & Joan Berglan	Patron (1)
102	Joan Bergland	prime rib	1	Bergland	No	Tom & Joan Berglan	Patron (1)

←      

*~~Hint~~*

**The F8 Sales Bar toggles off and on by selecting F8 on your keyboard.  
No information is lost when hiding the Sales Bar.**

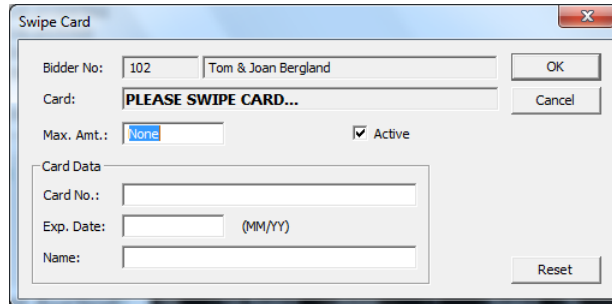
### To register a guest that has pre-registered:

- Open the Sales Bar (F8)
- Click on the 'Check In' tab.
- Greet the guest and enter all or some of the bidder's name and hit tab or enter.
  - If the bidder exists, their name will appear.
  - For multiple results, a list will appear. Select the correct bidder by double clicking on the name (typically the guest will have a bid number already assigned).
- Confirm the Guests table, meal and group if listed. If you have to make changes double click on the name and edit the guest's information, click 'Accept'
- For guests wanting to use Express Checkout, click the 'Cards' button, swipe credit card and click 'OK'
- Click the box 'Check-in All' (even if there is only one name listed on the grid)
- Click the 'Check-In' button at the bottom to complete

### To manually enter credit cards:

If the guest's card is unreadable by the card reader device, you can manually enter the guest's credit card number.

- Place your mouse in the Card No. field and type the credit card number <tab> expiration date <tab> name as it appears on credit card, click 'OK'



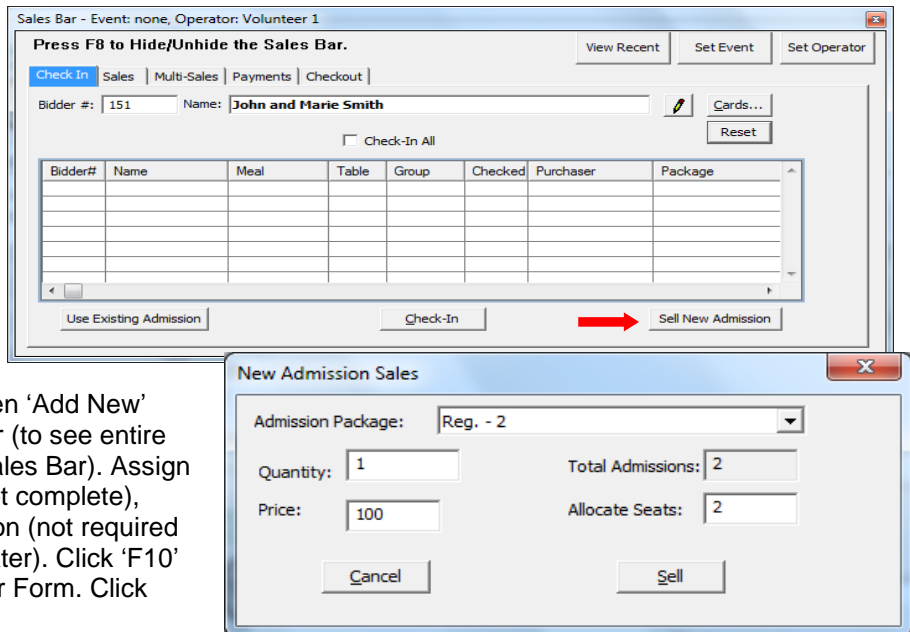
The 'Swipe Card' dialog box contains the following fields and controls:

- Bidder No.: 102 (with Tom & Joan Bergland name)
- Card: PLEASE SWIPE CARD...
- Max. Amt.: None
- Active:
- Card Data section:
  - Card No.:
  - Exp. Date: (MM/YY)
  - Name:
- Buttons: OK, Cancel, Reset

### New Bidders - New Admissions:

#### To register a new guest which will be purchasing their own admission:

- Open the Sales Bar (F8)
- Click on the 'Check In' tab.
- Greet the guest and enter all or some of the bidder's name and hit tab or enter.
  - If the bidder exists, their name will appear.
  - For multiple results, a list will appear. Select the correct bidder by double clicking on the name
  - If the guest does not exist, add a new bidder by clicking 'OK', 'OK' again, then 'Add New'
  - The Bidder Form will appear (to see entire form click 'F8' to hide the Sales Bar). Assign Bidder Number, Name (if not complete), Table and contact information (not required at check in, can be added later). Click 'F10' to save and close the Bidder Form. Click 'F8' to see the Sales Bar.
- Click in the Name field and tab to update the bidder information
- Click 'Sell New Admission' button and select the 'Admission Package' from the drop down
- Enter Quantity of packages to be purchased
  - \*Note\*** the Quantity of the packages is not always the same as the number of Total Admissions included in package. Always check the number of admissions that come with the package.
- Verify the Price and enter the number of Seats Used by bidder, click 'Sell'.
  - \*Note\*** if the package includes multiple seats, the purchaser (this bidder) may not use all of them. Any additional bidders with this group will be entered separately as a guest.
- For guests wanting to use Express Checkout, click the 'Cards' button, swipe credit card and click 'OK'
- Click the 'Check-In' button at the bottom to complete



The 'Sales Bar' window shows the 'Check In' tab selected. The Bidder # is 151 and the Name is John and Marie Smith. A table below lists bidder information with columns: Bidder#, Name, Meal, Table, Group, Checked, Purchaser, Package. The 'Sell New Admission' button is highlighted with a red arrow.

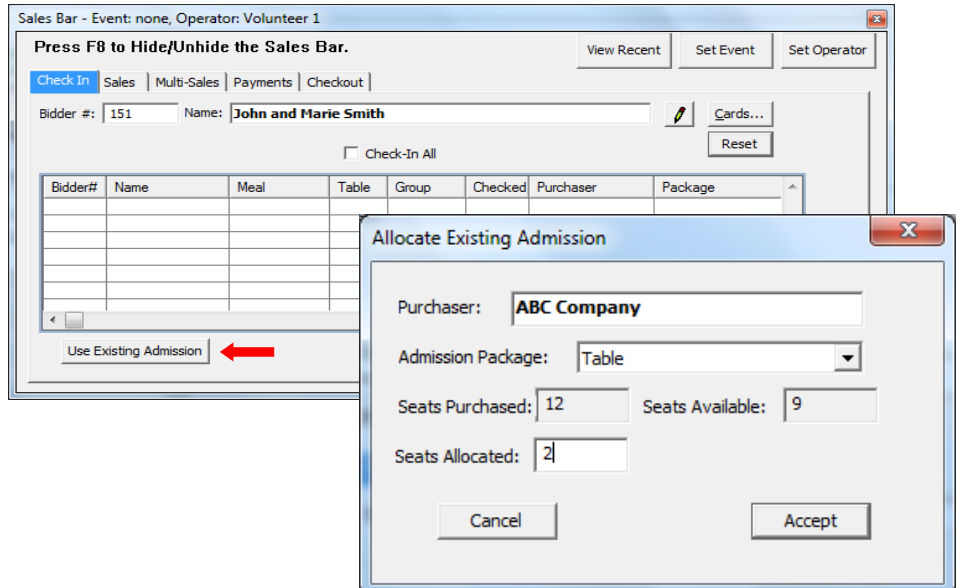
The 'New Admission Sales' dialog box shows:

- Admission Package: Reg. - 2
- Quantity: 1
- Price: 100
- Total Admissions: 2
- Allocate Seats: 2
- Buttons: Cancel, Sell

## New Bidders - Guest Admissions:

### To register a new guest whose admission was purchased by someone else:

- Open the Sales Bar (F8)
- Click on the 'Check In' tab.
- Greet the guest and enter all or some of the bidder's name and hit tab or enter.
  - If the bidder exists, their name will appear.
  - For multiple results, a list will appear. Select the correct bidder by double clicking on the name
  - If the guest does not exist, add a new bidder by clicking 'OK', 'OK' again, then 'Add New'
  - The Bidder Form will appear (to see entire form click 'F8' to hide the Sales Bar). Assign Bidder Number, Name (if not complete), Table and contact information (not required at check in, can be added later). Click 'F10' to save and close the Bidder Form. Click 'F8' to see the Sales Bar.
- Click on the 'Use Existing Admission button'; enter all or part of the Purchaser name (the person or company who purchased the tickets) and hit tab. The name will appear or you can choose from a list.
- Verify Admission package in drop down list.
- Enter the number of seats used by this guest. Click Register
- For guests wanting to use Express Checkout, click the 'Cards' button, swipe credit card and click 'OK'



Sales Bar - Event: none, Operator: Volunteer 1

Press F8 to Hide/Unhide the Sales Bar. View Recent Set Event Set Operator

Check In Sales Multi-Sales Payments Checkout

Bidder #: 151 Name: John and Marie Smith Cards... Reset

Check-In All

Bidder#	Name	Meal	Table	Group	Checked	Purchaser	Package

Use Existing Admission ←

Allocate Existing Admission

Purchaser: ABC Company

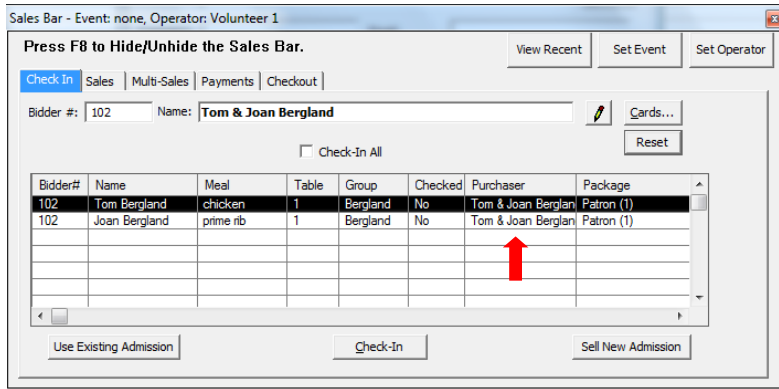
Admission Package: Table

Seats Purchased: 12 Seats Available: 9

Seats Allocated: 2

Cancel Accept

## Replace a Guest with a New Bidder:



Sales Bar - Event: none, Operator: Volunteer 1

Press F8 to Hide/Unhide the Sales Bar.

View Recent Set Event Set Operator

Check In Sales Multi-Sales Payments Checkout

Bidder #: 102 Name: Tom & Joan Bergland

Check-In All

Bidder#	Name	Meal	Table	Group	Checked	Purchaser	Package
102	Tom Bergland	chicken	1	Bergland	No	Tom & Joan Bergland	Patron (1)
102	Joan Bergland	prime rib	1	Bergland	No	Tom & Joan Bergland	Patron (1)

Use Existing Admission Check-In Sell New Admission

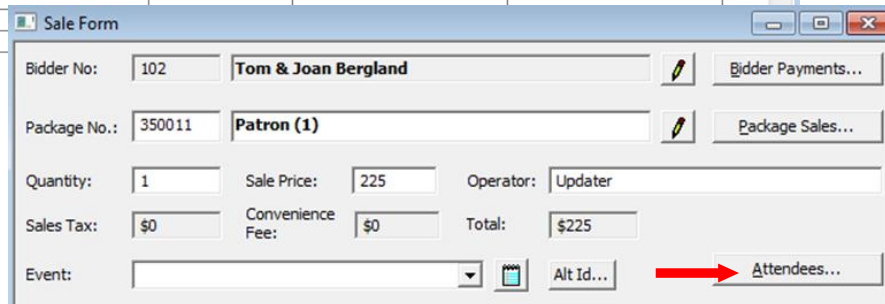
Item	Donor	Package	Staff
Bidder	Table	Sale	Payment
Sale \$:	to		
Qty:	to		
Package # Sold:			
Multi-Package Sold:			
Event:			
Sold to Bidder:	102		
	<b>Tom &amp; Joan Bergland</b>		
Operator Name:			
Include only sales which:			
Related Views	Reset	Search	

- Open the Sales Bar (F8)
- Click on the Check In tab
- Greet the guest, enter all or some of the *original* bidder's name and hit tab or enter
- Locate the Purchaser's name in the attendee grid
- On the Search Bar, select the Sales Tab and type the Purchaser name in the 'Sold to Bidder:' field and click search
  - Double click admission or sponsorship package to open the Sale Form
  - Click on the Attendees button to see who was allocated admissions
  - Highlight the *original* bidder's name and click the delete button
  - Close all open windows to save
- Refer to New Bidder - Guest Admission section above to add the new attendee

Search Results: Sales Grid (1 Records)

Bid #	Bidder Name	Pkg #	Package Name	Package Type	Quan
102	Tom & Joan Bergland	350011	Patron (1)	Admission	1

Double Click - ↑



Sale Form

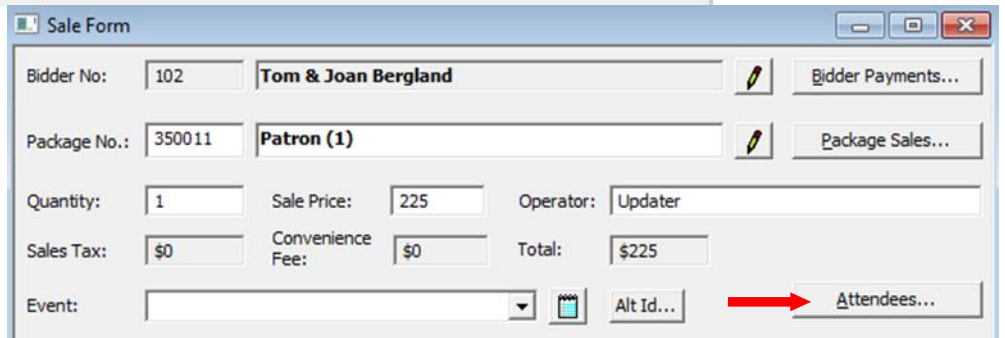
Bidder No: 102 Tom & Joan Bergland

Package No.: 350011 Patron (1)

Quantity: 1 Sale Price: 225 Operator: Updater

Sales Tax: \$0 Convenience Fee: \$0 Total: \$225

Event: Alt Id... Attendees...



Sale Form

Bidder No: 102 Tom & Joan Bergland

Package No.: 350011 Patron (1)

Quantity: 1 Sale Price: 225 Operator: Updater

Sales Tax: \$0 Convenience Fee: \$0 Total: \$225

Event: Alt Id... Attendees...

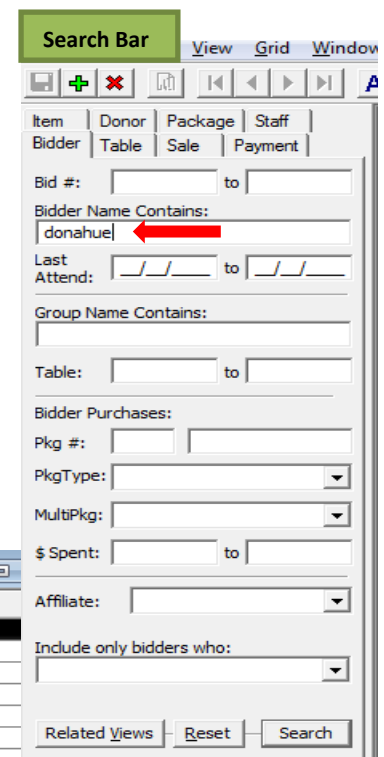
## Assign Bid Numbers:

### To assign guests bid numbers as guests attend:

- Open the Sales Bar (F8)
- Click on the Check In tab.
- Greet the guest and enter all or some of the bidder's name and hit tab or enter.
  - If the bidder exists, their name will appear
  - For multiple results, a list will appear. Select the correct bidder by double clicking on the name
  - If the guest does not exist, add a new bidder by clicking 'OK', 'OK' again, then 'Add New'
  - The Bidder Form will appear (to see entire form click 'F8' to hide the Sales Bar). Assign Bidder Number, Name (if not complete), Table and contact information (not required at check in, can be added later). Click 'F10' to save and close the Bidder Form. Click 'F8' to see the Sales Bar.
- For guests wanting to use Express Checkout, click the 'Cards' button, swipe credit card and click 'OK'
- Click the 'Check-In' button at the bottom to complete

### To assign a member of a household a different bid number:

- Open the Sales Bar (F8)
- Click on the Check In tab.
- Greet the guest and enter all or some of the *Household* bidder's name and hit tab or enter.
- On the Search Bar select the Bidder Tab, type the *Member* of the Household's name in the 'Bidder Name Contains' field and click search.
  - Double click on the Member of the Household's name to open bidder form, type in new bidder number in the Bidder No: field.
  - F10 to save form
- On the Sales bar (F8) click Reset to clear the form
- Enter new bidder number and hit tab or enter.
- Click No on the message screen that appears.



Search Bar View Grid Window

Item Donor Package Staff  
Bidder Table Sale Payment

Bid #: \_\_\_\_\_ to \_\_\_\_\_

Bidder Name Contains:  
donahue ←

Last Attend: \_\_\_\_/\_\_\_\_/\_\_\_\_ to \_\_\_\_/\_\_\_\_/\_\_\_\_

Group Name Contains: \_\_\_\_\_

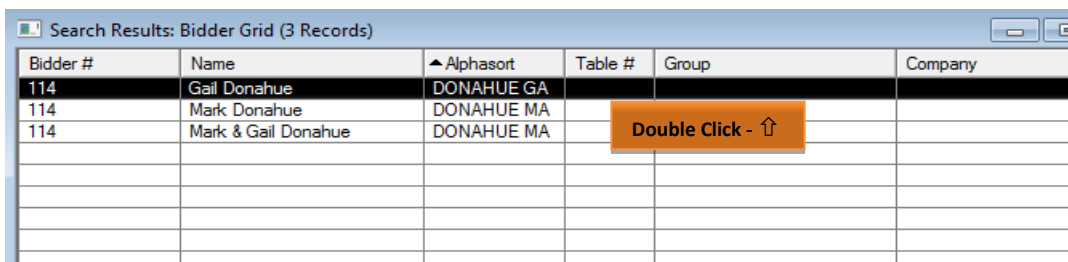
Table: \_\_\_\_\_ to \_\_\_\_\_

Bidder Purchases:  
Pkg #: \_\_\_\_\_  
PkgType: \_\_\_\_\_  
MultiPkg: \_\_\_\_\_  
\$ Spent: \_\_\_\_\_ to \_\_\_\_\_

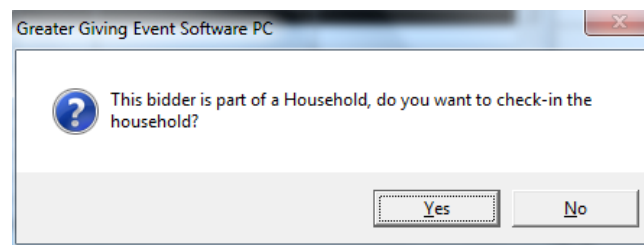
Affiliate: \_\_\_\_\_

Include only bidders who: \_\_\_\_\_

Related Views Reset Search



Bidder #	Name	Alphasort	Table #	Group	Company
114	Gail Donahue	DONAHUE GA			
114	Mark Donahue	DONAHUE MA			
114	Mark & Gail Donahue	DONAHUE MA			

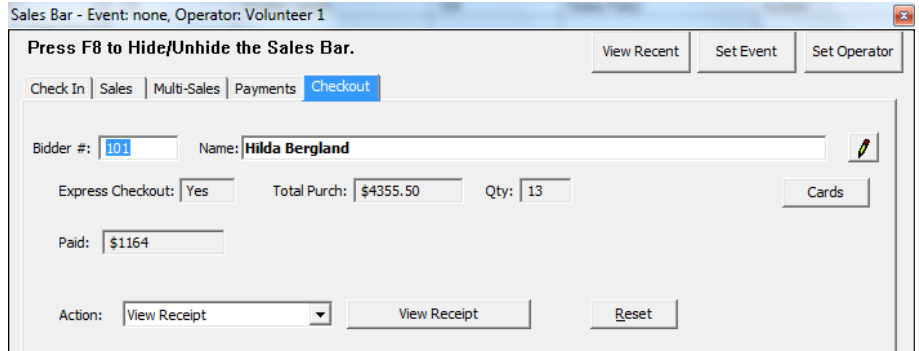


- Double click the Member in the Attendance Grid, check the 'Checked-In' box and select 'Accept'.
- If the Member would like to Express Checkout, click the Card button, swipe credit card and click OK.
- Click the 'Check-In' button at the bottom to complete

### **Check Out:**

At checkout, the guest will receive printed receipts generated by the Greater Giving Event Software. Ask the guest to sign one copy of the receipt for the organization's records.

Guests can choose to change their credit card information, add an additional credit card(s) or split a payment between multiple cards at check-in or check-out.



Sales Bar - Event: none, Operator: Volunteer 1

Press F8 to Hide/Unhide the Sales Bar. View Recent Set Event Set Operator

Check In Sales Multi-Sales Payments **Checkout**

Bidder #: 102 Name: Hilda Bergland

Express Checkout: Yes Total Purch: \$4355.50 Qty: 13 Cards

Paid: \$1164

Action: View Receipt View Receipt Reset

### **Cashiering:**

Guests who did not pre-swipe their credit card at registration will need to pay for their items at the cashiering/checkout station.

- Click on the Checkout tab from the Sales Bar (F8) and enter the guest's bidder number, then press Enter to see guest's total.
- Click on the Cards button, click the Add button, swipe credit card, making sure the magnetic strip of the card is facing down and away from you and on the same side as the lettering on the card reader device. Click Ok, then F10 to close Bidder Credit Card Form.
- If a bidder would like to put a Max on the credit card be sure to enter that amount on the Bidder Credit Card Form. \*Note\* This is important if they are splitting out their payments over several means of payment (credit card(s), cash, check).

### **Switching Credit Card:**

If the bidder elects to pay with a different credit card, please do the following:

- Click on the Checkout tab from the Sales Bar (F8) and enter guest's bidder number. Click the Cards button. Click your mouse in the Bidder Credit Card Form to see the current credit card on file.
- Click on the credit card to be removed and click "Activate/Deactivate". Verify that the "Active" column reads "No" for that credit card.
- Click the Add button. The Card Reader form will be displayed.
- Swipe the new credit card, making sure the magnetic strip of the credit card is facing down and away from you and on the same side as the lettering on the card reader device.
- Click the "OK" button to save the credit card information.
- Verify the credit card appears as the first entry and the "In Use" column reads "Yes" and then close the form by pressing F10 or clicking on the Red "X" in the corner of the form.

### **Split Pay:**

At the end of the event, some guests may elect to distribute their amount due over more than one credit card, we call this a split pay. The following procedure can be used to make the necessary changes:

- Click on the Checkout tab from the Sales Bar (F8) and enter the guest's bidder number. Click on the Cards button to display the Bidder Credit Card Form.
- Click the "Add..." button. The Card Reader form will be displayed.
- Swipe the new credit card, making sure the magnetic strip of the credit card is facing down and away from you and on the same side as the lettering on the card reader device for the bidder and enter the amount to be charged to the new credit card in the Max. Amt. field.
- Click OK to save the credit card information.
- Verify the credit card appears as the first entry in the grid on the Bidder Credit Card Form.
- If the bidder wants to use additional credit cards, use steps #2-5 for each credit card.
- Use the "Move Up" and "Move Down" buttons to adjust the order in which the credit cards will be charged. The amount due will be applied to each credit card, up to its Max. Amt., before the next credit card in the list will be charged.
- Close the cards listing by pressing the F10 key or the Red X in the corner of the form. The bidder's receipt will reflect the new split pay.