

# Sync Guide



This guide will instruct you on how to transfer data between Greater Giving Event Software and Auctionpay Master terminal **Before**, **During** and **After** your event.

Greater Giving Event Software



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## Sync Overview

Before the event

The Sync is an electronic transfer of data between Greater Giving Event Software and the Master terminal. You must complete all the syncs and submission of the credit cards in the PC version of the software prior to syncing with the Online version of the software.

### Sync Timeline

#### Before the Event

**Sync Test** – Prior to your event, test the sync using the Master terminal, a USB drive and your Computer

#### During the Event

**Sync 1** – Mark guests for Express Checkout in the software

#### After the Event

**Sync 2** – Enter Payment amounts into the terminal

**Send Changes to the Bank**

**Sync 3** – Post approved transactions to the software

### Equipment



**i** Everything you need to get your terminals up and running has been included in your shipment. Please refer to the packing slip for equipment list. Greater Giving does not provide power strips.

You will need one power outlet for each and every terminal.

- **Sync Test** – Performed prior to event day, this quick test confirms that the sync is working.
- **Sync 1** – Performed right after registration. The Master terminal marks guests that pre-swiped a credit card as Express Checkout in the Greater Giving Event Software.
- **Sync 2** – Performed after the event. The Greater Giving Event Software exports the amount due by each Express Checkout guest to the Master terminal for payment processing.
- **Sync 3** – Performed after sending charges to the bank. The Master terminal posts approved payment transactions to the Greater Giving Event Software.

## Setup

Before the event

### Set Up the Terminal Network

This guide is designed to provide step by step information for using the Greater Giving system before, during and after the event. Follow the steps below in the exact order listed to ensure proper setup of the Terminal network.

- Power **ON** the Master Terminal by plugging in the power adapter into the bottom of the Master Terminal. **Do not** power **ON** the Remote Terminals yet.
- It will take a few minutes for the Master terminal to initialize. When it is ready, the main screen appears. **SWIPE OR ENTER CARD NUMBER.**
- Insert the **YELLOW** end of the Network Cable into the **YELLOW** port on the bottom of the **Master Terminal**. Connect the **GREEN** end of the Network Cable to the **GREEN** port on the back of the first **Remote Terminal**.
- To connect each additional Remote Terminal, plug the **YELLOW** end of the Network Cable to the **YELLOW** port of the first Remote Terminal. Connect the **GREEN** end of this cable to the **GREEN** port of the back of the next Remote Terminal. Repeat for each additional Remote Terminal(s).
- On the last Remote Terminal, plug the **RED** loopback into the **YELLOW** port to close the circuit.  
*Note: This step is imperative in order for the Terminal Network to communicate.*
- Power **ON** all Remote Terminals at the same time (or within a few seconds of each other) by plugging in the power adapter into the right side of each remote terminal.

## Sync Test

Before the event

### Testing Sync 1 Before Your Event

A sync test must be completed **prior to event day** to make sure data can be transferred between the Master terminal and the Greater Giving Event Software.

To ensure a successful sync process, it is essential to perform a sync test prior to your event day with the primary computer.

### Enter Test Transactions

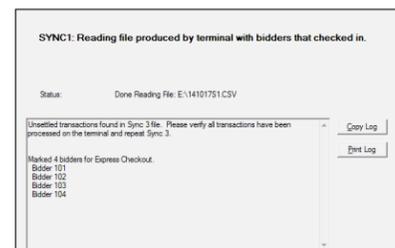
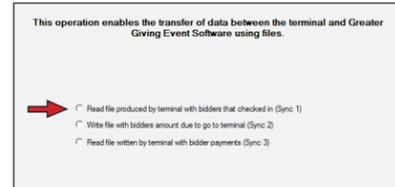
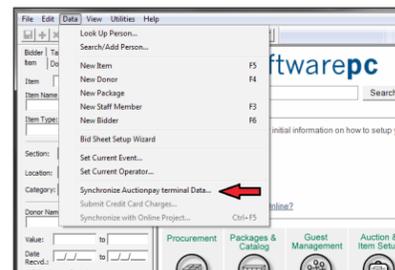
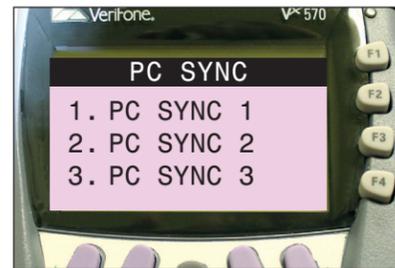
To create a test transaction, enter a bidder number into the Master terminal. This number must match a bidder number assigned in the Greater Giving Event Software.

1. Swipe test credit card
2. Enter a bidder # that exists in the software and press the green **'Enter'** button
3. **VERIFY BIDDER NUMBER:** re-enter bidder #, press the green **'Enter'** button
4. The merchant receipt prints automatically
5. Select **YES** to print a customer receipt (optional)

**Test Sync 1**

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

1. On the Master terminal press **F4** > Select **8. SETUP** > Select **7. PC SYNC** > Select **1. PC SYNC 1**.
2. Insert the **USB drive** directly into the **USB port** underneath the Master terminal or utilize the included USB sync adapter cable (see Setup, page 2) and press **Enter**.
3. Select **YES** to write the file and wait for message 'Take stick to PC'.
4. Remove the **USB drive** and plug it into the primary computer containing the Greater Giving Event Software.
5. Open your event database in the Greater Giving Event Software. From the Data menu, select **Synchronize Auctionpay terminal Data**.
6. Select **Read file produced by terminal with bidders that checked in (Sync 1)** and click **Next**.
7. Select the **Sync 1** file on the **USB drive** (e.g. 140729S1.csv) and click **Open**.
8. Once Sync 1 is complete, the Greater Giving Event Software displays a summary report. If any bidder numbers failed to sync, print the log and troubleshoot. Click **Finish**.
9. On the **Master terminal**, press the red **Cancel** button two times to return to the main screen.



**Confirm the Sync was Successful**

1. In the Greater Giving Event Software, go to the **View menu** and select **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  in the **Express Checkout** box.
3. To reset the record for the event, click on the  to clear the Express Checkout box and press **F10** to save.

**Clearing Test Transactions**

Make sure to clear all training data before your event. **Do not** clear the terminal if it contains live transactions that need to be sent to the bank.

**To clear a single transaction**

Press **F4** > Select **1. VOID** > Enter **Bidder #** > Verify **Bidder #** > Press **YES** to confirm > Press **Cancel** to return to main screen.

**To clear all transactions in the terminal**

Press **F4** > Select **7. BANKING** > Enter credentials > Select **7. CLEAR TERMINAL** > Select **YES** to confirm clear terminal. Press the red **Cancel** button twice to return to the main screen.

*NOTE: If the screen displays a summary of all Not Settled and Declined transactions, press Enter to continue to the Clear Terminal/Confirm Clear screen.*

**Do not clear the Terminal during or after the event. You WILL lose all of your credit card information.**



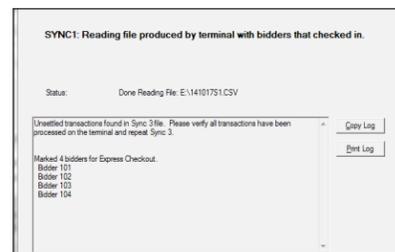
If you need assistance with the test transactions Greater Giving Client Services is available 24/7.

**Marking Express Checkout Bidders in the Event Software**

After registration closes, perform Sync 1 to transmit all Express Pay bidders from the Master terminal(s) to the Greater Giving Event Software. **'Express Checkout'** will now appear on printed receipts.

This process is exactly the same as the Sync Test.

1. From the main screen of the Master terminal, press **F4** > Select **8. SETUP** > Select **7. PC SYNC** > Select **1. PC SYNC 1**.
2. Insert the **USB drive** into the **USB port or adapter cable** attached to the Master terminal (see *Setup, page 2*) and press **Enter**.
3. Select **YES** to write the file.
4. Remove the **USB drive** and plug it into the primary computer containing the Greater Giving Event Software.
5. Open the Greater Giving Event Software. From the Data menu, select **Synchronize Auctionpay terminal Data**.
6. Select **Read file produced by terminal with bidders that checked in (Sync 1)** and click **Next**.
7. Select the **Sync 1** file on the USB drive (e.g. 140729S1.csv) and click **Open**.
8. Once Sync 1 is complete, the Greater Giving Event Software displays a summary report. If any bidder numbers failed to sync, print the log and troubleshoot. Click **Finish**.
9. On the Master terminal, press the red **Cancel** button two times to return to the main screen.
10. If you are using multiple Master terminals then repeat steps listed above.



Do not enter data into the Greater Giving Software while the Sync is performing.

Sync 1 can be performed multiple times as needed.

**Manual Sync 1 – Marking Bidders as Express Checkout in Event Software**

If you are unable to complete Sync 1 electronically, manually mark bidders for Express Checkout in the Greater Giving Event Software.

1. Print a **Bidder Report** from the Master terminal: press **F4** > Select **5. REPORTS** > Select **1. BIDDER**
2. In the Greater Giving Event Software, click on the **Bidder** tab on the search bar and enter **'1'** in the **Bid #** field. Leave the second field blank. Click **Search** to display all bidders assigned a bid number.
3. Select each bidder listed on the **Bidder Report** printed from the Master terminal. To select multiple bidders, hold down the **Ctrl** key on your keyboard while selecting.
4. From the **Grid** menu, select **Enable Express Checkout** and click **OK** to confirm. Each selected bidder is now marked for Express Checkout.
5. If you make a mistake and need to unmark a bidder as Express Checkout, highlight the bidder and select **Grid > Disable Express Checkout** from the menu.

The Bidder Report lists bidder numbers in numerical order.

**Sending Amounts Due to the Master Terminal**

During Sync 2, Greater Giving Event Software exports the amount owed by each Express Checkout bidder to the Master terminal for payment processing. This Sync is performed after the event.



If syncing with the multiple Master terminals, Sync 2 and 3 **must** be completed on the first Master terminal before starting Syncs 2 and 3 on the other Master terminal(s). **If this sequence is not followed, it may disable entire Sync process.**

1. In the Greater Giving Event Software, post all winning bids and enter all cash and check payments prior to performing Sync 2.

Do not enter credit card payments into the Greater Giving Event Software. Credit card payments are generated automatically during Sync 3.

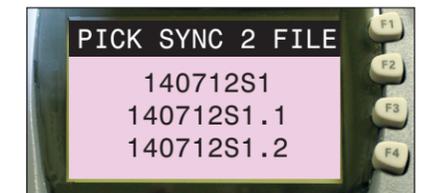
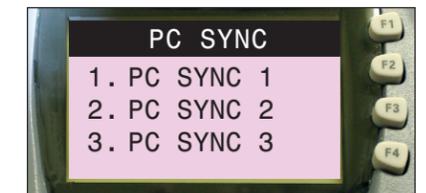
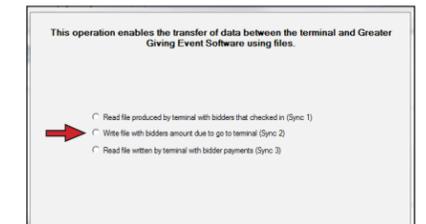
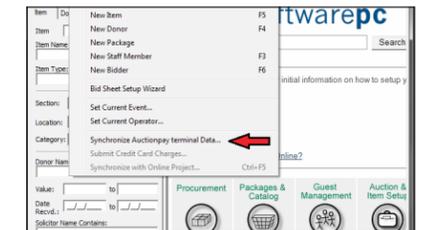
2. From the **Data** menu, select **Synchronize Auction pay terminal Data** and click **Next**.
3. Select **Write file with bidders amount due to go to terminal (Sync 2)** and save the new file to the USB drive.
4. Once Sync 2 is complete, the Greater Giving Event Software displays a summary report. If any bidder numbers failed to sync, print the log and troubleshoot. Click **Finish** when complete.
5. On the Master terminal press **F4** > Select **8. SETUP** > Select **7. PC SYNC** > Select **2. PC SYNC 2**.
6. Insert the **USB drive** into the **USB port or adapter cable** attached to the Master terminal (see *Setup, page 2*) and press **Enter**.
7. Select **YES** to confirm (if your USB drive contains several Sync 2 files, select the correct file from the list) by pressing the 'F' key associated to the desired file.

To ensure final purchase amounts are correct, audit the bidder totals by comparing a **Sales Report** from the Master terminal with the **BID-03** report (run from the **Bidder grid**) in the Greater Giving Event Software.

Sync 2 can be performed multiple times as needed.

8. Remove the USB drive and press the red **Cancel** button two times to return to the main screen.

No credit card payments should be entered into the Greater Giving Event Software. Credit card payments are generated automatically during Sync 3.



**Manual Sync 2 – Sending Amounts Due to the Master Terminal**

If you are unable to complete Sync 2 electronically, enter bidder amounts owed directly into the Master terminal.

1. In the Greater Giving Event Software, click on the **Bidder** tab on the search bar. In the Include only bidders who field, select '**Are using express checkout**'.
2. Click the printer icon, select the **BID-03** report and click **Print**.
3. On the Master terminal, press **F4** > Select **6. ENTER PAYMENTS** > Enter the amount due (including cents) for the first bidder and press **Enter**. If the bidder does not have any charges, just press **Enter** to move on to the next bidder number.
4. Repeat until finished. Once all bidders are entered into the terminal, a totals report will print automatically.

The terminal will prompt you to enter payments for every bidder with a \$0.00 balance. The terminal will skip bidders who were not swiped for Express Pay and where amounts have already been entered (i.e. – Adjustments, Cashiering, or Split Pay purchases).

**To Make Adjustments**

Press **F4** > Select **3. ADJUSTMENT** > Enter **bidder #** > Verify **bidder #** > Enter new total amount due (this will override existing amount). Verify if '**Cardholder**' is present, a new receipt will automatically print.

**To Void a Transaction**

Press **F4** > Select **1. VOID** > Enter **bidder #** > Verify **bidder #** > Press **YES** to confirm. Void receipt will automatically print.

**Submitting Transactions**

Once all bidder balances are entered into the Master terminal(s) the next step is to submit the payments to the bank. Use an internet connection for best results (a dedicated analog phone line method is also available, but not preferred).

**Do NOT attempt to submit transactions over a wireless connection.**

If using multiple Master terminals submit **only one** Master terminal at a time. Approved funds will be deposited into your bank account within **5 business days**.

**Sending Charges via Internet**

1. Plug an **Ethernet cable** into the Banking Port Ethernet on the bottom of the Master terminal.
2. Power **ON** the Master terminal by plugging in the power cable.
3. Press **F4** > Select **7. BANKING** > Enter credentials > Select **1. SEND TO BANK** > Select **1. INTERNET** > Select **YES** to upload now.
4. Confirm the total dollar amount to be submitted. If correct, press **YES** to submit. If incorrect, press the red **Cancel** button twice to return to the main screen and adjust totals.
5. If you receive connection errors, power **OFF** the Master terminal for 10 seconds and try again. If the problem persists, please call Greater Giving support.
6. After the charges have been sent to the bank, the Master terminal will automatically print a **Banking Report** of all approved and declined transactions.

**Sending Charges via Analog Phone Line**

1. Plug the **Phone Cord** into the bottom of Banking Port Phone Line on the bottom of the Master terminal.
2. Power **ON** the Master terminal by plugging in the power cable.
3. On the Master terminal, press **F4** > Select **7. BANKING** > Enter credentials > Select **1. SEND TO BANK** > Select **2. PHONE LINE** > Select **YES** to upload now.
4. Confirm the total dollar amount to be submitted. If correct, press **Enter** to submit. If incorrect, press the red **Cancel** button twice to return to the main screen and adjust totals.
5. Confirm need to dial 9 or other prefix and follow prompts.
6. If you receive connection errors, power **OFF** the Master terminal for 10 seconds and try again. If the problem persists, call Greater Giving support.
7. After the charges have been sent to the bank, the Master terminal will automatically print a **Banking Report** of all approved and declined transactions.

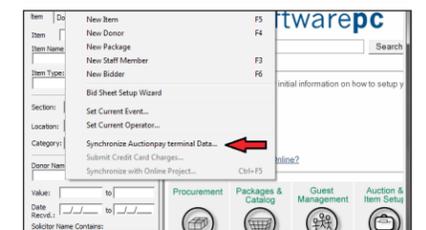
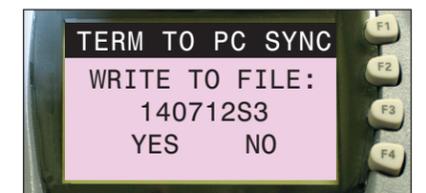
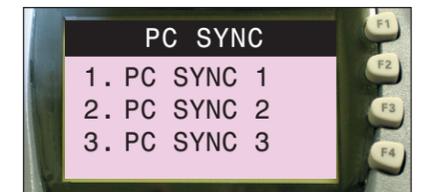
**IMPORTANT:** Charges must be transmitted to the bank **before** performing Sync 3.

**NOTE:** Do not resubmit declines or clear the batch until **after** Sync 3 is complete. If declines are resubmitted and approved, payment amounts can be manually entered into Event Software.

**Sync 3****Posting Credit Card Payments in the Event Software**

During Sync 3, the Greater Giving Event Software generates a payment for each approved transaction in the Master terminal. Perform Sync 3 **after** sending charges to the bank.

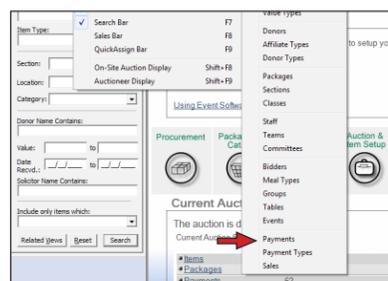
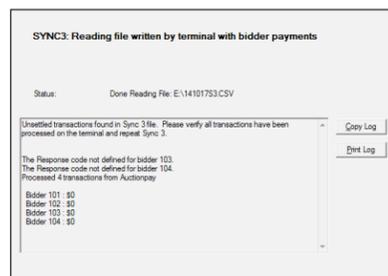
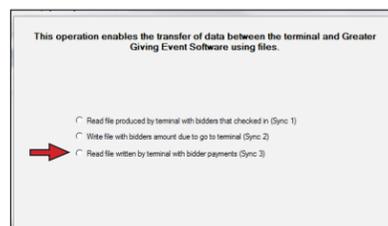
1. On the Master terminal press **F4** > Select **8. SETUP** > Select **7. PC SYNC** > Select **3. PC SYNC 3**.
2. Insert the **USB drive** into the **USB port or adapter cable** attached to the Master terminal (see Setup, page 2) and press **Enter**.
3. Select **YES** to write the file.
4. Remove the **USB drive** and plug it into the primary computer containing the Greater Giving Event Software.
5. Open the Greater Giving Event Software. From the Data menu, select **Synchronize Auctionpay terminal Data**.



## Sync 3

After the event

- Select **Read file written by terminal with bidder payments (Sync 3)** and click **Next**.
- Select the **Sync 3** file on the USB drive (e.g. 140729S3.csv) and click **Open**.
- Once Sync 3 is complete, the Greater Giving Event Software displays a summary report. If any bidder numbers failed to sync, print the log and troubleshoot. Click **Finish**.
- On the Master terminal, press the red **Cancel** button two times to return to the main screen.
- Verify payments are posted in the Greater Giving Event Software from the **View** menu, select **Grid Views**, select **Payments**.



**NOTE:** Sync 3 can only be performed **one** time.

### Manual Sync 3 – Manually Posting Payments

If you are unable to complete Sync 3 electronically, update bidder records manually in the Greater Giving Event Software. Once the **Banking Report** has printed (*on the Master terminal*) with the approved charges, create a payment record in the Greater Giving Event Software for each credit card transaction.

## Resubmitting Declines

After the event

Transactions can be declined due to insufficient funds or bank security policy. In the event of a decline, contact the card issuer for a Voice Authorization code. Optionally, contact the cardholder for another credit card.

### For Voice Authorization:

- Contact the appropriate card company:
  - Visa/MasterCard/Discover: 800.944.1111
  - American Express: 800.528.2121
- Provide the following information:
  - Bidder number
  - **Merchant ID** or MID (*found on the merchant receipt and Equipment Packing List*)
  - **Bank ID** (203600)
  - **Credit card number** and **expiration date**
  - **Cardholder's name**, as it appears on the credit card
  - **Cardholder's billing address**
  - **Amount** of the charge
- Once you receive an **Authorization Code** for a declined transaction, on the Master terminal press **F4** > Select **7. BANKING** > Enter credentials > Select **5. REAUTH DECLINE**.
- Enter the **invoice number** listed for the declined transaction on the **Banking Report**.
- At the **ENTER VOICE AUTH CODE** prompt, select **YES**.
- Confirm the dollar amount for the transaction. The Master terminal will charge the card again using the Voice Authorization code.

For more information on how to resubmit declines please refer to the Greater Giving Terminal Quick Start Guide or contact one of our client service representatives for assistance.

## Syncing ESPC with ESO

After the event

### After Your Event - Sync Data Back to Event Software Online

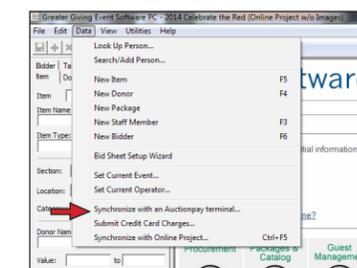
After your event has settled and you have processed and recorded your event transactions in the Event Software PC, you need to synchronize your Event Software PC data with Event Software Online so the PC data and online data match.

- **Internet connectivity** – You must have an internet connection to sync with Event Software Online.
- **Credit Card Charges** – All credit card charges must be submitted to the bank before attempting to sync with Event Software Online.

Once this synchronization is run, any data that needs to be updated should only be edited in Event Software Online.

### How to run the Synchronization:

- Open Event Software PC.
- From the **Data** menu, select **Synchronize with Online Project**.
- If prompted, enter your username and password and click **OK**. You must have Organization Administrator rights in Event Software Online and use that username and password.
- Event Software PC synchronizes with Event Software Online. A box will appear when the synchronization is complete, summarizing the information from the sync.



**Please return this guide with  
the rest of the equipment.**



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Visit [www.greatergiving.com/support](http://www.greatergiving.com/support) for additional software resources.