



Greater Giving Terminal QuickStart Guide

Greater Giving Event Payments |



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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 Greater Giving 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 Greater Giving Terminals, you play an essential role in keeping card information secure. In particular, observe these guidelines:

- Make sure Terminals (especially Master Terminals) are never left unattended 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 all transactions from the Terminal (see the “Declines | Shipping | Clearing Transactions” 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.

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 (Wi-Fi) 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 Wi-Fi 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).

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 continuously to keep in compliance with PCI Payment Application Data Security Standards.

Event Timeline

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During the Event

- Registration** – Process for check-in
- Check-out/Cashiering** – Close of event check-out and collect payments
- Closing** – Run Banking Reports

Before the Event

- Set Up** – Connect and power up the Greater Giving terminals
- Training** – Learning to do a transaction

After the Event

- Entering Payments** – Enter final purchase amounts
- Banking** – Send final purchase amounts to the bank
- Posting Payments** – Record approved payments
- Processing Declines** – Resubmit transactions that have been denied

Equipment Checklist

Before the event

Everything you need to set up and operate the terminals for the event has been included in your shipment.

Refer to your packing slip to confirm all equipment was received.

! Greater Giving does **not** provide a power strip.

Included in your shipment:

- Master terminal(s) (marked 'Master' with a sticker located on the left side), power cables
- Remote terminal(s), power cables
- USB Adapter Cable and USB Drive
- Network Cables
- Red Loopback Plug
- Phone cord/Ethernet cable
- Test Cards
- Quick Start Guide
- Training DVD



Once you have all the equipment shown here, you are ready to set up the terminal network.

*** Terminal training video is located on the USB Drive provided by Greater Giving ***

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.



1 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.



2 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.**



3 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**.



4 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).



5 **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.



6 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.

i If a terminal displays 'Error Communication Failure', then it is looking for the network. If it is not ready after a few minutes, disconnect all cables and power off the terminals, and then start the setup process again. If things are still not working correctly, feel free to call us at 866-269-8151. We are happy to help!

Credentials

🕒 Before the event

The credentials are used when accessing certain functions on the Master terminal in order to keep information safe. You will be prompted for your 'credentials' for Banking, Sales Reports and clearing the batch. Please use the unique user ID and password that was provided to you on the terminal packing slip. If you cannot locate these credentials please contact Greater Giving support.

Entering Your Credentials

Note that the terminals use an alphanumeric password.

1. When prompted, enter your unique **user ID**
2. Enter the **password** provided on the packing slip - (i.e. A123456)
 - For the letter **A**, press **2**, then press the **ALPHA** button once (located above the number pad) to convert the number to the corresponding letter
 - Enter the remaining numbers of the password (1-2-3-4-5-6) and press the **GREEN 'Enter'** button



IMPORTANT: Be careful when entering the credentials. Three (3) incorrect entries will lock the terminal for 30 minutes. You will still be able to continue to swipe credit cards during this time.

Changing Your Credentials

IMPORTANT: If you change your password and then forget it or misplace it, Greater Giving **CANNOT** retrieve it for you. For security purposes, we will need to send the terminal to another agency for unlocking.

On the Master terminal:

- Press **F4**
- Select **7. BANKING** (press **7** or use the purple buttons to scroll)
- When prompted, enter your **user ID**
- Enter the **password** provided on the packing slip
- Select **6. CHANGE PW**
- When prompted for new **Password**, enter a unique password
- Enter the **password** a second time and your password is changed



Record your credentials and keep them in a secure location like a safe or lock box.



Download Greater Giving's Fundraising Guide which offers suggestions and tips on how to efficiently run and implement a fundraising event. Access this and other resources online at www.greatergiving.com.

TRAINING RESOURCES

Prior to the event, Greater Giving recommends training staff and volunteers on the terminals to ensure a high comfort level with the equipment and process. This will ensure the overall success of the event. Greater Giving provides a variety of training resources with step by step instructions, which include:

- Training video or DVD (sent with equipment)
- Training module at www.greatergiving.com
- Event Quick Reference Sheet (download at www.greatergiving.com)

Terminal Modes - Instructions for this guide are based on the Express Pay Mode.

From the Terminal main screen you can swipe a credit card or manually enter the credit card information.

Express Pay Mode - Bidder number required

1. Swipe a card
2. Enter the guest's bidder number
3. Send transactions to the bank after the event

Express Pay terminal print receipts with a \$0 amount. Guests sign the receipt to agree that they will pay the final amount due.



The Terminals have been programmed in the mode you requested during the order process.

Retail Mode - No bidder number is used

- Swipe a card, enter the sale amount
- **Online** mode authorizes transactions when they occur, and sent to the bank for submission after the event
- **Offline** stores transactions to submit after the event



See page 22 for Retail Mode instructions

TERMINAL FUNCTIONS

Green Arrow (Enter) - Enter key/Confirm/OK

Yellow Arrow - Backspace during data entry

Red X (Cancel) - Cancel/Clear/Back

NOTE: To return to the Main terminal screen after using the F4 (Function) key, press the red (X) Cancel/Clear button.

F4 - Function Menu to access most terminal functions (available from the main screen)

Top Left and Right Purple Keys - Scroll Down and Up to navigate the menu

Shortcuts - Quickly navigate the menu system by pressing the corresponding number key for each option.

Power - Turn the terminal on and off by connecting or disconnecting the power cable. All data is automatically saved in the Master terminal.

Banking (Ethernet) Port - The port on the Master terminal used for internet banking submissions.

Yellow/Green Ports - The ports on the terminals used to connect the terminals together.

Phone Line - To submit to the bank via phone line, plug the phone cord into the Banking Port Phone Line on the bottom of the Master terminal.

Training

(Requires setting up the terminals.  See Setup.)

 Before the event

ENTER TRAINING TRANSACTIONS:

Express Pay

- From the terminal main screen, swipe the test card or key in the credit card number manually
- Enter the bidder # (e.g. 999) and press the green 'key in' button
- **'VERIFY BIDDER NUMBER'**: re-key bidder # and press the
- Press **'Yes'** to print customer receipt (optional) **'Enter'** button
- The merchant receipt prints automatically
- Press **'Yes'** to print customer receipt (optional)

Retail Online and Offline

- From the terminal main screen, swipe the card or key in the credit card number manually
- Enter a sale amount and press the green **'Enter'** button
- The merchant receipt prints automatically
- Press **'Yes'** to print customer receipt (optional)

If the terminal cannot read the card, manually key in the credit card number on the main screen.

CLEARING TRAINING TRANSACTIONS:

Clearing Data

Make sure to clear training data before the event. Do **not** clear the terminal if there are live credit card transactions awaiting bank submission.

To clear a single transaction with the Void function:

- Press **F4** for the main menu
- Select **1. Void**
- Enter the bidder # (e.g. 999) and press the green **'Enter'** button
- **VERIFY BIDDER NUMBER**: re-enter bidder # and press the green **'Enter'** button
- Select **'YES'** to confirm

- Select **'YES'** to print customer receipt (optional)
- Press the red **'Cancel'** button to return to the main screen

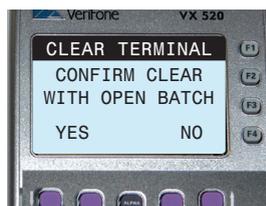
To clear all transactions in the Terminal:

On the Master terminal, press **F4** > Select **7. BANKING** > Enter Credentials > Select **7. CLEAR TERMINAL** > Select **'YES'** to confirm clear terminal > Press **Cancel** to return to the main screen.



Do not clear the terminal during or after the event. All credit card information will be lost.

NOTE: The initial Clear Terminal screen (pictured left) summarizes all Not Settled and Declined transactions in the terminal. Press the green Enter button to continue to the Clear Terminal Confirm Clear screen (pictured far right).



Registration & Check-in (Requires setting up the terminals.  See Equipment & Network)

 During the event

Setup – Refer to the ‘Equipment & Network’ tab

Registration/Check-In – Greater Giving Express Pay allows guests to swipe a credit card at registration, thus eliminating the need to see the cashier at the end of the event. Receipts for Express Pay guests will reflect a \$0 amount. The final purchase amounts for Express Pay guests are entered into the Master Terminal after the event.

Express Pay Transaction –

- Greet the guest, swipe credit card
- Key in the bidder number, press ‘Enter’
- ‘**VERIFY BIDDER NUMBER**’, re-key bidder number, press ‘Enter’
- Merchant receipt prints automatically
- Select ‘**YES**’ to print customer receipt (optional)

Manual Entry – If the terminal is unable to read the credit card, key in the card manually

- From the Main Screen, key in the credit card number, press ‘Enter’
- Enter the expiration date, press ‘key in’
- Confirm if cardholder is present, Select ‘Yes’ or ‘No’
- Enter bidder number, press ‘Enter’
- **VERIFY BIDDER NUMBER:** re-key in bidder number, press ‘key in’
- Merchant copy prints automatically
- Select ‘Yes’ to print customer receipt (optional)



Print a **Sales Report** as a paper backup of your credit card information, and keep in a secure location. All reports are run from the Master terminal.

- On the Master Terminal, press **F4** > Press **5. REPORTS** > Press **2. SALES** > Enter credentials (on packing slip) to complete.

Duplicate Bidder – If a bidder number is already entered, terminal will prompt ‘Duplicate Found’. If this occurs, press ‘Enter’ then verify correct bidder number.

Sales – Record package sales in event management software or other record-management system.

Check-out/Cashiering – Express Pay bidders will be able to bypass cashiering and pick up their purchased packages at item pickup. Check-out, which is set up once Check-In has closed, is where payments are obtained from guests who did not swipe their credit cards at Check-In. Non-Express Pay bidders with sales can swipe a credit card or pay by cash/check at the end of the event. The following functions are commonly used during Check-out/Cashiering.

- **Split Pay:** Allows guests to swipe multiple credit cards for purchases on one bid number. This function requires a total payment for each credit card used
 - Press **F4** > Select **4. SPLIT PAY** > Enter bidder # > Verify bidder # > Enter payment amount (for current credit card) or **ADD CARD** > Swipe additional cards (if no credit card exists in the terminal for bidder #, see above ‘Express Pay Transaction’ to add credit card)
- **Reprint a receipt:**
 - Press **F4** > Select **2. REPRINT** > Enter bidder #
- **Cashiering:** Swipe credit cards at check-out for non-Express Pay bidders (see page 23 for more detail)
 - Press **F1** > Swipe credit card > Enter bidder # > Verify bidder # > Enter final payment amount > Enter to print customer receipt (optional)
- **Adjustment:** Enter or adjust total amount due for credit cards stored in the terminal
 - Press **F4** > Select **3. ADJUSTMENT** > Enter bidder # > Verify bidder # > Enter new amount due or select transaction to adjust (this will override the previous amount) > Select ‘**YES**’ or ‘**NO**’ to confirm whether card is present

NOTE: To return to the Main terminal screen, press ‘Cancel’



Keep financial information in a secure location like a safe or lock box.

Closing

1. Print a Sales Report: Press **F4** > Select **5. REPORTS** > Select **2. SALES** > Enter credentials (*see page 6*).
2. Back up your event database (if using Greater Giving Event Software): Choose **Utilities > Backup Database**.
3. Shut down the terminals: Press **F4** > Select **9. SHUT DOWN**. It is now safe to unplug the power cable.

Test the Sync Process

When using event management software and syncing, Greater Giving strongly encourages testing the Sync interface prior to the event. For information, please refer to the Sync Guide provided by Greater Giving or consult the instruction manual for other event management software.



Download Greater Giving's Best Practices Guide which offers suggestions and tips on how to efficiently run and implement a fundraising event. Access this and other resources online at www.greatergiving.com.

Mark Express Pay or Sync 1

 During the event

In order to facilitate a more efficient check-out process at the end of the event, it is helpful to indicate on the Bidder file or spreadsheet that a guest has swiped his/her credit card for Express Pay. This step is completed between the close of registration/check-in and the transition to check-out/cashiering. Guests who are marked with Express Pay will not need to see the cashier at the end of the event. **Sync 1 is the only required sync at the event.**

Manually Marking Express Pay:

1. Print a Bidder Report from the Master terminal.
 - Press **F4** > Select **5. REPORTS** > Select **2. BIDDERS**
2. Mark bidder files as 'Express Pay' with an indicator such as a stamp or sticker.

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

Syncing with Event Management Software:

Sync 1 (*Electronically Marking Express Pay*)

Sync 1 imports a list of Express Pay bidders from the Master terminal into event management software.

NOTE: For step-by-step instructions please refer to the Greater Giving Sync Guide provided by Greater Giving or consult the instruction manual for your event management software.



If using event management software and syncing with more than one network of terminals please refer to the sync guide provided by Greater Giving for step by step instructions.

Entering Payments or Sync 2

After the event

In this process, final purchase amounts for Express Pay bidders are entered into the Master terminal in preparation for sending charges to the bank. This will be completed after the event, typically the following day.



To ensure your guests are charged the correct amount, double check the final purchase amount due for each bidder before entering payment amounts into the terminal (or performing Sync 2).



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



Manually Entering Payments into the Master Terminal:

Final purchase amounts for Express Pay bidders must be entered into the Master terminal before sending charges to the bank. The terminal will prompt the user to enter dollar amounts automatically by bidder number, skipping bidders where amounts have already been entered (i.e. for Adjustments, Cashiering purchases or Split Pay purchases).

- On the Master terminal, press **F4** > Select **6. ENTER PAYMENTS** > Enter the sales total for the bidder # shown > Press **'Enter'**.
- The Terminal automatically cycles through each bidder with a zero-dollar amount.
- To skip bidders with no purchases or a \$0 amount, press **'Enter'** to move onto the next bidder number (repeat until finished) Once all dollar amounts have been entered, a Totals report will automatically print.



Syncing with Event Management Software— Sync 2 (Electronically Entering Payments):

Final purchase amounts for Express Pay bidders must be entered into the Master terminal before sending charges to the bank. The terminal will prompt the user to enter dollar amounts automatically by bidder number, skipping bidders where amounts have already been entered (i.e. for Adjustments, Cashiering purchases or Split Pay purchases).

Sync 2 exports the total purchase amount for each Express Pay bidder from the event management software to the Greater Giving Master terminal for payment processing. Before performing Sync 2, all winning bids and any cash or check payments must be entered into the event management software. Do not post any credit card payments in the software; this will be done in Sync 3.— **Refer to the Greater Giving Sync Guide or your event management software to complete Sync 2.**

RECONCILING:

Print a Totals Report for a breakdown of transactions: Press **F4** > Select **5. REPORTS** > Select **4. TOTALS**

- **Zero Dollar Tran Count:** The number of bidders with a credit card on file but no charges applied
- **Unsettled Total Sales:** The number of transactions with entered dollar amounts that have not yet been sent to the bank
- **Settled Total Transactions:** The number of approved transactions that have been sent to the bank
- **Declined Total:** The number of declined credit card charges after sending to the bank
- **Total Transaction Count:** The total number of transactions

Print a Sales Report to confirm total purchase amount for each bidder prior to submitting charges

- Press **F4** > Select **5. REPORTS** > Select **2. SALES** > Enter Credentials (see page 6)

If purchase amounts need to be corrected or modified please use the Adjustment or Void functions as applicable.

Please refer to the **Function Tab**.

Sending Charges to the Bank

After the event

Before sending charges to the bank, ensure your guests are charged the correct amount by double checking the final purchase amount due for each bidder. There are two ways to send payments to the bank via the internet or dedicated analog phone line.

Sending Charges via Internet:

1. Plug the ethernet cable into the **Ethernet Banking Port** 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 **1. INTERNET** > Select **'Yes'** to upload
4. Confirm the total dollar amount to be submitted. If correct, select **'Yes'** to submit. If incorrect, select **'No'** then press **'Cancel'** twice to return to the main screen and adjust totals
6. After charges have been sent to the bank, the Master terminal will automatically print a Banking Report with all approved and declined transactions



Do not attempt to submit the transactions over a wireless connection.

Sending Charges via Analog Phone Line:

1. Plug phone cord into the Banking Port Phone Line 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 **2. PHONE LINE** > Select **'Yes'** to upload now.
4. Confirm the total dollar amount to be submitted. If correct, select **'Yes'** to submit. If incorrect, select **'No'** then press **'Cancel'** twice to return to the main screen and adjust totals
5. Confirm need to dial **9** or other prefix number
6. After the charges have been sent to the bank, the Master terminal will automatically print a Banking Report with all approved and declined transactions



*If you receive connection errors, power **OFF** the Master terminal for 10 seconds and try again. If the problem persists, call Greater Giving support.*



Typical fax lines are dedicated analog phone lines; however standard office extensions are not.

BANKING OPTIONS

After sending to the bank, the following functions are available on the Banking screen:

- **Send to Bank** – Send additional transactions to the bank
- **Banking Report** – A detailed report listing all transactions both declined and approved. This report can be reprinted as needed
- **Audit Report** – A more detailed banking report to be used only when instructed by Greater Giving support
- **Reauthorize Declines** – Manage and resolve declines
- **Clear Terminal** – Deletes all transactions in the Master terminal. This function should only be used after all charges have been sent to the bank, Sync 3 has been completed if syncing with event management software, and declines have been resubmitted. Once transactions are deleted they cannot be restored.



IMPORTANT! *When using event management software, make sure all declines are resolved and run a final Sync 3 prior to clearing the terminal. Please refer to the Greater Giving Sync Guide or other event management software for instructions on how to complete the sync.*

To reprint the Banking Report:

- On the Master terminal, press **F4** > Select **7. BANKING** > Enter Credentials > Select **2. BANKING REPORT**

POSTING PAYMENTS OR SYNC 3

Posting payments is the final step in the Greater Giving syncing process where event records are updated showing guests with approved and declined credit card charges for their purchases. **To ensure guest credit card information is kept secure, Greater Giving strongly recommends physically securing the credit card terminals until after all transactions have been submitted to the bank and the terminals have been cleared.**



Manually Posting Payments:

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

NOTE: If using event management software, but not syncing, use the appropriate tool in your software to designate guests as paid.



Syncing with Event Management Software Sync 3 (Electronically Posting Payments):

Sync 3 imports approved and declined credit card payment transactions from the Master terminal to the event management software. This process takes place **after** charges have been submitted to the bank.

NOTE: Refer to the Greater Giving Sync Guide on how to complete Sync 3

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.

Obtaining Approval Codes to Resubmit Declines

To resubmit declines the following information will be needed:

- 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 credit card
- Cardholder's billing address
- Amount of the charge



Contact the appropriate credit card company for authorization:

- Visa, MasterCard and Discover: 800.944.1111
- American Express: 800.528.2121

After collecting the above items follow these steps below to resubmit a decline:

To Resubmit Decline:

1. Reauthorize a declined transaction with a Voice Authorization code:
 - 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'**
 - Enter the Voice Authorization code obtained
 - Confirm the dollar amount for the transaction. The terminal will charge the card again using the Voice Authorization code
2. Send transactions to the bank (see *Banking & Posting Payments* tab for further instructions)

To Void a Declined Transaction:

1. Reauthorize the declined transaction without a Voice Authorization code:
 - 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 **'No'**
 - Confirm reauthorization
2. Void the reauthorized transaction:
Press **F4** > Select **1. VOID** > Enter bidder # > Verify bidder # > Select **'Yes'** to confirm void > Select **'No'** to cancel void

POST EVENT INFORMATION

After charges have been sent to the bank and payments have been posted, if there are no declined transactions to resubmit, the terminals can be cleared and returned to Greater Giving. **If there are any declined transactions on the Banking report, see the Declines tab for further instructions.**

CLEARING TRANSACTIONS

Do not clear the terminal if you have live transactions that need to be sent to the bank.

To clear all transactions in Master terminal:

- Press **F4** > Select **7. BANKING** > Enter Credentials > Select **7. CLEAR TERMINAL** > Select **'Yes'**

NOTE: Once the Master terminal has been cleared all credit card information will be lost.

RETURN SHIPPING

When the event is complete and all transactions have been processed, please ship the equipment back to Greater Giving.

- Verify all transactions have been cleared using the Clear terminal function
- Return all of the equipment in the white packing case
- 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 the provided return shipping labels on the outside of the cardboard box
- Drop off at any UPS location, or arrange for pickup



Do **NOT** ship equipment back in only the white packing case. Be sure to save the cardboard box the Greater Giving terminals were shipped in. If you cannot locate the original cardboard box, please use an equivalent box to return the terminals.



Post Event Information:

- After charges are sent to the bank, funds will be deposited into your account within 5 business days.
- Please return all Greater Giving equipment within 4 business days after the event or late fees may apply.
- For financial record keeping, retain all signed credit card receipts, the final Sales Report and the Banking Report for 3 years in a secure location. In the unlikely event that there is a dispute over a guest charge, these receipts may be required for reference.

Retail

Retail Terminals are stand alone units that do not require Network Cables. In Retail mode, Greater Giving terminals accept credit card transactions without the use of a bidder number. Retail terminals can be set in Online or Offline mode (see page 7).

To Resubmit Decline:

- Enter Retail Sale Transaction Number:
- Swipe Credit Card
- Enter in the purchase amount > press 'Enter'
- Merchant receipt prints automatically
- Select 'Yes' to print customer receipt (optional)

Void – Deletes transaction data

- Press **F4** > Select **1. VOID**
 - Enter invoice #, press 'Enter'
 - Select 'Yes' to confirm void or select 'No' to cancel
- ***You can only void a transaction before settling to the bank*****

Reprint – Reprints receipt of a transaction currently in the terminal

- Press **F4** > Select **2. REPRINT**
- Enter the invoice #, press 'Enter'
- Merchant receipt prints automatically
- Select 'Yes' to print customer receipt (optional)

Adjustment – Allows user to override the current dollar amount in the terminal and replace it with a new amount

- Press **F4** > Select **3. ADJUSTMENT**
 - Enter the invoice #, press 'Enter'
 - If prompted, select transaction (use **PREV** and **NEXT** to scroll, **ALPHA** to select)
 - Enter the new purchase amount, press 'Enter'
 - Merchant receipt prints automatically
 - Select 'Yes' to print customer receipt (optional)
- ***Adjustments cannot be made if using Retail Online mode*****



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

CASHIERING

At the end of the event, guests who are not Express Pay can swipe their credit card to pay for their purchases. This method will show a dollar amount on the receipt instead of zero.

Cashiering Process

- Press **F1** to initiate the cashiering function (prior to swiping each credit card transaction)
- Swipe credit card > Enter bidder # > Verify bidder # > Enter dollar amount
- Merchant copy prints automatically
- Select 'Yes' to print customer receipt (optional)

Express Pay Functions

Functions used at registration or guest check-in

To register a guest for Express Pay:

- From the terminal main screen, greet the guest, swipe the credit card
- Enter the bidder number
- VERIFY BIDDER NUMBER: re-enter bidder #, press 'Enter'
- Merchant copy prints automatically
- Select 'Yes' to print customer receipt (*optional*)

To enter credit card information manually:

- From the terminal main screen, enter the credit card number, press 'Enter'
- Enter the expiration date, press 'Enter'
- Confirm if cardholder is present, select 'Yes' or 'No'
- Enter bidder #, press 'Enter'
- VERIFY BIDDER NUMBER: re-enter bidder #, press 'Enter'
- Merchant copy prints automatically
- Select 'Yes' to print customer receipt (*optional*)
- Press 'Enter' for customer copy (*optional*)

NOTE: Each Master or Retail Terminal has the capacity to store up to 500 credit card transactions. Terminal will prompt when approaching maximum capacity.

Check-out Functions

Functions used at registration or guest check-in

- **To enter a Cashiering transaction:** Press **F1**, Swipe credit card > Enter bidder # > Verify bidder # > Enter dollar amount
- **Void** – To clear a single transaction from the terminal: Press **F4** > **Void (1)** > Enter bidder # > Verify bidder # > Select 'Yes' to confirm void > Press 'Cancel' to return to main screen
- **Adjustment** – To change the total amount due for a bidder: Press **F4** > **Adjustment (3)** > Enter bidder # > Verify Bidder # > Enter new amount due or select transaction to adjust (this will override the previous amount) > Press 'Cancel' to return to main screen
- **Reprint** – To reprint a bidder receipt: Press **F4** > **Reprint (2)** > Enter bidder # > Press 'Cancel' to return to main screen
- **Split Pay** – To pay for bidder purchases with multiple credit cards: Press **F4** > **Split Pay (4)** > Enter bidder # > Verify bidder # > Enter payment amount for current credit card (if current credit card has \$0 balance) or **ADD CARD** > Swipe additional cards (if no credit card exists in terminal for bidder #, see above 'To register guest for Express Pay' to add credit card.)

Reports

- **Sales** – Press **F4** > Reports (5) > Sales (2) > Enter Credentials (*see page 6*)
- **Bidder** – Press **F4** > Reports (5) > Bidder (1)
- **Split Pay** – Press **F4** > Reports (5) > Split Pay (3)
- **Totals** – Press **F4** > Reports (5) > Totals (4)
- **Banking** – Press **F4** > Banking (7) > Enter Credentials > Banking Report (2)

NOTE: To return to the Main terminal screen after using **F4** (Function) key, press the red (X) **Cancel/Clear** button.