

auctionpay

Event Cheat Sheet

Registration

Auctionpay Express Pay allows your 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. Final purchase amounts for Express Pay guests are entered into the Master terminal after the event.

Express Pay Transactions

- Greet guest and ask them if they are using a credit card to pay for auction items. If, so swipe credit card for Express Pay
- Key in the bidder number, press **[Enter]**
- Re-key bidder number, press **[Enter]**
- Merchant receipt prints; obtain guest signature
- At the “**Customer Copy**” prompt, press **Yes** or **No** as appropriate

Manual Credit Card Entry – if the terminal cannot read the credit card, enter the card information manually

- If the terminal is unable to read the credit card, the card can be manually entered.
- Key in the credit card number, press **[Enter]**
- Key in expiration date, press **[Enter]**
- Key in the bidder number, press **[Enter]**
- “**Verify number**”, re-key bidder number, press **[Enter]**
- Merchant receipt prints, press **[OK]** or **[Enter]**
- Customer receipt prints

Voids – deletes bidder number and transaction data. This function can also be used to clear any test data residing in the terminal.

- Press **F4** for menu > Select **Void**
- Key in the bidder number, press **[Enter]**
- Re-key the bidder number and press **[Enter]**
- Confirm the dollar amount and bidder number. Press **Yes** or **[Enter]** to void the transaction
- The merchant receipt prints
- At the “**Customer Copy**” prompt, press **Yes** or **No** as appropriate

Reprint – reprints receipt of a bidder in the terminal

- From the main screen, press **F4** for menu > Select **Reprint**
- Key in the bidder number, press **[Enter]**
- Merchant receipt prints; obtain guest signature
- At the “**Customer Copy**” prompt, press **Yes** or **No** as appropriate

At the close of registration, it is a good idea to print both the Sales and Bidder reports from the Master terminal. Refer to the Auctionpay Quick Start Guide for detailed instructions. Be sure to keep these reports in a secure location.



Cashiering

Cashiering or check-out, which is set up once registration has closed, is where payments are taken from guests who did not swipe their credit cards at registration. Additionally, guests may want to adjust a previous payment, or split their payment between multiple credit cards.

Sales Transactions

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

Adjustments – allows user to replace the current dollar amount in the terminal with a new amount.

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

Adjustments can be made to Split Pay transactions.

Split Pay – allows users to swipe multiple credit cards for one bidder number. This function can only be performed when an amount for each credit card is known.

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

When cashiering/checkout closes, reprint a final Credit report from the Master(s) before shutting down terminals.



Reports

Bidder Report – A list of bidder numbers in numerical order with the type of credit card registered. *Not available in Retail modes.*

- Press **F4** for menu > Select **Reports** > Select **Bidder**

Sales Report – A list sorted by bidder number including: cardholder name, credit card type, full card number, expiration date and dollar amount.

- Press **F4** for menu > Select **Reports** > Select **Sales** > Enter user ID and password

Split Pay Report – A list of split pay guests sorted by bidder number including: credit card type, last 4 digits of the card number, dollar amount and bidder subtotal. *Not available in Retail modes.*

- Press **F4** for menu > Select **Reports** > Select **Split Pay**

Totals Report – A list of totals including Zero Dollar Transaction Count, Unsettled Total Sales, Settled Total Sales, Declined Total and Total Transaction Count. *Not available in Retail modes.*

- Press **F4** for menu > Select **Reports** > Select **Total**

Banking Report – A list of approved and declined payment transactions. The Banking report can be reprinted from the Banking screen. This report will automatically print after transmitting charges to the bank.

- Press **F4** for menu > Select **Banking** > Enter user ID and password > Select **Banking Report**

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

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

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

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