

auctionpay

Retail Mode Guide

Both Retail Offline and Retail Online terminals are stand-alone units that are not connected to other terminals or to a network router, but do require a power source. Retail terminals do not use bidder numbers; instead, each transaction is automatically assigned a unique invoice number. In Retail mode, final purchase amounts are entered for each transaction and printed on the receipt.

RETAIL OFFLINE MODE

In Retail Offline mode, Auctionpay terminals accept credit card transactions without the use of a bidder number. Transactions are stored in the Retail terminal until they are ready to be sent to the bank.

Terminal Set Up and Shut Down

Set Up

- Insert a power adapter marked “**Terminal**” into the power port on the right side of the terminal and then into a power outlet

Shut Down

- Unplug the power cord from the “PWR” port on the right side of the terminal (all data will be saved)

Transactions

To enter a Retail Offline transaction:

- From the main screen, swipe the guest’s credit card
- Key in the purchase amount and press the green **Enter** button
- The merchant receipt prints; obtain guest signature
- At the “**Customer Copy**” prompt, press **Yes** or **No** as appropriate

Manual Card Entry – if the terminal is unable to read the card, the card can be manually entered.

- On the main screen, use the key pad to key in the full credit card number and press the green **Enter** button
- Key in the four-digit expiration date in MMY format and press the green **Enter** button
- At the “**Card Present?**” prompt, select **Yes** or **No** as appropriate
- Key in the purchase amount and press the green **Enter** button
- The merchant receipt prints; obtain guest signature
- At the “**Customer Copy**” prompt, press **Yes** or **No** as appropriate

To delete a single transaction using Void:

- From the main screen, press **F4** for menu
- Select **Void**
- Key in the invoice number and press the green **Enter** button
- Press **Yes** to confirm the transaction to be voided
- The merchant receipt prints
- At the “**Customer Copy?**” prompt, press **Yes** or **No** as appropriate
- Press the red **Cancel/Clear (X)** button to return to the main screen

To print a new receipt using Reprint:

- From the main screen, press **F4** for menu
- Select **Reprint**
- Key in the invoice number found on the receipt and press the green **Enter** button
- The merchant receipt prints; obtain guest signature
- At the “**Customer Copy?**” prompt, press **Yes** or **No** as appropriate
- Press the red **Cancel/Clear (X)** button to return to the main screen

To modify a payment amount using the Adjustment function:

Note: The terminal will not add two dollar amounts together. At the prompt, enter the final or total dollar amount to be charged to the bidder. This overwrites the amount currently in the terminal.

1. Press **F4** for menu
2. Select **Adjustment**
3. Key in the invoice number and press Enter
4. Confirm the dollar amount and invoice number. At the “**Enter Amount?**” prompt, key in new final purchase amount to be charged and press the green **Enter** button
5. At the “**Consumer Present?**” prompt, press **Yes** or **No** as appropriate
6. The merchant receipt prints; obtain guest signature
7. At the “**Print Customer Copy?**” prompt, press **Yes** or **No** as appropriate
8. Press the red **Cancel/Clear (X)** button to return to the main screen

Refer to the Banking section in the Quick Start Guide for more information on sending charges to the bank.

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



RETAIL ONLINE MODE

Retail Online terminals are stand alone units connected to a power source and a dedicated analog phone line to allow real-time transaction processing. In Retail Online mode, Auctionpay terminals accept credit card transactions without the use of a bidder number. As this Mode is set for real-time authorizations, it is unable to resubmit declines or adjust processed transactions. After all transactions are authorized, charges must be settled to the bank as outlined in the Banking tab.

Note: Adjustments cannot be made to Retail Online transactions. To modify a transaction amount, void the current transaction and enter a new one.

To enter a Retail Online transaction:

- From the main screen, swipe the guest's credit card
- Key in the purchase amount and press the green **Enter** button
- The merchant receipt prints; obtain guest signature
- At the "**Customer Copy**" prompt, press **Yes** or **No** as appropriate

To enter credit card information manually:

- On the main screen, use the key pad to key in the full credit card number and press the green **Enter** button
- Key in the four-digit expiration date in MMY format and press the green **Enter** button
- At the "**Card Present?**" prompt, select **Yes** or **No** as appropriate
- Key in the purchase amount
- The merchant receipt prints; obtain guest signature
- At the "**Customer Copy**" prompt, press **Yes** or **No** as appropriate

To delete a single transaction using Void:

- From the main screen, press **F4** for menu
- Select **Void**
- Key in the purchase amount
- Press **Yes** to confirm the transaction to be voided
- The merchant receipt prints
- At the "**Customer Copy?**" prompt, press **Yes** or **No** as appropriate
- Press the red **Cancel/Clear (X)** button to return to the main screen

To print a new receipt using Reprint:

- From the main screen, press **F4** for menu
- Scroll to select **Reprint**
- Key in the invoice number found on the receipt and press the green **Enter** button
- The merchant receipt prints; obtain guest signature
- At the "**Customer Copy**" prompt, press **Yes** or **No** as appropriate
- Press the red **Cancel/Clear (X)** button to return to the main screen

(!) You must settle each terminal for your authorized funds to be processed. Refer to the Banking section for more information on sending charges to the bank.

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



Sending Charges to the Bank – Dedicated Analog Phone Line

To submit charges to the bank using a dedicated analog phone line:

1. Insert provided phone cord into the port on the back of the Retail terminal (the port looks like a phone)
2. Insert other end of phone cord into a dedicated analog phone line

Tip: Typically fax, modem, and home phone lines are dedicated analog lines. Standard office extensions are usually not dedicated analog lines.

3. Power up the Master terminal
4. Press **F4** for menu
5. Scroll to select **Banking**
6. Key in User ID and press the green **Enter** button
7. Key in password and press the green **Enter** button
8. Choose **Phone line** as settlement method
9. Scroll to select **Send to Bank**
10. At the “**Upload Now?**” prompt, press **Yes**
11. If a prefix is required to dial out, select **Yes** at the prompt and enter the dialing prefix (most common is **9**); if a prefix is not required, press **No**
12. Terminal prompts “**Total Correct?**” Confirm the amount to be submitted and press **Yes** or **No** as appropriate
 - If **No** is selected because the total is incorrect, bidder charges will not be sent to the bank, and the terminal returns to the Banking screen. See troubleshooting below
 - If **Yes** is selected, the terminal transmits credit card charges. Once the transmission is complete, the terminal generates a Banking report showing all approved and any declined transactions
13. Press the red **Cancel/Clear (X)** button twice to return to the main screen

Note: If data transmission fails, ensure the terminal is connected to a dedicated analog phone line and try again. If a connection cannot be established, the Master terminal will retry 4 times. Exit by pressing the red **Cancel/Clear (X)** button.

Declines

Refer to the Declines section in the Quick Start Guide or visit www.greatergiving.com for instructions on how to obtain authorization codes and resubmit declines.



Reports

Credit Report (Print out before powering down a terminal with live data); a list by invoice number including card holder name, type of card, card number, expiration date, and dollar amount.

- Press [More] [Reports] [Credit]

Totals Report – a list of the number of transactions with a dollar total.

- Press [More] [Reports] [Totals]

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