Greater Giving Online Software
Go Time

Quick Start Guide

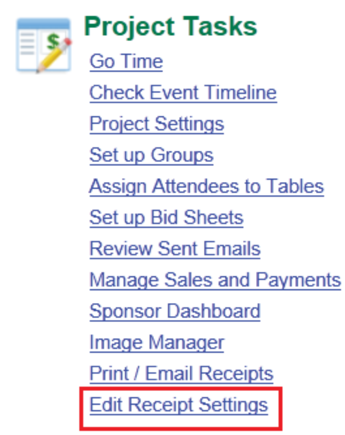
PRE-EVENT

Equipment and Internet Setup

- Set up registration equipment (laptops, iPads, tablets, PC's)
- Test internet connection on all devices you plan to use at your event (laptop, iPad, tablet, phone etc.) to ensure you have the proper connectivity. It is especially important to test connectivity at the venue prior to event date. We strongly recommend using hard wired internet access as opposed to Wi-Fi for connection.

Greater Giving Online Software Setup

- Log into Greater Giving Online event software - url: https://online.greatergiving.com
- Verify **Card Swipe** has been activated by going to '**Project Settings'** and looking for credit card images. This activates the ability to store credit card information during your event. If you do not see any credit card images, contact Greater Giving – (866) 269-8151
- Setup **Event Receipts**
  - Go to **Project Home**.
  - Under **Project Tasks**, click '**Edit Receipt Settings**'.
  - Verify settings on each tab of the **Event Receipt** - including **Email Receipts** and/or **Print Receipts,** based on preferred delivery.



Card Reader Setup

- Plug the card reader into a USB port on your computer, look for the green light, and listen for the beep.
- Test the card reader – Add a new 'test' bidder and check the guest in using the '**Checkin Attendee**' button and swiping the *auctionpay* test credit card. Delete 'test' bidder when done.

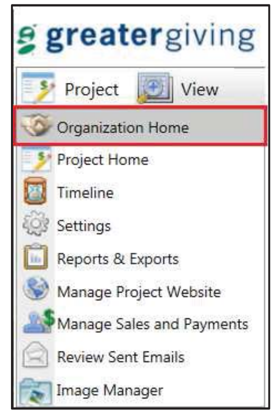
Mobile Card Reader Setup *(Valid for iPad or Android tablet)*

- Install Greater Giving App for iPad or Android from the App Store or Google Play
- Click icon to launch Greater Giving Go Time, Enter credentials
- Select the 'Test Card Reader' icon, Insert the mobile card reader into the audio port of the tablet,
- Swipe credit card to test, if successful 'Card Reader Active' with a green check mark will appear

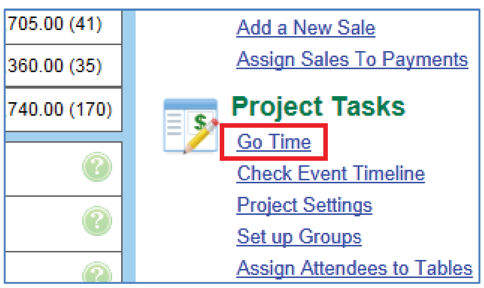
Go Time SETTINGS

Go Time Volunteer Access

Volunteers working check-in, entering sales, and checkout will need to have Greater Giving Online Software credentials. We recommend one login be shared amongst all Volunteers. Follow these steps to set up Volunteer Access:

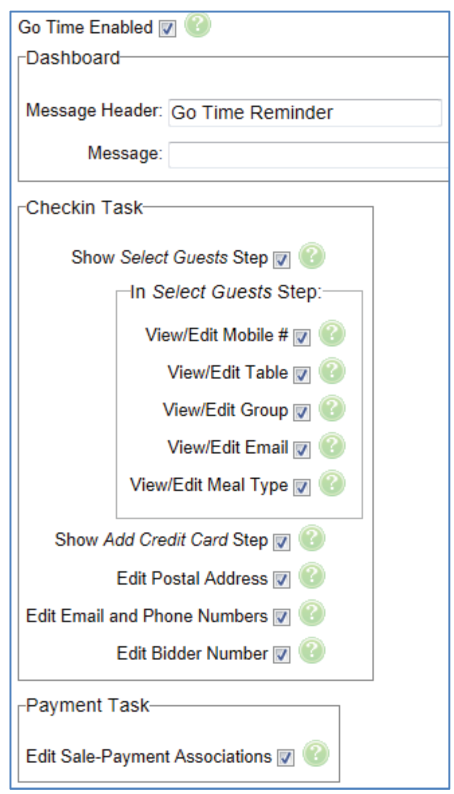


- From Project Home, go to '**Project**', '**Organization Home**'.
- In the User area at the bottom of the page, click '**View/Edit Users & Permissions**'.
- Click '**Add**'.
- In the appropriate fields, enter Username, Full Name, and Email for the new user.
- Provide a password and confirm. The password must be at least **six characters** and contain at least **two non-alpha characters** such as numbers.
- In the Default Permissions area, assign desired permissions. If processing charges in a batch make sure '**Charge Credit Cards**' is <u>not</u> selected.



Verify *Go Time* Settings

- Go to Project Home
- Under '**Project Tasks**' on the home page, click ***'Go Time'***
- Preview each step to ensure ***Go Time*** is set up to your specifications



Reconfigure *Go Time* Settings

- Click '**Project Settings**' on the home page
- Click '**Edit Go Time Settings**'
- Make necessary changes
- Add special instructions/notes for Volunteers in the **Message** field. This information will appear on the ***Go Time*** **Dashboard**
- Click '**Save**'

GUEST REGISTRATION

Go Time handles Registration, Auction Sales, Payments, and Guest Checkout.

Print recommended reports from the **Admin** computer to be used for reference during Registration:

- **BID-01**: BID-01: Guest listing and check in *or* **BID-02:** Guest listing (2 column)
- **UTL-05**: Blank Bidder Registration Forms (Walk-ins, Replacements, Ticket Sales)
- **TBL-01**: Table Listing
- **GRP-01**: Group Listing

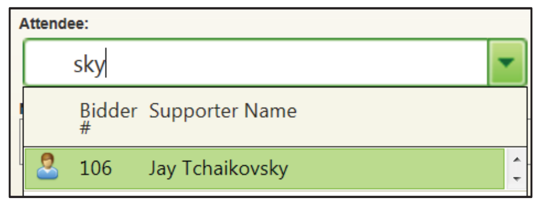
To access ***Go Time*** click the link under '**Project Tasks'** on the home page of Greater Giving Online Software. **Note**: ***Go Time*** will open in another window or tab of your internet browser.

Select **'Check in Attendee**'

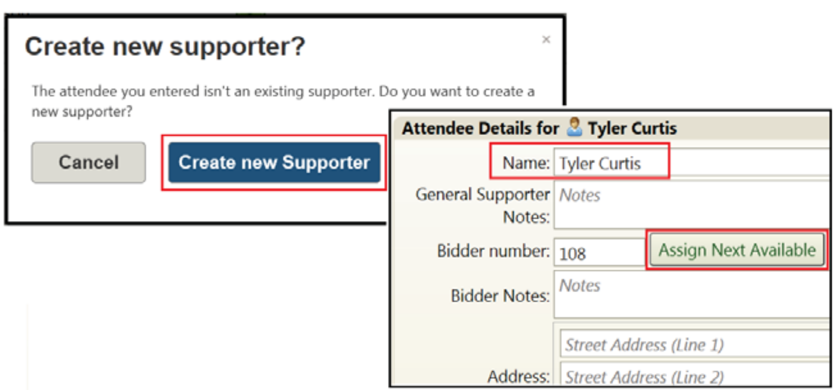
Checkin Step 1: Get Name

The ***Go Time*** wizard is configured to match the flow of a typical guest registration.

- Type the guest's name in the **'Attendee'** field
    - Type a portion of the first or last name to see a list of potential matches – e.g. - type "sky" to locate "*Tchaikovsky*"
    - Once correct name appears, highlight the name and click **'Next'**



- If a guest name cannot be found in the software, you will need to create a new guest record
    - Type the guest's name, '**Enter**'
    - Click **'Create New Supporter'**
    - Type in contact information - Only name and bidder number are required to continue. If having a Mobile Bidding event you will also want to capture cell phone and email address. All contact info can be captured on the **UTL-05**: Blank Bidder Registration Form.
    - Click **'Assign Next Available'** to auto assign a bidder number or simply enter the bidder number to assign a specific one, click '**Update**' to save
    - Click **'Next'** to continue to **Checkin Step 2 – Select Guests**



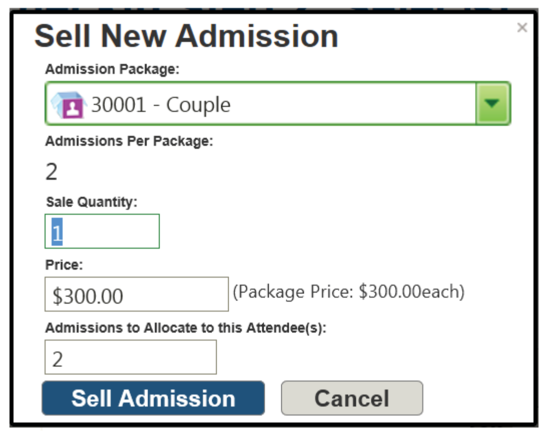
Checkin Step 2 – Select Guests:

*****NOTE:** If **not** tracking admissions, go to ‘**Project Settings**’, ‘**Edit Go Time Settings**’ and uncheck ‘**Show Select Guests Step’**. This will allow you to skip this step.*

- This screen displays the guest name, mobile #, email, table, group, and meal (each of which can be managed under *‘**Project Settings**’, ‘**Edit Go Time Settings**’)*
- Check the box next to each guest to check them in

- Click on ‘**Details**’ to view or edit the Attendee Details, make necessary changes, click ‘**Update**’ to save
- Click ‘**Next**’ to continue to **Checkin Step 3 – Add Credit Card**

If the guest does not have an admission allocated then you will need to sell them a **New Admission** or use an **Existing Admission** – see below:

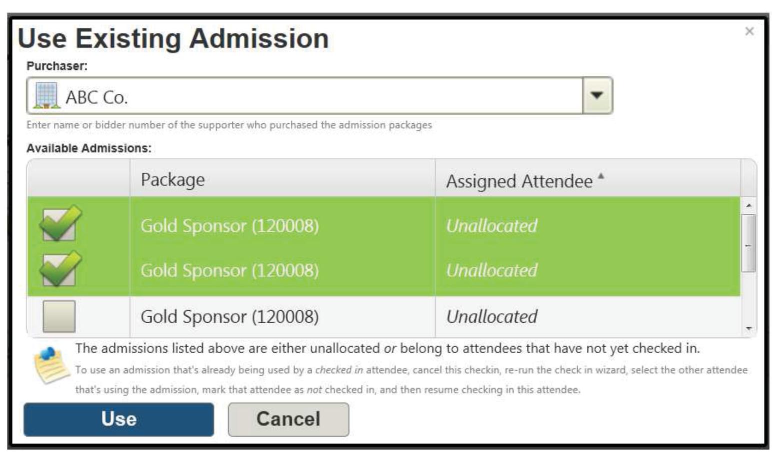


A) New Admissions

If the attendee needs to purchase a new admission

- Click on **‘Sell New’**
- Select **‘Admission Package’** from the drop down menu
- Specify the quantity to be sold – note the number of seats included before adjusting the quantity (e.g. – If a Couple Ticket has 2 seats you only need to sell 1 package for 2 guests)
- Confirm sale price
- Click **‘Sell Admission’** to complete
- Check the box next to each guest to check them in
- Assign Group and Table for each member (if the Group has already been assigned to a table in the project then it will default to the correct table. However, you can overwrite this, if needed.)
- Click ‘**Next**’ to continue to **Checkin Step 3 – Add Credit Card**

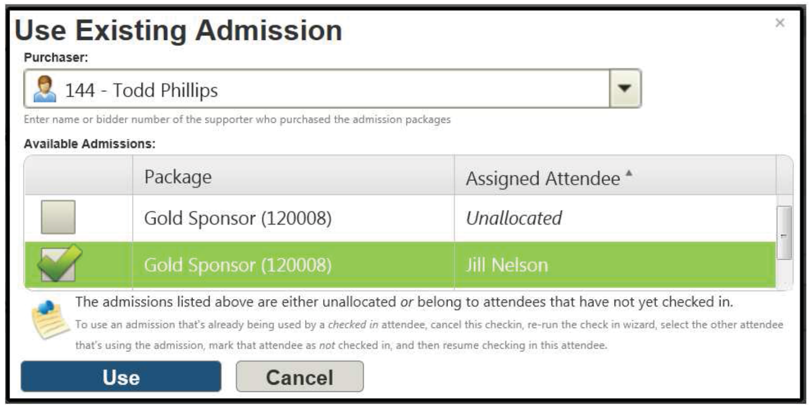
B) Existing Admission



Assign an admission purchased by another guest:

- Click **‘Use Existing’**
- Type the purchaser’s name
- Check the number of admissions needed
- Click ‘**Use**’
- Assign Group and Table for each member (Table will auto assign if the Group has already been assigned to a table in the project. However, you can overwrite this, if needed.)
- Click ‘**Next**’ to continue to **Checkin Step 3 – Add Credit Card**

C) Replace Admission



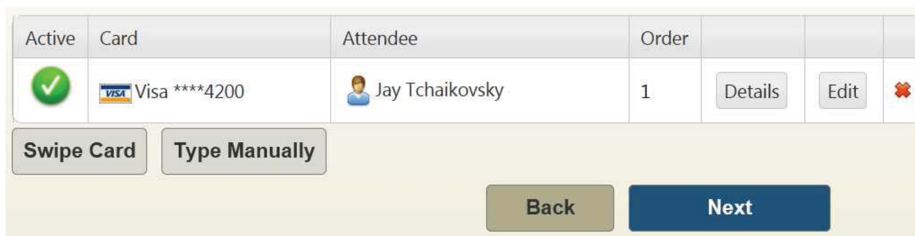
When an attendee is replacing another guest

- Click on **'Use Existing'** button
- Type the purchaser's name
- Select the guest being replaced which is listed in the Assigned Attendee column
- Click **'Use'**
- Check box next to each guest to check them in
- Assign Group and Table for each member (Table will auto assign if the Group has already been assigned to a table in the project. However, you can overwrite this, if needed.)
- Click '**Next**' to continue to **Checkin Step 3 – Add Credit Card**

Checkin Step 3 - Add Credit Card

This area is used to store the credit card to be used for the guest's purchases. A guest may already have opted to store a credit card prior to the event which will show on file. They may also swipe a credit card at checkout.

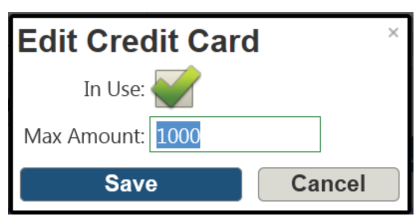
Add a Credit Card:



- Click **'Swipe Card'**
- Swipe the credit card with the magnetic strip facing the arrows on the card reader
- The credit card info will automatically be saved and will appear in the grid view
- If the card cannot be read you can click '**Cancel**' and then click **'Type Manually'.** Type the credit card number, expiration date, and card holder name. Click **'OK'**
- Click **'Next'** to complete the check in

ADDITIONAL CREDIT CARD OPTIONS

Edit a Credit Card: (Maximum amount)

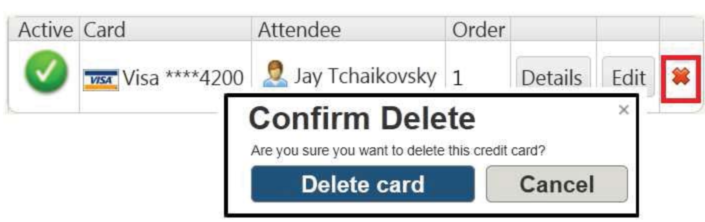


- Click **'Edit'**
- Enter the maximum dollar amount to be charged
- Click **'Save'**

Deactivate a Credit Card:

- Click '**Edit**'
- Uncheck the box for '**In Use**'
- Click '**Save**'

Void a Credit Card

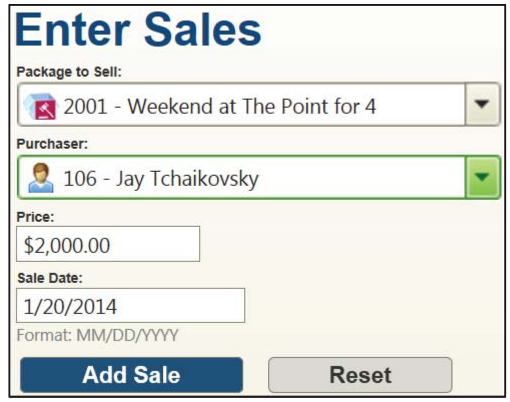


- Click the red **'X'** to delete
- Click **'Delete Card'** to confirm

Click **'Next'** to complete the check in

SALES

Select '**Enter Sales'** from the '***Go Time***' Dashboard



<u>Package Sales</u>

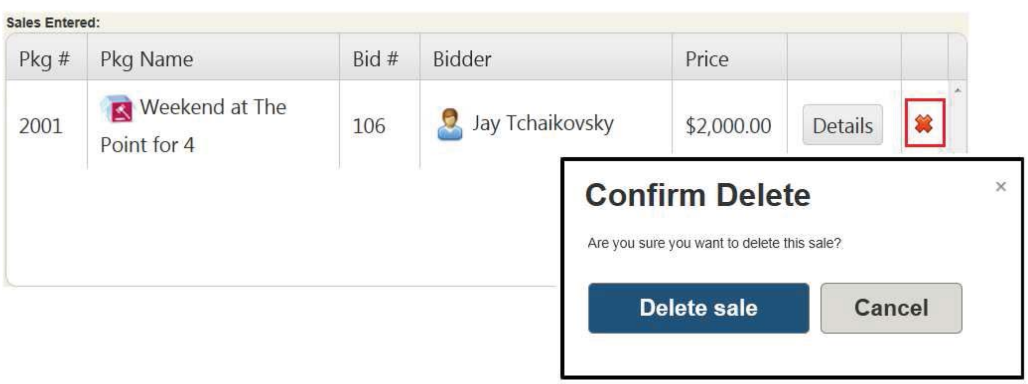
- Type Package Number or Name, '**Enter**'
- Type Bidder Number or Name, **'Enter'**
- Type winning bid amount in the price field, **'Enter'**
- Click **'Add Sale'** to confirm and save
- Repeat steps 1-4 for additional sales

<u>Multi-sales</u> – Selling a package multiple times to single or multiple bidders (e.g. - raffle tickets, paddle raises, centerpieces)

- Type the Name or Number of the multi-sale package, '**Enter**'.
  Note: *This package should already be setup prior to event night as a 'Multi-sale' package*
- Type Bidder Number or Name, **'Enter'**
- Type the quantity, (automatically sums the total price), **'Enter'**
- Click **'Add Sale'** to confirm and save
- Repeat steps 2-4 for additional sales

<u>Edit Sales</u> - If a sale was incorrectly entered you can delete the sale from the list below.

- Click the red **'X'**
- Click **'Delete Sale'** to confirm
- Correctly reenter the sale, if needed
  Note: *You will only be able to delete a sale from the computer that the sale was entered. To see all Sales, go to Checkout and pull up the bidder.*



If unable to locate the sale, go to the Admin computer to look it up in Greater Giving Online Software.

- Click '**View/Edit Sales**' under the **Sales** section on Project Home
- Click '**Show Advanced Search**' to filter for the package
- Type in either the Package Number or Name in the appropriate field, Click '**Search**'
- Here you can either '**Delete**' the sale so that it can be sold in ***Go Time*** or you can '**Edit**' the sale and '**Switch Supporter**' and/or sale price

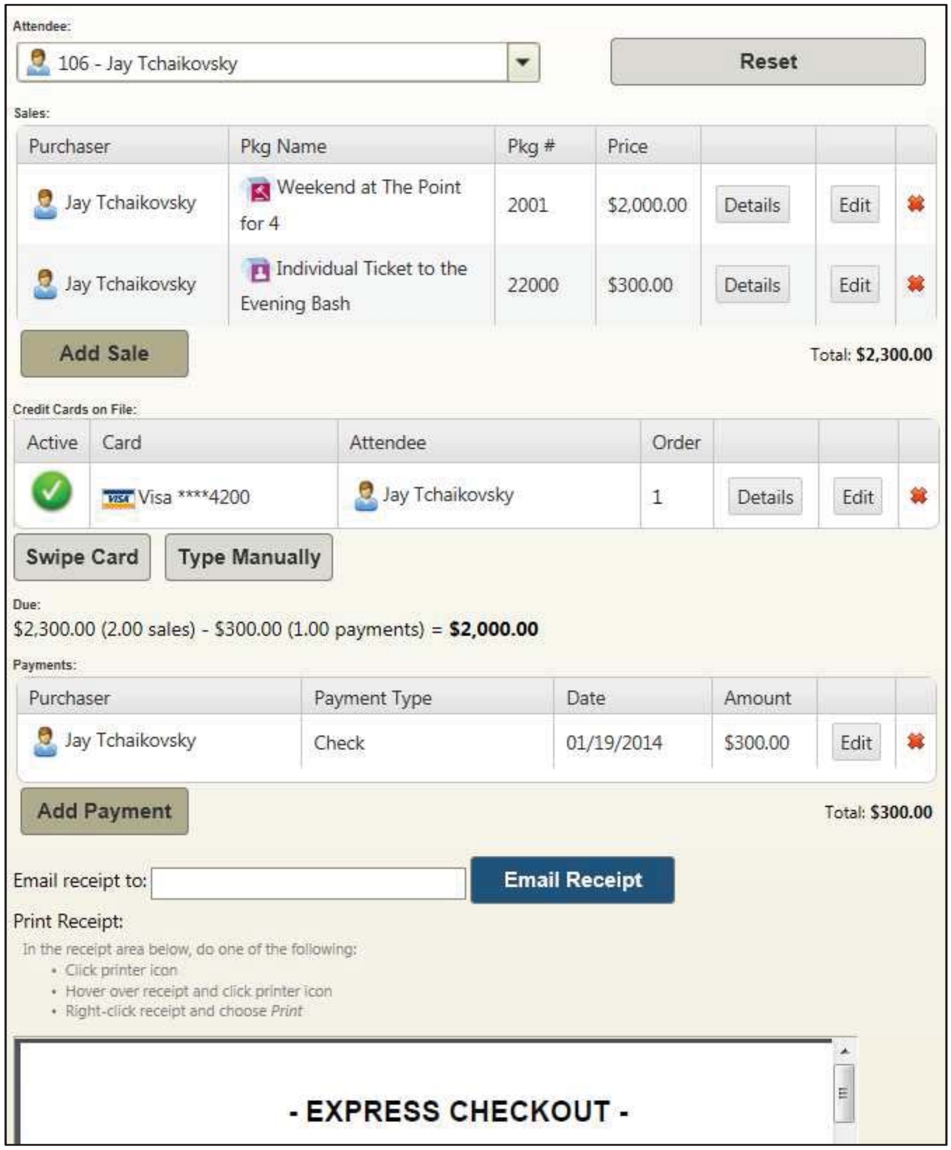
Print recommended reports from the **Admin** computer once all Sales are entered. These reports will be used for reference at Checkout and Item Pickup.

- **BID-03**: Sales listing by Bidder
- **PKG-03**: Sales listing by Package

CHECK-OUT

Select **'Checkout Attendee'** from the ***Go Time*** Dashboard

- Type Bidder Number or Name
- Click **'Enter'**
- Review the following information:
  - Sales entered
  - Credit cards on file
  - Payments received
  - Event receipt



<u>Sales</u> - View or edit all entered sales

- **Edit a Sale**
  - Click **'Edit'**
  - Adjust as necessary
  - Click **'Update Sale'** to save
- **Delete Sale**
  - Click the red **'X'**
  - Click **'Delete Sale'** to confirm
- **Add Sale**
  - Click **'Add Sale'**
  - Type package Number or Name, **'Enter'**
  - Type the price of the sale
  - Click **'Add Sale'** to save

<u>Credit Cards</u>

- **Add a Credit Card** – Used for non-Express Pay guests who did not swipe their card at Check In. Also for guests who would like to add an additional or different credit card at Checkout:
  - Click **'Swipe Card'**
  - Swipe the credit card with the magnetic strip facing the arrows on the card reader
  - The credit card info will automatically be saved and will appear in the grid view
  - If the card cannot be read you can click '**Cancel**' and then click **'Type Manually'.** Type the credit card number, expiration date, and card holder name manually. Click **'OK'**
- **Remove a Credit Card**
  - Click the red **'X'**
  - Click **'Delete Card'** to confirm
- **Splitting the Total Between Multiple Credit Cards**
  - Add all credit cards to be split
  - Click **'Edit'** and type the '**Max Amount**' on each of the credit cards needing a maximum limit, '**Save**'
  - If there is a maximum on each credit card, be sure to edit each credit card appropriately. Credit Cards will be charged in the order they appear, cards without a Max Amount will be charged the remainder of the balance (confirm the order that you want the credit cards to be charged).

Payments - Money received as Cash or Check (or other non-credit card payments) to be recorded.

- **Add a Payment**
  - Click **'Add Payment'**
  - Type the amount of payment (if whole dollars, you do not have to add cents)
  - Select the Payment Type from the dropdown menu
    - If paying by check enter the check number
  - Select the sale associated with the payment. If the amount is equal to the package then it will automatically associate with the correct sale.
  - Click **'Enter Payment'** to confirm

- **Remove a Payment**
  - Click the red **'X'**
  - Click **'Delete Payment'** to confirm

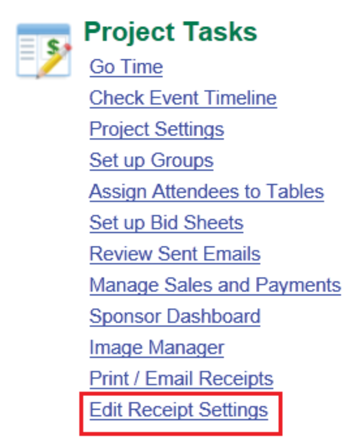
- **Edit a Payment**
  - Click **'Edit'**
  - Make necessary changes
  - Click **'Update Payment'** to confirm

Receipts – You have the option of either emailing or printing receipts. You also have the option of individual receipts vs. batch receipts.

IMPORTANT: All settings need to be setup in Greater Giving Online Software. Batch receipts need to be processed in Greater Giving Online Software as ***Go Time*** does not have this option. To edit receipt settings go to Page 1, section **Greater Giving Online Software Setup**.

Setup Receipt Settings

- Go to **Project Home** in Greater Giving Online Software (Admin computer)
- Under **Project Tasks**, click '**Edit Receipt Settings**'
- Verify settings on all tabs are correct for the **Event Receipt** - including '**Email Receipts**' or '**Print Receipts**' based on the delivery



Individual Receipts from *Go Time*

After reviewing the bidder's sales and payments, scroll down to view the receipt.

Email Receipt
- Confirm the email address or overwrite if different than what is populated, click **'Email Receipt'**
  Note: *If no email address is initially populated, the new address entered will be saved to the guest's record.*

<u>Print</u> Receipt

- In the preview area of the receipt, choose one of the following:
    - Click printer icon
    - Hover over the receipt and click the printer icon
    - Right-click receipt and select 'Print'

<u>Batch Receipts from Greater Giving Online Software</u>

- Batch <u>Email</u> Receipts
    - From **Project Home**, click **'View/Edit Supporters'** under the **Supporters** section
    - Click **'Show Advanced Search'**
    - Filter the information as needed (i.e. - click the box for **'Search on Sales and Payments Info'** and/or **'Include Only Bidders Who'**), '**Search**'
    - Click '**Print/Email Receipts**' from the toolbar
    - To associate all payments to the sales, click on the button **'Assign Sales to Payments'** (optional)
    - Select **'Email'** for the receipt format
    - Select '**Event Receipt**'
    - The number of receipts to be emailed will be displayed
    - Click **'Preview Email Receipts'**
    - Click '**Send Emails**'

- **Batch <u>Print</u> Receipts**

    - From **Project Home**, click **'View/Edit Supporters'** under the **Supporters** section
    - Click **'Show Advanced Search'**
    - Filter the information as needed (i.e. - click the box for **'Search on Sales and Payments Info'** and/or **'Include Only Bidders Who'**), '**Search**'
    - Click '**Print/Email Receipts**' from the toolbar
    - If you would like to associate all payments to the sales, click on the button **'Assign Sales to Payments'** (optional)
    - Select **'Print'** for the receipt format
    - Select '**Event Receipt**'
    - The number of receipts generated will be displayed
    - Click **'Generate Receipts'**
    - Hover over the receipt until you see the printer tool bar, select the printer icon
    - Click **'Done viewing or printing receipts'** to close

POST EVENT

All Post-Event tasks will need to be completed within **Greater Giving Online Software**.

<u>Reports</u>

After the event, run the following **Reports** to review bidder sales, payments, and prepare to submit credit card transactions to the bank.

- Go to **Project Home** of the Greater Giving Online Software (Admin computer)
- Click on **'All Reports'** under the **Reports & Exports** section
    - **BID-03** - List of sales, sorted by supporter

- **PKG-03** - List of sales, sorted by package
- **PAY-01** – List of payments recorded by each supporter
- **BID-18** - List of all credit cards, amount per credit card, and status. Includes cards on file, charges waiting to be submitted, and charges submitted. Authorization codes and decline status also included.

Before running any report you can filter and sort the grid to provide data that meets your criteria. Go to **Advanced Search** to apply filters.

- Some filter options include but are not limited to:
  - Range of bid numbers
  - Bidders from a certain table
  - Bidders who have not fully paid for purchases
- To sort - double click the desired column header in the grid view

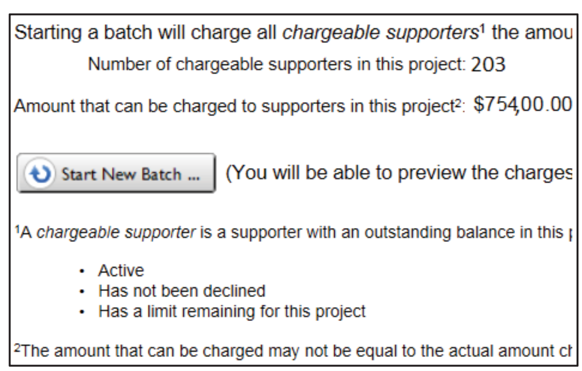
SUBMITTING PAYMENTS

IMPORTANT: *Prior to submitting credit card transactions to the bank, we strongly recommend comparing the BID-03 and the BID-18 report to confirm the amounts to be charged to each bidder's credit card(s) on file. All checks, cash and other forms of payments other than credit cards must be posted to bidders' records prior to submission. Unless a* ***'Max Amount'*** *is specified on a bidder's credit card, all outstanding balances will be charged to the card(s) on file.*

Submit Transactions to the Bank - Once you have verified the amounts to be charged to each credit card you may submit the transactions to the bank.

Note*: An internet connection is required to process credit card payments.*

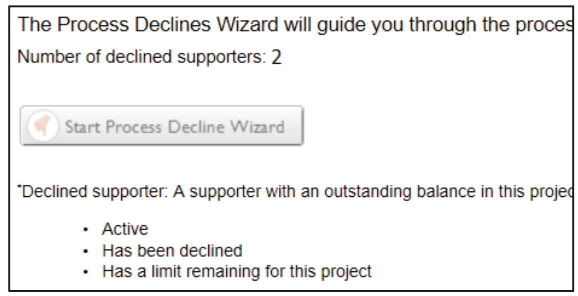
- Go to **Project Home** of Greater Giving Online Software (Admin computer)
- Click **'Manage Charge Batches'** under the **Payments** section
- Click **'Start New Batch'**
- Verify the charges in the batch
  - If any adjustments need to be made to the charges waiting to be submitted, cancel and go to **Manage Sales & Payments** on the Supporter record
- Click **'Charge Cards in Batch'**
- Click **'Done'** to complete
- A list will generate once the batch is complete



DECLINES

Declined Transactions - Transactions can be declined for insufficient funds, or a bank's regional security policy. In most cases, contacting the bank for authorization is the solution to a declined credit card.

- Go to **Project Home** of Greater Giving Online Software (Admin computer)
- Click '**Manage Charge Batches**' under the **Payments** section
- Scroll down to the bottom of the screen and click **'Start Decline Wizard'**
- You will need to provide:
  - Your Merchant ID
  - Bank Number
  - Credit card number
  - Amount to be charged
- If authorization was successful, you will be provided an authorization code that can be entered into the software
- Click '**Submit**' to push the transaction through
- The cardholder can also contact their bank for authorization
  - If so, click **'Attempt to Charge Now'**,
  - Click '**Go'**
- You can change the supporter's card on file by selecting the supporter from the list of declined charges or you can obtain another form of payment.



RETURN SHIPPING

Return Shipping – Return all equipment within 4 days of event to prevent late fees.

- Use the white shipping case that arrived with the equipment
- Refer to the packing slip to confirm that all of the items are returned (A fee will be assessed for any missing or damaged equipment)
- Place the white shipping case in the brown cardboard box that the equipment was shipped in
- Place the return shipping label provided in the box over the original shipping label
- Keep the back portion of the return shipping label for your records

  Shipping the white shipping case that was provided by Greater Giving, without the cardboard box can damage the equipment and may result in a damage fee. If you cannot locate the original brown box, you can purchase a replacement at any UPS store.

UPS Ground for shipping return:

You can place the box in a regular pick-up area if you have a UPS Ground pickup, or drop the package at a UPS location (1.800-PICK-UPS / 1.800.742.5877)

Ship or Mail to:

Greater Giving
1920 NW Amberglen Parkway, Suite 140
Beaverton, Oregon 97006

DATA SECURITY (PCI)

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 Auctionpay products use strong encryption for the storage of credit card information and for the transmission of card information over public networks.

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 Card Readers in wireless networks at this time, but if the Card Readers 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)
- Change all 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).

This guide is reviewed and updated continuously to keep in compliance with PCI Payment Application Data Security Standards.