Greater Giving Online Software
Online Bidding & Go Time

Quick Start Guide

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:**
  - From the **Project Home**, click **Edit Receipt Settings** under the **Project Tasks area.**
  - Verify settings on each tab of the **Event Receipt** - including **Email Receipts** and/or **Print Receipts,** based on preferred delivery.

Event Receipt

Details to display for each sale
Filter sales and payments
Header settings
Header image
Footer settings
Miscellaneous settings
Email settings
Print Settings

Project Tasks

- Go Time
- Show Auctioneer Display
- Check Event Timeline
- Project Settings
- Set up Groups
- Assign Attendees to Tables
- Set up Bid Sheets
- Review Sent Emails
- Manage Sales and Payments
- Sponsor Dashboard
- Image Manager
- Print / Email Receipts
- Edit Receipt Settings

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 and specific Android tablets)*

- 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.
- Click 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.

ONLINE BIDDING PAGE

Preview the *Online Bidding* Page

- From the **Project Home**, click **Show Bidding Page** under the **Online Bidding** area**.**

ONLINE BIDDING SETTINGS

Verify *Online Bidding* Settings

- From the **Project Home**, click **Online Bidding Settings** under the **Online Bidding** area.
- Preview each option to ensure your bidding, display and communication settings are set up to your specifications.

If you are planning on offering your bidders the ability to donate via your Online Bidding site, you will need to add that feature.

- From the **Project Home**, click **Online Bidding Settings** under the **Online Bidding** area.
- Click **Edit** and check the box to **Use Online Bidding to collect donations.**
- Select the Donation package to use or select the pencil icon to create a new Donation package.
- Indicate the donation increments, separated by a comma. We recommend entering the highest amounts first.
- Add a **Donation Label**.
- Add an **Appeal board logo** to appear on the donation button.

Online Bidding

Packages included on Online Bidding: 6
Bidders configured for Online Bidding: 18
Sponsors displayed on Online Bidding: 2

Updated at 8:28:33 AM   *Refresh*

Online Bidding Settings
Online Bidding Admin
Show Bidding Page
Show Leaderboard
Show Appeal Board
Show Countdown Timer
Import Online Bidders (Auto)

If you are planning to use the Greater Giving Appeal Display, you will need to set your options accordingly.

- Select to have your bidders name appear once they donate.
- Upload an image to appear on the bottom left of the appeal display and the donation button.

Donations

☑ Use Online Bidding to collect donations

Package to use for donations from Online Bidding: Cash Donation (9000) ▾

Suggested donation amounts: 1000, 500, 250, 100, 50, 25

Donation label: Click Here to Donate

Donation goal: $10,000.00

Show thanks: ☑ Thank bidders by name on appeal board

Appeal-only event: ☐ Only allow donations (no bids)

Appeal board logo:
  ○ No Image
  ◉ Use Current Image
  ○ Upload New Image
  ○ Image from Image Manager

Gifts in Bloom
CHARITABLE FUND

Important: Events should only be marked as an "Appeal-only event" if you are only going to use the Online Bidding site to conduct an appeal (no bidding on Auction packages).

Manage Event Displays

Greater Giving Online Bidding offers you three types of event displays:

1. Leaderboard - Scrolls though the packages up for bid displaying current high bid and bidder number.

   To configure the leaderboard display settings:

   - From the **Project Home**, click **Online Bidding Settings** under the **Online Bidding area.**
   - Click the **Edit** button and scroll down to the **Leaderboard** area.
     o Choose which packages to display.
     o Adjust the number of packages on each page.
     o Adjust the number of seconds to display each page.
     o Change the color theme.
     o Preview the leaderboard by navigating to ggo.mobi/lb/orgshortname

2. Appeal - Displays an interactive arrow that fills in as bidders donate.

   To configure the appeal display settings:
   - From the **Project Home**, click **Online Bidding Settings** under the **Online Bidding area.**
   - Click the **Edit** button and scroll down to the **Donations** area.
     o Adjust the donation goal.
     o Choose to thank bidders by name.
     o Select an image to appear on the bottom right of the display.
     o Preview the appeal display by navigating to ggo.mobi/ap/orgshortname

3. Countdown Timer - Displays a clock counting down to the last closing time specified in your Greater Giving Online Project Settings.
   o Preview the countdown timer display by navigating to ggo.mobi/ct/orgshortname

Each display requires an internet connection and a laptop. We recommend using a computer with constant power and disabled screensaver.

Go Time Volunteer Access Setup

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 the **Project Home,** click **Project** in the top left corner and click **Organization Home.**
- In the **Users** 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.
- An email will be sent to the provided email address to create a new password. 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.
- For the Online Bidding Admin lead(s) ensure the **Manage Online Bidding** permission <u>is</u> checked. This will give them access to the Online Bidding Admin Panel. Also ensure the **Settings** permission <u>is</u> checked as this will give them access to change the close times if needed.
- For the Bid Assistants ensure the **Perform Bid Assistance** permission <u>is</u> checked. This will give them access to the Bid Assistant function through *Go Time.*
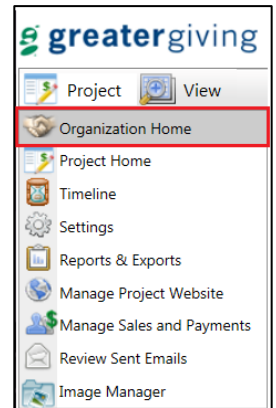
Verify *Go Time* Settings

- From the **Project Home,** click **Project Settings** under the **Project Tasks** area.
- Click **Edit Go Time Settings.**
- Preview each step to ensure *Go Time* is set up to your specifications.
- Make sure to select **Show *Select Guests* Step**, as that is the crucial step in Checkin to allow bidders access to the Online Bidding site.
- 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. When you check your guests in using *Go Time,* they are automatically sent a text to allow them to start bidding. All that is required is an allocated admission, a bidder number assigned, and the guest's cell phone number in the guest info record.

Print recommended reports 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
- **vGRP-01**: Group Listing

To access *Go Time,* click **Go Time** under the **Project Tasks** area of the **Project Home.**

Note: *Go Time* will open in another window or tab of your internet browser.
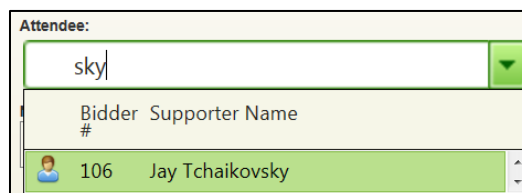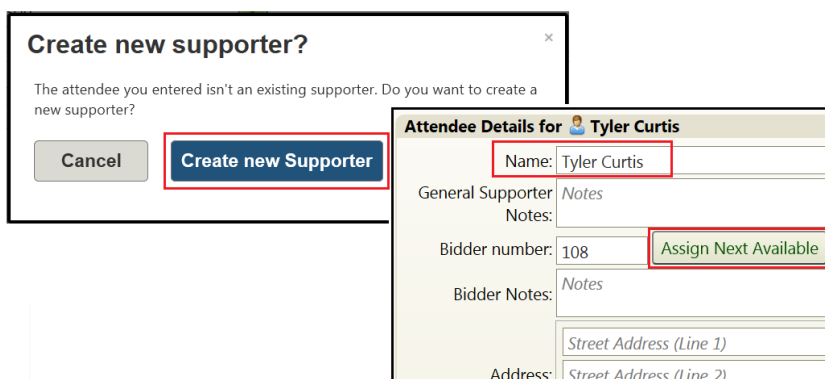
Click **Check in Attendee**.
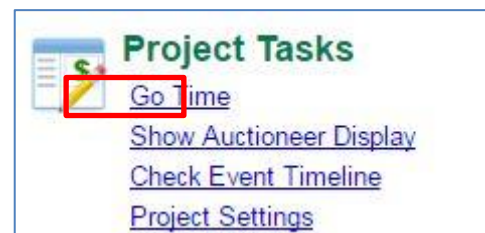
Checkin Step 1: Get Name

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, and press Tab or Enter on your keyboard.
  - Click **Create New Supporter.**
  - Type in contact information - Only name and bidder number are required to continue. For an Online Bidding event you will also want to capture a mobile number 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

This screen displays the guest name, mobile number, email, table, group, and meal (each of which can be managed under **Edit Go Time Settings** area of the **Project Settings**).

- Verify bidder number and mobile number.
- Check the box next to each guest to check them in.

- Click on **Details** to view or edit the Attendee Details, make any necessary changes, and 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 Admission

If the attendee needs to purchase a new admission:
- Click **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 **Use Existing**.
- 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**

Use Existing Admission

Purchaser:

144 - Todd Phillips

Enter name or bidder number of the supporter who purchased the admission packages

Available Admissions:

	Package	Assigned Attendee ▲
	Gold Sponsor (120008)	*Unallocated*
✓	Gold Sponsor (120008)	Jill Nelson

The admissions listed above are either unallocated *or* belong to attendees that have not yet checked in.
To use an admission that's already being used by a *checked in* attendee, cancel this checkin, re-run the check in wizard, select the other attendee that's using the admission, mark that attendee as *not* checked in, and then resume checking in this attendee.

Use   **Cancel**
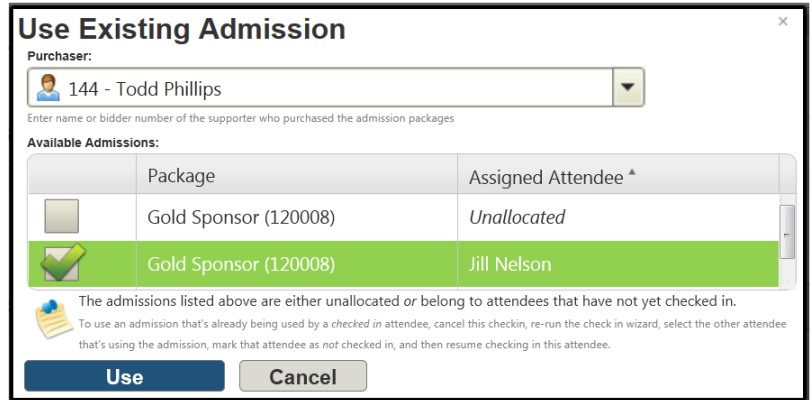
Checkin Step 3: Add Credit Card

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 Credit Card
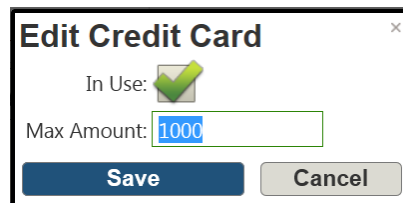
Active	Card	Attendee	Order			
✓	VISA Visa ****4200	Jay Tchaikovsky	1	Details	Edit	✖

Swipe Card   **Type Manually**

Back   **Next**

- 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, card holder name, security code, and billing address. Click **OK.**
- Click **Finish** to complete the check in.
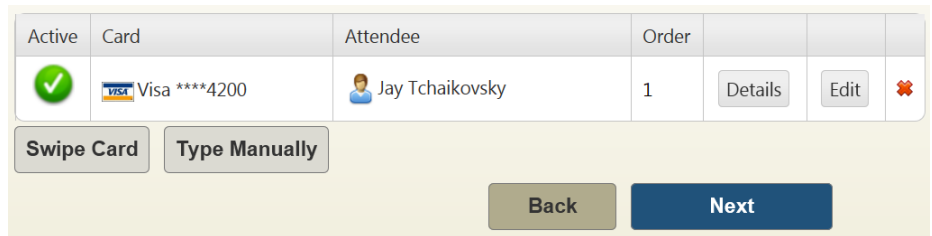
Edit a Credit Card: (Maximum amount)

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

Edit Credit Card
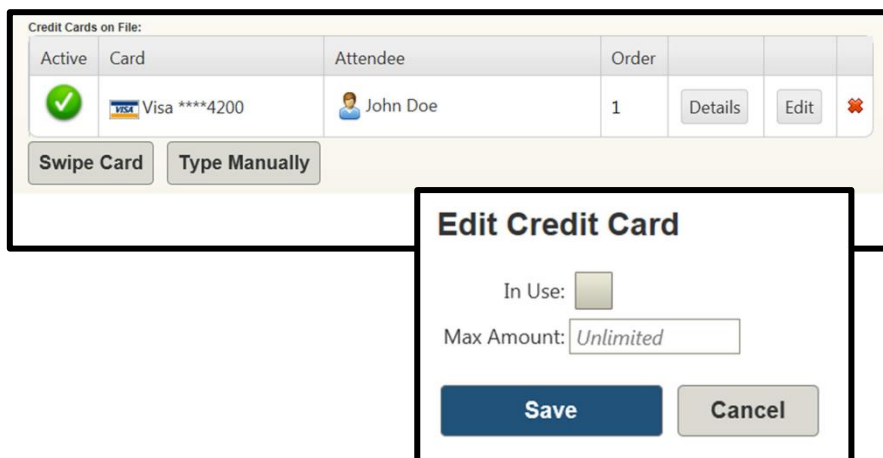
In Use: ✅

Max Amount: 1000

Save   Cancel

Deactivate a Credit Card:

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

Credit Cards on File:

Active	Card	Attendee	Order		
✅	VISA Visa ****4200	👤 John Doe	1	Details	Edit ✖

Swipe Card   Type Manually

Edit Credit Card

In Use: ☐

Max Amount: *Unlimited*

Save   Cancel

Delete a Credit Card

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

Click **Finish** to complete the check in.

Active	Card	Attendee	Order		
✅	VISA Visa ****4200	👤 Jay Tchaikovsky	1	Details	Edit ✖

Confirm Delete

Are you sure you want to delete this credit card?

Delete card   Cancel

During the silent auction you will be monitoring the performance of Online Bidding. You can keep an eye on the bidding and packages that have no bids. You may also need to retract a bid for a bidder or look up a bid number or a package. These tasks will be done through the **Online Bidding Admin** Panel.

Gifts in Bloom

Bidding Time: Jan 31, 2017 05:18:41 PM

6 packages in your account.

18 bidder numbers registered.

0 bids and 0 watched packages.

$0 Online Bidding Packages Total

    $0 appeal/fund-a-need sub-total

    $0 silent auction sub-total
       $0 bid
       $0 multisale

6 unbid packages.

0 guest(s) have bids.

$1,700 in reported market value.

» Refresh stats... | » Minimize Stats...

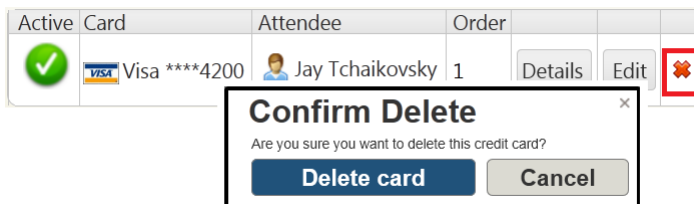**Guest Functions**

View Registered Bidders

Top Bidders By Number of Bids

Hide Show

Auction Package Functions

View Packages

Push Closing Times
Now In Go Time!

Top Packages By Bid Amount

Hide Show

Online Bidding Admin Access

- From the **Project Home**, click **Online Bidding Admin** under the **Online Bidding** area.

Show Auction Statistics

- Click **Generate and show statistics** under the project name & bidding time.

Look up Bidders

From the home screen of Online Bidding Admin:
- Click **View Registered Bidders** under **Guest Functions**.
- Search by name or bidder number.
- Click **Re-send Welcome Text** to send a welcome text to the guest's phone.

Online Bidding

Packages included on Online Bidding: 6
Bidders configured for Online Bidding: 18
Sponsors displayed on Online Bidding: 2

Updated at 8:28:33 AM   Refresh

Online Bidding Settings
Online Bidding Admin
Show Bidding Page
Show Leaderboard
Show Appeal Board
Show Countdown Timer
Import Online Bidders (Auto)

Look up Packages

From the home screen of Online Bidding Admin:
- Click **View Packages** under **Auction Package Functions**.
- Search by name or package number.

Guest Functions

View Registered Bidders

Auction Package Functions

View Packages

Retracting Bids

From the home screen of Online Bidding Admin:
- Click **View Packages** under **Auction Package Functions**.
- Search for the package by package number or name.
- Click **View Bids** for the package.
- Locate the bid you wish to retract and click **Remove.**

| 102 | Sky Diving Lessons... | View Bids | Del Max $1500 |

Texting Bidders

You may want to send messages out to your bidders throughout the bidding to keep them informed and to encourage bidding. From the Online Bidding Admin Home page:
- Select **Bidders** from the top navigation bar.
- Click **Text Bidders.**
- Compose your texts in the box provided.
- Select the recipients you wish to send the text to:
  - All Supporters: Texts any supporter who has self-registered and/or has been checked in through Go Time.
  - Winning Bidders: Texts any bidder who has won a package in Online Bidding.
  - Non-winning Bidders: Texts any bidder who does not have any winning bids in Online Bidding.
- Click **Send to Queue.**
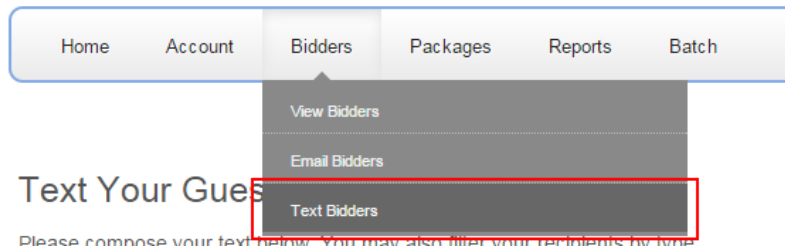
Extending the Auction

Extending the closing time for the auction can be done from the *Go Time* interface. Click **Section Times** from the *Go Time* Dashboard
- Check the box next to the section you would like to extend.
- Click **Change Close Time**.
- Click **Edit Close Time** on the pop-up window.
- Specify the number of minutes you would like to extend the auction (5 minutes, 10 minutes, etc.).
- Select either **Current Close Time** or **Now.**
  - Selecting **Current Close Time** will extend the auction xxxx minutes from the **Close Date & Time** as set in the **Item & Package Sections** area.
  - **Note:** If you did not set a **Close Date & Time** for the section, you will not see the **"Current Close Time"** option.
  - Selecting **Now** will extend the auction xxxx minutes from the time you click the OK button.
- Make note of the new section close time and click **OK**.

Immediately Closing the Auction

- Check the box next to the section you would like to immediately close.
- Click **Change Close Time**.
- Click **Close Now**.
- Click **OK**.

SALES – *ONLINE BIDDING*

All Multiple Sale, Buy Now and Donation package sales will post shortly after the selection is made. All other Silent Auction package sales will post within 15 minutes of the closing of the auction. No action is needed by you, just wait a few minutes and all your silent auction sales will be in *Go Time* ready for Check Out!

SALES – MULTIPLE SALE & LIVE AUCTION

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

Live Auction Sales

- Type Package Number or Name, click **Enter**.
- Type Bidder Number or Name, click **Enter.**
- Type winning bid amount in the price field, click **Enter.**
- Click **Add Sale** to confirm and save.

Multiple Sales
Selling a package multiple times to single or multiple bidders (e.g. - raffle tickets, paddle raises, centerpieces).
- Type the Name or Number of the Multiple Sale package, click **Enter**.
  Note: This package should already be setup prior to event night as a 'Multiple Sale' package.
- Type Bidder Number or Name, click **Enter.**
- Type the quantity, (automatically sums the total price), click **Enter.**
- Click **Add Sale** to confirm and save.

Edit Sales
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.

- 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 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.

Click **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.

Sales - 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, click **Enter.**
  - Type the price of the sale.
  - Click **Add Sale** to save.

Credit Cards

- **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, click **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).

- **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**.

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.*

Print 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 click **Print.**

Batch Receipts from Greater Giving Online Software

- **Batch Email Receipts**
  - From the **Project Home**, click **View/Edit Supporters** under the **Supporters** area.
  - 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**), click **Search**.
  - Click **Print/Email Receipts** from the toolbar.
  - To associate all payments to the sales, click on the button **Assign Sales to Payments** (optional).
  - Click **Email** for the receipt format.
  - Click **Event Receipt**.
  - Click **Preview Email Receipts.**
  - Click **Send Emails**.

- **Batch Print Receipts:**
    - From the **Project Home**, click **View/Edit Supporters** under the **Supporters** area.
    - 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).
    - Click **Print** for the receipt format.
    - Click **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.

Reports & Exports
All Reports & Exports
My Favorite Reports & Exports
General Project Reports & Exports
Common Event Reports & Exports
Join Me Reports & Exports

- From the **Project Home**, click **All Reports** under the **Reports & Exports** area.
    - **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.

- From the **Project Home,** click **Manage Charge Batches** under the **Payments** area.
- 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.

Payments
View/Edit Payments
Add a New Payment
Manage Charge Batches

Starting a batch will charge all *chargeable supporters*[1] the amou
Number of chargeable supporters in this project: 203

Amount that can be charged to supporters in this project[2]: $754,00.00

Start New Batch ...   (You will be able to preview the charges

[1]A *chargeable supporter* is a supporter with an outstanding balance in this

- Active
- Has not been declined
- Has a limit remaining for this project

[2]The amount that can be charged may not be equal to the actual amount ch

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.

- From **Project Home**, click **Manage Charge Batches** under the **Payments** area.
- Scroll down to the bottom of the screen and click **Start Process 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.
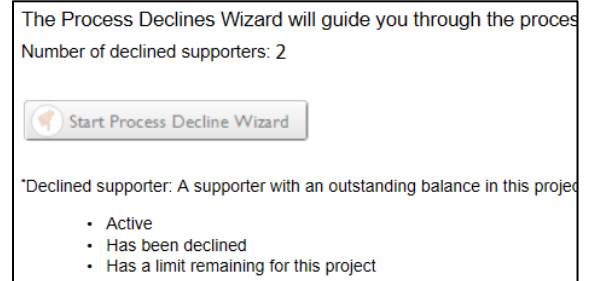

Payments
View/Edit Payments
Add a New Payment
Manage Charge Batches

The Process Declines Wizard will guide you through the proces
Number of declined supporters: 2

Start Process Decline Wizard

*Declined supporter: A supporter with an outstanding balance in this proje
- Active
- Has been declined
- Has a limit remaining for this project

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

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.