



## Auction! V4 – Greater Giving Sync 1, Sync 2, Sync 3

Applies to: *Credit card processing Sync between Auction! Version 4 and Greater Giving credit card processing terminals. As soon as the equipment arrives from Greater Giving, please test the complete sync process using the Sample V4\_How the West was Won as the practice project. Do not practice the syncs using your real project.*

### Equipment Requirements

#### Provided by Greater Giving:

- Master terminal(s)
- Any additional terminals
- USB Flash Drive
- Power cords for terminals
- Network Cables and Loopback Plug

#### Provided by you:

- A data entry computer with
- Auction!** installed and licensed to your organization
- Your Auction project
- Credit Card Sync** enabled in the **Data Exchange** task in **Auction!**

**BEFORE** Guest check in, connect Master Terminal to any additional terminals following the instructions from

**Greater Giving.** As the guests arrive use the *Greater Giving* equipment to capture credit card information from your guests. Sync 1 occurs after check-in is complete.

### Sync 1 - Get Bidder Information

Step	Explanation
1. At the Master Terminal <ol style="list-style-type: none"> <li>a. On the master terminal press <b>F4 8 7</b></li> <li>b. Press <b>1. PC Sync 1</b></li> <li>c. Insert USB flash drive on back of terminal</li> <li>d. Press Enter</li> <li>e. Remove the USB flash drive when directed</li> </ol>	A file from the master terminal is saved onto a USB flash drive. The file has a list of bidders, by bid number, who have a credit card stored in the master terminal. This file does not contain any actual credit card numbers. <b>File name:</b> yymmddS1.csv If another Sync 1 file is saved on the same day the file will have the same name and will overwrite the first Sync 1 file with the up to date sync 1 information.
2. On your <i>Auction!</i> data entry computer <ol style="list-style-type: none"> <li>a. Insert the USB flash drive into a USB port</li> <li>b. In your open project on the <b>Home</b> task bar click <b>Data Exchange</b> and then click <b>Credit Card Sync</b></li> <li>c. Click <b>1b:Retrieve Bid #'s</b></li> <li>d. Browse to the flash drive, locate the file and click <b>Open</b></li> <li>e. Select <b>Greater Giving</b> as the <b>Quick Checkout sync preset.</b></li> <li>f. Press <b>Import Now</b> and the Sync 1 will occur.</li> <li>g. An <b>Import Log</b> will display showing the results. Scroll through the log looking for <b>Orange</b> highlighted errors. Correct any errors and run sync 1 again.</li> </ol>	In this step <b>Auction!</b> takes the list of bidders who have pre-swiped a card and marks them for Quick Checkout.  The most common error happens when a bid number associated with a credit card in the <i>Greater Giving</i> terminal does not have a corresponding bid number in the <b>Auction!</b> data. This may occur when the bidder had not pre-registered and was given an available bid number at check in. Enter this and any other walk in bidder into the <b>Auction!</b> project and then complete Sync 1 again.

If you have late arrivals, you can do sync 1 again by following steps above.



**Sync 2** may not occur until a day or two after your event. In **Sync 2** a file created in **Auction!** will be uploaded to the **Greater Giving** Master terminal. This file contains the balance due for each bidder that **Auction!** shows has a credit card stored in the **Greater Giving** Master terminal. Before performing **Sync 2**, enter all cash or check payments in the **Auction!** project and make sure the remaining balance due for each guest is the accurate amount to charge their credit card.

To make sure that **Auction!** has the complete list of bidders that have a credit card stored in the terminal, before performing **Sync 2** you should retrieve a new **Sync 1** file to capture any bidder who used the credit card terminal at checkout. If you do not complete a final **Sync 1**, the balance due for bidders who registered their credit cards late or at checkout will not be uploaded to **Greater Giving**.

**Sync 2 - Send Totals**

Step	Explanation
1. At the Master Terminal a. After the event is over, perform step 1 of the <b>Sync 1</b> process again.	<b>File Name:</b> yymmddS1.csv
2. On your <b>Auction!</b> data entry computer a. Insert the USB flash drive into a USB port b. Open your <b>Auction!</b> project and on the <b>Home</b> Task bar click <b>Credit Card Sync</b> . c. Click <b>2a: Send Totals</b> . d. Select <b>Greater Giving</b> as the <b>Preset for sending Totals</b> . e. <b>Auction!</b> will show you the list of bidders it will export and the balance due for each bidder. Check over this list before proceeding. f. Click <b>Export Now</b> g. Read the <b>Important</b> screen carefully. If you have not completed the final <b>Sync 1</b> , click the <b>Browse for latest Sync 1 file</b> button and follow the steps to complete <b>Sync 1.b</b> before proceeding to <b>Sync 2</b> . If you have completed a final <b>Sync 1</b> so your list of bidders with credit card on file is complete, click the <b>I have performed a recent...</b> button. h. Either click <b>I want to postpone</b> and <b>Close</b> or click the large <b>I have entered all ...</b> button and then press <b>Perform Sync 2</b> to proceed with <b>Sync 2</b> . i. Locate the flash drive and <b>Save</b> the file. j. Safely remove the flash drive.	<p>If you have just completed <b>Sync 1</b> before continuing with <b>Sync 2</b>, the <b>Sync 2a</b> button may not be visible. Click the <b>Credit Card Sync</b> button again and all the sync buttons will re display.</p> <p>If you see incorrect balance due for any bidder or if a bidder is missing from the list displayed by <b>Auction!</b>, discontinue <b>Sync 2</b>, correct any problems and start <b>Sync 2</b> again.</p> <p><b>File Name:</b> yymmddS2.csv If you save another <b>Sync 2</b> file on the same day it will overwrite the earlier <b>Sync 2</b> file.</p>
3. In <b>Greater Giving</b> Master terminal a. Insert USB flash drive into port on bottom of <b>Greater Giving</b> Master. b. On Terminal press <b>F4 8 7</b> . c. Press <b>2. PC Sync 2</b>	In this step the amount due for each credit card is saved in the <b>Greater Giving</b> Master terminal.

**BEFORE CONTINUING** on with **Sync 3** you **MUST** upload the totals to **Greater Giving** either via a phone line or the



internet. This is when the cards actually get charged. Please follow the instructions for **Submitting Transactions** found in the *Greater Giving Sync* Guide.

### Sync 3 – Get Settlement Info

Step	Explanation
<p>1. At the Master Terminal</p> <ol style="list-style-type: none"> <li>a. Press <b>F4 8 7</b>.</li> <li>b. Insert USB Flash drive and press <b>3. PCSync 3</b>.</li> <li>c. Remove USB flash drive when directed.</li> </ol>	<p>In this step you are saving a file with the results of the credit card transactions that occurred when you submitted the transactions to <i>Greater Giving</i> via a phone line or the internet.</p> <p>DO NOT attempt to open this file with Excel as it may change some cells. If the file is opened with Excel and resaved, when Sync 3 is complete all transactions may inaccurately appear as declined in your <i>Auction!</i> project.</p> <p><b>File Name:</b> yymmddS3.csv</p>
<p>2. On the <i>Auction!</i> data entry computer</p> <ol style="list-style-type: none"> <li>a. Start <i>Auction!</i> and open your project.</li> <li>b. On the <b>Home</b> Task Bar click <b>3b: Record Payments</b>.</li> <li>c. Browse to the Sync 3 file and press <b>Open</b>.</li> <li>d. Choose <i>Greater Giving</i> as the <b>Preset for recording Payment</b> and <b>Select &amp; Close</b>.</li> <li>e. <i>Auction!</i> will display the list of transactions</li> <li>f. Press <b>Import Now</b>.</li> <li>g. Review the <b>Import log</b> and make note of any credit card declines.</li> </ol>	<p>In <b>Sync 3b</b> All the credit card payments are automatically entered for you in your <i>Auction!</i> project. The payments include the payment type and the last four digits of the credit card number.</p>
<p>3. Handling declines</p> <ol style="list-style-type: none"> <li>a. If you have any declines, which are rare, you can resubmit the declines. You may need to contact the card holder and ask them to authorize payment with their bank. Repeat the steps for <b>Sync 2</b>. Since you have already completed <b>Sync 3</b> in your auction project, the only bidders with a balance due remaining will be for the bidders who were declined. If the credit cards were accepted this time complete <b>Sync 3</b>.</li> <li>b. Or call the bidders with declines and ask for another form of payment such as a check or cash.</li> </ol>	<p>It is rare to have declines but you can re submit the declines to <i>Greater Giving</i> or contact the bidder for another form of payment.</p>