



### Auction! V3 – Greater Giving Sync 1, Sync 2, Sync 3

**Applies to:** Credit card processing Sync between Auction! Version 3 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 V3\_Pikes Peak Snowball as the practice project. Do not practice the syncs using your real project. If you have any difficulty with an automatic sync 1 at the event, you can perform a manual sync 1 following the instructions found in our FAQ entitled “Greater Giving Auctionpay-Manual Sync 1”.

#### 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
- Greater Giving menu enabled in **Auction!**
- **Auction!** - *Greater Giving Interface* installed

**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 <u>does not</u> contain any actual credit card numbers. <b>Original 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. Start the <b>Auction! - Greater Giving Interface</b> and choose <b>Sync 1A Input</b>. Browse to the file on the flash drive and select</li> <li>c. In the <i>Interface</i> select <b>Sync 1A Output</b>. Choose a save location and click <b>Save</b>. Press <b>Convert</b>. The file name includes the words <b>Sync1</b>.</li> </ol>	<b>Sync 1A</b> converts the original file on the USB flash drive into a new file that can be read by <b>Auction!</b> .  The <b>Auction!-Greater Giving Interface</b> Application is required for conversion.  <b>Converted file name:</b> yyyyymmdd_hhmm_Sync1_GreaterGiving.csv
3. Still on the <i>Auction!</i> data entry computer <ol style="list-style-type: none"> <li>a. If you have not already done so, start <b>Auction!</b> and open your project.</li> <li>b. In the Greater Giving Menu choose <b>Sync 1</b> then click <b>Sync 1B: Get Bidders</b></li> <li>c. At the prompt, browse and select the new converted Sync 1 file.</li> <li>d. A report of bidders with a credit card on file displays. <b>Print</b> and/or <b>Close</b> report after</li> </ol>	<b>Sync 1B</b> Marks the bidders who have a credit card stored in the master terminal as <b>Quick Checkout</b> in <b>Auction!</b> .  The words <b>Quick Checkout</b> will appear on the invoice of any bidder who was captured in sync 1. These bidders do not need to go to the cashier. Their credit card will be charged after sync 2 is complete and the master terminal is connected to a phone line or the internet and banking is complete.

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 another **Sync 1** does not occur, the balance due for these bidders will not be uploaded to **Greater Giving**.

### Sync 2 - Send Totals

Step	Explanation
1. At the Master Terminal <ol style="list-style-type: none"> <li>a. After the event is over, perform step 1 and 2 of the <b>Sync 1</b> process again.</li> </ol>	In <b>Sync 2 Auction!</b> will require a new <b>Sync 1</b> to ensure the <b>Auction!</b> project has the complete list of bidders who have a credit card stored in the <b>Greater Giving</b> Master terminal, including any bidders who stored a credit card number at the cashier at the end of the evening.  <b>File Name:</b> yymmddS1.csv <b>Converted File Name:</b> yyyyymmdd_hhmm_Sync1_GreaterGiving.csv
2. On your <b>Auction!</b> data entry computer <ol style="list-style-type: none"> <li>a. Insert the USB flash drive into a USB port</li> <li>b. Open your <b>Auction!</b> project and in the <b>Greater Giving</b> menu choose <b>Sync 2A</b>. Then <b>Review Invoices</b> for accuracy.</li> <li>c. Click <b>Sync 2A:Send Totals</b>. Read the screen and proceed when ready. <b>Continue</b>.</li> <li>d. Import the final list of bidders by selecting the most recent converted <b>Sync 1</b> file.</li> <li>e. Choose a save location for the <b>Sync 2</b> file and <b>Save</b>.</li> <li>f. A report will display showing the bidders and the amount their card will be charged. <b>Print</b> and/or <b>Close</b> the report after reviewing.</li> </ol>	<b>Sync 2A</b> Creates a file from your <b>Auction!</b> project that contains the list of bidders known to <b>Auction!</b> to have a credit card stored in the <b>Greater Giving</b> terminal and the balance due to be charged to each of those bidders.  The <b>Auction!-Greater Giving Interface</b> Application is required to convert this file before uploading to the <b>Greater Giving</b> Master terminal.  <b>Original File Name:</b> yyyyymmdd_hhmm_Sync2_GreaterGiving.csv
3. Still on the <b>Auction!</b> data entry computer <ol style="list-style-type: none"> <li>a. Start the <b>Auction! - Greater Giving Interface</b> and choose <b>Sync B Send Totals</b>, then <b>Sync 2B Input</b>. Browse to the <b>Sync 2</b> file you just saved and <b>Open</b>.</li> <li>b. Click <b>Sync 2B Output</b>. Save to the USB flash drive and press <b>Convert</b>.</li> <li>c. Safely remove the flash drive.</li> </ol>	<b>Sync 2B</b> Converts the <b>Sync 2A</b> file and saves it onto the USB flash drive.  <b>Converted File Name:</b> yymmddS2.csv
4. In <b>Greater Giving</b> Master terminal <ol style="list-style-type: none"> <li>a. Insert USB flash drive into port on bottom of <b>Greater Giving</b> Master.</li> <li>b. On Terminal press <b>F4 8 7</b>.</li> <li>c. Press <b>2. PC Sync 2</b></li> </ol>	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
1. At the Master Terminal <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>	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. <b>DO NOT</b> 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. <b>Original File Name:</b> yymmddS3.csv
2. On the <b>Auction!</b> data entry computer <ol style="list-style-type: none"> <li>a. Insert the USB flash drive into a USB port</li> <li>b. Start the <b>Auction! - Greater Giving Interface</b>; choose <b>Sync 3A Input</b>, browse to the <b>Sync 3</b> file you just saved and <b>Open</b>. All files from the terminal are named with a series of numbers that start with the year, the month, the day followed by S and the sync (1, 2 or 3)</li> <li>c. Click <b>Sync 3A Output</b> and choose a save location and <b>Save</b>. Then press <b>Convert</b>.</li> </ol>	Using the <b>Auction! - Greater Giving Interface, Sync 3A</b> converts the file from the terminal to a form that can be read by <b>Auction!</b> .  <b>Converted File Name:</b> yyyyymmdd_hhmm_Sync3_GreaterGiving.csv
3. Still on the <b>Auction!</b> data entry computer <ol style="list-style-type: none"> <li>a. Start <b>Auction!</b> and open your project.</li> <li>b. In the <b>Greater Giving Menu</b> choose <b>Sync 3B</b> and click <b>Sync 3B: Receive Payments</b>.</li> <li>d. Browse to the Sync 3 file and <b>Open</b>. The final sync will occur and a report will display with the results. <b>Print</b> and/ or <b>Close</b> the report.</li> </ol>	In <b>Sync 3B</b> All the credit card payments are automatically entered for you in your <b>Auction!</b> project. The payments include the payment type and the last four digits of the credit card number.
4. Handling declines <ol style="list-style-type: none"> <li>a. If you have any declines, which are rare, you can re submit the declines after completing Sync 3B. You may need to contact the card holder to have them contact their bank to authorize payment. Repeat the steps for <b>Sync 2</b>. Since you have already completed <b>Sync 3</b> in your <b>Auction!</b> 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 card holders with declines and ask for another form of payment such as a check or cash</li> </ol>	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.