



Auction! V4 –EventPay! Credit Card Processing

Applies to: Credit card processing in **Auction! V4** using **EventPay!**

Equipment and Software Requirements:

- Swipers (must be purchased from CardConnect – contact Auction Systems for options and pricing).
- PCs with Windows 7, 8 or 10 for swipe stations. PCs can be different from the **Auction!** data entry computers and networking is not required or suggested. Internet is optional.
- **EventPay!** app on each card swipe station. Download from: [Download EventPay! App](#).
- USB Flash Drive .
- Power strips for PCs if needed.
- Data Entry computer(s) running **Auction! V4** and your project.

BEFORE Guest check in: Install the **EventPay!** app on each swipe station computer. If you have accepted reservations in advance and assigned bid numbers to your guests, import bidders from your **Auction!** project into the **EventPay!** app on each swipe station computer.

Step 1 – In **EventPay!** App - Update Names file (pre event):

| Step | Explanation |
|--|--|
| 1. In Auction! a. Insert flash drive in Auction! computer. b. In Home click Data Exchange . c. Click Credit Card Sync . d. Click Export Bidders . e. In Exports list choose EventPay! f. Click Export Now . g. Save file on flash drive. | In Auction! export a list of bidders with their bid numbers and addresses and import it into the Auction! EventPay! app on each computer credit card swiping station. Since the names and bid numbers, as well as the billing zip code is already pre-loaded in the app, capturing credit cards at check in will be a snap! If you have not pre-assigned bid numbers in Auction! and/or if you have walk in guests – don't worry – you can capture those credit cards too! |
| 2. On EACH computer credit card swiping station a. Insert the USB flash drive into a USB port. b. Start the EventPay! app. c. Click Yes (you have an updated Names file to load). d. Browse or Paste the file on the flash drive e. Click Import File Now . f. A pop up tells how many names were imported. | In this step, your bidders' names and addresses are imported into the EventPay! app on EACH card swipe station. This step can be done again if you have any late registrations before the event starts. |



Step 2 – Capture Credit Cards and Associate with Bid Number at check in:

Capture the credit cards in a swiping station in the *EventPay!* app. Each swiping station consists of a Windows 7, 8 or 10 PC computer with the *EventPay!* app installed and CardConnect swiper attached.

Swipe – Pre-registered guests (guests with a bid number that have been imported into the *EventPay!* App):

| Step | Explanation |
|--|--|
| <p>In the app:</p> <ol style="list-style-type: none"> 1. Enter the bid number. 2. Confirm the guest name is correct. Press Person matches Bid#. If not correct, click Wrong Person and enter the correct Bid #. 3. Confirm the billing zip code is correct and click Billing Zip is Correct. If not correct, click Enter/Change Billing Zip and type in the correct zip code. 4. Select type of Swiper. (Only required for first card. Assumed from then on.) 5. Press Click, then Swipe Card. The type of card, last 4 digits and expiration will show. <u>Verify you have the expiration date.</u> 6. Click Register Card. | <p>The credit card for a pre-registered guest is being securely stored and encrypted in the app.</p> <p>Bid number, billing address zip code, and card expiration date are required.</p> |

Swipe – Walk-in or non-pre-registered guests (guests not already in the *EventPay!* App):

| Step | Explanation |
|---|--|
| <p>Assign a bid number to the guest, then in <i>EventPay!</i> app:</p> <ol style="list-style-type: none"> 1. Enter the bid number. 2. Re-enter the bid number to confirm it. 3. Click I will Enter Billing Zip, ask the guest for it and enter it. 4. Select type of Swiper. (Only required for first card. Assumed from then on.) 5. Press Click, then Swipe Card. The type of card, last 4 digits and expiration will show. <u>Verify that you have the expiration date.</u> 6. Click Register Card. | <p>It is easy to enter non pre-registered guests in the <i>EventPay!</i> app. Simply give them a bid number and swipe their credit card.</p> <p>Bid number, billing address zip code, and card expiration date are required.</p> |

Before continuing with the next step, you must enter the walk in bidders into the *Auction!* project. Both the *EventPay!* app and the *Auction!* project must have matching names and bid numbers. Enter name information in *Auction!* manually. Does not occur automatically when swipes are retrieved into *Auction!* project.

Suggestion: At check in, have your walk in guests fill out an index card with their name and contact information. Write the bid number assigned to them on the card and give the card to the *Auction!* data entry team so the bidder can also be entered into the *Auction!* project well before entering winning bids. The guests need not wait while their name and bid number gets entered in *Auction!*. Once their card is swiped and they have a bid number, they can be in the door and bidding. Enter them in the *Auction!* project before entering winning bids or retrieving the card swipes into the *Auction!* project.



Step 3 - After Check-in is complete: Export the swipe data from EACH card swipe station and Retrieve the swipe data into the *Auction!* project:

Save swipe data from each swiping station onto the flash drive. Retrieve the data file(s) into the *Auction!* project. This marks each swiping guest for **Quick Checkout**.

Export Swipe Data/Retrieve Swipes - Marking Guests for Quick Checkout:

| Step | Explanation |
|--|--|
| <p>1. At EACH card swipe station in the <i>EventPay!</i> App:</p> <ul style="list-style-type: none"> a. Insert a flash drive into card swipe computer. b. Save the file onto the flash drive. <p>DO NOT CHANGE THE NAME OF THE FILE.</p> <p>The file name will contain the name of the station computer on which the file was generated, so if you have more than one card swipe station you will know which file is from each station.</p> | <p>In this step you are getting an encrypted file from the app on EACH card swipe station and saving EACH file onto the flash drive.</p> <p>The card swipe data is unique at EACH station so you MUST get the card swipe data file at EACH station.</p> |
| <p>2. On the <i>Auction!</i> data entry computer</p> <ul style="list-style-type: none"> a. Insert the flash drive with the files. b. In Home click Data Exchange. c. Click Credit Card Sync. d. Click Retrieve Swipes. e. Browse to or paste the encrypted data file. f. In Quick Checkout formats choose EventPay! g. Click Import now. h. Look closely at the report for any errors. Resolve any errors by making sure the bid number from the swipe file is being used by the correct bidder in the <i>Auction!</i> project. Revise bid numbers in <i>Auction!</i> if necessary to match the bid number associated with the credit card stored in <i>EventPay!</i> Then repeat steps f to h again to check that errors are resolved. i. If there are more swipe files from other swipe stations repeat steps d-h for each additional swipe data file. | <p>In this step you are retrieving the encrypted credit card swipes into the <i>Auction!</i> project. You will need to do this for EACH encrypted file from each credit card swiping station so that all bidders who allowed their credit card to be swiped at check in are marked as quick checkout.</p> <p>You may retrieve swipes multiple times if necessary and you must always check the report for errors, resolve any errors and repeat the retrieve swipes with the same file to make sure the errors were resolved.</p> <p>Do this step for EACH data file before printing invoices.</p> |

Anyone who does not swipe their credit card at check in can use *EventPay!* to pay at the cashier at the close of the event. This is still a card capture at the end of the event. The cards are not charged until later when you confirm that all potential charges are correct.

AFTER everyone has checked out, YOU MUST export the swipe data file again from EACH card swipe station that accepted credit cards at checkout. In the *Auction!* project, Retrieve Swipes data from EACH station. This gives the encrypted card information to *Auction!* for any late swipe guests.



Step 4 - Post event – Process Payments:

After your guests have left, usually within the next day or two, you will process the payments, but first you MUST do 4 preliminary steps to make sure the charges are complete and correct:

1. **Retrieve swipes** again in **Auction!** using the swipe file from any card swiping computer used at checkout to capture late swipes.
2. Enter any cash and check payments into the **Auction!** project to lower the balance due for any bidder who swiped a credit card but also may have paid for a portion or all of their purchases with cash or check.
3. Confirm all winning bids in the **Auction!** project are correct.
4. Confirm the balance due for any guest marked as **Quick Checkout** is correct. The report can be found in **Auction!** in **Reports, Names, Households Companies, Bidders/Participants, Quick Checkout Non Zero Bal** (summary or detailed)

PROCEED ONLY AFTER COMPLETING the above 4 preliminary steps!!

Process Payments: Charge Cards

| Step | Explanation |
|---|--|
| 1. In the Auction! project <ol style="list-style-type: none"> a. Go to Data Exchange. b. Click Credit Card Sync. c. Click Process Payments. d. Enter <i>EventPay!</i> Merchant ID, User Name and Password. e. Click Process & Record Payments Now. f. Review the report of the transactions. | <p>In this last and final step, with one click of the mouse the credit cards are charged and the payments automatically are entered into Auction! for each bidder that has a credit card stored and has a balance due.</p> <p>If there are any declines, contact the bidder and ask for another form of payment, such as a check. If they wish to use a different credit card, use the <i>EventPay!</i> virtual terminal for a point of sale transaction for that payment.</p> <p>Point of sale transactions are not automatically entered into the Auction! project when the card is charged. You must enter any point of sale transactions into Auction! by hand in the individual bidder’s register just as you would with cash or checks.</p> |