Auction! V4 – Spire Payments Sync 1, Sync 2, Sync 3

Applies to: ***Credit card processing Sync between Auction! Version 4 and Spire Payment Solutions credit card processing.*** *. As soon as the equipment arrives from Spire Payment Solutions, 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 Spire:

- Tablets or netbooks w/swipers
-Mi Fi hotspot

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!***
-a USB flash drive

BEFORE Guest check in, connect the netbooks or tablets to your Spire Portal following the instructions from Spire. As the guests arrive use the *Spire* equipment to capture credit card information from your guests.

After check in is complete but before printing invoices perform **Sync 1**

Sync 1 – Get Bidder Information

Step	Explanation
1. Retrieve a Sync 1 file from your Spire Portal following instructions from Spire. Once the file is saved, if saving the file on the USB flash drive, remove the flash and insert it in the ***Auction!*** data entry computer.	A Sync 1 file is a list of the bid numbers of the bidders who have a credit card stored on your Spire Portal. If your Auction! data entry computer has internet you can retrieve the file directly from Spire and save it on the computer, otherwise retrieve the file from any Spire tablet or netbook and save it to the USB flash drive. **File Name:** sync1-quick-pay-SpireAcct#-yyyymmddhhmmss.csv
2. On your *Auction!* data entry computer a. In your open project on the **Home** task bar click **Data Exchange** and then click **Credit Card Sync** b. Click **1b:Retrieve Bid #'s** c. Browse to the flash drive, locate the file and click **Open** d. Select ***Spire Payments*** as the **Quick Checkout sync preset.** e. Press **Import Now** and the Sync 1 will occur**.** f. An **Import Log** will display showing the results. Scroll through the log looking for **Orange** highlighted errors. Correct any errors and run sync 1 again.	In this step Auction! 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 *Spire Portal* does not match any bid number in the ***Auction!*** 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 bidders into the ***Auction***! project and then complete Sync 1 again.

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

After the event is over, you may return the *Spire* Equipment to *Spire Payment Solutions*. For Sync 2 and 3 you will need a data entry computer with your ***Auction!*** project and an internet connection.

Sync 2 may not occur until a day or two after your event. In **Sync 2** you will be uploading a file created in ***Auction!*** to the *Spire Portal*. This file contains the balance due for each bidder that ***Auction!*** shows has a credit card stored in the *Spire Portal*. Before performing **Sync 2**, enter all <u>cash or check</u> 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 *Spire Portal*, before performing **Sync 2** you should complete a new **Sync 1** 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 *Spire*.

Sync 2 – Send Totals

Step	**Explanation**
1. Retrieve a new Sync 1 file from the Spire Portal	**File Name:** sync1-quick-pay-SpireAcct#-yyyymmddhhmmss.csv
2. On your ***Auction!*** data entry computer a. Open your ***Auction!*** project and on the **Home** Task bar click **Data Exchange** and then **Credit Card Sync**. b. Click **2a:Send Totals**. c. Select ***Spire Payments*** as the **Preset for sending Totals**. d. ***Auction!*** will show you the list of bidders it will export and the balance due for each bidder. Check over this list before proceeding. e. Click **Export Now** f. Read the **Important** screen carefully. If you have not completed the final **Sync 1**, click the **Browse for latest Sync 1 file** button and follow the steps to complete Sync 1.before proceeding to Sync 2. If you have completed a final Sync 1 so your list of bidders with credit card on file is complete, click the **I have performed a recent…** button. g. Either click **I want to postpone** and **Close** or click the large **I have entered all …** button and then press **Perform Sync 2** to proceed with Sync 2. h. **Save** the file.	If you have just completed **Sync 1** before continuing with **Sync 2**, the **Sync 2a** button may not be visible. Click the **Credit Card Sync** button again and all the sync buttons will re display. If you see incorrect balance due for any bidder or if a bidder is missing from the list displayed by ***Auction!,*** discontinue Sync 2, correct any problems and start Sync 2 again. **File Name**: yymmddS2.csv
3. Log on to the Spire Portal and upload the saved **Sync 2** file.	In this step the amount due for each credit card is uploaded to *Spire Payment Solutions*. When the cards have been charged the representative of record will receive email notification from *Spire* that a Sync 3 file is available for download.

When your organization receives notification from Spire that a Sync 3 file is available you may continue with Sync 3.

Sync 3 – Get Settlement Info

Step	Explanation
1. Log onto the Spire Portal and retrieve a Sync 3 file.	In this step you are saving a file with the results of the credit card transactions that occurred when you submitted the transactions to *Spire* in Sync 2. **File Name**: post-event-sync3-SpireAcct#-yyyymmddhhmmss.csv
2. On the ***Auction!*** data entry computer a. Start ***Auction!*** and open your project. b. On the **Home** Task Bar click **Data Exchange**, then **Credit Card Sync** and then **3b: Record Payments.** c. Browse to the Sync 3 file and press **Open**. d. Choose ***Spire Payments*** as the **Preset for recording Payment** and **Select & Close**. e. ***Auction!*** will display the list of transactions f. Press **Import Now.** g. Review the **Import log** and make note of any credit card declines.	In **Sync 3b** All the credit card payments are automatically entered for you in your ***Auction!*** project. The payments include the payment type and the last four digits of the credit card number.
3. Handling declines a. If you have any declines, which are rare, you can re submit the declines. You may need to contact the card holder and ask them to authorize payment with their bank. Contact Spire and ask them to re submit the declines. b. Or call the bidders with declines and ask for another form of payment such as a check or cash	It is rare to have declines but you can re submit the declines to *Spire* or contact the bidder for another form of payment.