Payments

User Guide

Greater Giving Go Time

Conveniently manage your entire event –
from start to finish

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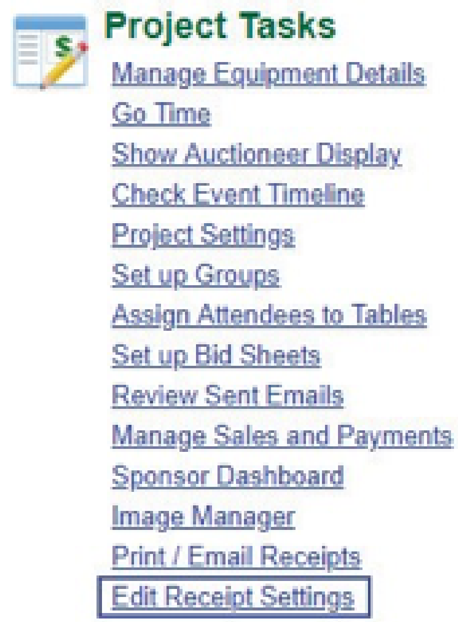
Pre-Event

Equipment and internet setup

- Set up registration equipment (laptops, iPads, tablets, PCs)
- Test Internet connection on all devices you plan to use at your event (laptop, iPad, tablet, phone, etc.) to ensure that you have the proper connectivity. It is especially important to test connectivity at the venue prior to the event date. We strongly recommend using hard wired Internet access, as opposed to Wi-Fi.



Greater Giving online software setup

- Log in to Greater Giving Online event software at https://online.greatergiving.com
- Verify that the project is enabled for Card Swipe by going to Project Settings and looking for credit card images. This activates the ability to swipe, store and process credit cards for your event. If you do not see any credit card images, contact Greater Giving Client Services at **(866) 269-8151.**
- Verify **Event Receipts**:
    - From the **Project Home**, click **Edit Receipt Settings** under the **Project Tasks** header
    - Verify settings on each tab of the **Event Receipt**, including **Email Receipts** and/or **Print Receipts**, based on preferred delivery

Card reader setup

- Plus 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 text bidder, check the guest in using the **Check in Attendee** button and swipe the Auctionpay test credit card. Delete your test bidder when done

Mobile card reader setup

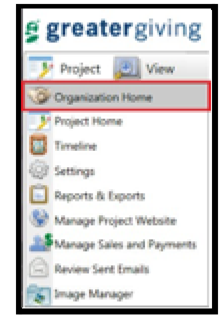
(Valid for iPad and specific Android tablets)

- Install the Greater Giving App for iPad or Android from the App Store or Google Play
- Click the icon to launch Greater Giving **Go Time**, and enter your credentials
- Click the **Test Card Reader** icon and insert the mobile card reader into the audio port of the tablet
- Swipe the credit card to test. If successful, **Card Reader Active**, with a green checkmark, will appear

Go Time settings

Go Time Volunteer Access setup

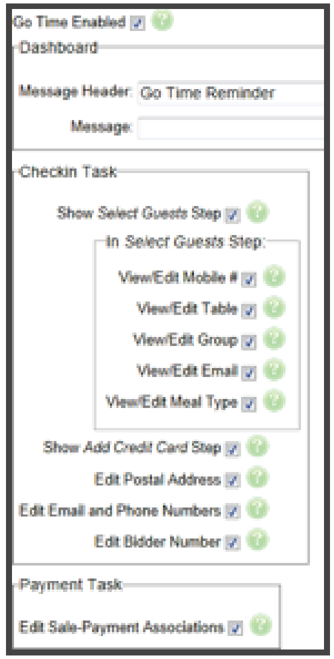
Volunteers working check-in, entering sales, and checkout will need to have Greater Giving Online event software credentials. We recommend one login be shared amongst all volunteers. Follow these steps to set up volunteer access:



- 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, assigned desired permissions. If processing charges in a batch, make sure that **Charge Credit Cards** <u>is not</u> selected
- For the Online Bidding Admin lead(s), ensure that the **Manage Online Bidding** permission <u>is</u> checked. This will give them access to the Online Bidding Admin panel. Also ensure that the **Settings** permission is 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 check-in 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**



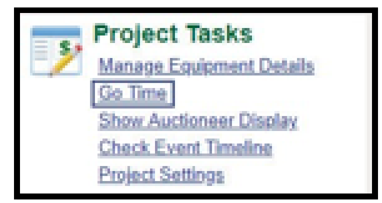
Guest registration

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 and the guest's cell phone number in the guest info record.

Print recommended reports to be used for reference during registration:

- **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
- **GRP-01**: Group Listing

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



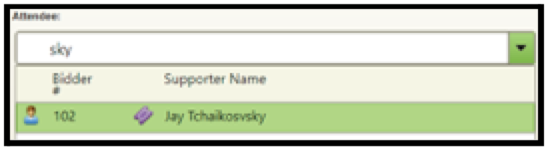
NOTE: Go Time will open in another window or tab of your Internet browser

Click **Check in Attendee** from the Go Time dashboard

Check in 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")

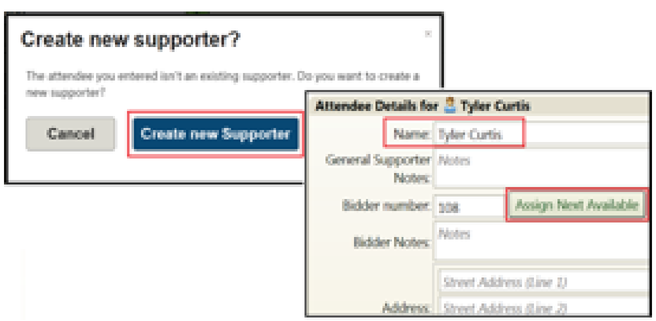


- Next to each name there are **possible icons** that may appear:

  Supporter has already been enabled as an **Online Bidder**

  Supporter has an admission allocated

- Once the 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 or click the Create New Supporter button



  - 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 information 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 [Check in Step 2: Select Guests]

Check in Step 2: Select guests

This screen displays the guest name, mobile number, email, table, group and meal (each of which can be managed under the **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

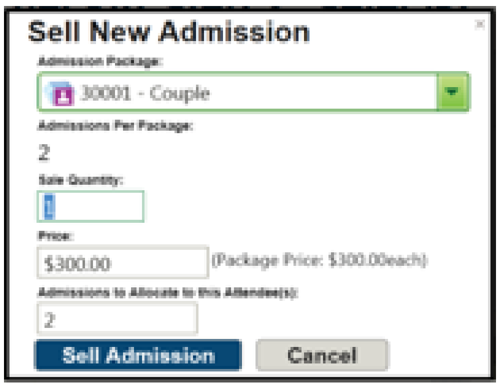
- Click on **Details** to view or edit the **Attendee Details**, make any necessary changes, and click **Update** to save
- Click **Next** to continue to [Check in Step 3: Add Credit Card]

NOTE: If the guest does not have an admission allocated, then you will need to sell them a **New Admission** or use an **Existing Admission**, as outlined below.

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 two seats, you only need to sell one package for two guests)
- Confirm sales price

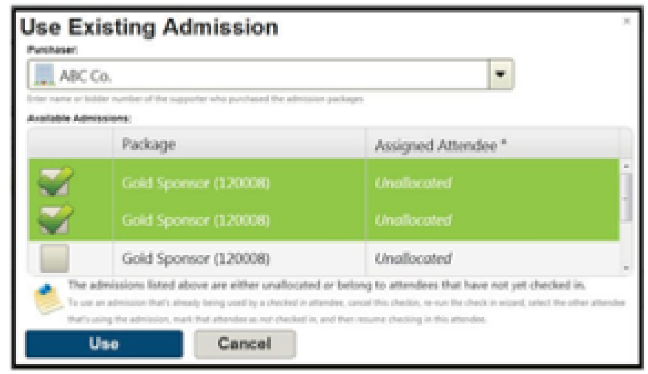


- Click **Sell Admission** to complete
- Check the box next to each guest, in order to check them in
- Assign Group and Tablet for each member (NOTE: If the Group has already been assigned to a table in the Project, then it will default to the correct table. You can overwrite this, if needed)
- Click **Next** to continue to [Check in Step 3: Add Credit Card]

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**

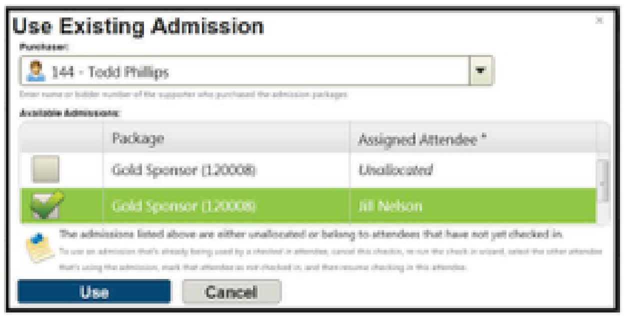


- Assign **Group** and **Table** for each member (**NOTE:** Table will auto assign if the **Group** has already been assigned to a table in the project. You can overwrite this, if needed)
- Click **Next** to continue to [Check in Step 3: Add Credit Card]

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 the box next to each guest to check them in



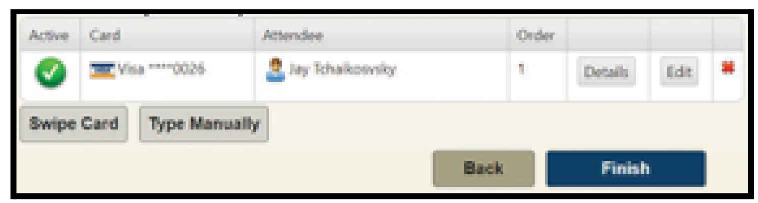
- Assign **Group** and **Table** for each member (**NOTE:** Table will auto assign if the **Group** has already been assigned to a table in the project. You can overwrite this, if needed)
- Click **Next** and continue to [Check in Step 3: Add Credit Card](#)

Check in Step 3: Add credit card

This area is used to store the credit card to be used for a 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

- Click **Swipe Card**
- Swipe the credit card with the magnetic stripe facing the arrows on the card reader
- The credit card information 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, cardholder name, security code and billing address. Click **OK**
- Click **Finish** to complete the check in

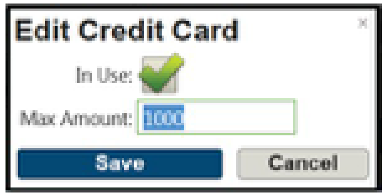


Additional credit card options

Edit a credit card

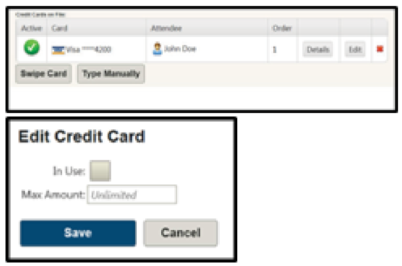
(Maximum Amount)

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



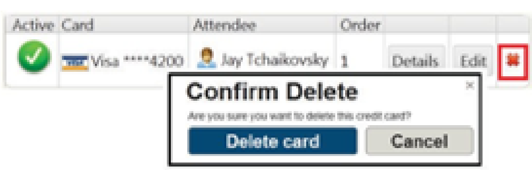
Deactivate a credit card

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



Delete a credit card

- Click the red X to delete
- Click **Delete Card** to confirm
- Click **Finish** to complete the check in



Sales – Multiple Sale and Live Auction

Select **Enter Sales** from the Go Time dashboard and locate the following options:

Live Auction Sales

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

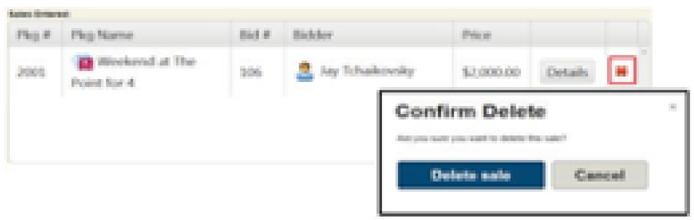
Multiple sales

Use this when 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 and click **Enter** (NOTE: This package should already be set up prior to the event night, as a “Multiple Sale” package)
- Type Bidder Number or Name and click **Enter**
- Type the quantity (automatically sums the total price) and click **Enter**
- Click **Add Sale** to confirm and save

Edit sales

- If a sale as incorrectly entered, you can delete the sale by following the steps outline below:
- Click the red X
- Click **Delete Sale** to confirm
- Correctly re-enter the sale, if needed (**NOTE:** You will only be able to delete a sale from the computer on which the sale was entered. To see all sales, go to **Checkout** and pull up the bidder)



- Click **View / Edit Sales** under the Sales header on the **Project Home**
- Click **Show Advanced Search** to filter for the package
- Type in either the Package Number or the Name in the appropriate field and 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 the 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

Checkout

Click **Checkout Attendee** from the Go Time dashboard.

- Type Bidder Number or Name and click **Enter**
- Review the following information:
  - Sales entered
  - Credit cards on file
  - Payments received
  - Event receipt

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 and click **Enter**
- Type the price of the sale
- Click **Add** Sale to save

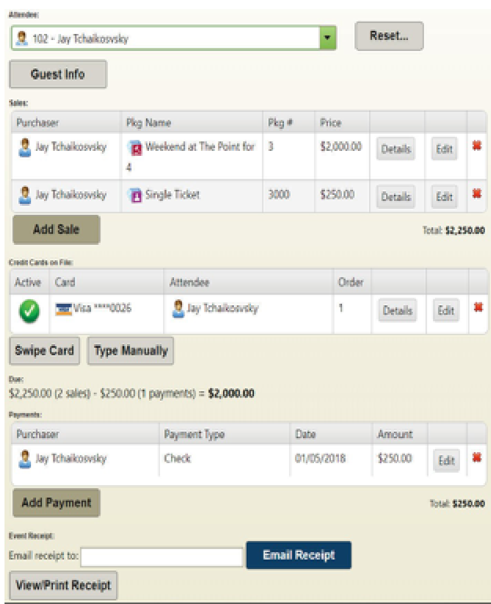
Credit cards

Add a credit card

- Click **Swipe Card**
- Swipe the credit card with the magnetic stripe facing the arrows on the card reader
- The credit card information 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 cardholder 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 and 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 (**NOTE:** Be sure to confirm the order that you want the credit cards to be charged)

Payments

(Money received as cash, cheque 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 cheque, enter the cheque number
- Select the sale associated with the payment. If the amount is equal to the package then it will be automatically associated 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 vs. batch receipts.

IMPORTANT: All settings need to be set up 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, refer to the Greater Giving Online Software Setup section, on page one of this guide.

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, and click **Email Receipt.** **NOTE:** If not email address is initially populated, the new address entered will be saved to the guest's record.

Print receipt

- Click **View / Print Receipt** to generate the supporter 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 the receipt and click **Print**

Batch receipts from Greater Giving online software

Batch print receipts

- From the **Project Home**, click **View/Edit Supporters** under the Supporters header
- 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) and click **Search**
- Click **Print/Email Receipts** from the toolbar

- If you would like to associate all payments to the sales, click on the bottom **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 toolbar, select the printer icon
- Click **Done** viewing or printing receipts to close

Post-Event

All post-event tasks will need to be completed with Greater Giving Online Software.

Reports

After the event, run the following Reports to review bidder sales, payments and prepare to submit credit card transactions.

From the Project Home, click All Reports under the Reports & Exports are:

- **BID-03:** List of sales, sorted by supporter
- **PKG-03:** List of sales, sorted by package
- **PAY-01:** List of payments records 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

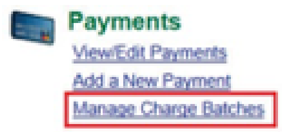
IMPORTANT: Prior to submitting credit card transactions, we strongly recommend comparing the **BID-03** and **BID-18** report to confirm that amounts to be charged to each bidder's credit card(s) on file. All cheques, cash and other forms of payment, other than credit card, must be posted to bidders' records prior to submission. Unless a **Max Amount** is specific on a bidder's credit card, all outstanding balances will be charged to the card(s) on file.

Submit Transactions for Processing

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 header

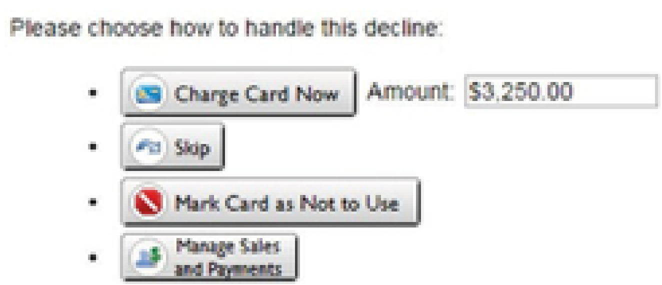


- Click **Start New Batch**
- Verify the charges in the batch:
    - If any adjustments need to be made to the charges waiting to be submitted, cancel and go to **Manage Sales & Payments** on the Supporter record
- Click **Charge Cards** in Batch
- Click **Done** to complete
- A list will generate once the batch is complete

Declines

Declined Transactions

Transactions can be declined for insufficient funds, or a bank's regional security policy. In most cases, contacting the supporter is the solution to a declined credit card.



- From **Project Home**, click **Manage Charge Batches** under the Payments header
- Scroll down to the bottom of the screen and click **Start Process Decline Wizard**
- **Charge Card Now** – This option will attempt to recharge the remaining available balance
- **Skip** – This option will skip the current decline and move on to the next one
- **Mark Card as Not to Use** – This option will mark the card as no longer available and it will no longer show up in the decline wizard
- **Manage Sales and Payments** – This option will take you to the Supporter's Manage Sales and Payments. This allows you to add additional credit cards or payments, remove sales, or alter the record

Return Shipping

Return Shipping

Return all equipment within five (5) days of the event, to prevent late fees.

- Use the white shipping case that arrived with the equipment
- Refer to the packaging 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 (NOTE: Shipping the white shipping case that was provided by Global Payments without the brown cardboard box can damage the equipment and result in a damage fee. If you cannot locate the original brown box, you can purchase a replacement.)

- Attach the “Return Service Pre-Printed Purolator Waybill” to the box
- Call Purolator at **1-888-744-7123** to arrange for pickup, quoting the Purolator PIN on the pre-printed return waybill
- Return the original equipment to:

  Global Payments Canada Logistics Centre 151 Carlingview Drive, Units 16 & 17 Toronto, ON M9W 5S4

- Please retain a copy of your Purolator Waybill as proof of return

Data Security (PCI DSS)

Cardholder Data Security

The Payment Card Industry Data Security Standards (PCI DSS) were developed by the major payment networks as a set of guidelines to help organizations that process card payments prevent credit card fraud and to protect against security vulnerabilities. Global Payments applies the PCI guidelines rigorously in its terminal and online products. Our Greater Giving solution maintains a level 1 certification with annual audits by an accredited third party. When you use our 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 recommends if using a wireless (Wi-Fi) connection for Go Time that the connection be properly secured. 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 identified (SSID)
- Change default passwords or passphrases on access points
- Change default SNMP community strings
- Enable Wi-Fi protect access (WPA and WPA2) technology for encryption and authentication (**NOTE:** 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 102.11i)

This guide is reviewed and updated regularly to maintain alignment with PCI Payment Application Data Security Standards.