

Chapter 17 - Automated Bank Card Processing

Auction! now provides an upgrade that links **Auction!** to Auctionpay™, an automated solution for expediting bank card processing at your event.

Auctionpay, Inc. is an independent company offering a vital companion solution for expediting the payment phase of checkout. Auction Systems, Inc. and Auctionpay, Inc. have developed a linkage between their products to facilitate rapid checkout at our customers' events. The two companies are financially independent of each other; the cooperation is limited to the product linkage and marketing its availability.

How it Works

Auctionpay™ programs one or more credit card terminals for your organization's banking information. This programming is accomplished as part of your relationship with Auctionpay™. Auctionpay™ also provides a driver CD. Installation of the driver enables your PC to recognize and understand communications with the terminal.

The terminal is then attached to the computer, typically via USB cable. Guests wishing to check out more rapidly swipe their credit or debit cards in the terminal, their bid number is keyed in, and confirmed.

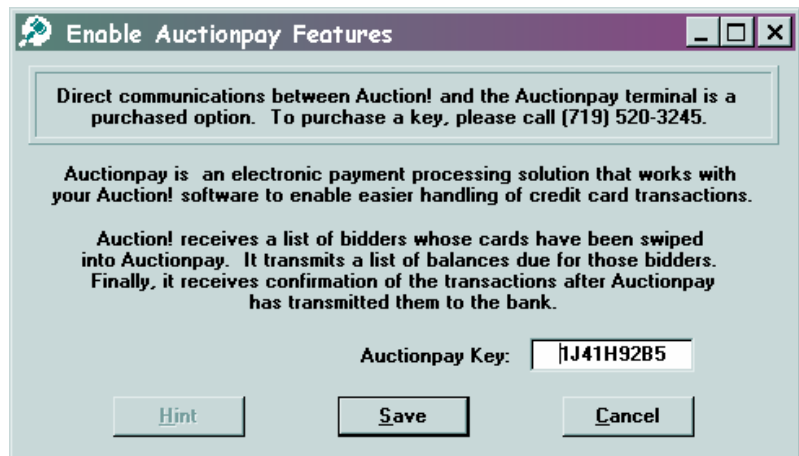
Communication between **Auction!** and Auctionpay™ is handled by **Sync** operations. The terminal sends bid numbers for guests who've swiped their cards. This notifies **Auction!** that invoices for these guests should be marked with **Quick Checkout**. After you verify purchases, payments and amounts due, **Auction!** sends balance due information for the registered bidders to the Auctionpay™ terminal. The Auctionpay™ terminal handles bank settlement, and reports results back to **Auction!**

Your bidders can pick up their itemized invoices, collect their items, and be on their way as soon as the auction concludes. You have quick, efficient processing of bankcards, and delighted guests!

Enabling Auctionpay™

When you purchase the linkage upgrade, you'll receive a nine-character key.

1. Click **Help, Enable Auctionpay**.
2. Type your key in the space provided. The spaces between characters may be included or skipped; they are there to enhance legibility.
3. Click **Save** to record the key and enable these functions.
4. A new menu, **Auctionpay**, will be visible on your screen, between **Settings** and **Help**.



Tip

*Auctionpay™ keys are encoded to work with your **Auction!** license key. Each key is unique. Keys may not be shared with other organizations.*

Installing Auctionpay™ drivers

Your computer must be configured to recognize and communicate with the Auctionpay™ terminal.

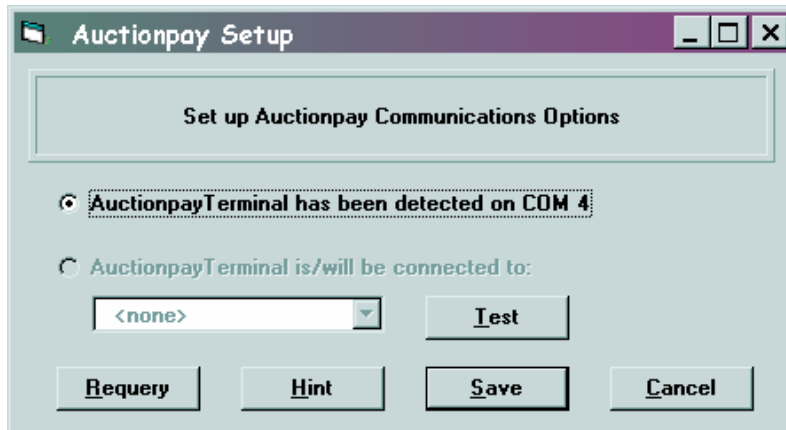
1. Plug the Auctionpay™ cable into your computer, into a USB or Serial port as desired.

2. If you have not already done so, you will be prompted to provide a driver for the new hardware device. Insert the Auctionpay™ CD into your computer for driver installation.
3. Follow the prompts to install the driver on your computer.

Configuring Auctionpay™

Once the driver is installed, and the terminal cable is plugged in, you're almost ready to go.

1. Click **Auctionpay, Configure**.



2. On some computers, the terminal will already be detected:

3. On other computers, you may need to select a communications port, and click **Requery**. The software will check all serial and USB ports to determine whether or not the terminal is connected.
4. Click **Save** to store the setting.
5. When a terminal is selected, you may click **Test** to verify the communication between it and the **Auction!** software.

The Auctionpay™ Screen

The Auctionpay™ screen is organized in tabs, sequentially. The final tab, **Clear Data**, is used for “cleanup” tasks. Each tab is covered in detail in this chapter.

There are two choices always available on the Auctionpay™ screen: **Auctionpay Bidder Status** and **Show Invalid Bidders**. You can review this information at any time.

Sync 1 (Get Bidder Information)

As your guests arrive, they will be offered the option for express checkout. Each guest swipes their credit card, and their bid numbers are keyed in. The terminal will prompt for a confirmation of the bid number. After confirmation, two copies of a bidder receipt will be printed, for zero value. We strongly recommend having the bidder sign the merchant copy.

After bidders have pre-registered with Auctionpay™, and before printing invoices, you will perform a **Sync 1 (Get Bidder Information)**.

1. Click **Auctionpay, Sync 1**. If communications has not been verified since plugging in the terminal, it will be checked prior to displaying the Sync 1 screen.
2. The Sync 1 tab of the Auctionpay™ screen will be displayed.
3. Click **Get Bidder Information** to retrieve pre-registered bid numbers from the Auctionpay™ terminal. Get Bidder Information is disabled when no terminal is detected.
4. After retrieving bidder information, a log is displayed, indicating the results. You may print the log if desired. The log is also saved on your computer, for reference.

- All identified bidders are recorded in your project data. When their invoices are printed, **Quick Checkout** will be indicated just below the bid number, as well as on the payment screen.

Tip

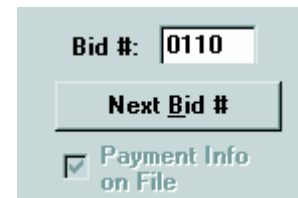
Large events: when operating two or more Auctionpay™ networks for very large events, you must do Sync each network.

Caution

*Bid numbers in the Auctionpay™ terminal not found in **Auction!** must be resolved. These guest names and bid numbers must be added to the project data, or their bid number corrected in the terminal.*

Identifying Quick Checkout Guests (Payment Info on File)

After **Sync 1**, guests whose bid numbers were transmitted successfully will be indicated on many screens. On Name Entry and Quick Name screens, **Quick Checkout** will be checked and disabled. The check box may only be cleared by clicking **Clear Auctionpay Indications**.



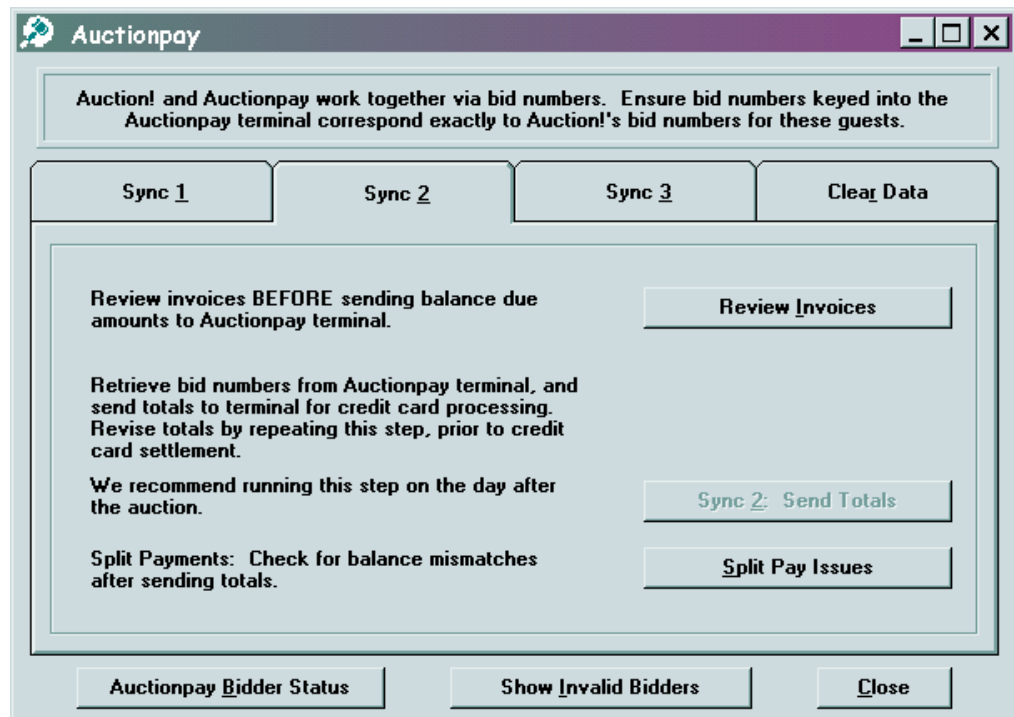
Payment info on file is indicated in other locations. On the Names Grid View, the **PMT** column will contain **AP** for guests who've swiped their cards in an Auctionpay™ terminal. Guests whose payment information has been indicated manually with have an asterisk * indicating payment on file.

On the Payment screens, it is indicated just below the balance due. On Documents, Bidder Invoices, it is indicated in the last column. You may sort by this indication, to facilitate printing these invoices first. Payment Info on File is also shown on Review, Invoices needing to be Printed, and Review, Guests with Nonzero Balance.

Sync 2 (Send Totals)

Once your winning bids are entered, you will prepare to send the bidder totals to the Auctionpay™ terminal.

- Select **Auctionpay, Sync 2**.
- Before sending totals, review invoices carefully. You may wish to delay sending totals until the conclusion of the event or the following day. Sometimes guests checking out will bring bid entry problems to your attention, and totals will change.



- When you are ready to send totals to the Auctionpay™ terminal for bank processing, click **Sync 2**. A **Sync 1** will be performed automatically, to make sure any late-swiped credit cards are reported to **Auction!**

4. Sync 2 may be repeated to update the terminal if any balance changes occur after sending totals. For each bidder, the most recent data sent to the Auctionpay™ terminal will replace the prior total sent.
5. After sending totals, click **Split Pay Issues** to check for any balance mismatches after sending totals.

Once totals have been sent, settle the charges in the Auctionpay™ terminal.

Sync 3 (Receive Payments)

After settlement in the Auctionpay™ terminal, you will want to record payment information in **Auction!**

1. Select **Auctionpay, Sync 3**.
2. Click **Sync 3, Receive Payments**.
3. Successfully settled payments will be recorded in **Auction!** The specific card type, its last few digits, the amount, date & time will be recorded as a payment for each bidder. The cashier name will be recorded as **Auctionpay**.
4. Declined payments are also recorded in **Auction!** The same details are sent, and the payment is marked as **Void**. Void payments will not clear balance due for those bidders. You can use the **Review** menu, **Guests with Nonzero Balance** to identify these, or **Reports, Bidders, and Exclude Bidders with a Zero Balance** for a printed summary.

Clear Data

Occasionally, a guest will swipe their credit card at reception, and then later change their mind about payment method. They might decide to pay cash or by check, or choose a different credit card.

When Sync 1 has already occurred, the guest's record has been marked to indicate **Payment Info on File**. This indication must be cleared in **Auction!** to prevent sending their totals for settlement, or printing **Quick Checkout** on their invoice. The Auctionpay™ terminal does not send a "Cancel" for these bidders to **Auction!**

Depending on the number of guests who change their minds, it could be easy to miss one or two, or be unaware of someone's cancellation. To be safe, click **Clear Auctionpay Indicators**, then perform **Sync 1** before printing invoices or sending totals.

Auctionpay™ terminals are usually configured with one master terminal, which communicates with the computer, and one or more slave terminals, which transmit swiped cards to the master terminal. When this configuration is used, it is always safe to do a **Clear Auctionpay Indications** before **Sync 1**, and then **Sync 2**.

Tip

*Very large events will have two or more master terminals, communicating with one or more computers running **Auction!** Each master terminal **must** Sync 1 after clearing.*

Split Pay Issues

Split Pay on Auctionpay™ terminals allows a bidder to charge part of their bill to one bankcard, and the balance to a different card. This is a complex process, and we recommend avoiding it if at all possible.

Auctionpay™ terminals normally receive balance due for each bidder directly from **Auction!** In a split pay transaction, the amounts for the bidder's bankcards are keyed in manually on the Auctionpay™ terminal. If these do not total the balance due in **Auction!**, the split pay error will be noted after Sync 2. You must reconcile these in the Auctionpay™ terminal.