

Auctionpay - Bridge Documentation

Synchronizing With Telosa Exceed!

Overview

The synchronization described in this document is designed to allow you to exchange auction event information between Auctionpay's Event Software (AES) and Telosa's Exceed! Donor Management System, thereby enabling you to get a full 360 degree view of your donors and their participation in benefit events. This bridge will help you simplify your event preparation by allowing you to import attendees from Exceed! to the Auctionpay Event Software. It will also give you the ability to fully store and maintain event results in your primary database of record (Exceed!), making your donor database current from one event to the next.

Compatibility

Please ensure that you have version 4.1 or later of Auctionpay's Event Software installed prior to moving forward with the Telosa Exceed! Bridge synchronizations. For questions about updating your software version, contact our client service department for assistance at support@auctionpay.com or call 1-866-269-8151.

Preparing for the Integration

To successfully utilize the Auctionpay-Telosa Exceed! Bridge, it is important that you have a working knowledge of Exceed! and its import and export features.

Please review the import/export documentation as defined in Telosa's help system.

Sync Explanation

To achieve the desired results, the following syncs were designed for implementation:

Before the Event:

Sync TE1 (Exceed! to Auctionpay Event Software): Sync TE1 allows you to transfer your attendee information from the Exceed! database into the Auctionpay Event Software. This transfer populates the bidder, donor, and staff information in the Auctionpay Event Software and it carries over their Exceed! Supporter ID. This transfer can be executed multiple times if needed.

After the Event:

Sync TE2 (Auctionpay Event Software to Exceed!): Sync TE2 allows you to transfer attendees in the event software that do not have an associated Telosa Exceed! Supporter ID. This process will ensure that all supporter records created in Auctionpay's Event Software have corresponding records in Exceed!. The sync will help account for walk-ins and last minute entries into the Event Software. During this import, any contacts not recognized in Exceed! will be treated as new and assigned a new Supporter ID.

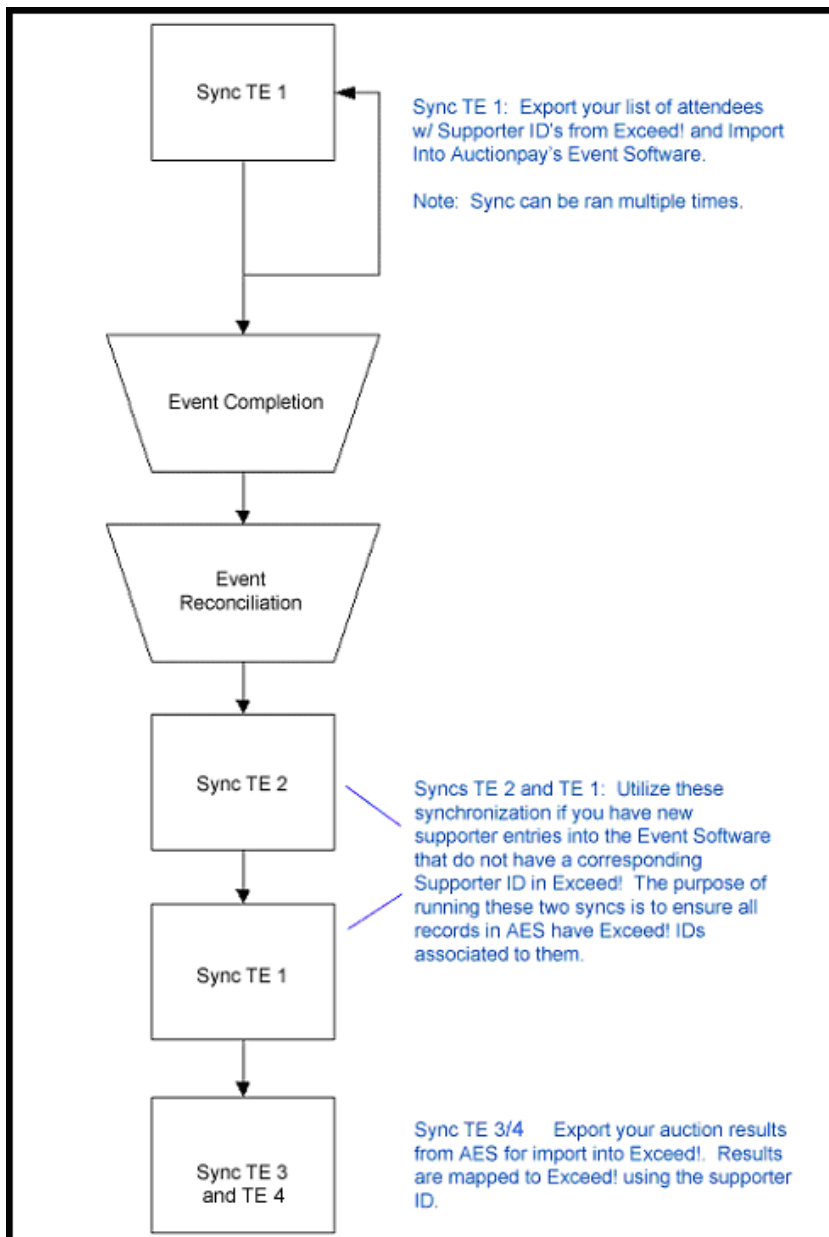
Note: sync TE2 is not necessary in all cases, only if you have records in the event software without Telosa Exceed! Supporter IDs.

Sync TE1 (Exceed! to Auctionpay Event Software): Sync TE1 is designed to pull down any additional Constituent ID's from Exceed! that were not imported during previous sync TE1. During

this import, the Event Software will scan the import file and only bring in IDs of records that it recognizes as pre-existing. Note: Here you will be using the same file format as in previous TE Sync 1. The only difference is that you will include all Exceed! supporters. Generally this sync is necessary only if you do not have Supporter IDs associated with every record in the event software. This sync is especially important if you just ran sync TE2.

Syncs TE3 and TE4 (Auctionpay Event Software to Exceed!): Sync TE3 and TE4 allow you to transfer all attendee, donor and purchase information back to Exceed!. These imports will map all of the correct information back to the assigned constituent using their Supporter ID.

Below is visual representation of how the synchronizations work:



Before the Event - Sync 1: Transferring General Attendee Information from Exceed! to Auctionpay Event Software

It is recommended that you run a query in Exceed! that includes only records you want to include in your auction. However, If you choose to export **All Records**, you can still delete records from AES later that you know will not be needed. At the same time, you can also repeat Sync TE 1 at a later time in case you missed some bidders or donors in the first transfer. If you bring over a large dataset, your sync will take longer and paging through records in AES will require more time. So it is advisable to start with a well defined subset of all your donor records.

Exporting from Telosa Exceed!

Please refer to your Telosa documentation to learn more about exporting records.

For Sync TE 1, the following fields should be exported to a .csv file for importing into Auctionpay's Event Software:

Alternate ID/Supporter ID

Title

First Name

Last Name

Suffix

Spouse Title

Spouse First Name

Spouse Last Name

Saluation

IsCompanyName

Company

Address Line 1

Address Line 2

City

State

Zip

Phone 1

Phone 2

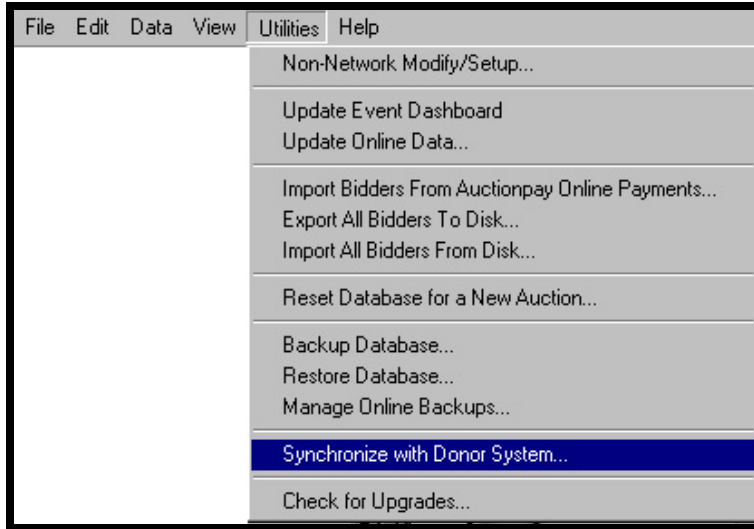
Email

Date_Modified

Importing Records into Auctionpay Event Software

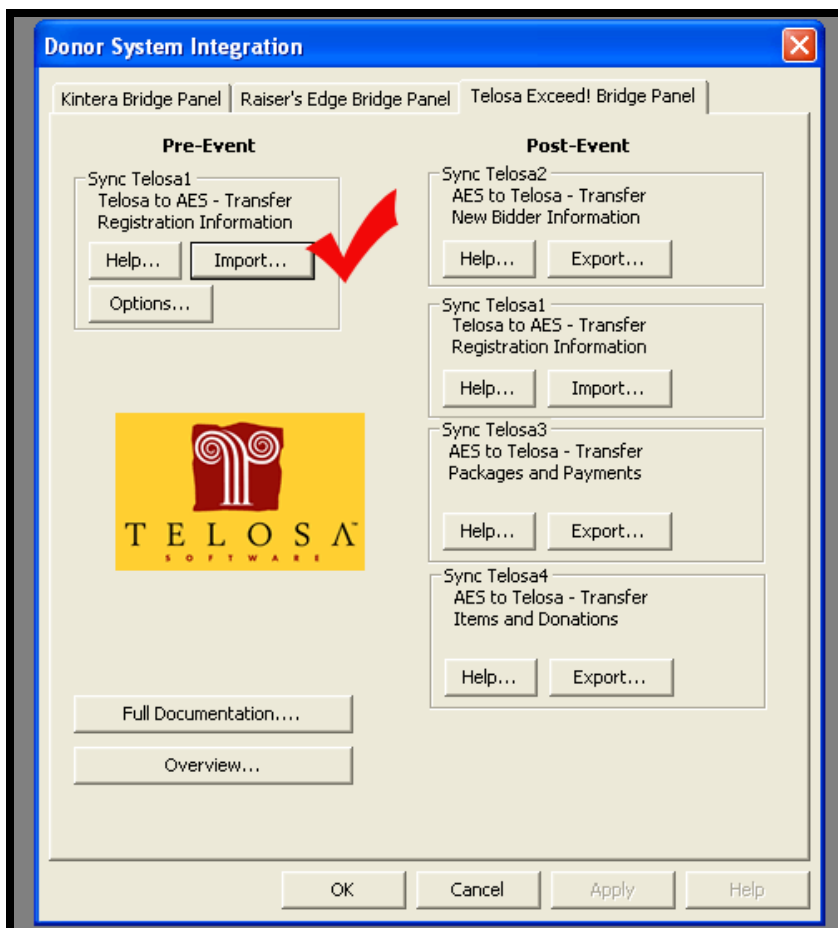
Open the Auctionpay Event Software application. If you have not previously entered any information into the software, choose to open a new blank database. If you have previously entered item and package information, make sure you open the database that you have been working with.

Highlight **Utilities** in the navigation bar, and click on **Synchronize with Donor System**.

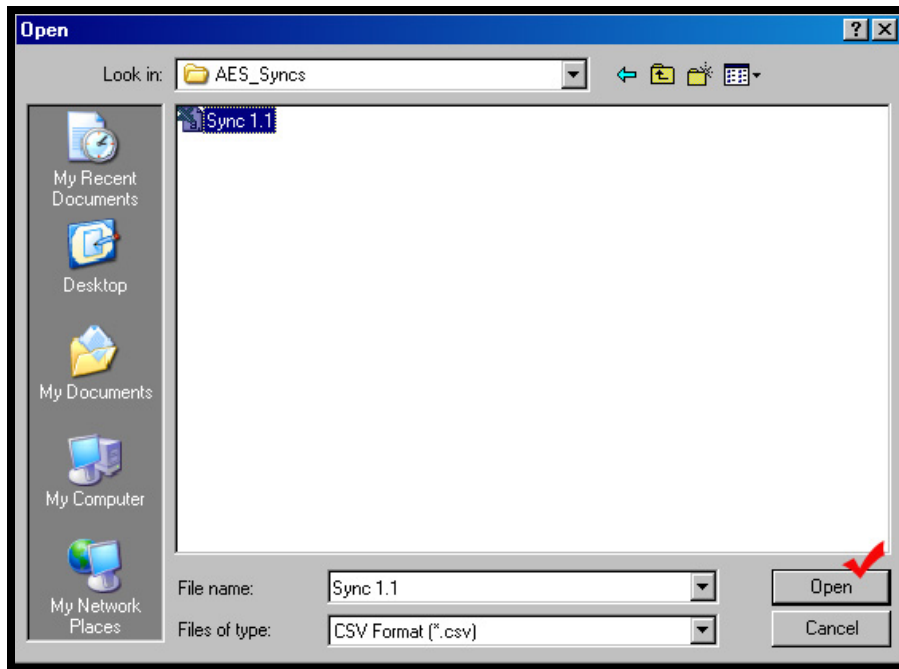


You will be prompted to enter your login/password. If you do not have your admin password, please refer to the documentation sent to you regarding administrator access or contact our client service department for assistance at softwaresupport@auctionpay.com or 1-866-269-8151.

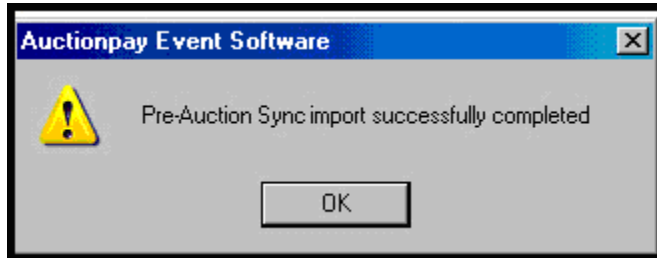
From the synchronization panel, click on the Import button under Pre-Event > Sync Telosa 1.



Locate the .csv file that you created that contains your exported attendee list from Exceed!. Click **Open**.



If the import worked correctly, you will see the following message:



Note that you can run Sync TE 1 multiple times. Auctionpay Event Software recognizes the records that were previously imported and will not create duplicates.

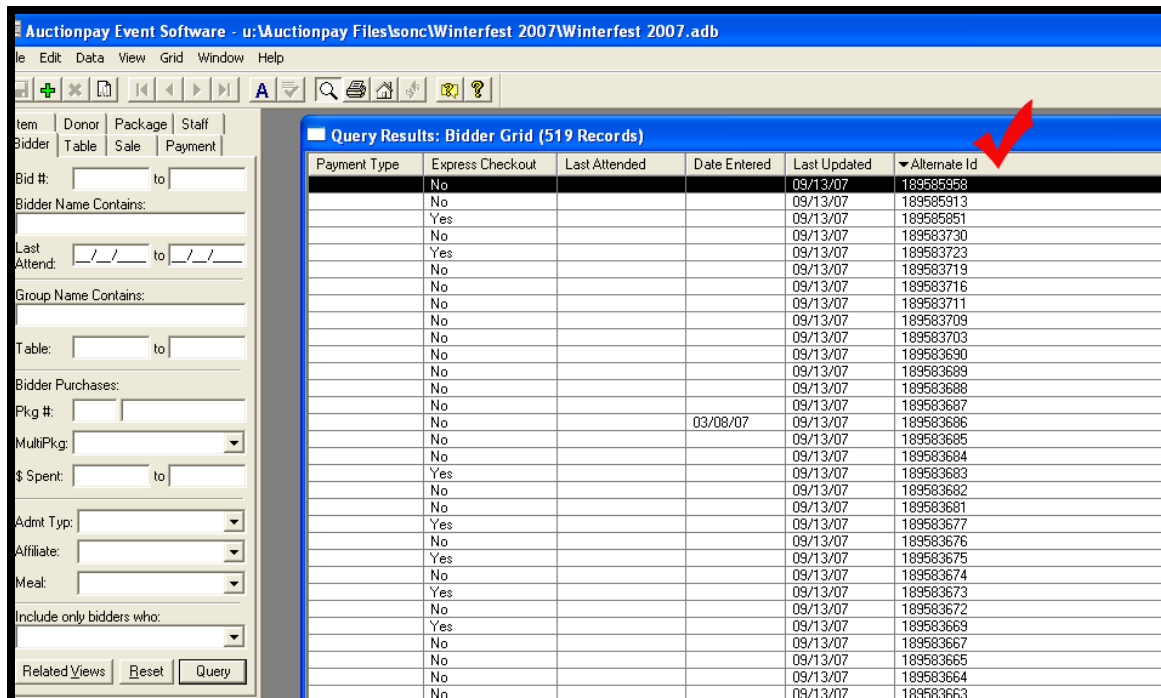
After the Event - Sync 2: Transferring General Attendee Information from Auctionpay Event Software to Exceed!

Exporting from AES

Sync 2 and a repeat of Sync 1 are designed to ensure the Supporter IDs between both applications are matched. When new contacts get added to your Event Software database, they will not necessarily be found in the Exceed! database. To properly synchronize the two databases, you'll need to run Sync 2 and 1 to locate any additional supporter IDs not found in AES or create new constituent records in Exceed! and send the IDs back to the event software. If you are sure that you did not add any new constituents to the Event Software since the initial sync 1, then you do not need to run Syncs 2 and 1 at this time. You can skip right to Sync 3 from here.

Important: Auction information associated with records in AES that do not have Exceed! supporter IDs cannot be mapped to Exceed! and therefore will not be exported. Please double check that all records in the Auctionpay Event software have a supporter ID attached to them.

To verify this is the case, open a bidder grid view and scroll to the right until you get to the Alternate ID column. All of your bidders should have associated values in the Alternate ID field.

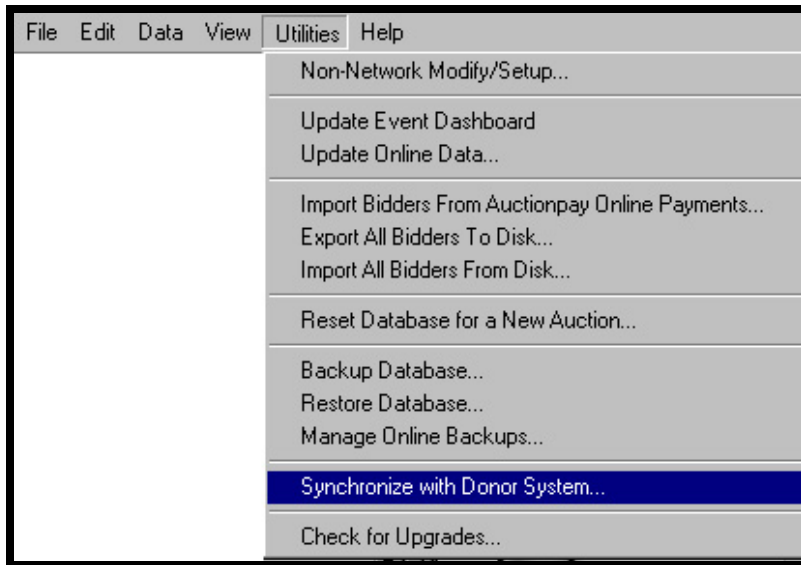


The screenshot shows the Auctionpay Event Software interface with a query results grid for 519 bidder records. The grid columns are: Payment Type, Express Checkout, Last Attended, Date Entered, Last Updated, and Alternate ID. A red arrow points to the Alternate ID column header. The grid contains various rows of bidder data, including fields like Bidder Name, Last Attend, Group Name, Table, Bidder Purchases, Pkg #, MultiPkg, \$ Spent, Admt Typ, Affiliate, and Meal.

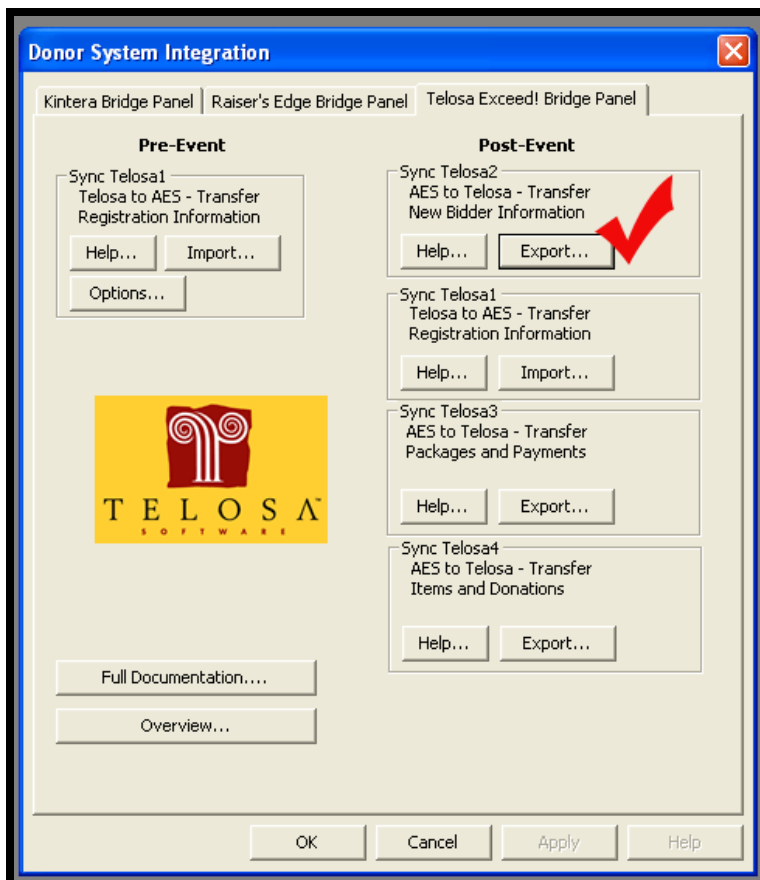
Payment Type	Express Checkout	Last Attended	Date Entered	Last Updated	Alternate ID
No	No			09/13/07	189585958
No	No			09/13/07	189585913
Yes	Yes			09/13/07	189585851
No	No			09/13/07	189583730
Yes	Yes			09/13/07	189583723
No	No			09/13/07	189583719
No	No			09/13/07	189583716
No	No			09/13/07	189583711
No	No			09/13/07	189583709
No	No			09/13/07	189583703
No	No			09/13/07	189583690
No	No			09/13/07	189583689
No	No			09/13/07	189583688
No	No			09/13/07	189583687
No	No		03/08/07	09/13/07	189583686
No	No			09/13/07	189583685
No	No			09/13/07	189583684
Yes	Yes			09/13/07	189583683
No	No			09/13/07	189583682
No	No			09/13/07	189583681
Yes	Yes			09/13/07	189583677
No	No			09/13/07	189583676
Yes	Yes			09/13/07	189583675
No	No			09/13/07	189583674
Yes	Yes			09/13/07	189583673
No	No			09/13/07	189583672
Yes	Yes			09/13/07	189583669
No	No			09/13/07	189583667
No	No			09/13/07	189583665
No	No			09/13/07	189583664
No	No			09/13/07	189583663

Also remember to check on the donor and staff grids as well.

To perform Sync 2, access the donor synchronization panel by highlighting **Utilities** and clicking on **Synchronize with Donor System**.



Next, choose **Export** underneath Sync 2. Save the export file to your computer so that you can easily refer to it later.



Importing New Supporters Back to Exceed!

Sync 2 will export a .csv file of only those records that do not have an Exceed! Supporter ID.

The file should be imported and mapped according to the standard import guidelines for Telosa. Please refer to Telosa's support documentation to learn more about importing your supporter records to their system.

The .csv file will contain the following fields for importing into Exceed!:

Alternate ID/Supporter ID

Title

First Name

Last Name

Suffix

Spouse Title

Spouse First Name

Spouse Last Name

Saluation

IsCompanyName

Company

Address Line 1

Address Line 2

City

State

Zip

Phone 1

Phone 2

Email

Date_Modified

After the Event - Sync 1: Transferring All Supporter IDs From Exceed! to AES

Exporting from Exceed!

This run of Sync TE 1 is very similar to running Sync 1 the first time only this time you should export all supporters instead of just a subset. When importing back to AES, the program will ensure that all records are matched using the appropriate ID and then it will drop any records not already entered in the event software. No new records will be created at this time.

As a refresher, the following field should be exported from Exceed! For importing to AES:

Alternate ID/Supporter ID

Title

First Name

Last Name

Suffix

Spouse Title

Spouse First Name

Spouse Last Name

Saluation

IsCompanyName

Company

Address Line 1

Address Line 2

City

State

Zip

Phone 1

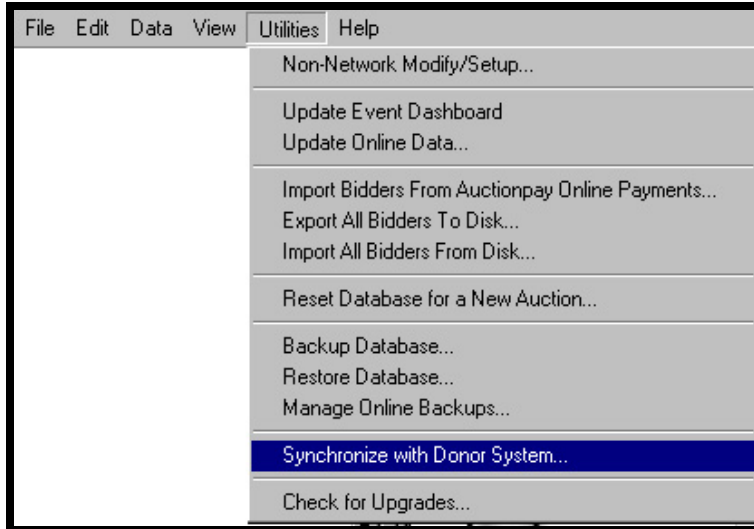
Phone 2

Email

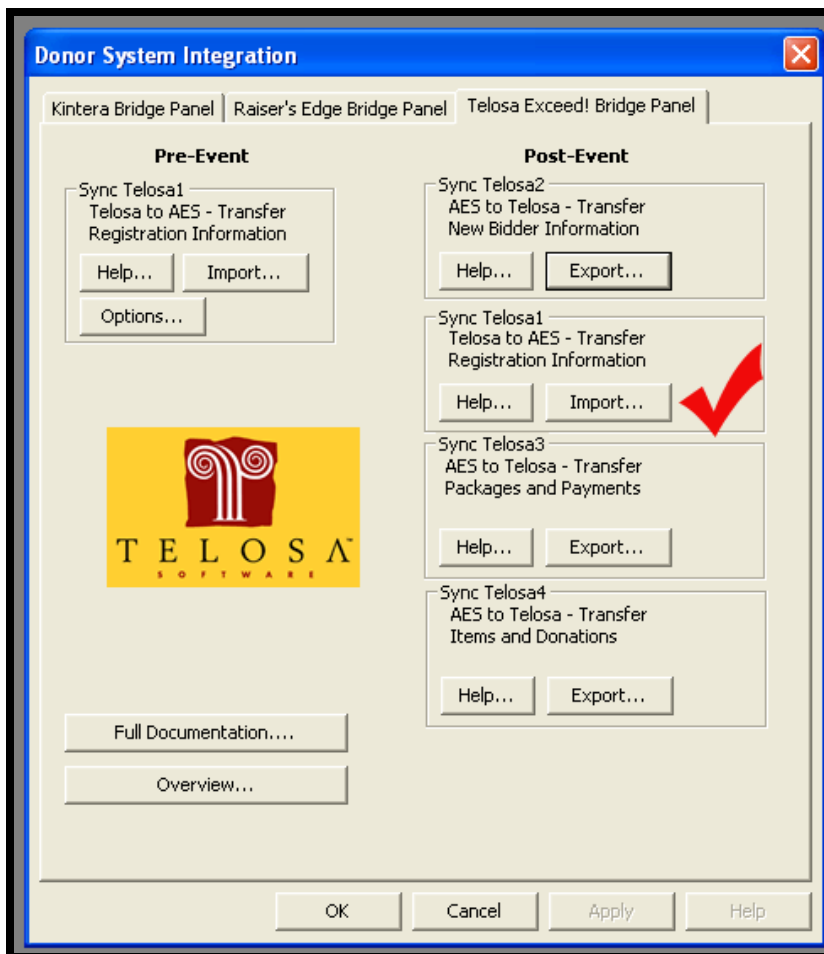
Date_Modified

Importing Into Auctionpay Event Software

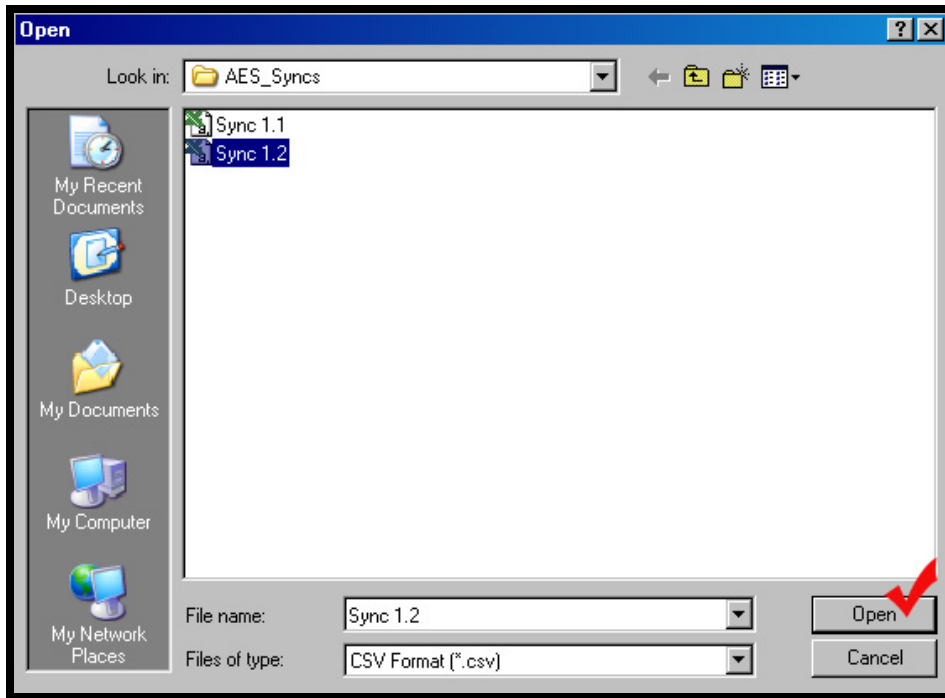
To finish sync 1, open your AES database and access the donor synchronization panel by highlighting Utilities and clicking on Synchronize with Donor System.



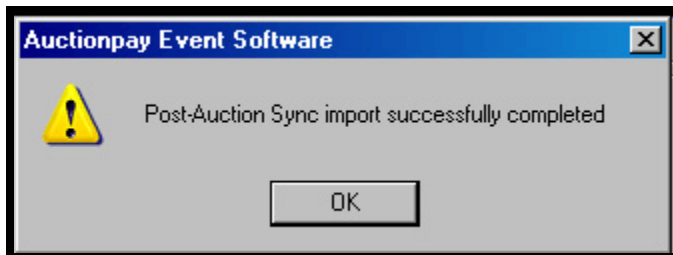
Once you log in, click on **Import** underneath Sync 1 on the Post Event side.



Choose your file and click **Open**.



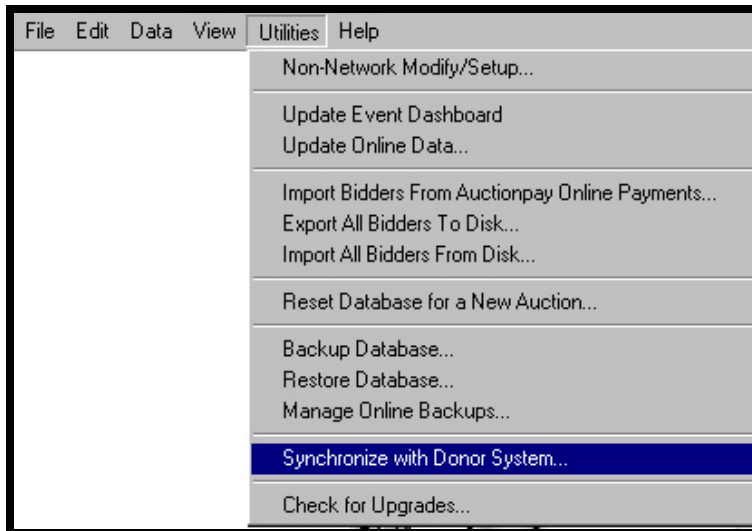
If the import worked correctly, you will see the following message:



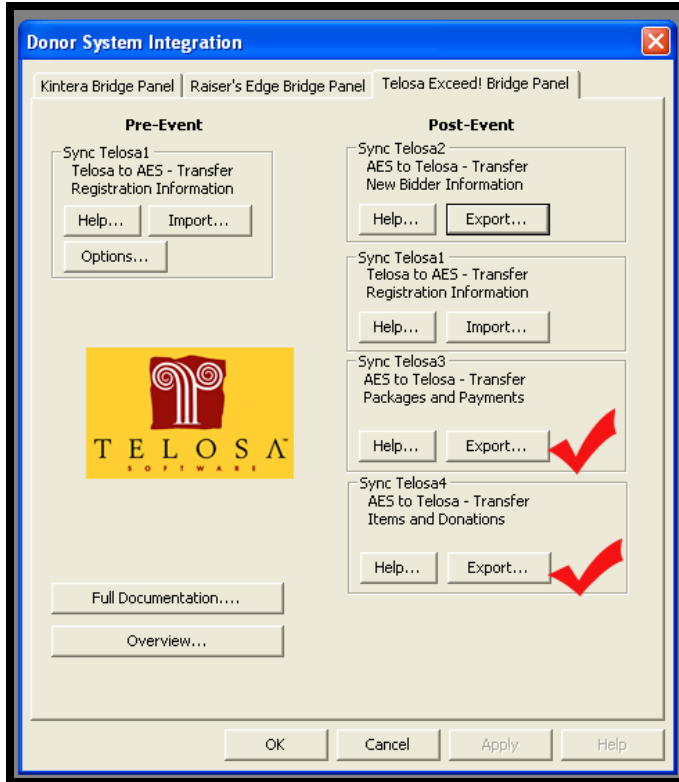
After the Event - Syncs 3 and 4: Transferring All Attendee and Purchase Information From AES to Exceed!

Exporting from AES

To export syncs 3 and 4, access the donor synchronization panel by highlighting **Utilities** and clicking on **Synchronize with Donor System**.



Next, choose **Export** underneath Sync 3. Save the export file to your computer so that you can easily refer to it later. Do the same for Sync 4.



Importing Sync 3 and 4 Files to Exceed!

The following fields will be exported from Auctionpay's Event Software for import into Exceed!.

Please refer to your Exceed! import documentation to learn more about importing into the Telosa Exceed! system.

Sync TE 3 Payment Info Fields

Alternate ID/Supporter ID
Payment Type
Payment Date
Amount
Receipt Amount
Auctionpay bidder ID
Package No.
Package name
Section
Quantity
Sales price
Sales tax
Buyer's premium
Total
Paid (Y/N)

Sync TE 4 Item Donation Fields

Supporter ID
Number Donors
Item No.
Date Received
Item name
Thanked checkbox
Section
Item value
Solicitor
Package No.

Congratulations!

You have completed all of the steps necessary. For questions, please contact our client service department for assistance at support@auctionpay.com or call 1-866-269-8151.