ReadySetAuction Countdown To Auction To-Do List

Soon After Purchasing ReadySetAuction

_____ Add additional staff members (*Admin > Event Staff > Add Staff Member* — be sure to set at least one permission level to 'view' or 'modify').

_____ Invite additional staff members (*Admin > Event Staff ✎ Actions on Staff Members* pull down menu). Don't forget to communicate to them your Access Code *(Admin > Event Settings > Event Details)* so they can register successfully.

_____ If you purchased via your *Persistent Staff Member Account*, transfer the Admin role to yourself or another registered staff member *(Admin > Event Staff ✎Actions on staff members* pull down menu*)*.

_____ ReadySetAuction will periodically send reminder email messages to the Administrator's email address, as shown on your staff roster. Confirm that your Administrator can receive email messages from ReadySetAuction.

_____ Contact ReadySetAuction's merchant account partners to set up a ReadySetAuction-compatible merchant account. If you plan to use a merchant account that your organization set up for your last event, contact your merchant account provider to confirm that your account is still active.

_____ Enable and test the connection between your merchant account and ReadySetAuction *(Admin > Organization Settings > Merchant Account)*.

_____ Select payment methods that your organization is set up to accept *(Admin > Event Settings > Payment Methods).* Don't enable a payment method that your merchant account is not configured for. Contact your merchant account provider if you are unsure.

_____ Choose and enter the Admin Code (*Admin > Event Settings > Event Details)*, a secret password that you'll provide to trusted cashiers during the event. They will need to know this code in order to retract wins of biddable items during checkout. If left blank, only the Administrator may do so.

_____ Read the following Help Center FAQs:

- How To Add A Contact
- Differences Between Sponsorships and Admission Tickets
- How to Record RSVPs
- How Donations and Packages Work Together
- eBidding vs. ePrebidding vs. Traditional Bidding Styles

_____ Establish your event goals *(Setup > Goals).*

_____ Set your package and bidding defaults (*Setup* > *Defaults*).

_____ Establish the admission ticket types that you'll be selling (*Setup* > *Admission Tickets*).

_____ Establish the sponsorship levels that you'll be selling *(Setup > Sponsorship Levels).*

_____ Establish meal choices, tables, venue details, and policies *(Setup tab).*

_____ Recruit a *Technology Person*, the person in charge of assessing the Internet connection at the venue and setting up the computers and printers for check-in, bid recording and checkout.

For Select and Complete Plan Customers

_____ Confirm that the email address listed on the *Admin* > *Organization Settings* > *Organization Details* page is how visitors to your Event Website can contact you.

_____ Complete your Event Website Address *(Admin > Event Settings > Event Details).*

_____ Enable you Event Website *(Admin > Event Settings > Event Details).*

_____ Assign whether access to your event website will be public, by request or private *(Admin > Event Settings > Event Details).* If you have questions about what the differences are among Public, Private and By Request, read the Tool Tip (circle "?" icon) next to each.

_____ Customize your event website with a banner image, intro message and closing message (*Setup* > *Event Website*). For instructions on how to add your sponsors' logos, read the Help Center FAQ: "How to Recognize Sponsors in the eCatalog."

_____ Customize your Event Showcase by choosing a theme, transition style and the number of seconds each slide will display (*Setup* > *Event Showcase*).

For Complete Plan Customers

_____ Inform your Technology Person that (s)he is also in charge of setting up the Shared Bidding Stations and assessing WiFi availability at the venue.

In The Weeks Leading Up To Your Event

____ Create categories *(Items > Categories).*

____ Customize solicitation email/letter language *(Patrons > Communications > Solicitations)*.

____ Send solicitation emails *(Patrons > Donors -> Actions on donors menu)* and generate solicitation letters *(Patrons > Printed Materials > Donor Materials > Prospect Solicitation Letters).*

____ **After** you have emailed and printed solicitation communications that reference the prior event's donations, review your Patron list and merge duplicate patrons. *****IMPORTANT***** Once two records are merged, the operation is final and irreversible. Merged records cannot be unmerged. The Duplicate patron's donation history from the *prior* event will be discarded once that patron is merged into another patron. The discarded record is permanently removed. Therefore, do not merge records until after you have you sent your personalized solicitation/procurement letters/emails for your current event (or if you don't intend to utilize this feature). Please refer to the Help Center FAQ How To Merge Duplicate Patrons for more information on merging patron records.

____ Record donations *(Items > Donations > Add Donation).*

____ Create packages and place them into categories *(Items > Packages > Add Package)*.

____ Watch your printed materials take shape *(Items > Printed Materials)* and discuss with your committee whether you plan to create a custom catalog using a Microsoft Word template provided or use a "Ready-to-print" version generated by the system.

____ Record the sales of tickets that were purchased directly (not online) along with the RSVPs of the ticket buyer's guests *(Patrons > RSVPs > Yes).*

____ Record just the RSVPs for guests of sponsors and guests of other guests *(Patrons > RSVPs > No).*

____ Basics and Essentials Users: Wed the two members of a couple to the same bidder number *(Patrons > Bidders* ✎Click on one of the bidder's names ✎Click the *Change* link next to *Bidder #* ✎Choose *Using* ✎select the bidder's partner/spouse*)*.

____ Assign guests to tables. (Open the *Reports > Activities > Seating and Meals* report. In a separate window, go to *Patrons > Bidders* ✎click a bidder's name ✎assign the bidder to a table or change his table assignment. Refresh the *Seating and Meals* report.)

____ Schedule volunteers to assist with check-in, bid recording and checkout at your physical event.

____ Work with your auctioneer to arrange the order of your packages and the timing of your Special Appeal/Fund-A-Need (*Items > Packages > Arrange*).

_____ Visit your local print shop to discuss options for duplicating your catalog. Discuss NCR paper if you want carbon-copy bid sheets.

_____ Make a plan for displaying the Display Sheets (e.g. purchase frames).

_____ Gather supplies including: pens, markers, printer paper, card stock, clear tape, duct tape, battery-operated calculators, flashlights, NCR receipt books (as back up).

_____ Request a Training Site from the ReadySetAuction support team. The training site will be available for 15 days.

For Select and Complete Customers

_____ Watch your event website take shape *(Home > Preview Event Website).*

_____ When you're ready to start selling tickets online, confirm that your event website is 'enabled' and that you've enabled online ticket sales *(Admin > Event Settings > Event Details).*

_____ Wed the two members of a couple to the same bidder number *(Patrons > Bidders >* Click on one of the bidder's names > Click the *Change* link next to *Bidder # >* Choose *Using* > select the bidder's partner/spouse*)*. *****IMPORTANT***** If selling tickets online, then first check the PayReady™ report *(Reports > Activity Reports)* to determine which member of the couple should own the bidder number. **Hint:** the person whose credit card is on file should own the bidder number. The other member of the couple should be set to "using" his/her partner's bidder number.

For Complete Customers

_____ Print and laminate several copies of the *eBidder Tips Sheet (Patrons > Printed Materials > Bidder Materials).*

_____ Request a Training Site from the ReadySetAuction support team. The training site will be available for 15 days. Be sure you understand how to register guests for bidding at check in. For instructions, please download the ReadySetAuction Check In Guide from the Help Center.

Before Your eCatalog Access Period Opens

Complete Plan Customers

_____ Review the open and close times of your packages. *(Items > Packages > Manage* click the "Open" table heading to order the packages by open time. Repeat with the "Close" table heading.) If necessary, adjust times using the *Actions on selected packages* menu at the bottom of the package list. *****IMPORTANT***** Note that once a package has opened and has received a bid, you can only change its close time by visiting that package's *Update Package* page.

_____ Confirm that you have set up each package with the proper Bidding Style: eBidding vs. ePrebidding vs. Traditional. See Help Center FAQ: Differences Among eBidding, ePrebidding and Traditional Bidding Styles. *****IMPORTANT***** The Bidding Style of a package cannot be changed once the package has received a bid.

_____ Optionally enable Overtime eBidding on a per package basis. *****IMPORTANT***** Overtime Bidding on a package cannot be changed once the package has received a bid.

_____ Set your starting bidder number and/or renumber your bidders if needed *(Patrons > Bidders > Manage Actions on bidders, OR, Patrons > Bidders > Manage click on bidder's name for the Update Bidder page*). *****IMPORTANT***** Once eBidding has opened, bidders can be renumbered only one at a time and only from within each bidder's *Update Bidder* page.

_____ Review your event website (*Home > Preview Event Website*).

_____ Customize the bidder invitation (*Patrons > Communications > Invitations*) and then explicitly invite bidders to set up bidding accounts (*Patrons > Bidders choose "Invite All" from Actions on bidders menu*). Or, if access to your event website is "public," distribute the web address of your event website to your constituents via email and/or with a link on your organization's website.

_____ Decide if you want auto-activation 'on' or 'off' (*Admin > Event Settings > Event Details*). If auto-activation is 'off,' you and your committee must manually activate bidders after they've registered.

_____ Decide whether you will offer the self-payment option *(Admin > Event Settings > Payment Methods).*

_____ If, in addition to on-screen and emailed outbid notifications, you would like your bidders to receive outbid notifications by text, then use the Text Messaging feature included with the Complete package. Registration at event check-in will also be facilitated by text with this feature.

One Week Prior to Your Event Date

_____ Continue to sell tickets, record RSVPs, assign guests to tables, record donations and make packages.

_____ Test your merchant account using a $1 monetary donation *(@Event > Record Sales > Monetary Pledges*) for **all** forms of credit card payments that your merchant account is configured for.

_____ Download, review and make copies of the [Check In Guide], which is available in the Help Center.

_____ Train your event-night volunteers/staff. Each event-night volunteer/staff member must have his own login. The system won't allow volunteers/staff members to share accounts.

_____ At the venue, set up and test your computers, printers and the Internet connection. Log into the ReadySetAuction Control Center and visit pages to ensure fast response.

_____ Deliver catalog to print shop for duplication.

_____ Distribute printed catalog in advance, if possible, to registered guests.

_____ Finalize table assignments *(Reports > Activity Reports > Seating and Meals).*

_____ Print bid/purchase sheets *(Items > Printed Materials > Bid/Purchase Sheets).*

_____ Print bidder paddles *(Patrons > Printed Materials > Bidder Materials).*

_____ Print display sheets *(Items > Printed Materials > Display Sheets).*

_____ Print gift certificates *(Items > Printed Materials > Gift Certificates).*

_____ Recruit volunteers to help set up the venue.

Complete Plan Customers

_____ Customize the bidder invitation *(Patrons > Communications > Invitations).*

_____ Invite bidders who have not yet created accounts *(Patrons > Bidders > Manage ✏ Actions on bidders > Invite All (if not yet invited)).*

_____ Send welcome email to registered and activated bidders, i.e. those who have already created an account. *(Patrons > Bidders > Manage ✏ Actions on bidders > Send Welcome Email to All Confirmed/Activated).*

_____ Activate registered bidders, if auto-activation was off. *(Patrons > Bidders > Manage ✏ Actions on bidders > Activate Selected).*

_____ Once ePrebidding has closed, print bid/purchase sheets for those packages *(Items > Printed Materials)*. **Hint:** Print to a PDF file. Then select which pages to print.

Morning of Event

For Essentials, Select and Complete Plan Customers

_____ Set up computers for check-in, bid recording and checkout. Include copy of the Check-In Guide alongside each computer.

_____ Confirm that each event-night volunteer/staff member has his own login. The system won't allow volunteers/staff members to share accounts.

_____ Provide event-night volunteers/staff with the Admin Auth Code (*Admin > Event Settings > Event Details)* to allow them to remove biddable packages from invoices during checkout*.*

_____ Confirm that your merchant account is enabled (*Admin > Organization Settings > Merchant Account.).*

_____ Confirm that you have selected payment methods (*Admin > Event Settings > Payment Methods).*

_____ Run a final test transaction per the instructions in your Reminders email and the Help Center FAQ: How to Run A Test Credit Card Transaction.

_____ Arrange your packages with display sheets on the display tables. **Hint:** Use the *Reports > Activity Reports > Packaging Status* report as a quick reference.

_____ In the unlikely event of a power failure or loss of Internet connectivity, print the following materials:

- Bid/Purchase Sheets *(Items > Printed Materials > Bid/Purchase Sheets)*
- Bidder Payment Slips *(Patrons > Printed Materials > Bidder Materials)*
- Seating and Meals report, which includes bidder numbers *(Reports > Activity Reports)*
- All Bidders report *(Reports > Data Exchange)*
- Package Status report, which shows which donations belong in which packages *(Reports > Activity Reports)*

Select and Complete Plan Customers

_____ Set up computers with monitors (computer monitor, television, projection system) for displaying the Showcase slideshow (*Admin > Event Settings > Showcase Displays*).

Complete Plan Customers

_____ Print bid/purchase sheets for ePrebidding packages that have recently closed.

_____ Place out the laminated *eBidder Tips Sheets* that you prepared earlier.

_____ Re-invite bidders who have not yet set up an account.

- *Patrons > Bidders > Manage.* Filter the list by: "Invited" = yes, and "Account" = none. Add check mark to all records on page 1 of the filtered list. Choose "Invite Selected" from the "Actions on Bidders" menu. Repeat for each page of the filtered list.
- *Patrons > Bidders > Manage* Actions on Bidders menu > Re-invite Expired.

_____ Invite bidders who have not yet set up an account (*Patrons > Bidders > Manage select "Invite All (who are not yet invited)" from Actions on Bidders).*

_____ On the *Admin > Event Settings > Bidding Stations* page, check all three boxes. Save.

_____ On the *Admin > Event Settings > Event Details* page, check the box labeled "Automatically activate eBidders." Save.

_____ Only if you want to restrict registration to only invited guests, set "Access to Event Website is" to "Private" (*Admin > Event Settings > Event Details*).

_____ Set up Shared Bidding Stations around the venue and at Check-In to assist with check-in (see Check In Guide available in Help Center).

During the Event

_____ Check in guests and capture their credit card information *(@Event > Check In Bidders).*

_____ Record silent and live auction traditional winning bids, fund-a-need donations, monetary donations, and other purchases at the event *(@Event > Record Sales).*

For Complete Plan Customers

_____ Monitor eBidding packages for those that haven't received bids *(Reports > Activity Reports > Bidding Activity by Package)*. Have your auctioneer or emcee announce some of these packages, just like (s)he would during a traditional silent auction.

_____ Extend closing times of eBidding packages that haven't received any bids, or reopen packages for eBidding if they closed without any bids.

_____ Encourage bidders to use the filters in the bidding interface to view packages with the fewest bids.

_____ Remind bidders that they can view everything they've placed bids on by visiting their "Favorites."

Near the End of the Event

_____ Print invoices for bidders *(@Event > Create Invoices > All Invoices).* Each invoice shows what the bidder has won, what he has purchased, and how much money he owes. If the bidder's credit card is on file, **Card on File** will appear in the upper left corner of the invoice.

_____ Staple each invoice to a shopping bag and have your volunteers fill the bags with what each bidder has won.

_____ If the invoice on the bag indicates that a credit card is on file, then hand the guest his bag. In this case, the guest can leave without stopping to check out.

_____ For those guests who didn't provide credit card information at check-in and/or would like to pay via cash or check, check them out face-to-face *(@Event > Check Out Bidders).*

For Complete Plan Customers

_____ Decide whether you want to conduct a post-event online auction 'fire sale.' If so, use the expanded eCatalog window for up to 45 days after your event, or purchase additional extensions in two-week increments for access beyong that *(Admin > Purchase Services).*

In the Month Following Your Event Date

_____ Record any post-event sales.

_____ Check out guests and collect payments for those who still owe money *(Reports > Accounting Reports > Payments Due).*

_____ Mark all donations to delivery status = 'received.' Only donations marked as 'received' will appear on donor receipts.

_____ Customize the receipt language (*Patrons > Communications > Receipts*).

_____ Email receipts to all patrons (*Patrons > Everyone > Manage -> Actions on patrons > Send receipt to all*).

_____ If you also would like to email and/or snail mail thank you notes to donors and bidders, customize the *Donor Thanks* and *Bidder Thanks* (*Patrons > Communications > Donor Thanks* and *Patrons > Communications > Bidder Thanks*). Note that you can choose to include, or not, receipt information in the donor and bidder thank you correspondences.

- To email thank you notes to donors, go to *Patrons > Donors > Manage ✏ Actions on donors.*
- To email thank you notes to bidders, go to *Patrons > Bidders > Manage ✏ Actions on bidders*.
- To download and print thank you notes to donors, go to *Patrons > Printed Materials > Donor Materials > Donor Thank You Letters.*
- To download and print thank you notes to bidders, go to *Patrons > Printed Materials > Bidder Materials > Bidder Thank You Letters*).

_____ Transfer the Admin role to your organization's *Persistent Staff Member Account*. Each year, your organization will purchase from this account, and future committees can look back to past years' event data. After moving on to your next event, you can transfer the Admin role for the new event to any registered staff member. Then once that event is over, you will transfer the Admin role back to the *Persistent* account.

Congratulations! Job well done!

We look forward to working with you on your next fundraiser auction.

If your next event will take place during the same calendar year -- January 1 thru December 31 -- as the event you just finished, contact the ReadySetAuction support team for a coupon code.

