ReadySetAuction™
Control Center User Guide

Welcome!

Thank you for choosing ReadySetAuction™ for your charity auction event.

With ReadySetAuction*,* you can prepare for and conduct:

- a traditional auction using silent auction bid sheets and a live auctioneer
- an electronic auction where your supporters use their own smartphones, tablets and other mobile devices to browse your auction catalog, place bids, buy fixed-price items, and make donations to Fund-A-Need special appeals
- a combination auction with electronic (mobile) and traditional bidding

The purpose of this guide is to get you up and running quickly. It provides general instructions for using your ReadySetAuction **Control Center** along with specific steps for tracking donors, adding donations, creating packages, managing bidders (guests), conducting and monitoring your auction, and wrapping things up.

This guide includes features available in our *Complete* plan service level. If your organization has purchased the *Basics*, *Essentials* or *Select* plan, then some features discussed here will not be available.

For more resources:

1. Visit our **Help Center,** which you can access by clicking the **Help** link found at the top of your Control Center.
2. Click on the help icons — ? — that appear throughout the Control Center.

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1. Getting To Know The Control Center

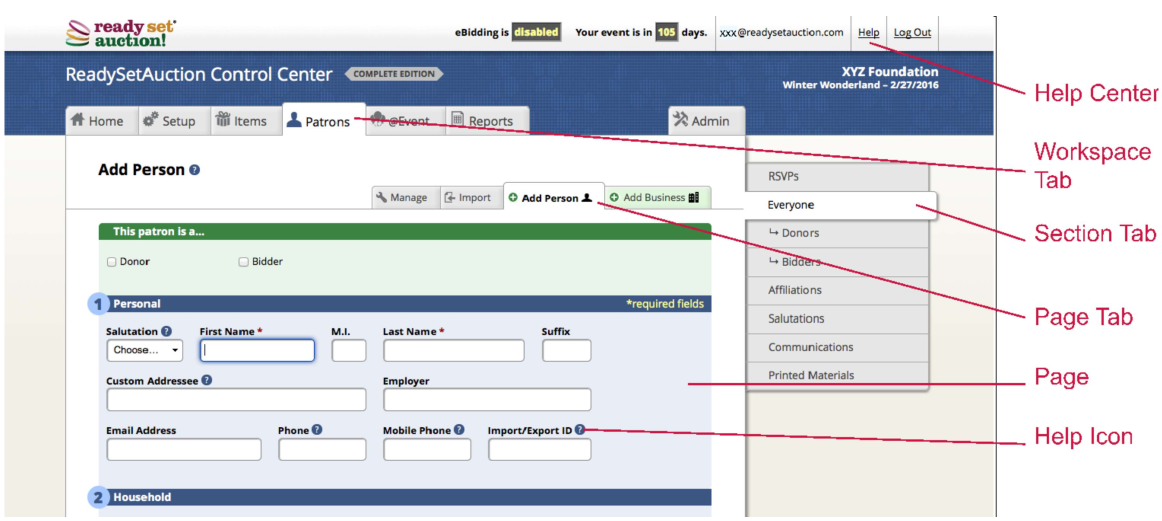
Navigation

The ReadySetAuction **Control Center** is the web application you'll be using to prepare for, monitor, and close out your auction. Because ReadySetAuction runs in the cloud, there's no software to install, and you can always access it from anywhere you can connect to the Internet.

The application consists of **Pages** that are logically organized by function using a hierarchy of Workspace Tabs, Section Tabs, and Page Tabs or Page Icons.

> The **Workspace Tabs** are the tabs with icons that appear across the top of your Control Center. They group the application's pages into broad categories of functionality called **Workspaces**.
>
> Workspaces are divided into **Sections**. When you click on a Workspace Tab, its **Section Tabs** appear vertically in the right column of your Control Center. These are the second-level tabs.
>
> Some Sections consist of just a single Page. Other Sections contain multiple pages that are accessed by a third level of tabs — the **Page Tabs** — or, in the case of paginated lists, by **Page Icons**.

The convention used in this guide to define a page's location is: *Workspace > Section > Page*. So, for example, as shown in the illustration below, to add a Patron, you would go to *Patrons > Everyone > Add Person.*



Workspace Tabs

Every registered auction staff member can see six Workspace Tabs. If you are the ReadySetAuction Administrator of your Control Center, you will see a seventh, the Admin Workspace.

1. **Home** — The *Home Workspace* consists of a dashboard that provides at-a-glance summaries of your progress; a preview area where you can see what your eCatalog will look like to bidders; the latest news from ReadySetAuction; and if you're a staff member using ReadySetAuction for more than one organization, a switch for toggling between your accounts.
2. **Setup** — In the *Setup Workspace,* you and your auction team can define your goals and package defaults, as well as customize your sponsorship and admission ticket levels, meal choices, tables, venue location, auction policies, the appearance of your Event Website, and the appearance of your Event Showcase.
3. **Items** — The *Items Workspace* is where you add, import, update and manage your donations and packages. Here you can also set up categories for organizing your donations and packages. These categories appear in your eCatalog and on printed auction materials, which you can print from this tab.
4. **Patrons** — In the *Patrons Workspace*, you can: add one at a time, import in bulk, update and manage your patrons (the donors and bidders/guests associated with your event); track donors through the procurement process; email invitations to bidders; record RSVPs -- with and without ticket sales; and email and print receipts, thank yous, labels and other materials. Your Administrator can also merge duplicate patron records here.
5. **@Event** — Use the *@Event Workspace* during your event to check in bidders, record traditional auction sales (e.g., items auctioned off by bid sheet or auctioneer, fund-a-need paddle raises, and drink tickets), place proxy bids during electronic bidding, look up who won packages and which packages were won by whom, generate printed invoices, check out bidders, and generate receipts.
6. **Reports** — Visit the *Reports Workspace* to view, print, and export reports to .CSV-formatted files. ReadySetAuction's wide array of reports gives you full insight into donation, package, donor, bidder, sales, payment data and more.
7. **Admin** — The *Admin Workspace* is available only to your Administrator and is where (s)he lays the groundwork for your use of ReadySetAuction*,* including who can access your Control Center, how bidders can register to bid, what types of payment forms your organization will accept, instructions for setting up bidding stations and the showcase (slideshow), etc. The Administrator is also the only committee member who can purchase services, like upgrades and extensions.

Help

Although we've designed ReadySetAuction to be intuitive and easy-to-use, we are aware that you may still have questions. With this in mind, we have provided both inline help, in the form of **Tool Tips** and a **Help Center.** Can't find an answer? Our friendly and knowledgeable support team is here to help.

Tool Tips: Throughout the Control Center you will find **help icons**. Click a help icon and a tool tip will pop up containing an explanation of the adjacent form field, or terminology.

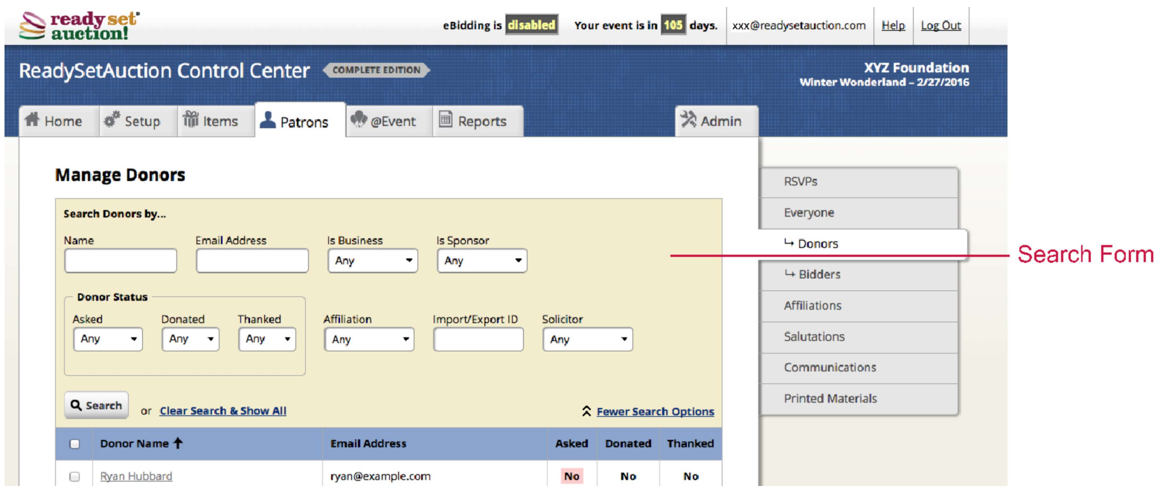
Help Center: To access the Help Center, click the **Help** link that is always present in the top right corner of the Control Center. Here you can search for answers to frequently asked questions (FAQs).

Support Team: You can contact our support team by clicking the bright orange question mark that is always present in the bottom right corner of the Control Center or from the Help Center by clicking its "Contact Support" tab. By way of our web-based technical support system, we provide unlimited, technical support free of charge to all registered users of your Control Center. We do not provide phone-based support. Our support team is available Monday thru Friday, 8:00AM to 6:00PM Pacific Time, excluding holidays. They strive to answer support questions promptly, thoroughly, and courteously, usually within an hour or two. We promise 24-hour turn-around on business days. Please keep in mind that our support team is made of up people just like you, so please be courteous.

Search Form

You will find a **Search Form** at the top of the Donations, Packages, Everyone, Bidders and Donors Lists.

Use the search form to narrow the list based on criteria you choose.



Tip: *To save screen space, you may collapse and expand the search form using the "Fewer Search Options" and "More Search Options" toggle links. ReadySetAuction will automatically remember your preference the next time you return to that list.*

To search a list: Enter a word or phrase into a field in the search form, and/or choose criteria from a pull-down menu. Click the **Search** button.

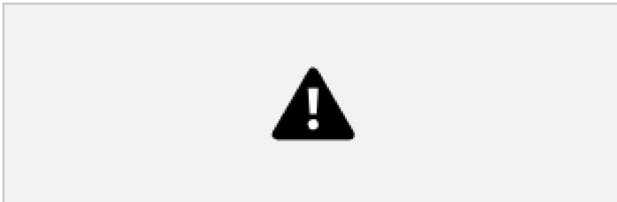
Tip*: If you select multiple search criteria, only records matching ALL selected criteria will be shown.*

To clear the search form: Click the **Clear Search & Show All** link.

Tip: *Be sure to clear the search form when you would like to view the full list again.*

Actions Menu

You will find an **Actions Menu** at the bottom of the Packages, Everyone, Bidders and Donors Lists.



From the menu, choose an action to perform on the records that you've selected.

To perform an action:

1. Select the record or records by checking the checkbox in the leftmost column for that record. If a padlock appears in place of a checkbox, then that record is locked from bulk actions.
2. Choose an action from the pull-down menu.
3. Click the **Confirm** button.

Tip*: To perform an action on all records* ***on a page****, check the checkbox in the table heading.*

VERY IMPORTANT: *Checking the box in the table header adds check marks only to the records on the page that is displayed.* ***If your list contains multiple pages and the action you're taking refers to 'selected' records only, then you must perform the action on each page of the list.***

2. The Admin Workspace

Only your Control Center's Administrator can perform certain tasks. These tasks, which are found in the *Admin Workspace*, include the ability to enter information about your organization as well as details for this specific auction, manage the auction staff's access to the Control Center, establish tax rates (if applicable to your auction), and purchase additional ReadySetAuction services.

Admin > Organization Settings

The information that you enter here about your organization will be used in your communications with bidders, on invoices, and in receipts. This section contains the following three pages:

1. *Admin > Organization Settings > Organization Details:*
    - Provide the address, phone number, and tax ID number of your organization.
    - Provide the email address by which visitors to your Event Website can contact your organization about your event.
2. *Admin > Organization Settings > PayPal Account:* (Select and Complete plans only)
    - Link your PayPal Business account to your ReadySetAuction account so that 1) visitors to your online Event Website can purchase tickets and sponsorships and make monetary gifts/donations prior to your event, and 2) winners can self-pay by PayPal or credit card. **Important:** Linking your PayPal account does **not** support the capture of credit card information prior to the event or at event check-in. And it does not support checkout via the @Event Workspace by your auction committee.
3. *Admin > Organization Settings > Merchant Account:*
    - Set up a merchant account and link it to your ReadySetAuction account so that 1) visitors to your online Event Website can purchase tickets and sponsorships and make monetary gifts/donations prior to your event, 2) your auction committee can capture credit cards and run transactions **at check-in and/or checkout via the @Event Workspace**, and 3) winners can self-pay by credit card.
    - Select your provider from the menu. If your provider does not appear, contact our sales team for more information.

Admin > Event Settings

This section contains the following five pages:

1. *Admin > Event Settings > Event Details:*

   - Set the date and times of your physical event.
   - Confirm that your time zone is set correctly.
   - Take note of your **Access Code**, which was chosen at the time of purchase.
   - Establish your **Admin Auth Code**. Provide this to trusted cashiers so they can remove purchases from invoices at checkout. If left blank, only the Administrator may do so.
   - Complete the Event Website Address by adding the name of this event, for example, auction2016. Once you save this page, your Auction URL cannot be changed.
   - Enable your Event Website.
   - Enable the various features when you're ready to display your items online, sell tickets/sponsorships online, accept cash donations online, and allow procurement information to be submitted electronically via the online procurement form.

     Note: *Your eCatalog will be viewable to online visitors only during your* **eCatalog Access Period** *as defined on your* Home > Dashboard *page. Need to extend it? Visit the* Admin > Purchase Services *page.*

   - Decide whether you would like packages that have been won to be hidden in the eCatalog and the Showcase.
   - Decide whether bidders will be automatically activated when they click the **Bid Now** or **Buy Now** button for the first time in the online catalog. Each activation will use one of your activation credits. **Important:** If you disable this option, bidders won't be able to bid on your auction until you manually activate their accounts. **Important:** Changing this setting will not affect the activation status of bidders who are already activated.
   - Determine whether access to your Event Website is:

     Public: Anybody can access your Event Website.

Private: Only those bidders who you explicitly invite can create an account and then access your Event Website.

By Request: Only those bidders who you explicitly invite can create an account and then access your Event Website. Others can request an invitation.

2. *Admin > Event Settings > Payment Methods:*
   - Choose the **forms of payment** that you'll accept for ticket and sponsorship sales, cash donations, and winners' payments.

     IMPORTANT*: If you check the generic "Credit Card" option on this page, then you and your auction staff must run credit card transactions on your own via a separate processing system, one not integrated with ReadySetAuction. ReadySetAuction will not prompt for credit card information at check-in or checkout.*

     In order for ReadySetAuction to prompt your auction staff to enter credit card information at check-in and checkout, you must set up a merchant account with a ReadySetAuction partner provider and enter its gateway details into the Admin > Organization Settings > Merchant Account *page.*

   - If you have integrated your merchant account with your ReadySetAuction account *(Admin > Organization Settings > Merchant Account)*, the specific credit cards – VISA, MasterCard, American Express and Discover – will be presented as options. **Important:** Check off only those specific credit cards you have contracted with your merchant account provider to accept.
   - If you have integrated your PayPal account with your ReadySetAuction account *(Admin > Organization Settings > PayPal Account)*, then PayPal will be presented as an option.
   - Will you allow bidders to self-checkout from their own smartphones, tablets and computers? If so, then enable this feature.

     Hint: *If you prefer for bidders to wait until the end of your event to check out, wait until then to enable the self-checkout feature.*

3. *Admin > Event Settings > Patron Accounts:*

- Add check marks if you'll require bidders to provide their full addresses and/or phone numbers when they sign up for their accounts.
- Choose whether to ask bidders if they plan to attend or will bid remotely. If attending, will they require a bidding device? This information appears in the *Reports > Activity Reports > Bidder Registration* report to help you determine the number of *Bidding Stations*, proxy bidders and/or loaner devices you will need to provide at your event.
- Choose whether to not allow anonymous electronic bidding, require that all bidders appear as anonymous during electronic bidding, or make it the bidder's choice whether (s)he appears as anonymous during electronic bidding. **Note:** If a bidder is bidding anonymously, other electronic bidders will not know who (s)he is. You and your staff, however, will continue to see the bidder's name in the Control Center.

4. *Admin > Event Settings > Bidding Stations:*
   - Find instructions here for setting up **Bidding Stations** at your event and for disabling them following your event. A Bidding Station can be a desktop computer, a laptop, or even a tablet — like an iPad — that registered electronic bidders can pass around. Bidders at your event who do not have their own ReadySetAuction-compatible mobile device can bid instead via Bidding Stations that you provide.
   - Select whether you will allow guests to register to bid at Bidding Stations, and if so, whether they must first check in before doing so.

How Bidders Without Access to Email Can Use Bidding Stations To Register For eBidding

Whether an unregistered bidder who cannot retrieve his email can register at a Bidding Station will depend on the settings you choose on the *Admin > Event Settings > Bidding Stations* page.

***Option 1:* Open Registration at Bidding Stations**
Any unregistered guest can sign up for an account at a Bidding Station by clicking 'Sign Up' in the upper left corner of a Bidding Station.
- On the *Admin > Auction Settings > Bidding Stations* page, check "Enable Bidding Stations" and "Allow registration at bidding stations."

***Option 2:* Controlled Registration at Bidding Stations**
Only guests who have already checked in — that is, those with a status

of *Checked In* on the *Bidders > Manage Bidders* list — can register to bid at a Bidding Station by clicking 'Sign Up' in the upper left corner of a Shared Bidding Station.

- In order to become a registered bidder, the guest will be prompted to enter his Bidder # (which a cashier must provide at to him at Check-in) and his email address as it was entered during Check-in.
- On the *Admin > Auction Settings > Bidding Stations* page, check "Enable Bidding Stations", "Allow registration at bidding stations" and "Only checked in bidders may register at bidding stations."

***** VERY IMPORTANT**: *** Guests should never attempt to retrieve email at a Bidding Station. Links in the email will not work because the computer is set up in Bidding Station mode.

5. *Admin > Event Settings > Showcase Displays:*
    - Enable the Showcase feature here.
    - Find instructions here for setting up **Showcase Displays (slideshows)** throughout your event venue. All that's needed to set up your slideshow is a computer with access to the Internet and a large monitor or projection equipment.
    - Additional Showcase controls can be found on the *Setup > Event Showcase* page.

Admin > Event Staff

Your event staff includes those colleagues who will help you prepare for your auction. Some may require access to the Control Center. Your **Staff List** is located on the *Admin > Event Staff* page.

Note: *Only those people who appear on your staff list can later be associated as Solicitors of donors.*

It is a violation of our Terms of Service for staff members to share login credentials. You must invite each staff member individually so that (s)he can become a registered user with her/his own login and password. If an account is being shared, the users of that account will bump each other out.

Don't forget: Staff members will need your **Access Code**, *which you can locate on the* Admin > Event Settings > Event Details *page, in order to register successfully.*

To add a staff member:

- Click the **Add Staff Member** button at the top of the Staff List.
- Complete the information, making sure to set the **Staff Access Level** field to either 'view' or 'modify.' You will not be able to send an invitation to a staff member with an access level of 'none.'
- If a staff member is simply a Solicitor, then keep his/her access level as 'none.'
- Click the **Add Staff Member** button near the bottom of the Staff List.

To invite* one or more staff members:

1. View the Staff List.
2. Check the box of each staff member you would like to invite.
3. Choose "Invite Selected" from the **Actions on staff members** menu at the bottom of the Staff List.
4. Click the **Confirm** button.
5. Review the preview of the email.
6. Click the **Send** button.

* You can also use the **Actions on staff members** menu to **delete** or **change access** levels of one or more staff members at a time.

To view the details of and/or to update a staff member record:

Due to space constraints, not all information about a staff member can be displayed in the Staff List.

1. View the Staff List
2. Click the staff member's name.
3. If you make any changes, be sure to click the **Update Staff Member** button.

Admin > Tax Rates

Some states require that nonprofit organizations collect sales tax on the selling price of certain items at an auction. For state-specific sales tax regulations, please check with a certified accountant or with your state's Department of Revenue (or an equivalent state department).

If your state requires that your organization collect sales tax, set up the tax rate — or multiple tax rates, if applicable — in this section. Then, when you create or update an auction package, you will be able to assign it a tax rate from a menu of choices.

Admin > Purchase Services

Annual Subscription

In order to get started with *ReadySetAuction*, you must first select a plan and pay the Annual Subscription fee. Your subscription is valid for twelve months, and you can use ReadySetAuction for unlimited non-concurrent auction events throughout that year. Once you have subscribed, you will have access to the *ReadySetAuction* Control Center to prepare for your auction events.

If your organization has purchased the Select or Complete plan, you can enable your Event Website and online procurement form as soon as you've paid the Annual Subscription fee. You can begin to sell tickets and sponsorships online and collect cash donations online as soon as you've established a ReadySetAuction-compatible merchant account or PayPal account. The eCatalog in your Event Website will be viewable during the eCatalog Access Period, which is 45 days before and 45 days after your event.

If your organization has purchased the Complete plan, items can open and close for electronic bidding on their own schedules throughout this eCatalog Access Period.

Included in the Annual Subscription fee is email/web-based technical support between 9:00 AM and 6:00 PM Eastern Standard Time on business days for all registered staff members. Phone support is not included but can be purchased for an additional fee.

Pre-Event eCatalog Extension (Select and Complete plans)

You can purchase one or more contiguous, 2-week extensions to extend the viewing window prior to your eCatalog Access Period, and in the case of the Complete plan, during which items can be bid on and purchased.

Post-Event eCatalog Extension (Complete plan)

You can purchase one or more contiguous, 2-week post-event extensions to extend your eCatalog Access Period – and in the case of the Complete plan, extend eBidding.

IMPORTANT: *The Post-Event eCatalog Extension must be purchased before your current eCatalog Access Period has ended.*

Bidder Activation Credits (Complete plan)

In order to bid electronically, a bidder must set up an account and then become 'activated.' Activation can happen in one of two ways:

1) If you account Administrator has enabled 'auto-activation' (*Admin > Event Settings > Event Details*), then, after setting up her/his account, each bidder is activated immediately when (s)he clicks on her/his first 'Bid Now' or 'Buy Now' button in the eCatalog.

2) If you want finer control over who can bid electronically, your Administrator can require that an auction staff member manually activate each bidder (*Patrons > Bidders > Manage → 'Actions on bidders' menu*).

One-Hour Training Session

You can purchase training for your auction team. Training is conducted via private webinar.

Post-Event Access Extension

You can purchase one or more contiguous post-event access extensions to extend beyond four weeks the period during which data in your Control Center can be modified.

IMPORTANT: *Post-Event Access Extension doesn't provide an extension to the eCatalog Access Period; and the Post-Event Access Extension must be purchased before access becomes view-only.*

Text Messaging (Complete Plan)

The Text Messaging feature provides unlimited outbid notifications to your bidders' mobile phones via text message. In addition, you may text eBidder registration links to your guests' mobile phones during event check-in. Of course, unlimited emailed registration links, emailed outbid notifications, the outbid badge and outbid icons are included too.

3. The Home Workspace

The *Home Workspace* serves as "mission control." It provides a progress overview with quick links to important FAQs and common actions, a preview of your Event Website, the ability to switch to another account if you are associated with more than one organization using ReadySetAuction, and news from ReadySetAuction.

Home > Dashboard

The **Getting Started** help box offers quick references to helpful information about how to use *ReadySetAuction*, including a link to this guide and links to answers to FAQs in the Help Center. Once you're a pro, collapse the box by un-checking **Show 'Getting Started' Help,** and it will be out of your way.

Depending on the plan your organization purchased, up to eight **widgets** provide helpful information at-a-glance; shortcuts to common tasks; and quick access to actions, statistics, and reports.

1. **Your Progress Widget:** How are you progressing toward your fundraising and seating goals? How many donations are not yet packaged? Refer to this widget for immediate feedback.
2. **Credits Widget:** Offers a summary of the number of activated eBidders and quick access for Administrators to deactivate an eBidder if needed.
3. **Event Website Widget:** Shows the eCatalog Access Period for your event. The **eCatalog Access Period** is the time span during which your eCatalog is viewable (and in the case of the Complete plan, biddable) on your Event Website. If you are the Administrator, you'll find a shortcut here for purchasing extensions.
4. **Donations Widget:** Provides important statistics about the types of donations you've collected so far and their delivery statuses. Click a statistic for details about your donations.
5. **Packages Widget:** Provides pertinent information about your packages. Click a statistic for details about your packages.
6. **Donors Widget:** How are your procurement efforts proceeding? Check this widget for quick answers. Click a statistic for details associated with donors.
7. **Bidders Widget:** Provides pertinent information about your bidders, including how many have set up accounts. Click a statistic for details associated with bidders.

8. **Gross Proceeds:** Summarizes how much you've made on your event from various income sources like ticket sales, high bids, and fixed-price purchases.

Home > Preview Event Website

In the *Preview Event Website* section, you will see an approximation of how your ReadySetAuction-hosted event website will appear on both mobile devices and desktop computers.

Use *Preview Event Website* to view various features in your Event Website — like online ticket and sponsorship sales — before your Administrator has enabled them in your live website. ***Preview Event Website*** **is also especially useful for viewing your eCatalog before the eCatalog Access Period has begun.**

Dashboard > Switch Event

Working on more than one event? If so, use *Switch Event* to switch from one account's Control Center to another's.

Dashboard > News & Tips

We've made it easy for you to stay up-to-date on the latest news, special offers, and tips from ReadySetAuction. Simply refer to the *News & Tips* section.

4. The Setup Workspace

The *Setup Workspace* is where you lay the groundwork for your auction. Information you enter here will be used in other Control Center workspaces, on your Event Website (i.e. your auction's online presence) and for Showcase (i.e. your slideshow during the event).

Setup > Goals

Enter the amount you intend to raise from this event and the number of seats you hope to sell. These goals will be tracked on your *Home > Dashboard* page. The **Gross Proceeds** goal will appear in the Showcase if you've enabled that feature on the *Setup > Event Showcase* page. The **Seats Sold** goal won't limit the number of tickets or sponsorships that can be sold.

Setup > Defaults

Settings on this page allow you to choose the default information that is pre-filled when entering *new packages* into the system. You will always be able to override the pre-filled data on a per-package basis if desired. Changing a default parameter here after a package has been created will *not* update that package's settings.

Setup > Sponsorship Levels

Sponsors are donors who provide finances to help carry out your event. In exchange for their donations, sponsors often receive special recognition prior to and/or during your event.

With *ReadySetAuction*, you can track at what levels sponsors have donated by entering their donations into *Items > Donations > Add Donation*. But first, you must define the levels at which people can donate.

Here are some examples of Sponsorship Levels:

- Premier Sponsor. Includes 10 seats and signage at the event. Price $5,000
- Table Sponsor. Includes 10 seats. Price $2,500
- ½ Page Advertisement. Includes 0 seats. Price $500

To set up custom sponsorship level types:

1. Go to *Setup > Sponsorship Levels > Add Sponsorship Level*.
2. Enter a **Name** and **Description** for the Sponsorship Level.

3. Does the Sponsorship Level include admission to the event? If so, for how many people? Enter this number into the **Seats Included** field.
4. Select the **Pricing Method** of this sponsorship. If it is *Fixed*, then enter a **Price**. If it's a *Range*, then enter the minimum and maximum prices in the range.
5. Enter its **Fair Value**. Any amount that the sponsor pays over **Fair Value** may be tax deductible.
6. If there is a limit to the number of this type of sponsorship available, then select *Limited* for the **Quantity for Sale** and enter a quantity. Otherwise, select *Unlimited*.
7. Choose a **Sale Method**, that is, how this sponsorship will be sold: Online (purchased by the donor him/herself via your Event Website) and/or Manual (recorded by a staff member via the Control Center).

Setup > Admission Tickets

An *Admission Ticket* admits one person to your event. If you have a 'ticket' that will admit more than one person — like a 'couple' ticket or a 'table' ticket — then you must set that up as a **Sponsorship Level.**

Here are some examples of Admission Tickets:

- General Admission. Admits 1. Price $100, Fair Value $30
- Early Bird Admission. Admits 1. Price $75, Fair Value $30
- Teacher Admission. Admits 1. Price $25, Fair Value $30
- Complimentary Admission. Admits 1. Price $0, Fair Value $30

To set up admission ticket types:

1. Go to *Setup > Admission Tickets > Add Admission Ticket Category.*
2. Select the number of seats this ticket will admit. (If it's more than 1, you will be directed to set up a Sponsorship Level instead.)
3. Enter a **Name** and **Description** for the admission ticket.
4. Enter the **Price** of this admission ticket.
5. Enter its **Fair Value**.
6. If there is a limited number of this admission ticket available for sale, then select *Limited* for the **Quantity for Sale** and enter a quantity. Otherwise, select *Unlimited*.
7. Choose a **Sale Method**, that is, how this admission ticket will be sold: Online (purchased by the donor him/herself via your Event Website) and/or Manual (recorded by a staff member via the Control Center).

Note: *$0 Admission tickets cannot be sold online. Only admission tickets with a price of $1 or greater can be sold online via your Event Website.*

Setup > Meal Choices

Add the names of the meal selections available for your event and their descriptions. These will appear in a pull-down menu for bidders who purchase their tickets online as well as for your committee members when they manually enter an RSVP into *Patrons > RSVPs* and *Patrons > Bidders > Manage > Update Bidder > Bidder Info*.

Setup > Tables

Add the names of the tables, table numbers and number of seats available for each table at your event. As your committee members record RSVPs, they can assign bidders to tables. They can also reassign bidders to different tables from within each bidder's RSVP tab and even during event check-in.

Hint: *If you don't know which table will eventually be assigned which table #, then create your tables starting with #101. That will make it easier to later reassign table numbers starting at #1.*

Setup > Venue

Enter the name and address of where your event is taking place. This information will appear on your Event Website.

IMPORTANT: *If you limit the **Seating Capacity**, the system will disable the sale of tickets and/or sponsorships – from both within the Control Center and online – if it will result in over-selling the capacity.*

Setup > Policies

Payment Policy: The information you enter here will appear at the bottom of printed invoices and during self-checkout. Describe how bidders can submit payments if you're not offering self-checkout or if the bidder prefers to check out in person.

Refund Policy: Bidders can view your refund policy on your Event Website.

Shipping Policy: Bidders can view your shipping policy on your Event Website.

Setup > Event Website

Your Event Website is your fundraiser's public-facing online hub. Visitors to your Event Website can purchase tickets and sponsorships, donate money and items, view the auction catalog, and — if your organization has purchased the Complete plan — bid online.

To customize the appearance of your Event Website:

- Enter the **Banner Image Web Address**, i.e. the URL of the image you would like to appear at the top of your Event Website.
- Compose the **Intro Message** and **Closing Message** that will appear on your Event Website. You may change this text as often as you like. You can use these fields also to add the logos or advertisements of your sponsors. Please see the Help Center for more details.
- Select a **Theme -** a background color for your Event Website.
- Including any **Special Instructions** you want to convey to people while they are buying tickets and sponsorships online or making cash contributions online.
- Choose a **Spotlight Category** from among the categories you set up on the *Items > Categories* page. This category will be promoted with a dedicated button on your eCatalog's home (tiles) page.

Note: *Prior to enabling your Event Website and making it viewable online to the public, you can preview it on the* Home > Preview Event Website *page of your Control Center.*

Setup > Event Showcase

The Showcase feature lets you display a slideshow of your items and sponsors on monitors placed throughout your event venue. All that's needed to set up your slideshow is a computer with access to the Internet and a large monitor or projection equipment.

On this page, you will customize the appearance of your slideshow by selecting its theme, the transition style between slides, and the duration of each slide.

You can also determine which types of slides will appear in your slideshow: the progress slide (gross proceeds), package slides and sponsor slides.

At any time during your event, you can make updates to this page. So, for example, during checkout, you might choose to show only the progress bar and your sponsors.

5. The Items Workspace

The *Items Workspace* is where you track donors and donations, create packages (a.k.a. baskets), and print materials for your event, including bid sheets for a traditional silent auction, winner cards, display sheets, a catalog, gift certificates and labels.

Donations are the gifts that are given to your cause: items, services, cash, and sponsorships. Whereas most items and services will be auctioned off, some will be used to help carry out your event. We call these **In-kind Gifts** of items and services.

Think of the donation as the *raw material* used for tracking which donors donated what and at what values. ReadySetAuction uses the donation information to generate donor receipts and gift certificates.

Information you enter about the donation does not appear directly in the printed catalog or eCatalog. Instead, you will associate a donation or multiple donations with a package. **Packages** are featured in your printed and electronic materials and get auctioned off, sold at fixed-prices, and raffled off.

Items > Donations

In *Items > Donations*, you can record details about the donations you receive.

A donation can be:

- An **Item** or **Service** that you plan to auction off or sell.
- An **In-kind Gift,** which is a donation of an item or a service that will be used to help carry out your event.
- A monetary gift/contribution, a.k.a a **Cash** donation.
- A **Sponsorship** that has been pre-defined by your auction team.

Your **Donation List**, located on the *Items > Donations > Manage* page, provides you with an at-a-glance summary of important attributes of each donation.

Use the search form, found at the top of the Donation List, to narrow the list of donations based on the criteria you choose or enter. Be sure to clear the search form using the **Clear Search & Show All** link when you would like to view the full list again.

Tip: *Hover your mouse cursor over the icons in the* ***Kind*** *and* ***Status*** *columns of the Donation List for more information about a donation.*

In the *Donations Section* you can manage (view, find, edit/update and delete), import and add donations.

To view, find, edit/update and delete donations

1. G**o to** *Items > Donations > Manage.* This page consists of a list of all the donations you and your team have entered, including: items, services, cash donations, sponsorships, in-kind gifts and consignment items
2. **Find:** Use the search bar to find a donation.
3. **Edit/Update:** Click a donation's Name to make changes to it.
4. **Delete:** Select (check off) a donation and use the "Delete Selected" button at the bottom of the list.

To import donations

For quick entry, you can import your donation information into *ReadySetAuction* from a comma-separated value (.CSV) file.

For complete and detailed instructions on how to prepare the .CSV file, please refer to the ***Donation Import Guidelines*** found in the Help Center.

1. Go to *Items > Donations > Import*
2. Click the **Browse** button on the *Items > Donations > Import* page.
3. Locate the .CSV file on your computer and select it.
4. Does your file contain a fixed row of column titles, a.k.a. a header row? If so, check the box.
5. Click the **Upload File** button.
6. Review the sample data.
7. Select the appropriate label for each column. If your file contains more than a few columns, you will need to use the horizontal scroll bar located at the bottom of the sample data.
8. Click the **Import Donations** button.

To add donated items and services

1. Go to *Items > Donations > Add Donation*. (You will also find shortcuts for adding a donation in the *Dashboard's* "Getting Started" help box and Donations widget.)
2. Select the **Item or Service** button.
3. Optionally associate a donor or multiple donors to the donation by selecting an existing donor from the pull-down menu, or by adding a new donor using the **Add New Donor** link.

Note: *If you add more than one donor to a donation, then each donor's receipt will reflect an equal percentage of that donation. So, for example, if you add four donors to a donation, each donor's receipt will reflect his donation amount as 25% of the Fair Market Value.*

Hint: *If a couple has donated the item/service, you can assign just one member of the couple as the donor and then update that donor's* ***Donor Acknowledged As…*** *field (Patrons > Donors > Manage → click on donor's name > Donor Info).*

4. Fill in the *Details* about this donation **- Donation Name, Inventory Tag, Delivery Status** and **Comments**. Click on the help ("?" icons) for explanations of the fields.
5. For **Donation Kind,** select *Auction Item/Service*
6. Enter the **Fair Market Value** of the donation.
7. Fill in the **Qty** (Quantity) field with the number that has been donated.
8. Is this donation on consignment? If so, check the **Consignment Item** box. A consignment item is one that the donor expects to be paid for if the item sells at the auction. Therefore, you must set the starting bid at least equal to the consignment price.
9. Check off one or more **Categories** for this donation. To create more categories, go to *Items > Categories*. Categories help you sort and find donations while making Packages.
10. If a **Gift Certificate** is needed, select whether the donor will provide it or whether you would like the system to generate it. If you choose that the system must generate it, then complete the **Gift Certificate Title, Gift Certificate Description** and **Expiration Date** fields.

Note: *All information that you want to convey to the winner on the gift certificate – including donor's name and contact information – must be included in the* **Gift Certificate Description** *field.*

11. Click the **Add Donation** button.
12. If this donation will be auctioned off alone — i.e., not combined with other donations — then you can quickly make it into a package by clicking the **Package this Donation** button. Please refer to the *Items > Packages* section of this guide for additional instructions for how to make a package.

To add an in-kind gift

Note: *An In-kind gift does NOT get auctioned off. It is an item or services that your committee will use to carry out the event, like the use of a truck, catering services or cases of water that you'll serve to your guests.*

1. Follow steps 1 thru 4 above for adding an item or service donation.
2. For **Donation Kind,** select *In-kind Gift*
3. Enter this in-kind gift's **Fair Market Value**
4. Click the **Add Donation** button

To add a miscellaneous cash contribution

1. Go to *Items > Donations > Add Donation*. (You will also find shortcuts for adding a donation in the *Dashboard's* "Getting Started" help box and Donations widget.)
2. Select the **Cash or Sponsorship** button
3. Add a *Donor* to this donation by selecting an existing donor from the pull-down menu, by using the **Find A Donor** link, or by adding a new donor using the **Add New Donor** link.

> ***Note:*** *A cash or sponsorship donation can have just a single donor associated with it. If two donors are splitting the cost of a sponsorship, then create a "half sponsorship" under* Setup > Sponsorship Levels *and record each donation separately.*

4. Select *Miscellaneous Cash* as the **Donation Kind.**
5. Enter the **Amount** of the donation.
6. If you have received the donation, then choose a **Payment Method**. If the payment is by check, the system will prompt you to enter the check number. If you choose credit card, the system will prompt you for the last four digits of the credit card number. **Important:** Integrated credit card processing is not available for miscellaneous cash contributions recorded this way. Therefore, in this case you must process the payment directly with your merchant account provider.
7. If you have indicated a payment method, then you must also set the **Delivery Status** field to *Received*.
8. Click the **Add Donation** button.

> ***Note:*** *Cash contributions entered in this manner and marked as 'received' will appear in Donations reports and on each Donor's receipt.*

To add a defined sponsorship donation

1. Go to *Items > Donations > Add Donation*. (You will also find shortcuts for adding a donation in the *Dashboard's* "Getting Started" help box and Donations widget.)
2. Select the **Cash or Sponsorship** button

3. Add *Donors* to this donation by selecting an existing donor from the pull-down menu, or by adding a new donor using the **Add New Donor** link.
4. Select *Defined Donation* as the **Donation Kind.**
5. Select a sponsorship from the pull-down **Sponsorship Level** menu. Only sponsorships that have been established in the *Setup > Sponsorship Levels* section will be available in the menu.
6. Into the **Qty** (Quantity) field, enter the number of sponsorships purchased at this level by this donor.
7. If the sponsorship level includes a range of prices, then you can fill in your own price in the **Amount** field. If the sponsorship level has a fixed price, then the **Amount** field will be pre-filled for you.
8. If you have received the donation, then choose a **Payment Method.** If the payment is by check, the system will prompt you to enter the check number. If you choose credit card, the system will prompt you for the last four digits of the credit card number. **Important:** Integrated credit card processing is not available for sponsorship donations recorded this way. Therefore, in this case you must process the payment directly with your merchant account provider.
9. If you have indicated a payment method, then you must also set the **Delivery Status** field to *Received*.
10. Click **Add Donation** button.

Note: *Sponsorships recorded in this manner and marked as 'received' will appear in Donations reports and on each Donor's receipt.*

Items > Packages

In *Items > Packages*, you can build a package consisting of one or more donations. Or, if you don't care to track donors, send donor receipts, or send personalized procurement emails and letters for your next event, you can add packages one-at-a-time or as a bulk import that do not contain donations. We refer to a package that contains no donations as an *empty package*.

The information you enter about a package is what appears in the printed catalog and eCatalog, and on bid sheets and display sheets.

Your **Package List**, located on the *Items > Packages > Manage* page, provides you with an at-a-glance summary of important attributes of each package.

Use the search form, found at the top of the **Package List**, to narrow the list of packages based on the criteria you choose or enter. Be sure to clear the search form using the **Clear Search & Show All** link when you would like to view the full list again.

Tip: *Hover your mouse cursor over the icons in the* ***Kind*** *and* ***Status*** *columns of the Package List for more information about a package.*

In *Items > Packages* you can manage (view, find, duplicate, edit/update and delete), import, and add packages. From within the *Update Package* page, you can also view a package's bid (or purchase) history and, if you're the Admin, retract bids (or remove purchases) as long as the winner has not yet paid for the package.

To manage packages (Perform actions in bulk or one-at-a-time) *Items > Packages > Manage ⟶ Actions on selected packages menu*

Use the **Actions on selected packages** pull-down menu located at the bottom of the Manage Packages page to perform the following actions on one or more packages that you've selected (checked-off):

IMPORTANT: *Once a package has received a bid, you cannot use the* ***Actions on selected packages*** *menu for it. Instead you will need to edit the package from within its* Update Package *page, i.e. you must click on the package's name on the* Items > Packages > Manage *list to update it.*

- **Duplicate**. You may duplicate a package as long as it has not yet received a bid.

  Hint: *If you suspect multiple bidders will split a package at your event, create several duplicates of it before your event. You can then easily edit these packages to sell to the additional winners.*

- **Delete.** Permanently remove a package or packages. Only packages without bids or purchases can be deleted. See instructions below for how to **Retract a Bid or Purchase**.
- **Change Primary Category.** Change the Primary Category that has been assigned to a package or packages.
- **Add New Category.** Add a package or packages to a new category.
- **Remove Category.** Remove the package from a category it has been assigned to.

- **Change Status.** Open a package that was in draft status or put an open package into draft status.

> ***Hint:*** *If you do not want a package to show in your eCatalog until you're ready – for example, perhaps you don't want it to show up for bidders until a similar package has already sold – then leave it in 'draft' mode. As soon as you update its status to 'open,' it will be available for bids.*

- **Change Open Time.** Set a new open time for a package or packages.

- **Change Close Time.** Set a new close time for a package or packages.

To import packages

For quick entry, you can import your package information into *ReadySetAuction* from a comma-separated value (.CSV) file.

For complete and detailed instructions on how to prepare the .CSV file, please refer to the ***Package Import Guidelines*** found in the Help Center.

To import packages:

1. Go to *Items > Packages > Import.*
2. Click the **Browse** button on the *Items > Packages > Import* page.
3. Locate the .CSV file on your computer and select it.
4. Does your file contain a fixed row of column titles, a.k.a. a header row? If so, check the box.
5. Click the **Upload File** button.
6. Review the sample data.
7. Select the appropriate label for each column. If your file contains more than a few columns, you will need to use the horizontal scroll bar located at the bottom of the sample data.
8. Click the **Import Packages** button.

To add a package

1. Go to *Items > Packages > Add Package*.
2. A package can contain one donation or more, or it can be empty. To add a donation or donations to the package, click the **Choose Donations** button. In the pop-up window, select donations by checking off those that you want in this package. Click **Apply**.
3. Enter the **Package Name**. This name is what will appear in your printed and electronic catalogs, bid sheets, displays etc.
4. Select the **Displayed Donor Name,** i.e. how you want the donor name or names to be displayed.

5. Enter the **Package Description**. If comments were entered as part of a donation, then you can view and copy them to the package's description by clicking the Comments Icon — — adjacent to the donation in the **Donations in this Package** list.
6. Enter the web address of the **Catalog Image**. The optimal image size is 225x225 pixels. If you need a place to host your images, try a free image hosting service.
7. Enter the web address of the **Showcase Image**. The optimal image size is 800x800 pixels. This image will be used for your showcase slides. If you need a place to host your images, try a free image hosting service.
8. Choose a **Primary Category.** This is the category in which the package will appear in your printed catalog and how it will be auto-numbered if you use the Arrange Packages features.
9. Choose one or more additional categories under **All Categories**. Bidders may browse by these categories in the eCatalog.
10. Enter a **Catalog #** or leave it blank and assign Catalog #'s later under *Items > Packages > Arrange*.
11. Use the **Inventory Tag** for your internal tracking purposes only. This field will not appear to bidders. If the package has a catalog number, use the Catalog # field for that.
12. Enter the package's **Fair Market Value**. This is the price at which this package would normally sell at market. This value will be auto-calculated based on the value of all donations in the package. This value will also appear on bidder receipts and may be used for tax purposes, so it should accurately reflect the package's true value.
13. For **Displayed Value**, choose how you want the value to appear to bidders in the printed materials and eCatalog.
14. Configure the package's Auction Settings: **Package Kind, Catalog Options, Bidding or Buyable Parameters, Bidding Style and the eCatalog Bid/Buy Window.** For more details on how to set up Biddable, Buyable and Raffle packages and how to feature them for eBidding, ePrebidding, or at a traditional silent/live auction event, **please refer to "More About Auction Settings" at the end of this chapter.**
15. Save by clicking the **Add Package** button found at the bottom of the form. In order to successfully save a package, it must have a unique Package Name. If you included a Catalog # and/or Inventory Tag, they must also be unique.

Hint: *In addition to the method described above, there is another way to add a package. We call it "Quick-Packaging." Quick-Packaging is a fast way to make a single donation straight into a package. To Quick-Package a donation, click the* ***Package This Donation*** *button after entering the donation or from its* Update Donation *page.*

To view/update a package

1. Go to *Items > Packages > Manage*.
2. From the **Package List**, click a package's **Package Name.**
3. Review and/or update fields on the *Package Info* page.

Note*: You will not be able to update certain fields once a package has been bid on, won, or closed. These non-editable fields are marked with* ✗.

4. Save your changes by clicking the **Update Package Info** button at the bottom of the form.

To arrange packages in a custom order and auto-number them (for the printed materials)

1. Go to *Items > Packages > Arrange.*
2. Click the **Arrange Packages** button for the first primary category in your list.
3. Use the up and down arrows to establish the *order* you would like for the packages within that primary category.
4. Click **Done**.
5. Repeat steps 2 thru 4 for each primary category.
6. For each primary category, enter the **First Catalog #,** that is the number that you would like that category to start with. For example, if you enter 101 as the First Catalog # for the primary category you've named Dining, then the packages in the Dining primary category will be numbered consecutively starting at 101 in the order that you established in steps 2 through 4 above.
7. When you have finished arranging the packages within each primary category and have established a First Catalog # for each primary category, click the **Renumber Packages** button.

IMPORTANT: *Once you click the Renumber Packages button, the action cannot be undone. Therefore, if you've already printed auction materials with package numbers (e.g. bid sheets, a printed catalog, etc.) you'll need to re-generate and re-print all these materials after renumbering your packages.*

To view a package's bid history or purchase history

1. Go to *Items > Packages > Manage.*
2. From the Package List, click a package's **Package Name**. This brings you to the *Package Info* page as indicated by the third-level tab.

3. Click on the *Bid (or Purchase) History* third-level tab.

To retract a bid or purchase

1. Go to *Items > Packages > Manage*.
2. From the Package List, click a package's **Package Name**. This brings you to the *Package Info* page as indicated by the third-level tab.
3. Click on the *Bid (or Purchase) History* third-level tab.
4. A **Retract Bid** or **Retract Purchase** button will appear next to the bid or purchases that can be retracted.

IMPORTANT*: Only the Administrator of your Control Center can retract bids or purchases from this page. Registered staff can do so from the* @Event > Checkout *page only if they've been given the **Admin Auth Code** by the Administrator. The Admin Auth Code can be found on the* Admin > Event Details > Event Settings *page.*

Note: *For eBiddable and ePrebiddable packages, the Administrator can only retract the most recent bid placed by a **human** bidder. If the high bid was an "Otto bid," that is placed automatically by the computer system on behalf of a bidder's maximum, then it will be retracted automatically when you retract the last bid placed by a human bidder.*

Items > Categories

Categories can be assigned to both donations and packages.

- Categorizing **donations** makes it easier to sort them when deciding whether to combine them into packages.
- Categorizing **packages** makes it easier for your bidders to locate them at the in-person event and to find them in the eCatalog.

You control both the names of your categories and the order in which they appear in the printed catalog and eCatalog.

Your **Category List** is located in the *Items > Categories* Section.

Shortcut: *To see which donations or packages have been assigned to a particular category, click the number in the **# Donations** or **# Packages** columns of the Category List on the* Items > Categories *page.*

To add a category

1. Go to *Items > Categories*.
2. Click the **New Category** button found above the top right corner of the Category List.
3. Enter the name of your new category, and click the **Add** button.

To rearrange categories

Use the up and down arrows to change the order of the categories. This is the order that they will display in your printed catalog and eCatalog.

To edit a category name

1. Go to *Items > Categories*.
2. Click the **Edit** link for the category you would like to change.

Note: *Only empty categories can be deleted.*

Items > Printed Materials

From the information you've entered about donations and packages, *ReadySetAuction* generates fully formatted, ready-to-print auction materials as well as Microsoft Word versions from which you can create materials of your own design.

To generate ready-to-print auction materials (gift certificates, display sheets, bid sheets, an auction catalog and labels)**:**

1. Click a page tab in the *Items > Printed Materials* section.
2. Click the **HTML** download button. A new window or tab will open in your browser.
3. Click the **Print** button found in the upper right corner of that new window or tab, or use your browser's print command.
4. Before printing, use the settings in your print dialog box to remove the page headers and footers. For instructions on how to do this, please refer to the Help Center FAQ: [How to Print HTML Auction Materials without Headers and Footers.]

   Tip: *Print a couple of test pages first to make sure you have properly removed the title, URL, date/time, and page numbers that most browser software will include when printing web pages.*

To generate files from which you can create auction materials of your own design

1. Click the **RTF** download button to download an .RTF file.

   Note: *You must open the file in* ***Microsoft Word*** *and edit it there or bring it into a desktop publishing program.*

2. Or, for more advanced users of Microsoft Word, download the appropriate report from the *Reports* tab and merge it with one of the templates provided or with a template of your own design.

More About Auction Settings

The Auction Settings on the *Add/Update Package* page give you control over the type of package – biddable, buyable or a raffle package –; its bidding parameters or selling price; the time during which it can be bid on or bought online; and in which catalogs (eCatalog and/or paper catalog) and other printed materials it will appear.

The 6 Package Kind / Bidding Style Combinations

A package's **Package Kind** can be *Biddable*, *Buyable* or *Raffle*. For Biddable packages, you must also select a **Bidding Parameter** of *eBidding*, *ePrebidding* or *Traditional*. For Buyable packages, you must also select a **Buyable Parameter** of *Fixed-Price* or *Range-Price*. Below are the attributes of each kind of package.

1. Biddable–*eBidding*

- Activated eBidders can place eBids on the package via the eCatalog.
- Auction Staff can place eBids on behalf of any activated eBidder using the Control Center's *@Event > Record Sales > Proxy Bids* page.
- Winner is determined by the highest eBid at the package's close.

2. Biddable–*ePrebidding*

- Activated eBidders can place eBids on the package via the eCatalog.
- Auction Staff can place eBids on behalf of any activated eBidder using the *@Event > Record Sales > Proxy Bids* page.
- When package closes in the eCatalog, the high eBid will carry over as the starting bid for the in-person (traditional, offline) live/silent auction.
- Winner is determined by the highest bid during the in-person (traditional, offline) live/silent auction.
- Auction Staff must record winner using the Control Center's *@Event > Record Sales > Wins & Purchases* page.

3. Biddable–*Traditional*

- Bidders at your in-person (traditional, offline) event can bid on the package via bid sheet or live auctioneer.
- Winner is determined by the highest bid during the in-person (traditional, offline) live/silent auction.
- Auction Staff must record winner using the Control Center's *@Event > Record Sales > Wins & Purchases* page.

4. Buyable–*Fixed-Price* (e.g., party tickets, drink tickets, fund-a-need levels)

- Activated eBidders can purchase one or more fixed-price packages at a pre-determined price via the eCatalog.

- Auction staff can record the sale of fixed-price packages using the Control Center's *@Event > Record Sales > Wins & Purchases* page.

5. Buyable–*Range-Price* (e.g., dessert dash, teacher wish list, centerpieces, name your price)

- Activated eBidders can purchase range-price packages in the eCatalog at a price they designate as long as it's between the pre-determined minimum and maximum prices.
- Auction staff can record the sale of range-price packages using the Control Center's *@Event > Record Sales > Wins & Purchases* page.

6. Raffle

- Visitors can view the raffle package in the eCatalog.
- Because of the variety of online gambling and raffle laws at the state and city levels, *ReadySetAuction* does not support the online sales of raffle tickets. Instead, auction staff can record the sale of **raffle tickets** using the Control Center's *@Event > Record Sales > Wins & Purchases* page.

Catalog Options

For each package, you can choose any or all of the following catalog options:

- **Show in eCatalog** — When checked, the package appears in the eCatalog.
- **Sell in eCatalog** (Buyable packages only) — When checked, activated eBidders can purchase this buyable package via the eCatalog.
- **Display Buyers** (Buyable packages only) — When checked, buyers will be displayed in both the eCatalog and Showcase for others to see.
- **Show in Paper Catalog** — When checked, the package's information appears in 1) the printable Auction Catalog *(Items > Printed Materials),* and 2) the Paper Catalog Export Report *(Reports > Data Exchange Reports).* Use the **Paper Catalog Export Report** to create your paper catalog via a mail merge with the **Paper Catalog Merge Template** *(Items > Printed Materials)*. Advanced users of Microsoft Word can also create their own merge template.
- **Show in Showcase** — When checked, this package will appear in the Showcase. For more information on the Showcase, go to *Admin > Event Settings > Showcase Displays*.
- **Generate Display Sheet** — When checked, a display sheet will be generated for this package. Go to *Items > Printed Materials* to generate and print.
- **Generate Bid Sheet** — When checked, the package's information appears in 1) the printable Bid/Purchase Sheets *(Items > Printed Materials),* and 2) the Paper Catalog Export Report *(Reports > Data Exchange Reports).* Use the **Paper Catalog Export Report** to create your own bid sheets via a mail merge with the **Bid Sheet Merge Template** *(Items > Printed Materials)*. Advanced users of Microsoft Word can also create their own merge template.

Bidding Parameters (Biddable packages only)

With Biddable packages, you must designate a starting bid and minimum raise. A Win-It-Now price is optional.

- **Starting Bid** — The price at which bidding begins.
- **Minimum Raise** — The minimum amount over the leading bid that a bidder must enter for the bid to be accepted.
- **Win-It-Now** — The price at which a bidder can purchase the package outright. Leave blank if you're not offering Win-It-Now and prefer bidding to continue until the package's eCatalog Bidding Window closes. If eBidding reaches 80% of the Win-It-Now price, this option is disabled to encourage continued eBidding by interested bidders.

Buyable Parameters (Buyable packages only)

The fields presented will depend on whether Fixed-Price or Range-Price is chosen.

- Fixed-Price
  - **Price** — The price at which bidders can purchase this package.
  - **Quantity** —The total number available to sell at the specified price range. If more become available, you may increase the Quantity at any time.

- Range-Price
  - **Min. Price** — The lowest price at which bidders can buy this package.
  - **Max. Price** — The highest price you will accept for this package
  - **Quantity** —The total number available to sell at the specified price range. If more become available, you may increase the Quantity at any time.

Raffle Parameters (Raffle packages only)

- **Ticket Price** — The price people will pay for a raffle ticket
- **Quantity** — The total number of raffle tickets for sale. You can increase this quantity at any time.

> ***Note:*** *Because of the variety of online gambling and raffle laws at the state and city levels, ReadySetAuction does not support the* ***online*** *sales of raffle tickets.*
>
> *Therefore, when you add a raffle package to ReadySetAuction, it can only be* ***viewed*** *in the eCatalog.*
>
> *Auction staff can sell raffle tickets to bidders only in person via* @Event > Record Sales > Wins & Purchases*.*

eCatalog Bidding/Buying Window

- You can independently set the **Open Date, Open Time, Close Date**, and **Close Time** for those packages that are available for sale in your eCatalog, which would include the following package kind-styles: Biddable-eBidding, Biddable-ePrebidding, Buyable-Fixed-Price-sell-in-eCatalog and Buyable-Range-Price-sell-in-eCatalog.
- **Need to change the time zone?** Your Administrator can do so in the Control Center's *Admin > Event Settings > Event Details* page*.*

> ***Note:*** *The earliest a package can open and the latest it can close depends on your eCatalog Access Period. To view your eCatalog Access Period, go to the* Home > Dashboard > Event Website *widget. Your Administrator can purchase extensions to the eCatalog Access Period on the* Admin > Purchase Services *page.*

How To Set Up Special Types of Auction Packages

For instructions on how to create these special types of packages, please visit our Help Center:

- Fund-a-Need / Paddle Call
- Dessert Dash
- Buy-In Parties
- Centerpieces
- Wish List
- Name Your Price

You can also always access the Help Center by clicking the "Help" link located in the upper right corner when logged into your Control Center.

6. The Patrons Workspace

Patrons are people who support your cause. They consist of donors and bidders.

A patron who donates an item or service for the auction, contributes a cash donation, and/or purchases a sponsorship before the auction is called a **Donor**.

A patron who bids on items/services, makes purchases, and/or donates cash during your event is called a **Bidder**.

Patrons > RSVPs

The RSVP process in ReadySetAuction includes:

1. Selling ticket(s) to a bidder, if (s)he needs to purchase tickets
2. Designating who is using those tickets
3. Assigning the bidder to a table
4. Tracking her/his meal selection

When a bidder purchases a ticket or tickets, to record his/her RSVP

1. Go to *Patrons > RSVPs*.
2. Choose **Yes** for *Does this guest need to buy tickets?*
3. *Select a Guest** or *Add a Guest* who is purchasing tickets.
4. Enter the number of tickets this bidder is purchasing.
5. Click **Next: Confirm Tickets.**
6. Review the purchase, and click **Next: Record Payment**.

IMPORTANT: *If instead you choose* **Skip Payment and Record RSVPs***, then the ticket purchase will be added to the bidder's invoice and the bidder must pay for her/his ticket(s) at the same time (s)he pays for her/his auction purchases. Therefore, if the bidder has purchased her/his tickets via another online system, we suggest you click* **Next: Process Payment** *and choose 'Other' as the payment method for step 7 below.*

7. Select a *Payment Method,* or *Add Credit Card* if you've established a merchant account connection.
8. Click **Record Payment**.
9. Record the RSVPs of those people, **including the purchaser**, using the tickets that were just purchased. At this time you can also record the table assignment and meal choice for each guest.
10. Click **Save Changes**.

** Does the guest's name appear twice or more in the menu? This means the guest has multiple patron records. Your Administrator can merge these duplicate records. You'll find the instructions below and in the Help Center.*

When a bidder is attending as the guest of another person or as the guest of a sponsor, to record her/his RSVP

1. Go to *Patrons > RSVPs.*
2. Choose **No** for *Does this guest need to buy tickets?*
3. From the pull down menu, choose the appropriate *Party of* ticket. Click **Next: Record RSVPs**.
4. *Select a Guest** or *Add New Guest*.
5. Choose the table assignment and meal choice for the guest.
6. Click **Save Changes**.

** Does the guest's name appear twice or more in the menu? This means the guest has multiple patron records. Your Administrator can merge these duplicate records. You'll find the instructions below and in the Help Center.*

Patrons > Everyone > Manage

Your **Everyone List** on this page provides you with an at-a-glance view of all the Donors and Bidders associated with your event as well as other supporters who are neither donors nor bidders. Keep in mind that in ReadySetAuction, the Donor List and Bidder List are subsets of the Everyone List.

Use the **filter**, found at the top of the Everyone List, to narrow the list of your patrons and to find specific patrons quickly. **Tip:** Be sure to clear the search form using the **Clear Search & Show All** link when you would like to view the full Everyone List again.

Use the **Actions on patrons** menu at the bottom of the list to:

- Delete patrons you've selected, as long as the patron is not a donor, is not a bidder, has not purchased anything, is not assigned to a party, and is not attending the event.
- Merge duplicate patron records (Admin function only).
- Send receipts to all patrons or those you've selected.

NOTE: *Receipts you send from here include the patron's: donations, tickets, winnings (both from eBidding and at the event), fixed-price purchases (both online and at the event), and all payments.*

Patrons > Everyone > Import

For quick entry, you can import patron information into *ReadySetAuction* from a comma-separated value (.CSV) file. When performing the import, you can also decide whether to add each patron onto the Donors or Bidders subset lists

For complete and detailed instructions on how to prepare the .CSV file, please refer to the Patron Import Guidelines found in the Help Center.

1. Go to *Patrons > Everyone > Import.*
2. Click the **Browse** button on the *Patrons > Everyone > Import* page.
3. Locate the .CSV file on your computer and select it.
4. Does your file contain a fixed row of column titles, a.k.a. a header row? If so, check the box.
5. Click the **Upload File** button.
6. Review the sample data.
7. Select the appropriate label for each column. If your file contains more than a few columns, you will need to use the horizontal scroll bar located at the bottom of the sample data.
8. Click the **Import Patrons** button.

Patrons > Everyone > Merge (Administrator Only)

ReadySetAuction helps to reduce the possibility of entering duplicate patrons by requiring a patron's email address to be unique from that of any other patron. However, the email address field is optional. Therefore, it is possible to enter the same patron multiple times if no email address is provided or if the same person has been entered with two different email addresses. Should this occur, ReadySetAuction provides the ability for your RSA Administrator to merge two patron records that you determine are duplicates into a single record.

IMPORTANT: *Once two records are merged, the operation is final and irreversible. Merged records cannot be unmerged. The discarded record is permanently removed.*

Before performing a merge, we strongly recommend that you export the following reports in case you need to reference them later:

- PayReady *(Reports > Activity Reports)*
- Seating and Meals *(Reports > Activity Reports)*
- RSVP Party Assignment by Party *(Reports > Activity Reports)*
- All Patrons *(Reports > Data Exchange)*

For complete instructions on how the Administrator can perform a merge, visit the Help Center FAQ: [How To Merge Duplicate Patrons.]

Patrons > Everyone > Add Person & Patrons > Everyone > Add Business

As described above, you can add patrons to ReadySetAuction from a .CSV file using the import feature. You can also add patrons one-at-a-time using the **Add Person** and **Add Business** third tier page tabs.

Because *people* can be both donors and bidders whereas *businesses* can be only donors, you are prompted to enter different information. In other words, these two types of records contain different fields. For this reason, a Business record cannot be converted into a Person record. And a Person record cannot be converted into a Business record.

Why is this important?

You may recall that email address and mobile phone number must be unique to a patron record, even if one of those records is a Business and one is a Person. So, for example, if one of your supporters provides a donation from his/her place of business, that individual's bidder (person) record cannot share the same email address or mobile phone number as his business's donor record.

If you are not able to add a new patron to ReadySetAuction, search the **All Patrons** report *(Reports > Data Exchange)* to see if that patron's email address and/or mobile phone number are already assigned to another record.

Patrons > Donors

Your **Donor List**, located on the *Patrons > Donors > Manage* page, is a subset of the Everyone List. It provides you with an at-a-glance summary of the important attributes of each donor.

Use the filter, found at the top of the Donor List, to narrow the list of donors based on the criteria you choose or enter.

Tip: *Be sure to clear the search form using the* ***Clear Search & Show All*** *link when you would like to view the full Donor List again.*

In *Patrons > Donors* you can:

- **Communicate with donors, one-at-a-time or in bulk — ask, send receipts, and thank:** *Patrons > Donors → Actions on Donors menu*

- **View/Update a donor's detailed information:** *Patrons > Donors* → click a donor's **Donor Name**
- **Record notes about each donor:** *Patrons > Donors* → click a donor's **Donor Name** > *Notes*
- **View each donor's account history:** *Patrons > Donors* → click a donor's **Donor Name** > *History*
- **View each donor's donations**: *Patrons > Donors* → click a donor's **Donor Name** > *Donations*
- **View, print and email each donor's consolidated receipt:** *Patrons > Donors → click a donor's* **Donor Name** > *Donations* → click **View Consolidated Receipt** *button*. Only donations with a status of 'Received' will appear on the receipt.

Patrons > Bidders

Your **Bidder List**, located on the *Patrons > Bidders > Manage* page, is a subset of your Everyone List. It provides you with an at-a-glance summary of the important attributes of each bidder.

Use the search form, found at the top of the Bidder List, to narrow the list of bidders based on the criteria you choose or enter.

Tip: *Be sure to clear the search form using the* ***Clear Search & Show All*** *link when you would like to view the full Bidder List again.*

In *Patrons > Bidders* you can:

- **Perform actions on bidders, one-at-a-time or in bulk — activate, deactivate, delete, renumber bidder numbers, remove, invite, send welcome, invoice, and thank:** *Patrons > Bidders → Actions on Bidders* menu
- **View/Update a bidder's detailed information:** *Patrons > Bidders* → click a bidder's **Bidder Name** > Bidder Info

  PIN: *When setting up their ReadySetAuction bidder accounts, each bidder is prompted to choose a 4-digit PIN, which (s)he will use only if bidding from a Bidding Station. If a bidder has forgotten her/his PIN, you can look it up here and reset it if necessary.*

- **View/Update a bidder's RSVP status (attendance, party, table and meal):** *Patrons > Bidders* → click a bidder's **Bidder Name** > *Bidder Info > RSVP Status*.
- **Record notes about each bidder:** *Patrons > Bidders* → click a bidder's **Bidder Name** > *Notes*

- **View each bidder's account history (when (s)he set up an account, when communications were sent, and when payments were made):** *Patrons > Bidders* → click a bidder's **Bidder Name** > *History*
- **View each bidder's winnings**: *Patrons > Bidders* → click a bidder's **Bidder Name** > *Winnings*
- **View, print and email each bidder's consolidated receipt:** *Patrons > Bidders* → click a bidder's **Bidder Name** > *History* > click **View Consolidated Receipt**. A bidder's consolidated receipt includes all the items he/she has paid for at your event and during online/mobile bidding.

More About Bidder Accounts

Each record on the *Patrons > Bidders > Manage* List must equate to an **individual** in order for you to track accurately:

- whether this person is attending
- who bought her/his ticket (e.g., perhaps (s)he's coming as a guest of a sponsor or another bidder)
- the table at which (s)he is seated
- her/his meal selection

eBidding

To bid electronically – via smartphone, tablet, computer or Bidding Station – a patron must have an *activated* eBidder account.

To view whether a patron is activated, go to *Patrons > Bidders* and refer to the "Account" column. You can also filter the bidder list by the various *Account Statuses* using the search bar. For more information on ways a bidder account can become activated, see the **Admin > Event Settings** section of this guide.

IMPORTANT: *If you prefer that a couple eBid from a single eBidder account at your event, then they must share one of their mobile devices; that is, they must pass their phone or tablet back and forth between the two of them. If the couple attempts to share an eBidder account while each uses her/his own mobile bidding device, they will continually log each other out.*

Bidder Numbers

Bidder Numbers are used by your patrons only during the in-person event. They have no role in electronic bidding.

ReadySetAuction assigns a bidder number to each bidder record as it is added to the Bidder List. So, for example, if you import Patrons that you've designated as Bidders, ReadySetAuction will assign them all bidder numbers. Also, when someone uses your Event Website to purchase a ticket for themselves and/or tickets for others, those guests are automatically added to the Bidder List and the system assigns them bidder numbers.

For purposes of the in-person auction (live, silent, paddle raise etc.) two bidders can share a bidder number. For instructions, refer to the Help Center FAQ [How A Couple Can Share A Bidder Number.]

Patrons > Affiliations

Affiliations designate the relationship that each patron has to your organization. For example, Since Mary Smith's daughter attends your school, you might designate Mary's affiliation as "Parent." While completely optional, this setup step can be helpful when sorting donors and contacts.

- To add an affiliation, click the **New Affiliation** button, found above the top right corner of the Affiliation List. Enter the name of your new affiliation, and click the **Add** button.
- To edit an affiliation, click the **Edit** link, make the change, and click the **Update** button.

Patrons > Salutations

A *Salutation* determines how each patron will be addressed in communications generated by *ReadySetAuction*. Mr., Mrs., Miss, Ms., and Dr. are examples of common salutations. The Honorable, Senator, Sister, Reverend, etc., are less common.

Set up your Salutations in this section. Then you can assign the salutation when adding or updating a patron.

- To add a salutation, click the **New Salutation** button, found above the top right corner of the Salutation List. Enter the name of your new salutation, and click the **Add** button.
- To edit a salutation, click the **Edit** link, make the change, and click the **Update** button.

Patrons > Communications

In this section, you can customize the six auction-related correspondence that you can send to your donors and bidders via *ReadySetAuction*:

1. ***Solicitations****:* Customize the language of the email message you can send to **donors** asking them to make donations.
2. ***Invitations****:* Customize the language of the email message you can send to invite **bidders** to set up an account to buy event tickets and sponsorships, contribute, and bid electronically.
3. ***Invoices****:* Customize the language of the email you can send to winning **bidders**.

4. ***Receipts:*** Customize the language that appears at the top of **both donor and bidder receipts**.
5. ***Donor Thanks****:* Customize the language of the thank you that you can both email to and print for your **donors**.
6. ***Bidder Thanks****:* Customize the language of the thank you that you can both email to and print for your **bidders**.

Patrons > Printed Materials > Donor Materials

From this page you can download in .RTF format, open in Microsoft Word, and then print the following materials:

- **General Procurement Form** — A paper form that you can distribute to your prospects (potential donors).
- **Prospect Mailing Labels** — Use for mailing letters to all patrons on your Donor List.
- **Donor Solicitation Letters** — Individually addressed letters to each of your donors. To customize the language on these letters, go to *Patrons > Communications > Solicitations*.
- **Donor Mailing Labels** — Use for mailing Thank Yous and Receipts to donors. Generated only for those donors whose donations have been 'received.'
- **Donor Thank You Letters** — Individually addressed letters to each of your donors who has donated and whose donation has been 'received.' To customize the language on these letters, go to *Patrons > Communications > Donor Thanks*.

You can also download the **Procurement Letter Merge Template** in order to design your own solicitation letters. Use this merge template in conjunction with the *Reports > Data Exchange > Consolidated Donations by Donor Report (Prior Event).*

Patrons > Printed Materials > Bidder Materials

From this page you can download in .RTF format, open in Microsoft Word, and then print the following materials:

- **eBidder Tips Sheet** — a quick reference page for electronic bidders at your event that includes:
    - A shortcut URL that makes accessing the eCatalog easy for those electronic bidders who pre-registered and forgot to bookmark the eCatalog.
    - Explanations of the icons used in the eCatalog.
    - Instructions for how to place bids, search, find the Outbid list, and check out.

***Tip:** Print the **eBidder Tips Sheet**, make copies, perhaps laminate, and have available for bidders to reference at Check-In and during your event.*

You might also consider enlarging a few to hang in well-travelled areas.

- **Bidder Mailing Labels —** Use for mailing the printed thank you and receipts to all of your bidders.
- **Bidder Folder Labels —** Organized by bidder #. Use when preparing file folders for your bidders.
- **Bidder Folder Labels —** Organized by last name. Use when preparing file folders for your bidders.
- **Bidder Name Tags —** Organized by bidder #.
- **Bidder Name Tags —** Organized by last name.
- **Bidder Paddles —** Generated for all bidders who are marked with a status of “Attending” or “Checked in.”
- **Bidder Payment Slips —** In case of power outage or internet issue, use these to record credit card payment information.
- **Bidder Thank You Letters —** To customize the language on these letters, go to *Patrons > Communications > Bidder Thanks*.

You can also download the **Bidder Paddle Merge Template** if you’d like to design your own bidder paddles. Use this merge template in conjunction with the *Reports > Data Exchange > All Bidders Report*.

7. The @Event Workspace

ReadySetAuction includes a full suite of cashiering features for managing your mobile auction event, your traditional silent/live auction event, or a combination event.

In the *@Event Workspace,* any number of auction staff can simultaneously:

1. Check In Bidders
2. Sell Admission Tickets to Walk-In Guests
3. Record Wins & Purchases
4. Record Monetary Pledges
5. Record Raffle Winners
6. Place Proxy eBid (place eBids on behalf of electronic bidders)
7. Check Out Bidders
8. Look Up Sales by Bidder and Sales by Package
9. Create Invoices
10. Create Receipts

@Event > Check In Bidders

From as many computers as you'd like, check in bidders as they arrive. *ReadySetAuction* even handles walk-in guests easily.

Tip: *As part of Check-in, use PayReady™ to capture the credit card information of your guests either with card-swipers hooked up to your check-in computers or by manual entry. Auction staff can then use these stored cards for express checkout, meaning bidders can skip the checkout line entirely.*

For detailed instructions on how to check in guests, download the Check-In Guide from the Help Center.

@Event > Record Sales > Wins and Purchases

The auction staff can record wins or purchases for:

- Live and silent auction packages (Biddable-Traditional packages)
- ePrebidding packages; that is the bidding started online and finished in person either via bid sheet or auctioneer (Biddable-ePrebidding packages)
- Online/mobile bidding packages that have closed without receiving a single bid (Biddable-eBidding packages)
- Buyable packages
- Raffle tickets that were created along with a raffle package

To record a win or purchase

1. Go to *@Event > Record Sales > Wins & Purchases.*
2. Enter the catalog number or select a package from the pull down menu. **Hint:** You can also start typing the name of the package into the **Select a Package** field.
3. Click **Next**.
4. Record the winning bid or purchase information:
   - For a Biddable-Traditional package or a Biddable-ePrebiddable package, enter the winner's bidder # or select the winning bidder from the pull down menu. Then enter the amount of the winning bid. Click **Next**.
   - For a Buyable package or Raffle Tickets, enter the bidder # or select the bidder who is making the purchase. Then enter the quantity they're purchasing. Click **Next.**
5. **IMPORTANT:** Review what you entered, and click the **Confirm Winning Bid** or the **Confirm Purchases** button.

@Event > Record Sales > Monetary Pledges

Using the *@Event > Record Bids > Monetary Pledges* page, auction staff can record miscellaneous monetary contributions made by bidders at your event. For fund-a-need/special appeal contributions, see the instructions below.

How to Setup Fund-A-Need Levels / Special Appeals

To make data entry efficient during the event, set up each fund-a-need level as an ***empty, buyable => fixed-price*** package (*Items > Packages > Add Package)*. This will allow you and your auction staff to record up to ten contributions at a time without having to enter the amount.

@Event > Record Sales > Admission Tickets

It is unlikely that you will ever use this tab since the sale of Admission Tickets is also included in the @Event > Check-In Guests workflow.

Nonetheless, if you need a quick way to sell additional tickets to a guest and add them to his/her invoice, you can do so here.

@Event > Record Sales > Raffle Winners

Use *@Event > Record Sales > Raffle Winners* to record each raffle package's winner.

Note: *The system will have created an "X Raffle Tickets" package if the package was set up with a* Package Kind = Raffle*. If instead you would like to sell raffle tickets in groups at a discounted price, then you must set up a special buyable => fixed-price package for each type of raffle ticket group.*

@Event > Record Sales > Proxy Bids (i.e., Place eBids on behalf of eBidders)

Do you have an eBidder who lost his/her glasses, whose device's battery had died or is simply technically challenged and cannot bid from her/his own device or a Bidding Station? If so, your auction staff can place electronic bids on behalf of any registered and activated eBidder using the *@Event > Record Sales > Proxy Bids* page.

Note: *Proxy bids can be placed on any Biddable-eBidding package and on any Biddable-ePrebidding package whose eCatalog Bidding Window is open.*

To place a Proxy eBid

1. Confirm that the eBidder is "Activated." (*Patrons > Bidders* and refer to the bidder's *Account* column on the *Bidders List*.)
   a. If the bidder's Account column says "Confirmed," add a check mark to his/her row and use **Activate Selected** in the *Actions on Bidders* menu at the bottom of the page to activate him/her.
   b. If the bidder's Account column says "None," then assist the bidder to register either on a Bidding Station or by sending him/her an invitation using **Invite Selected** in the *Actions on Bidders* menu.

2. Go to *@Event > Record Sales > Proxy Bids.*
3. Enter the bidder's number, or select the bidder from the menu, or click the **Find a Bidder** link. Click **Next**.
4. Select a package from the pull down menu, or enter its Catalog #.
5. Enter the bid amount.
6. Click **Next**.
7. **IMPORTANT:** Review the bid, and click **Confirm**.

@Event > Create Invoices

To help streamline pay-in-person checkout and merchandise pickup, *ReadySetAuction* generates printed invoices for all bidders who have won or purchased at least one item and/or have made a monetary donation.

To create an invoice for a specific bidder

1. Go to *@Event > Invoices > Individual Invoices*.
2. Enter the Bidder #, or select the bidder from the menu, or click the **Find a Bidder** link. Click **Next.**
3. Click **Print Invoice** or **Email Invoice.**

To create invoices for all bidders

1. Go to *@Event > Invoices > All Invoices.*
2. Click **Print Invoices.**

IMPORTANT: *Once eBidding has closed it may take up to 5 minutes before* @Event > Invoices > **All** Invoices *is up-to-date.*

An Individual Invoice *is always up-to-date.*

How to Streamline Checkout Using Invoices

1. **Five minutes after** the last eBidding package closes and after you have recorded winning bids and purchases from your traditional (offline) silent/live event, generate and print **two** copies of *All Invoices*. Distribute one copy to the bidders and one to your auction staff.

2. Have your auction staff gather each bidder's winnings into a bag and staple/tape their invoice to it.

3. Deliver bags to bidders, or have them picked up at Merchandise Pickup.

4. The bidder is free to leave if 1) his invoice shows a Balance Due = $0, or 2) "Credit Card on File" is noted in the upper left corner of his invoice.

5. Bidders who still owe money can either self-pay or pay-in-person.

6. When a bidder has self-paid or paid-in-person, his invoice will show a $0 balance. You can check the bidder's invoice either from 1) *@Event > Create Invoices > Individual Invoice*, or 2) @Event > Check Out, or 3) the bidder's phone (navigate on the bidder's phone to My Account > Invoice.). **DO NOT RELY** on the *Balance Due* column on the *Patrons > Bidders > Manage* page. It updates only every 5 minutes.

@Event > Check Out Bidders: Self-Checkout and Pay-In-Person Checkout

Self-Checkout (Select and Complete plans only)

From their own smartphones, tablets and computers, bidders can view and pay for all wins and purchases they made in your online, mobile and traditional auctions. No lines, no waiting, no headaches.

Here's how self-checkout works

- If the bidder owes money, 1) when logged into her/his account, your Event Website's landing page will include a **Pay Invoice** button, and 2) if viewing his eCatalog, a button will appear at the top. Clicking either button sends her/him to her/his eInvoice, where (s)he can select from a pull-down menu of payment options.
- If the bidder provided her/his credit card at Check-in, then paying with that credit card will be an option. Other options may include: Pay by PayPal (if your organization has linked its PayPal Business account to *ReadySetAuction*), pay by a different credit card, and Pay in Person.

- When the bidder pays electronically by credit card or PayPal, *ReadySetAuction* automatically emails her/him a receipt.

To inform bidders that they owe money

1. Go to *Patrons > Communications > Invoices* to customize the language that will appear in the email you're about to send.
2. Go to *Patrons > Bidders > Actions on bidders* → select *Invoice All With Balance Due*.

IMPORTANT: ***To provide guests with the option to self-checkout:***

1) Your Administrator must link either a PayPal Business Account or a ReadySetAuction-compatible merchant account to your ReadySetAuction account. (Admin > Organization Settings)***, and***

2) Your Administrator must enable self-checkout along with appropriate payment methods (Admin > Event Settings > Payment Methods)*.*

Pay-In-Person Checkout (a.k.a. Pay the Cashier)

For bidders who prefer to pay in person using cash, check or credit card, *ReadySetAuction's* streamlined and speedy checkout process keeps the lines moving quickly. Your checkout volunteers will have an opportunity to review each bidder's winnings and remove any items a bidder has decided against. There's even a way to add an optional checkout donation of any size during the checkout process.

To check out a bidder in-person

1. Go to *@Event > Check Out Bidders.*
2. Enter the bidder's bidder number into the **Bidder #** field, select his name from the pull-down menu, or begin typing his name into the **Select a Bidder** field. Click **Next**.
3. Review the invoice with the bidder. Click **Next.**

Tip: *If the bidder believes there is a mistake, the Cashier can remove an item using the* ***Remove Item*** *button. Staff Members with modify access to the Control Center must enter the* ***Admin Auth Code*** *in order to remove an item during checkout. Locate this code on the* Admin > Auction Settings > Auction Details *page.*

4. Select a payment method.
5. Optionally add an additional monetary donation.
6. Click **Process Payment**.

Tip: *If an email address is on file for the bidder, ReadySetAuction will email him a receipt. You can also print the receipt by clicking the Print Receipt button on the* @Event > Create Receipts *page*.

ReadySetAuction automatically emails a receipt each time a bidder pays via self-checkout or in person. If the bidder requires a printed receipt, the auction staff can print it when prompted at the end of the checkout process or generate one later.

To view, print and resend *Individual* receipts

1. Go to *@Event > Create Receipts > Individual Receipts.*
2. Enter the bidder's # or select a bidder.
3. Click the receipt you wish to view.
4. Print or email it using the **Print Receipt** or **Email Receipt** buttons.

ReadySetAuction not only generates a new receipt each time a bidder pays, it also generates a consolidated receipt that shows all purchases and all payments made by a bidder.

To view, print and resend *Consolidated* receipts

1. Go to *Patrons > Bidders.*
2. *Click bidder's name > Winnings > View Consolidated Receipt.*
3. Click the **Email Receipt** or **Print Receipt** button.

8. The Reports Workspace

Visit the *Reports Workspace* to view, print, and export reports containing bidder, package, and sales information. All reports export to .CSV-formatted files, which can be opened and further manipulated using Microsoft Excel or any program that can read .CSV files.

Tip: *Many reports contain more columns than can be displayed on screen. Use the scroll bar, found at the bottom of each report, to scroll left and right to view more columns.*

Even better, use the ***Columns*** *button, found in the upper right corner of each report, to customize your on-screen view of a report.*

To view a report

1. Click on the report name.
2. Use the horizontal scroll bar located at the bottom of the report to see additional columns that do not appear in the workspace.

To print a report

1. Click on the report name.
2. Click the **Print** button located in the upper right corner of the page.
3. Select your settings in your Print Dialog Box, and print.

To export report data

1. Click on the report name.
2. Click the **Export** button located in the upper right corner of the page.
3. Your data will be exported to a .CSV file on your computer. You can open the file in Microsoft® Excel® or any program that can understand .CSV documents.

This Workspace is divided into six sections: *Activity Reports, Sales Reports, Analysis Reports, Accounting Reports, Data Exchange Reports* and *DonorPerfect Reports*.

Activity Reports

These reports contain information about how your staff, donors and bidders have interacted with the system.

1. Table Status
2. Seating and Meals
3. Meals Summary
4. Patron Notes
5. RSVP Party Assignment Summary
6. RSVP Party Assignment by Party
7. Item/Service Donation Status
8. Packaging Status
9. Unpackaged Donations
10. Donor Status
11. Bidder Status
12. Bidding Activity by Bidder
13. Bidding Activity by Package
14. Purchase Activity by Package
15. PayReady™
16. Raffle Winners

Note: *To view the bid history of individual biddable packages, or the purchase history of individual fixed-price packages, go to* Items > Packages > Manage → *click a package's name > click the* Bid History *page or* Purchase History *page.*

Sales Reports

These reports summarize information about your sales.

1. Cash Donations and Sponsorship Sales
2. Fixed-Price Sales Summary
3. Monetary Pledges Summary
4. Sponsorship Levels Sales Summary
5. Admission Tickets Sales Summary
6. Raffle Ticket Sales Summary

Analysis Reports

These reports analyze information about your sales.

1. Sales Margins
2. Sales by Category

Accounting Reports

These reports provide information about which bidders have a balance due; which bidders have paid, when, and with what payment methods; how much sales tax you've collected; and how much you've made from each revenue source (e.g., ticket sales, cash donations, bidding, fixed price sales etc.).

1. Payments Due
2. Payments Received
3. Sales Tax
4. Gross Sales

Data Exchange Reports

These reports contain information about your bidders, packages, and winning bids. Use these reports primarily for making your own labels and letters, importing data to your next auction, and importing *ReadySetAuction* data into other systems.

1. All Donors
2. All Bidders
3. Bidder Labels
4. Item/Service Donations
5. Consolidated Donations by Donor (Prior Event)
6. Consolidated Donations by Donor (This Event)
7. All Packages
8. Paper Catalog
9. Paper Catalog with Bid Increments
10. Admission Tickets
11. Gifts
12. Winnings

DonorPerfect Reports

After your event, with the click of a button, you can export your auction results (winnings, gifts and admission tickets) from ReadySetAuction to .CSV files that the DPO import module can already understand.

While the parameters currently set will limit the number of duplicate records that are created in your DPO data, the possibility still exists. Therefore, DonorPerfect strongly encourages you to run the Duplicate Removal Screen in DPO after a ReadySetAuction import has been conducted.