

# ReadySetAuction Check-In Guide

## To Prepare for Check-In:

1. Invite staff members who will be serving as Check-In staff. Each staff member must be *registered* in order to conduct Check-In. **IMPORTANT: Staff members cannot share accounts;** that is, if one staff member is logged in to an account and another staff member logs in to that **same** account, the first staff member will be bumped out. To invite staff members:
  - a. Go to *Admin > Event Staff > Add Staff Member* to add staff member.
  - b. Be sure to set staff member's permission level to 'modify.'
  - c. Add more staff members.
  - d. Go to *Admin > Event Staff* - -> select all staff members you would like to invite.
  - e. Choose **Invite Selected** from the "Actions on staff members" pull down menu.
  
2. Confirm that: 1) your merchant account is enabled: *Admin > Organization Settings > Merchant Account*, and 2) payment methods are selected: *Admin > Event Settings > Payment Methods*.
  
3. **If conducting mobile bidding:**
  - a. Print the **eBidder Tips Sheet** from *Patrons > Printed Materials > Bidder Materials*. Make multiple copies and have them available around your event for bidders to refer to at check-in and during your event.
  - b. Check all three boxes on the *Admin > Event Settings > Bidding Stations* page. Be sure to save.
  - c. If you want to restrict registration to invited guests only, set "Access to Event Website is" to **Private** on the *Admin > Event Settings > Event Details* page.
  - d. Check the box labeled "Automatically activate eBidders" on the *Admin > Event Settings > Bidder Registration* page.
  - e. Set up Bidding Stations around the venue at which any registered eBidder can bid. We recommend one Bidding Station for every five to ten bidders who won't have their own devices. For instructions on how to set up a Bidding Station, go to *Admin > Event Settings > Bidding Stations*.

4. Near the entrance to your event, set up Check-In Stations, each manned by one of your auction staff.

**Check-In Stations consist of:**

- a. **Computers connected to the Internet**, at which auction staff people will be logged into the Control Center. We recommend, at minimum, one computer for every 50 guests.
- b. ***If conducting mobile bidding: Tablets set up as Bidding Stations.*** If a bidder hasn't pre-registered to bid and doesn't have his/her own mobile device, then a staff person can help the bidder complete his/her registration using the tablet (see matrix below). We recommend, at minimum, one tablet for every 50 guests. Note that these bidders can complete their registrations at any Bidding Station, including those you have set up around the venue. If you expect a large number of these bidders, we recommend you have more Bidding Stations available near check-in. For instructions on how to set up a Bidding Station, go to *Admin > Event Settings > Bidding Stations*.

## To Conduct Check-In:

I. Go to *@Event > Check In*, to check in your guests.

II. Choose whether you are checking in a *Single* person or a *Couple*.

**IMPORTANT NOTE:** When checking in a couple, the system will prompt you to enter a credit card only for the Primary Guest.

### STEP 1: Choose Guest(s)

1. Begin typing the guest's first or last name into the "Select Guest" field.
2. If you find the guest, choose the guest's name from the pull down menu.
3. If the guest cannot be found in the menu, click **Add a Guest**.
4. Enter the guest's First Name, Last Name and Email Address.
5. Click **Add Guest** and **Next**.
6. Click **Next**.

### STEP 2: Update Guest(s)

1. Complete the guest's *Personal* and *Household* information. If you are checking in a couple, note that you can easily copy information from one record to the other.
2. Click **Next**.

### STEP 3: Capture Credit Card

1. Click **Add a Credit Card** to put the guest's credit card on file for the event. If you are checking in a couple, you can only enter the credit card information of the Primary Guest.
2. Click **Next**.

### STEP 4: Check In Guests

1. **Refer to the "Party (Ticket)" field of the guest (or both guests if you are checking in a couple).**
2. Is the "Party (Ticket)" field already filled in? If so, this guest has a ticket, and you can skip to #6 below.
3. If the "Party (Ticket)" field is not filled in, then ask the guest if he has a ticket. Specifically, did he buy his own ticket? Did someone else buy him a ticket? Or is he coming as the guest of a sponsor? If yes, then find and choose the ticket in the "Party (Ticket)" menu.
4. \*\*\*\* Only if the guest needs to purchase tickets at the door, click **Sell Tickets**. Follow the prompts to record the sale of the tickets.
5. If still not assigned, choose a "Party (Ticket)" for the guest.
6. Choose or relay to or confirm with the guest where he will be seated (Table) and what meal he is assigned (Meal).
7. Tell the guest his bidder number. **NOTE:** You can optionally use the pull down menu to allow the guest to use (share) another guest's bidder number, e.g. to share with a spouse who is already a bidder.

8. Decide what emails (if any) need to be sent to this guest.

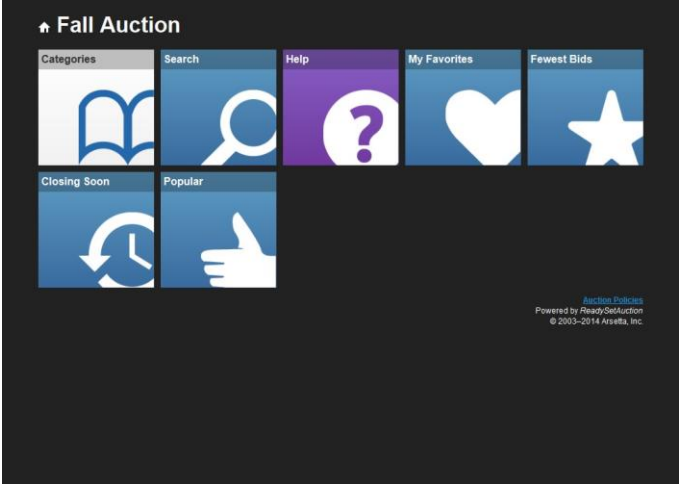
**IMPORTANT: If conducting mobile bidding**, ask bidder whether he can retrieve email. Then follow the instructions in the table on the following page based on whether the guest has pre-registered to bid and whether he/she can retrieve his/her email.

9. Click **Check in Guest(s)**.

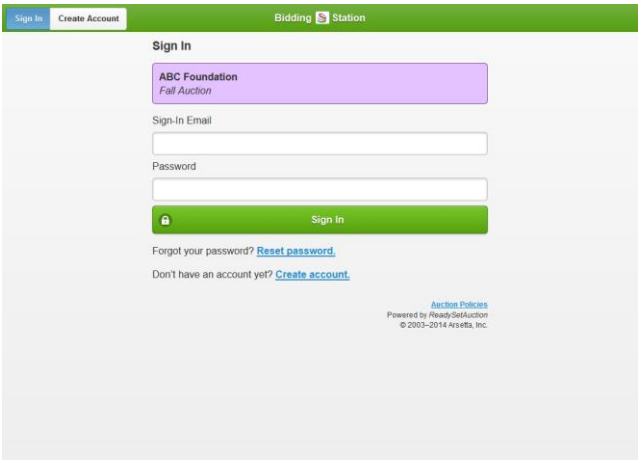
# How to Register Guests for Mobile Bidding

|                                  | CAN Retrieve Email   | CANNOT Retrieve Email  |
|----------------------------------|--|--|
| <b>Pre-Registered to Bid</b>     | <ol style="list-style-type: none"> <li>1. Keep "Send <b>welcome email</b> to this bidder" checked, &amp; click "Check in Bidder."</li> <li>2. Bidder receives Welcome Email, clicks the link, and logs in.</li> <li>3. If bidder has forgotten his password, he can click <a href="#">Reset It</a> on the login page.</li> </ol> | <ol style="list-style-type: none"> <li>1. Uncheck "Send <b>welcome email</b> to this bidder," &amp; click "Check in Bidder."</li> <li>2. Since the bidder doesn't have access to email, he can type <a href="http://rsabid.com">http://rsabid.com</a> into his phone's browser and enter your 5-Digit Event Code, which can be found on the <i>Bidder Tips Sheet</i>.</li> </ol>   |
| <b>Must Register at Check-In</b> | <ol style="list-style-type: none"> <li>1. Keep "Send <b>registration email</b> to this bidder" checked, &amp; click "Check in Bidder."</li> <li>2. Bidder receives Registration Email, clicks the link, and registers.</li> <li>3. Once registered, bidder can navigate to the eCatalog.</li> </ol>                              | <ol style="list-style-type: none"> <li>1. Uncheck "Send <b>registration email</b> to this bidder," &amp; click "Check in Bidder."</li> <li>2. Tell bidder his Bidder # as displayed on your screen.</li> <li>3. Pick up a Bidding Station tablet. -- Click the "Favorites" tile. -- Click "Create Account" button in upper left corner.</li> <li>4. Hand the tablet to the bidder.</li> <li>5. After entering his email address and Bidder #, the bidder can complete his registration.</li> <li>6. <b>A) Bidder can now bid from any Bidding Station:</b> To do so he will be required to enter his email address, password and 4-digit PIN.<br/> <b>B) Bidder can now also bid from his own bidding device:</b> Enter <a href="http://rsabid.com">http://rsabid.com</a> into his device's browser where he will be prompted to enter your event's 5-Digit Event Code.<br/> <b>C) Staff members may also place bid for an activated eBidder:</b> If eBidder is not yet activated, go to <i>Patrons &gt; Bidders</i>, check off the bidder, choose "Activate" from <i>Actions on Bidders</i> menu. To place proxy eBid, go to <i>@Event &gt; Record Sales &gt; Proxy eBids</i>.</li> </ol> |

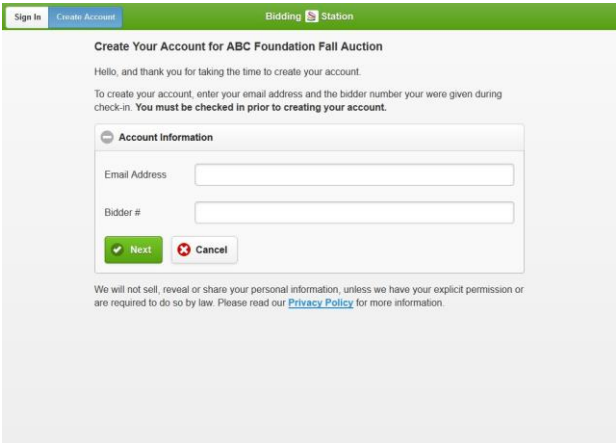
# How to Establish an eBidder Account at a Bidding Station



Step 1: Click the "My Favorites" tile.



Step 2: Click "Create Account" in the upper left corner.



Step 3: Only if check-in was required, bidder enters Email Address and Bidder #.

Sign In Create Account Bidding Station

### Create Your Account for ABC Foundation Fall Auction

Hello, and thank you for taking the time to create your account.

\*required fields

**Part 1: Contact Information**

Your Name

First Name \*

Last Name \*

Phone \*

Street Address \*

Street Address 2

City \*

State/Province \*

Zip/Postal Code \*

**Part 2: Sign-In Information**

Sign-In Email ?

Email Address \*

Confirm Email \*

Password ?

Choose Password \*

Confirm Password \*

Bidding PIN ?

Choose a 4-digit PIN \*

By creating a ReadySetAuction account, you agree to the [Bidding Rules](#) and [ReadySetAuction Terms of Service](#).

I agree to the terms. \*

We will not sell, reveal or share your personal information, unless we have your explicit permission or are required to do so by law. Please read our [Privacy Policy](#) for more information.

**Figure 4: Bidder completes fields. Required fields are determined by the Administrator on the *Admin > Event Settings > Patron Accounts* page.**

**IMPORTANT:** Be sure to Sign Out of the Bidding Station so that the next guest can establish his/her eBidder account.