

## Launch the Auction via e-mail:

Send URL via e-mail using our system

If you have e-mail addresses for all, some, or even just a few of your guests, you can Launch the auction using the option “Invite Guests” under the **Guests** option.

**iBid** Dashboard Manage Event **Guests** Items Manage Auction David @ kim's birthday 4/19/2017

### Invite Your Guests

Who do you wish to invite?  
All Guests

Invite Subject \*

From Name \*

Reply to Email \*

Invite Message \*

Format **B** **I** **U** [List Icons]

Dear [[Name]],  
Please use these links to join our auction:  
[[LINKS]]  
Regards,  
Our Charity

(Available Mail Merge Fields: [[Name]] = Guest Name, [[LINKS]] = Link to Guest Auction Page)

Send Messages

Your options within the “**who do you wish to invite?**” include All Guests, Guests who have not registered for electronic bidding, or just a specific guest.

Your “**from Name**” can be any person or organization, while the “**Reply to E-mail**” must be a valid e-mail address.

There is no character limit on the invite message, and you can include a logo in the message if you wish. Be sure to INCLUDE THE **[[LINKS]]** merge field so your guests can find the auction

IF you use the **[[LINKS]]** merge field, the e-mail being sent is a PERSON SPECIFIC e-mail – meaning it has the bidder number & cc (if connected) already connected to the link. A person specific link looks like this:

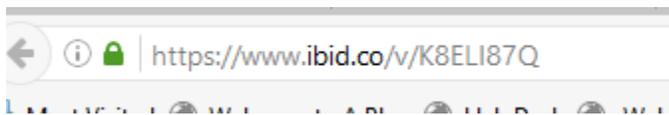


If you do not have e-mail addresses in our system for your guests, you can use any other contact system and include the link to the site by hitting the “preview” button from the dashboard

The screenshot shows the iBid Event Dashboard. At the top, there is a navigation bar with the iBid logo and menu items: Dashboard, Manage Event, Guests, Items, and Manage Auction. Below the navigation bar, the title of the dashboard is "iBid Event Dashboard - Organization's Fall Gala on 1". The dashboard is divided into two main sections: "Event Information" and "Revenue".

Event Information		Revenue
Event ID:	K8ELI87Q <a href="#">Preview</a>	Silent Auction:
Event Status:	Active	Sales:
Number of Guests:	2	Donation:
Number of Items:	8	Live Auction:
Base Fee:	\$24,400	Profit:

Which takes you to a preview of your auction:



From where you can copy and paste your event URL into your contact/email system.

Again, this URL is not person specific, so it can be shared via e-mail with any number of users.

---

AGAIN, THIS, on the other hand is a PERSON SPECIFIC URL, and cannot be shared:

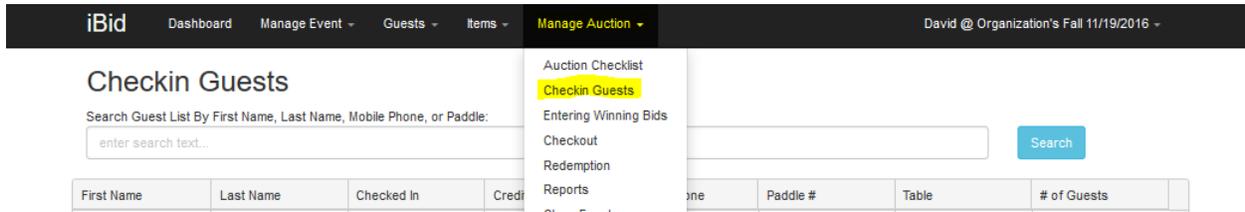


WITHOUT THE 7JE... portion, it is event specific, but not person specific.

The difference is that there is a second set of letters (the first is the Event URL, the second is the PERSON SPECIFIC information). URLs with two sets of random numbers should ONLY be shared between individuals who wish to bid as one “couple” or with one payment method.

# Administrator's Guide to the Day of Event:

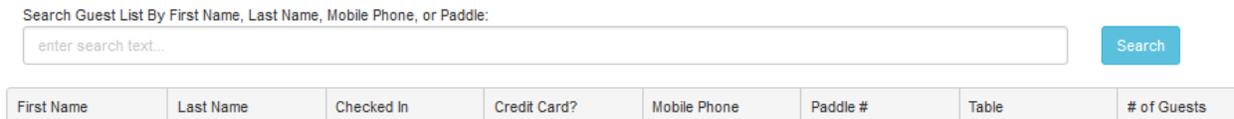
## Check-in Guests:



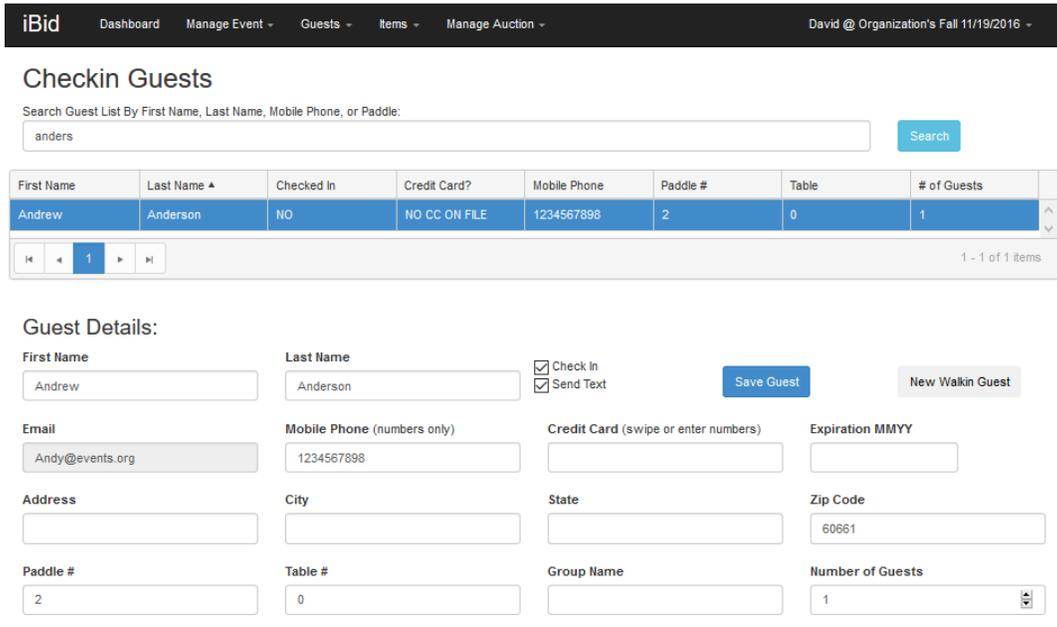
Utilize this screen to send a text to your guests providing them the information they need to immediately begin bidding (the text sent will include guest specific information – so it should not be forwarded from guest to guest unless they wish to share the same credit card).

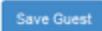
- 1) Type any portion of the guest's first or last name into this box

### Checkin Guests



- 2) Click Search
- 3) Highlight the name of the person you wish to check-in
- 4) The guest specific information appears in the bottom portion of the screen – and is ready for the credit card to be swiped or keyed, the cell phone and e-mail address verbally verified (or entered if not there), and the zip-code entered or confirmed.



- 5) Assuming the guest is not checked in, you can click the big blue  box.

- 6) The Save guest clicking initiates a text being sent to the guest. Clicking the Save Guest button more than once will send the text multiple times. While not needed, there is no harm in sending multiple texts.

### **Changing Credit Cards**

*Before the close of the event:* Please do so in the Manage Auction – Check-in Guest screens: call up the name of the person wishing to change credit cards, make the change – UNCLICK the box that says “send text” and then click “Save Guest”.

*At cashier check-out* – see cashier checkout notes:

### **Updating cell phones – transferring same “bidder profile” from one cell phone number to another**

Please do so in the Manage Auction – Check-in Guest screens: call up the name of the person wishing to switch phone numbers, change the number – resend the text to the corrected number. This is done by leaving the boxes that say check-in guest AND Send Text both checked and then hitting the “Save Guest” option

### **Correcting Guest Name or Address Info**

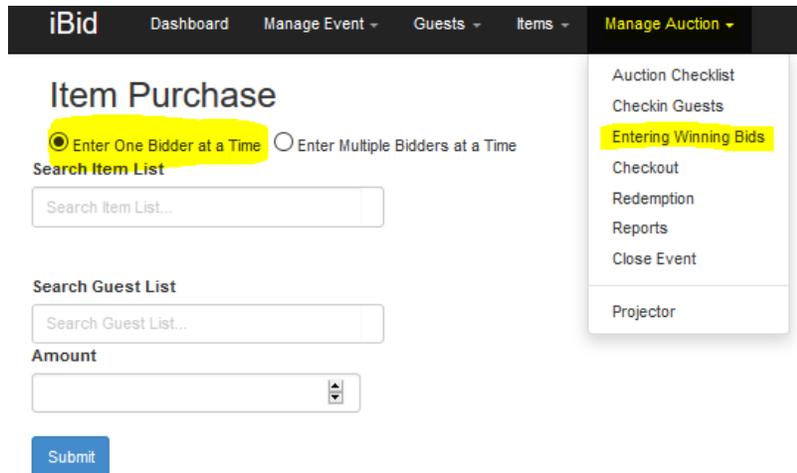
At any time during the event: Please do so in the Manage Auction – Check-in Guest screens: call up the name of the person wishing to change addresses, correct a spelling, etc, make the change – UNCLICK the box that says “send text” and save the change by clicking the “Save Guest” box.

**THE ONLY PIECE OF INFORMATION YOU CANNOT CHANGE IS THE E-MAIL ADDRESS.**

## Entering paddle raises, raffle tickets, or any item NOT bid upon.

### SINGLE ITEM ENTRY

Select **Enter Winning Bids** from the Manage Auction tab



The screenshot shows the iBid application interface. At the top, there is a navigation bar with the following items: iBid, Dashboard, Manage Event, Guests, Items, and Manage Auction. The 'Manage Auction' dropdown menu is open, showing options: Auction Checklist, Checkin Guests, Entering Winning Bids (highlighted in yellow), Checkout, Redemption, Reports, Close Event, and Projector. Below the navigation bar, the 'Item Purchase' form is visible. It features two radio buttons: 'Enter One Bidder at a Time' (selected and highlighted in yellow) and 'Enter Multiple Bidders at a Time'. Below these are three input fields: 'Search Item List', 'Search Guest List', and 'Amount'. A blue 'Submit' button is located at the bottom of the form.

Place radial button in the “Enter One Bidder at a Time option

Begin typing the item number into the “Search Items List” bar

You can search the Guest List by last name or bidder number.

Select the item desired from the pull-down, then fill in the amount box.

After filling in the item number, amount, and guest information, you can click or Tab to “Add to Guest Receipt”. Hit the return key or click the blue “Add to Guest Receipt” button and it will automatically be added to the guest receipt. You’ll note a **red confirmation message at the top of the page.**

## MULTIPLEBIDDERS - SAME ITEM ENTRY

Use this version of the screen to enter multiple instances of the same item (like a paddle raise or a raffle ticket sale)

Change the radial button from Enter One Bidder to Enter Multiple Bidders at a Time. The following grid appears – and you can enter by Bidder Number ONLY – and the amount. The amount will copy from line to line for your convenience.

Be certain to hit the SAVE button at the bottom of the page to save all entries.

And errors will be highlighted in RED at the top of the page.

iBid [Dashboard](#) [Manage Event -](#) [Guests -](#) [Items -](#) [Manage Auction -](#) David @ Viper Skate Again 9/11/2

### Item Purchase

Enter One Bidder at a Time  Enter Multiple Bidders at a Time

Search Item List

Bid Number	Amount
<input type="text"/>	<input type="text"/>

## Closing the Auction – the whole screen:

iBid Dashboard Manage Event Guests Items Manage Auction David @ Viper Skate Again 9/11/2016

### Event Closing

Remove Bids

SMS Message Broadcast:

Send Message

Golf Outing Live  Golf Outing Items  Hockey Things  Things to Eat  Kim's Favorites  donations at checkout

Step 1. Close Auction by Category

Step 2. Generate Transactions

Step 3. Send Auction Close Text Notifications

Step 4. Print Redemption Statements

Step 5. Process Credit Cards

Step 6. Email Receipt: (optional)

Subject Line:

Message:

***Some steps can be done multiple times, some only once – please pay attention to these instructions:***

### REMOVE BIDS

At the top of the screen is the “remove bids” feature. Here you can remove an errant bid at the request of the bidder if you so choose. Simply type the item you wish to remove the bid FROM and then the Bidder whose bid you wish to remove. Clicking the Remove Item Bid button will either result in a confirmation note acknowledging that the bid was removed, or a note indicating the selected bidder was not the highest bidder at the time you tried to remove it (so no bid removal was needed).

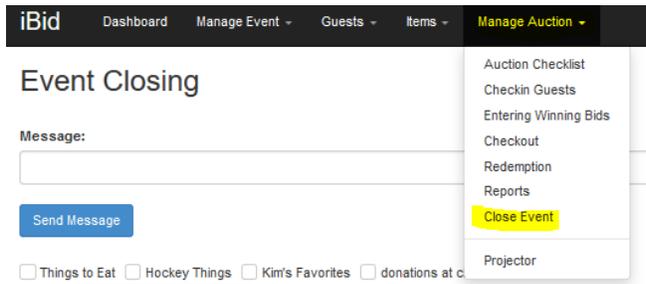
This removal process will also remove any max bid placed by the bidder.

### SMS BROADCAST

You have the option of sending texts to your guests. All you need to do is enter your message, and click the send message button. This will send a message to ALL of your guests.

## CLOSE EVENT

Select the Close Event Option from the Manage Auction tab:



## CLOSE AUCTION CATEGORY

Place a check in the box of each category you wish to close:

Things to Eat  Hockey Things  Kim's Favorites  donations at checkout

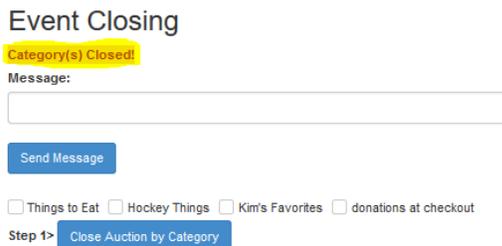
Step 1> [Close Auction by Category](#)

Step 2> [Generate Transactions](#)

Step 3> [Send Auction Close Text Notifications](#)

Step 4> [Process Credit Cards](#)

Click step 1 “Close Auction by Category” to end all bidding on all items in that category. You will see a confirmation message at the top of the page confirming that the categories are closed.



You can need only close each category once, and you **CANNOT** reopen a category once closed.

## GENERATE TRANSACTIONS

Click step 2 “Generate Transactions” This step moves the successful bids to the receipts of the winners.

You can repeat this step as many times as needed if you have separate category close times.

## SEND AUCTION CLOSE TEXT NOTIFCATIONS

Click step 3 “Send Auction Close Text Notifications”. This action **sends a notice to ALL who have bid upon an item:**

The message reads:

Congratulations, you're a winner! In order to pick up your items you must first confirm your purchases at <https://www.ibid.co/receipt?id=UNIQUEGUESTCODE>

Guests will follow that link to view their receipt.

### **PICK SLIPS – or REDEMPTION ONLY RECEIPTS**

If your organization would like to print paper slips for guests to sign acknowledging pickup OR if you'd like to presort the sold items based on purchaser, you can select this option. It generates a pdf file for all item winners, and can then be printed.

If you prefer electronic item pick up confirmation, you can choose the Item Redemption option discussed below.

### **PROCESS CREDIT CARDS**

Generally this is NOT done the night of the event as it processes all credit cards. Unfortunately, once a card has been processed, you CANNOT add anything to the person's invoice, and you cannot process the stored credit cards a second time. You can issue refunds, but your organization will NOT be credited for the transaction fees charged for the higher amount processed.

### **EMAIL RECEIPT**

Many guests also want the receipt e-mailed to them. Therefore, we've provided an easy way to mail all invoices to all guests. Simply add your thank you text and send the link to the receipt to all guests via e-mail. This is the same link texted above, but now is sent to e-mails, not phones.

# Cashier Checkout

Generally this screen for reviewing payments, adjusting payments, or viewing a receipt. For bidding to happen, guests must have a credit card on file, so the need to collect payment post event is minimal.

To access a guest, like with our other screens, type a portion of the guest's last name or bidder number into the search box.

You can add additional items on this screen. This comes in handy if the guest wishes to round the transaction up to the next dollar increment or buy one of the evening's momentos.

Generally you will wait to Process CC's until after the event is concluded and do a batch process. You can, however, process at any time – be aware, you can only process a stored credit card one time. If you click the Process CC button, you will not be able to increase or decrease the amount charged on that guest's credit card. You'll need to contact events.org if you wish to refund an overcharge.

## Accepting cash/check

In the bottom portion of the screen, under the Payment Details header, you'll select the New Payment Type from the pull down. Complete the appropriate details, and then click the Update Amounts box.

### Changing card on file

If the guest wishes to change or split between credit cards, you'll select credit card from the payment details pull down, then click your cursor in the next box and swipe or hand key the credit card – if swiping, the expiration date auto populates along with the cc number... if hand

keying fill in both fields. Type the amount in the next box add a comment if desired (work cc) and click the Add Payment box.

Payment Details  
 New Payment:

Date	Payment Type	Card/Check Num	Amount	Status	Comments	
09/09/2016	Cash		100	Approved		<input type="button" value="Edit"/> <input type="button" value="Remove/Refund"/>
09/09/2016	Credit Card	2935	369	Pending		<input type="button" value="Edit"/> <input type="button" value="Remove/Refund"/>
			\$ 469.00			

The system WILL NOT auto adjust any other payment methods, so you'll need to use the "Edit" button to adjust the payment on other cards to put the transaction in balance. You can enter a new amount then click the Update button.

			3 item(s)	\$ 469.00		
--	--	--	-----------	-----------	--	--

Add Item:

Payment Details  
 New Payment:

Date	Payment Type	Card/Check Num	Amount	Status	Comments	
10/18/2016	Credit Card	X2935	10	Pending		<input type="button" value="Edit"/> <input type="button" value="Remove/Refund"/>
09/09/2016	Cash		100	Approved		<input type="button" value="Edit"/> <input type="button" value="Remove/Refund"/>
09/09/2016	<input type="text" value="Credit Card"/>	<input type="text" value="2935"/>	<input type="text" value="369"/>	Pending		<input type="button" value="Update"/> <input type="button" value="Cancel"/>
			\$ 479.00			

The top of the page will display a transaction header indicating the transaction is in balance...

## Checkout Guest

Search Guest List (Last Name or Bidder #)

### Contact Information

Kim Heron  
 8477820562  
 kim@events.org

### Guest Receipt Summary

Trx ID: 95FF62YX  
 Transaction Total: \$469.00  
 Payment Total: \$479.00  
 Amount Due: (\$10.00)

Once the adjustment is made to the bottom portion of the receipt, and the update Amounts button is pushed, the top transaction header will update.

You can view and print the receipt from this screen.

## Checkout Guest

Search Guest List (Last Name or Bidder #)

Contact Information  
 Kim Heron

Guest Receipt Summary  
 Trx ID: 95FF62YX

## Item redemption

The screenshot shows the iBid web application interface. At the top, there is a dark navigation bar with the following items: "iBid", "Dashboard", "Manage Event", "Guests", "Items", and "Manage Auction". The "Manage Auction" item is highlighted in yellow, and a dropdown menu is open below it, listing several options: "Auction Checklist", "Checkin Guests", "Entering Winning Bids", "Checkout", "Redemption" (highlighted in yellow), "Reports", "Close Event", and "Projector".

Below the navigation bar, the main content area is titled "Redemption". Underneath this title, there is a search field labeled "Search Guest List (Last Name or Bidder #)". The search field contains the text "Search Guest List...".

Below the search field, there is a section titled "Item Details". Underneath this title, there is a label "Your Signature" followed by a large empty rectangular box for a signature. Below the signature box, there is a "Clear" link. At the bottom of the "Item Details" section, there is a blue button with the text "I Approve the Purchases and Charges and Picked Up My Items".

Using the Redemption option from the Manage Auction tab, you'll be able to make sure your guests leave with the right items – and that they sign for them as well.

In a similar fashion, you'll search for the guest name and the following information will display once you've selected the name:

## Redemption

Search Guest List (Last Name or Bidder #)

Kim Heron -

### Item Details

Catalog #	Item Name	Gift Cert?	Qty	Amount	Total Due
T1	Cookies	NO	1	19	0
d1	Donation to Special Olympics	NO	1	100	0
H1	Duncan's jersey	NO	1	350	0

1 - 3 of 3 items

Your Signature

Clear

I Approve the Purchases and Charges and Picked Up My Items

You can see that this guest is ready to pick up his or her items as there is no total due: Below is an example of someone who has a balance outstanding:

## Redemption

Search Guest List (Last Name or Bidder #)

Jacob H - 1525

### Item Details

Catalog #	Item Name	Gift Cert?	Qty	Amount	Total Due
K1	Coffee Mug	NO	1	23	23

1 - 1 of 1 items

Your Signature

The system will not prevent someone with a balance outstanding from redeeming their items, but your redemption team workers should look for this and then either make the person go to cashier checkout to pay or ensure that some other arrangement is made.