

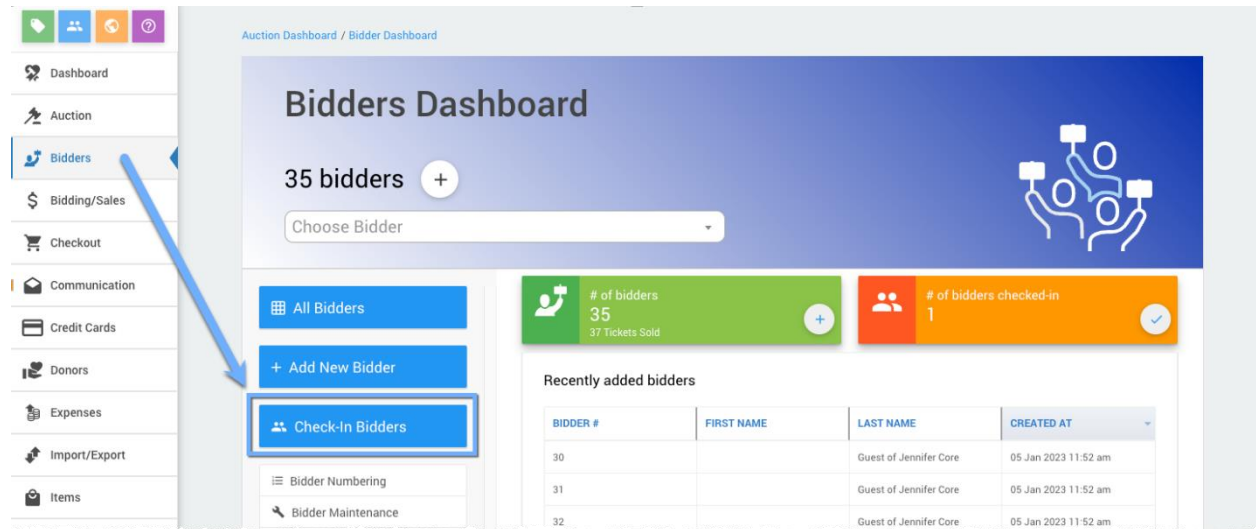
AUCTRIA BIDDER TUTORIALS: CHECK-IN & CHECK-OUT

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Checking In Bidders- [Check In Bidders | Auctria](#)



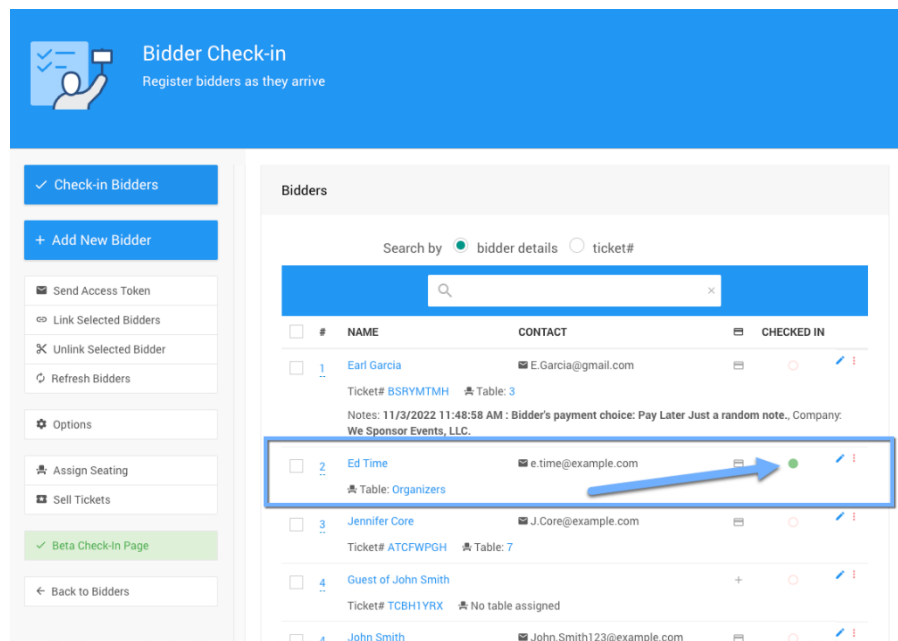
For In-Person events, you can use Auctria to Check In Bidders as they arrive. From the main **Auction Dashboard**, click through **Bidders > Check-in Bidders** under the **Actions** sidebar menu to open the **Bidder Check-in dashboard**.



You can search for bidders by entering details such as their last name or a ticket number to find the bidder you want to check in. Click the bidder(s) you want to check in and then click **Check-in Selected Bidders**.

After the bidders have been checked-in, they will show as such on the **Bidder Check-in** dashboard.

*An example of a checked-in bidder, with the green dot under **Checked In**.*



Add New Bidder

If the bidder is not in the system, yet, click **Add New Bidder** to quickly add the bidder.

Bidder Check-in
Register bidders as they arrive

✓ Check-in Bidders

+ Add New Bidder

Send Access Token

Link Selected Bidders

Unlink Selected Bidder

Refresh Bidders

Options

Assign Seating

Sell Tickets

✓ Beta Check-In Page

← Back to Bidders

Bidders

Search by bidder details ticket#

| <input type="checkbox"/> | # | NAME | CONTACT | | CHECKED IN | |
|---|---|---------------------|---------------------------|---|----------------------------------|--|
| <input type="checkbox"/> | 1 | Earl Garcia | E.Garcia@gmail.com | | <input type="radio"/> | |
| Ticket# BSRMTMH Table: 3 | | | | | | |
| Notes: 11/3/2022 11:48:58 AM : Bidder's payment choice: Pay Later Just a random note., Company: We Sponsor Events, LLC. | | | | | | |
| <input type="checkbox"/> | 2 | Ed Time | e.time@example.com | | <input checked="" type="radio"/> | |
| Table: Organizers | | | | | | |
| <input type="checkbox"/> | 3 | Jennifer Core | J.Core@example.com | | <input type="radio"/> | |
| Ticket# ATCFWPGH Table: 7 | | | | | | |
| <input type="checkbox"/> | 4 | Guest of John Smith | | + | <input type="radio"/> | |
| Ticket# TCBH1YRX No table assigned | | | | | | |
| <input type="checkbox"/> | 4 | John Smith | John.Smith123@example.com | | <input type="radio"/> | |

You can check-in the bidder as you register them, if needed.

Clicking **Save Bidder** will update/add the bidder and return you to the **Bidder Check-in** page.

Add New Bidder

Bidder ▾

Bidder #
Assign Automatically

First name Last name
First name Last name

Email
Email

Phone Number Cell Phone Number
Phone Number Cell Phone Number

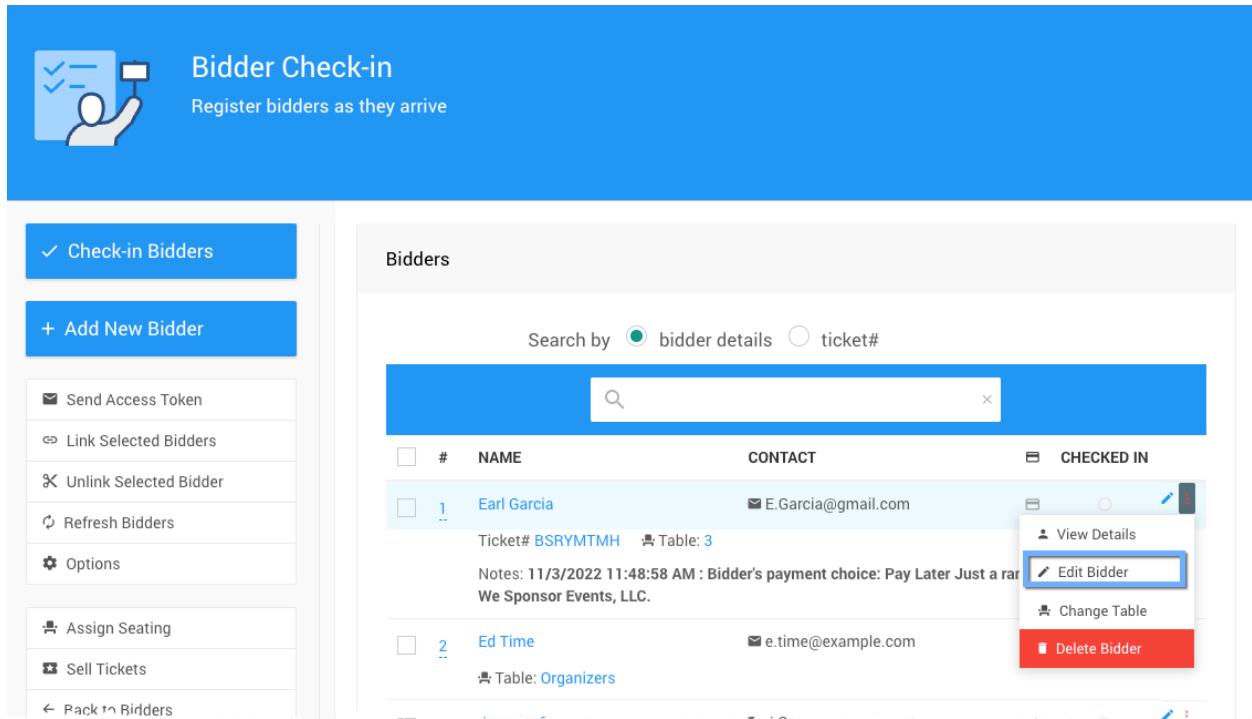
Checked in?

Additional bidders

Edit Bidder Details

If you want to edit bidder information at check-in or check the table assignment or address, click the **Quick Actions** icon (3 vertical dots icon at the far-right of the bidder row) and then select **Edit Bidder**.

Note that you can also delete a bidder and view bidder details from these **Quick Actions**. If you select view details, you will open the Bidder window for that bidder.



The screenshot shows the 'Bidder Check-in' interface. At the top, there is a blue header with the text 'Bidder Check-in' and 'Register bidders as they arrive'. Below the header, there is a left navigation bar with several buttons: 'Check-in Bidders', 'Add New Bidder', 'Send Access Token', 'Link Selected Bidders', 'Unlink Selected Bidder', 'Refresh Bidders', 'Options', 'Assign Seating', 'Sell Tickets', and 'Back to Bidders'. The main area displays a table of bidders. The table has columns for '#', 'NAME', 'CONTACT', and 'CHECKED IN'. The first bidder is 'Earl Garcia' with contact 'E.Garcia@gmail.com'. A popup menu is open over the first bidder row, showing options: 'View Details', 'Edit Bidder', 'Change Table', and 'Delete Bidder'. The 'Edit Bidder' option is highlighted with a blue border.

| # | NAME | CONTACT | CHECKED IN |
|---|-------------|--------------------|------------|
| 1 | Earl Garcia | E.Garcia@gmail.com | |
| 2 | Ed Time | e.time@example.com | |

If you selected **Edit Bidder**, a popup window will appear that allows you to edit the bidder details. You can make any changes, as needed, and then click the **Save** button at the bottom of the popup window to save your changes. Clicking the **Cancel** button will discard your changes and/or close the popup window without saving.

Linking Bidders

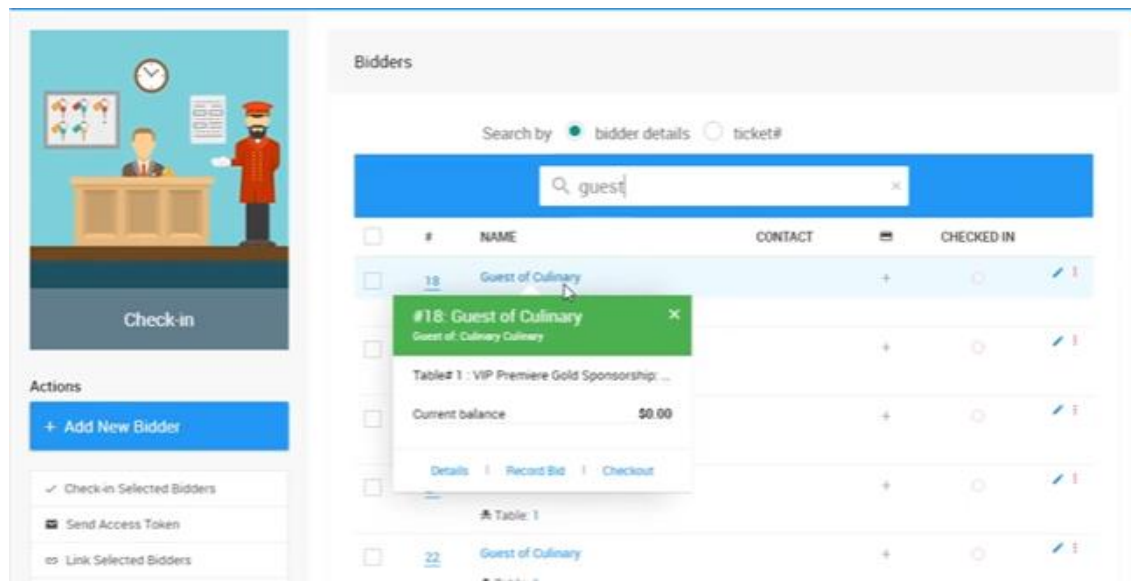
If two or more bidders would like to sit with one another, you can **Link** the two bidders' accounts when they are checking in. Simply check the appropriate box beside each bidder and click the **Link Selected Bidders Actions** button in the left navigation bar.

Send Access Token

An Access Token is an automated email that will send a bidder their Auctria bidder login information. All registered bidders in the system have already received this, so the only time you need to use the **Send Access Token Action** is when you have updated their contact information within the Bidder dashboard. First, you must select the bidder(s). Clicking the button will initiate the Bidder Access Tokens function and send an appropriate email to the selected bidder(s).

Guest Of

If someone is a guest or an organization or sponsor, you can search for their group by typing 'Guest' into the search bar. Click on the pencil 'Edit' button for the appropriate guest profile. Then, manually enter in the guest's information to add them to the bidder system. Once you have saved their information, enter their name into the search bar and check them in normally.



The screenshot displays the Auctria Bidder Dashboard. On the left, there is a 'Check-in' section with an illustration of a person at a desk and a staff member. Below it, an 'Actions' menu includes 'Add New Bidder', 'Check-in Selected Bidders', 'Send Access Token', and 'Link Selected Bidders'. The main area is titled 'Bidders' and features a search bar with 'guest' entered. A table lists bidders with columns for '#', 'NAME', 'CONTACT', and 'CHECKED IN'. A modal window is open for bidder #18, 'Guest of Culinary', showing details like 'Table# 1 : VIP Premiere Gold Sponsorship...', 'Current balance: \$0.00', and buttons for 'Details', 'Record Bid', and 'Checkout'.

Refresh Bidders

The **Refresh Bidders Action** is most useful when there are multiple Users from the **Organization** using the platform at the same time especially when using the check-in features to keep the data being viewed current. This will update Auctria check-in on your device.

Checkout- [Checkout](#) | [Auctria](#)



To access the **Checkout** functions, click through **Checkout** on the main **Auction Dashboard** menu.

A screenshot of the Auctria Auction Dashboard. On the left is a vertical navigation menu with icons and labels for Dashboard, Auction, Bidders, Bidding/Sales, Checkout (highlighted with a blue box), Communication, Credit Cards, Donors, Expenses, Import/Export, Items, Online Settings, and Organization. The main content area has a blue header with a shopping cart icon, the word "Checkout", and the subtitle "Process a single checkout transaction". Below the header is a "Make Payment" button. To the left of the main content is a sidebar with options: View Transactions, Remove Bidders From Checkout (highlighted in yellow), Send Statements On Payment, Refresh Bidders, Payment Options, Batch Checkout, and Transfer Payment. The main content area contains a section titled "Select a bidder to include in the current checkout:" with a "Choose Bidder" dropdown menu. Below this is a table with columns: BIDDER#, NAME, CHARGES, PREVIOUS PAYMENTS, BALANCE, and THIS PAYMENT. The table is currently empty with the text "No selected bidders" in the center. At the bottom of the table is a green "Totals" row with values: \$ 0.00, \$ 0.00, \$ 0.00, and \$ 0.00. Below the table is a "Payment Method" section.

Make Payment

The **Make Payment** Action is the default action when landing on the Checkout page. Organizers can **Record Payments** from the main **Auction Dashboard** with options to include credit card fees and select from available payment methods.

Steps to make a payment:

1. Select Bidder from the **Choose Bidder** selector at the top of the dashboard.

Select a bidder to include in the current checkout:

Choose Bidder

| BIDDER# | NAME | CHARGES | PREVIOUS PAYMENTS | BALANCE | THIS PAYMENT |
|---------------|-------------|------------------|-------------------|------------------|------------------|
| 1 | Earl Garcia | \$ 601.02 | \$ 101.02 | \$ 500.00 | \$ 500.00 |
| Totals | | \$ 601.02 | \$ 101.02 | \$ 500.00 | \$ 500.00 |

Add in credit card fees of \$ 12.73

- a. Partial Payments can also be made by adjusting the "This Payment" amount.
- b. Credit Card Fees can be optionally added (based on the payment amount).

It is important to note the organization (GALA) will always be paying the credit card processing fees **and** the Auctria integration fees on credit card transactions only.

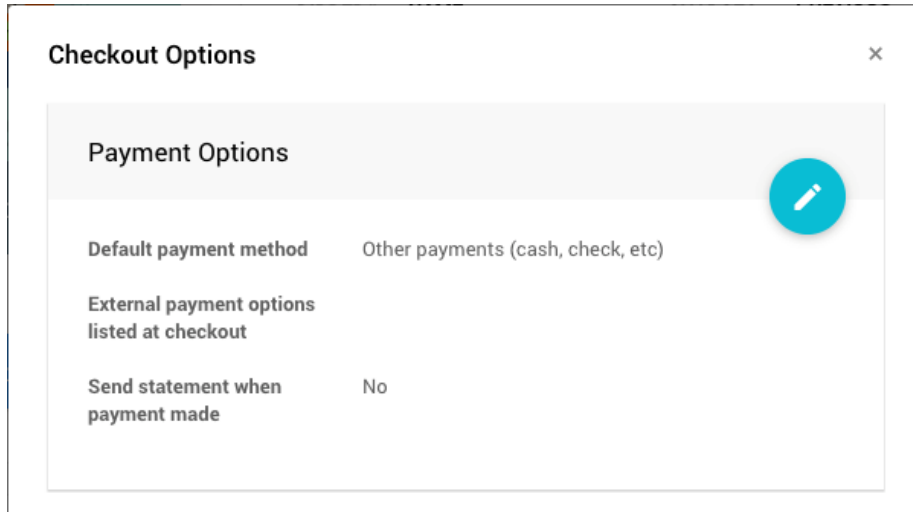
When a **bidder opts in to pay the fees**, they will be **paying an extra amount**. This **extra payment amount** is based on the credit card processing fees plus the Auctria integration fees and applied to their balance during checkout.

This **extra payment amount** will cover the fees being charged, which leaves the entire donation, purchase, and winning bid amounts to the organization (GALA).

2. Select Payment Method
 - a. **Credit Card**
 - b. **Registered Card** - available and selected by default if the bidder has a registered credit card on file
 - c. **Card Reader**
 - d. **Other**
 - i. **Cash**
 - ii. **Check**
 - iii. **Other**
3. Once the **Payment Method** is selected and its appropriate details entered, click the **Make Payment** button in the sidebar to continue the process for the bidder.

Checkout Payment Options

You can modify the list of the available **Payment Method | Other** tab options, as well as set the "Default payment method" for the event, via **Payment Options** under the Actions sidebar.

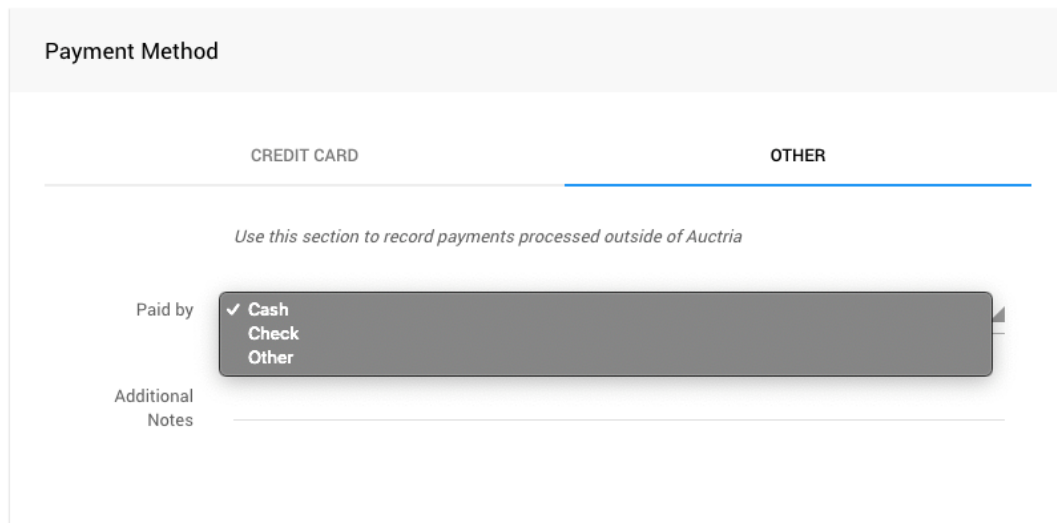


The screenshot shows a window titled "Checkout Options" with a close button (x) in the top right corner. Inside the window, there is a section titled "Payment Options" with a blue pencil icon in the top right corner. Below this section, there are three rows of settings:

| | |
|---|-----------------------------------|
| Default payment method | Other payments (cash, check, etc) |
| External payment options listed at checkout | |
| Send statement when payment made | No |

Clicking the **Payment Options** Action menu item will show the **Checkout Options** window. Click the edit button (pencil icon) to make changes to these options.

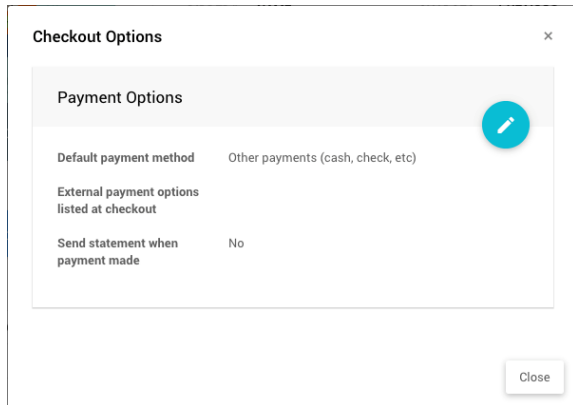
You can set your Default Payment Method and External Payment Options (ex. **Cash,Check,Other**). To do this, type in the names of the external methods you want to recognize separated by commas (with **no** spaces, as shown in above highlighted text). The **Payment Method** panel will show this as a list of other payment options being recognized although the method chosen will not have any affect on the transaction being recorded.



The screenshot shows the "Payment Method" panel. At the top, there are two tabs: "CREDIT CARD" and "OTHER". Below the tabs, there is a horizontal line and a note: "Use this section to record payments processed outside of Auctria". Underneath, there is a "Paid by" label and a dropdown menu. The dropdown menu is open, showing three options: "Cash" (selected with a checkmark), "Check", and "Other". Below the dropdown menu, there is an "Additional Notes" label and a text input field.

Send Statements on Payment

The **Send Statements On Payment** Action is a reference to a **Checkout Options** feature. If the "Send statement when payment made" option is disabled you will see the following popup window when you click on the action:

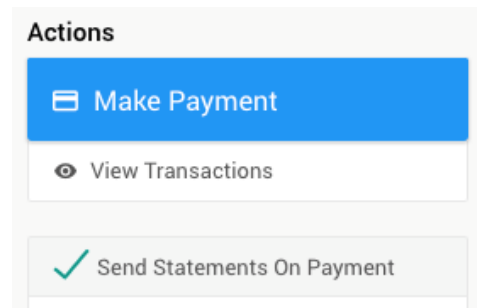


By default this option is disabled, it is enabled by selecting an appropriate option from drop-down selector (other than **No**).

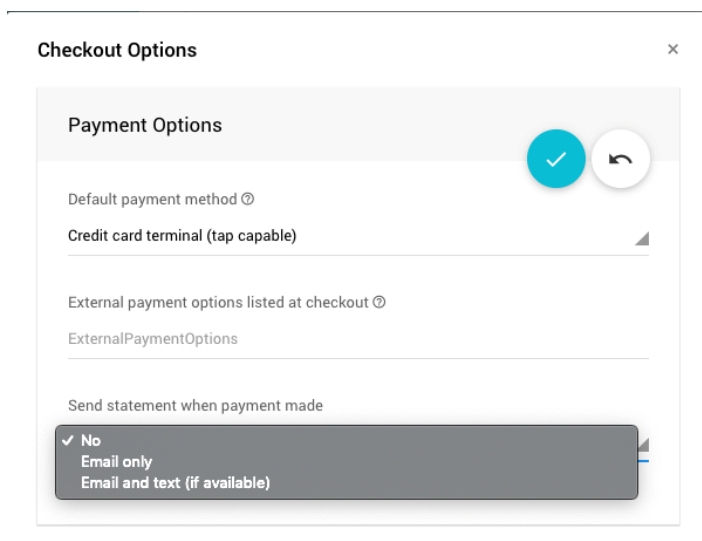
Leaving this disabled would allow for end-of-event [batch-style processing](#) for bidders providing them with a single invoice for their account balance to pay.

If this setting is enabled (a green check mark will appear beside its menu item), a purchase statement/receipt will be sent to the bidder/purchaser with **every completed purchase**.

Statements can be sent by "Email only" or "Email and text (if available)".



Click the check mark icon to save the changes made to the **Checkout Options**; or, click the arrow icon to close the window without saving any changes.



Refresh Bidders

The **Refresh Bidders Action** is most useful when there are multiple Users from the **Organization** using the platform at the same time especially when using the check-in features to keep the data being viewed current. This will update Auctria check-in on your device.

View Transactions

The **View Transactions** Action will, once a bidder is selected, show the bidder's current event transactions including "Item's Won", "Purchases", "Donations", "Payments", and "Amount Owing". You can find/verify the details of the payment here before processing it. This is an informational popup window and will not record any transactions when clicking its "Close" button.

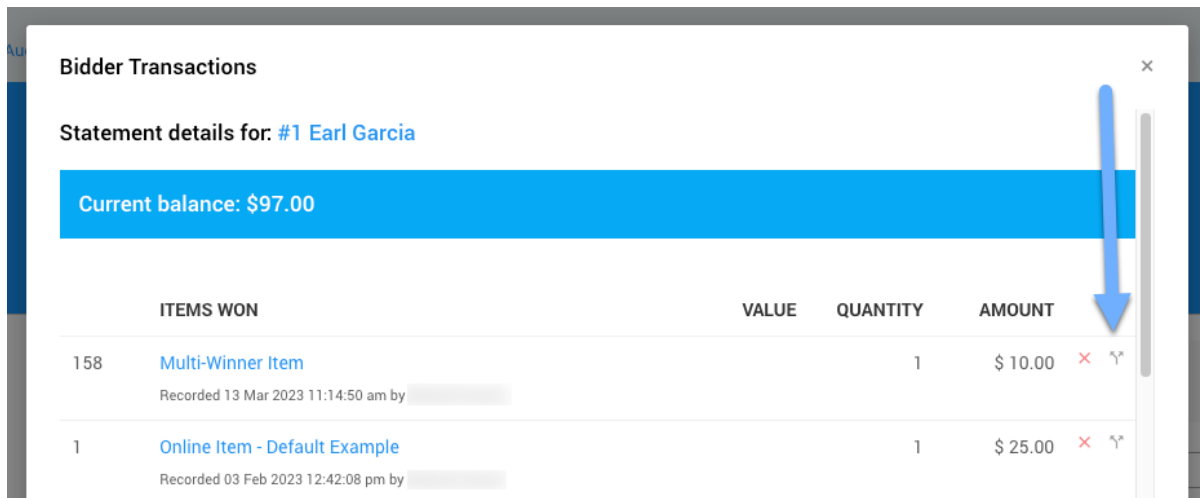
Remove Bidders from Checkout

This will clear the current bidder's details on the Checkout page and allow you to select a different bidder to check out.

Splitting Bids

Sometimes at checkout a bidder will want to split a bid with a number of other bidders.

From the main **Auction Dashboard**, click through the **Checkout** entry, then select the bidder > **View Transactions**. Click on the split icon to open the **Split Bid Dashboard** where you can split the bid, purchase, or donation between multiple **Bidders**.



Bidder Transactions

Statement details for: #1 Earl Garcia

Current balance: \$97.00

| | ITEMS WON | VALUE | QUANTITY | AMOUNT | |
|-----|---|-------|----------|----------|-----|
| 158 | Multi-Winner Item Recorded 13 Mar 2023 11:14:50 am by [redacted] | | 1 | \$ 10.00 | ✕ ⌵ |
| 1 | Online Item - Default Example Recorded 03 Feb 2023 12:42:08 pm by [redacted] | | 1 | \$ 25.00 | ✕ ⌵ |

By default the page will split the bid amount evenly, but you can disable this using the **Auto-calculate amount** checkbox on the left and manually enter the amounts.

Split Bid
Split a bid between bidders

✓ Split Bid

✓ Auto-calculate amount

Item Details

Bidding/Sales

Quick Bid Entry

Checkout

1 : Online Item - Default Example
Split this bid between multiple bidders

You can use this page to split an existing bid between a group of bidders that are buying it together.

Current bid is \$50.00 (Qty: 1) to [Earl Garcia](#) (bidder# 1)

Splitting a bid will only record the bid, no payment is recorded. You will still need to check the bidders out.

Split bid to bidders

Choose Bidder

| BIDDER# | NAME | AMOUNT |
|---------|-----------------------------|------------|
| 1 | Earl Garcia | \$ 50.00 × |
| | | \$50.00 |

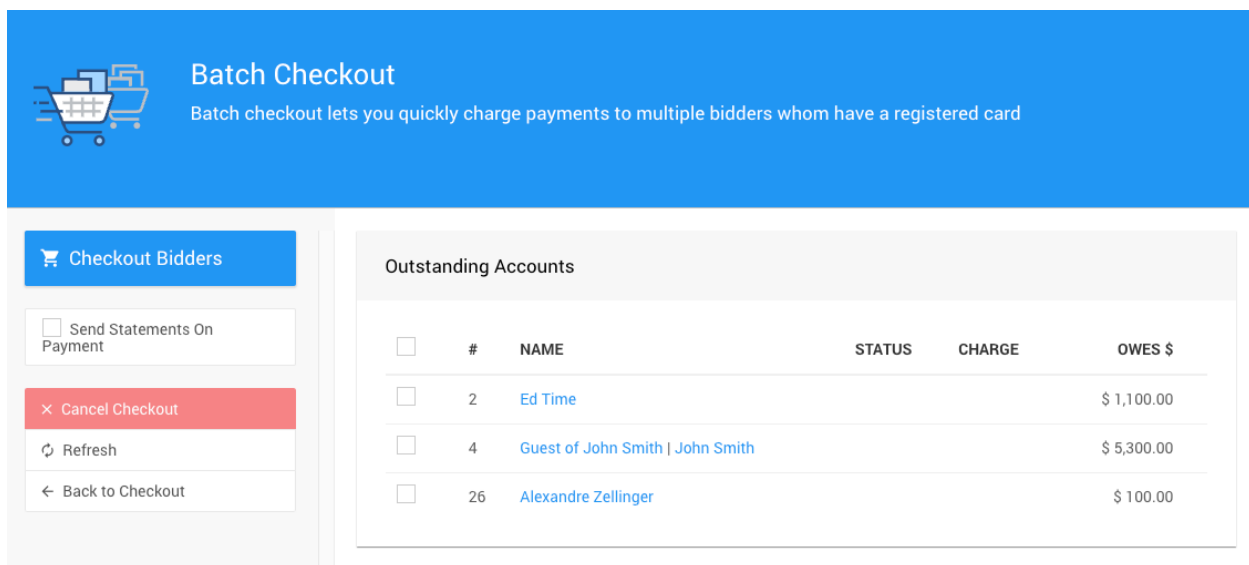
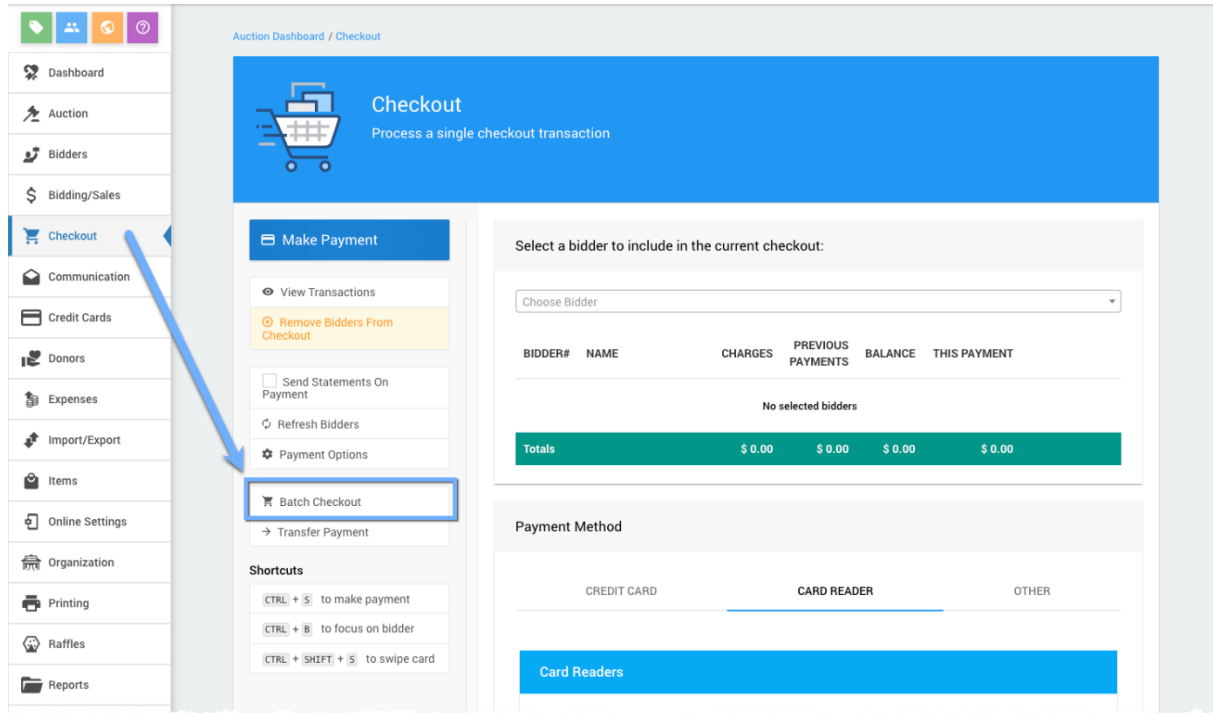
After selecting the bidders to split the item between, click on **Split Bid** to complete the transaction.

The page will refresh with a success banner appearing temporarily across the top of the page. The page will show the result of the **Split Bid** operation; you can then click on **Checkout** in the sidebar to return to the "checkout" you had in progress.

Batch Checkout

If you have enabled the Credit Cards processing integration, you can quickly process multiple checkouts at once for all bidders that have a registered credit card on their account. The batch checkout will process a payment equal to the outstanding balance for each bidder.

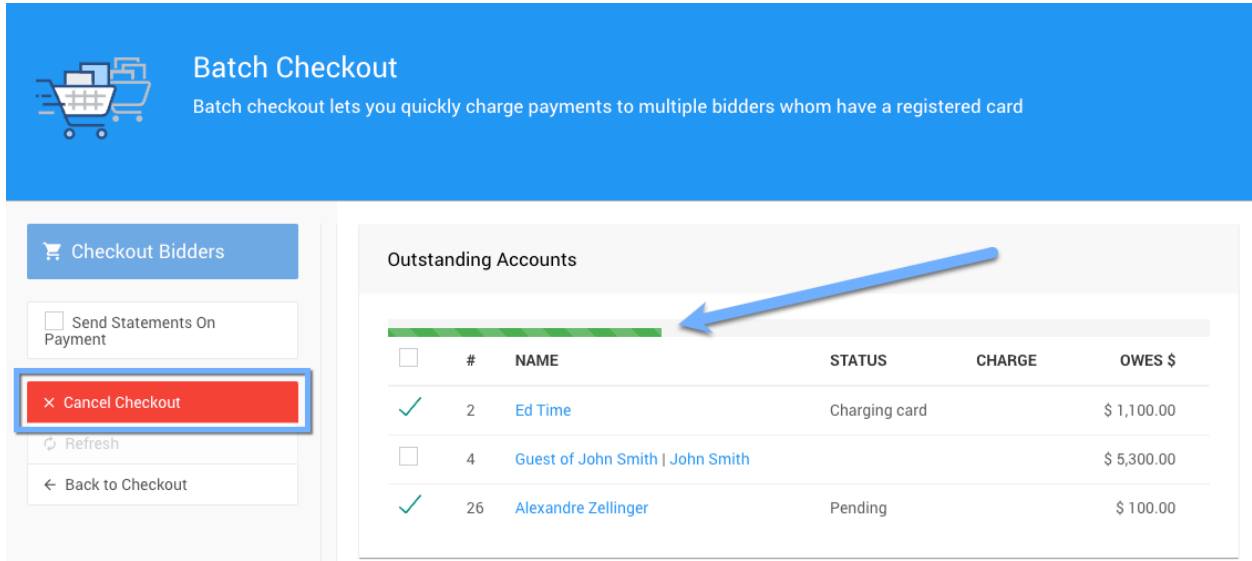
From the main **Auction Dashboard** you can click through **Checkout** and then through the **Batch Checkout** entry under the **Actions** menu.



A list of all bidders that have an outstanding balance and a registered credit card will appear.

- To include all bidders in the **Batch Checkout**, select the checkbox at the top of the table beside the column headers so that all bidder names are selected.
- To select specific bidders only in the **Batch Checkout**, only select the checkbox for the bidder(s) you want to include.

When the correct bidders are selected, click **Checkout Bidders**. A green bar appears along the top of the dashboard to show payments are being processed.



Batch Checkout
Batch checkout lets you quickly charge payments to multiple bidders whom have a registered card

Checkout Bidders

Send Statements On Payment

Cancel Checkout

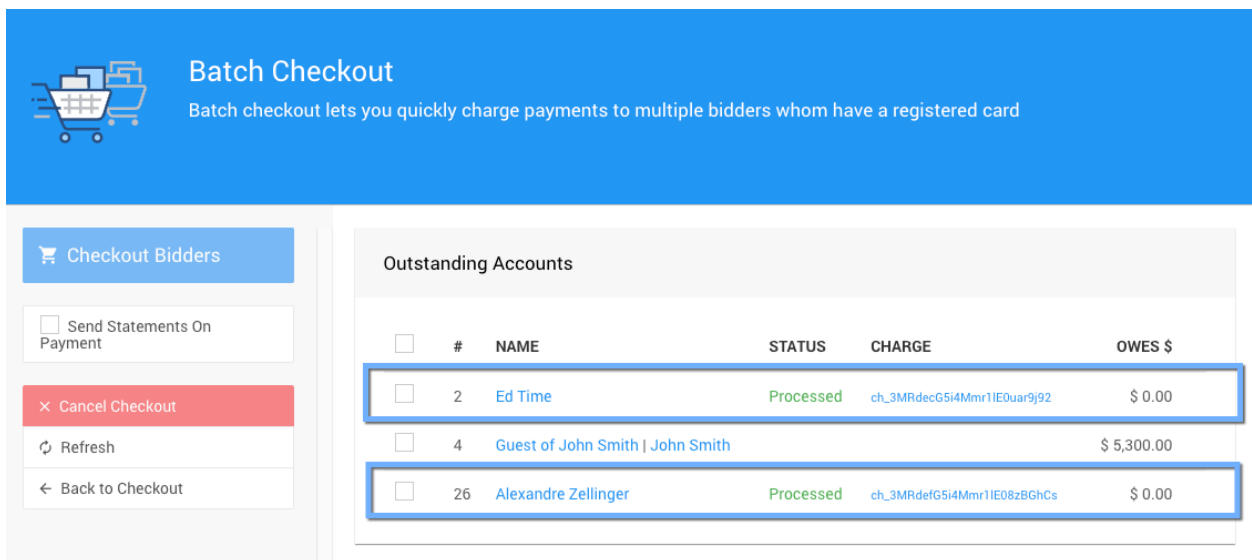
Refresh

Back to Checkout

Outstanding Accounts

| <input type="checkbox"/> | # | NAME | STATUS | CHARGE | OWES \$ |
|-------------------------------------|----|----------------------------------|---------------|--------|-------------|
| <input checked="" type="checkbox"/> | 2 | Ed Time | Charging card | | \$ 1,100.00 |
| <input type="checkbox"/> | 4 | Guest of John Smith John Smith | | | \$ 5,300.00 |
| <input checked="" type="checkbox"/> | 26 | Alexandre Zellinger | Pending | | \$ 100.00 |

To cancel the batch process, click **Cancel Checkout**. The current payment will be completed, but Auctria will not process any additional payments. Payments that were already processed will not be canceled.



Batch Checkout
Batch checkout lets you quickly charge payments to multiple bidders whom have a registered card

Checkout Bidders

Send Statements On Payment

Cancel Checkout

Refresh

Back to Checkout

Outstanding Accounts

| <input type="checkbox"/> | # | NAME | STATUS | CHARGE | OWES \$ |
|--------------------------|----|----------------------------------|-----------|-----------------------------|-------------|
| <input type="checkbox"/> | 2 | Ed Time | Processed | ch_3MRdecG5i4Mmr1IE0uar9j92 | \$ 0.00 |
| <input type="checkbox"/> | 4 | Guest of John Smith John Smith | | | \$ 5,300.00 |
| <input type="checkbox"/> | 26 | Alexandre Zellinger | Processed | ch_3MRdefG5i4Mmr1IE0zBGhCs | \$ 0.00 |

When the process is complete, a success message will appear at the top of the page for a few seconds. The payments that were processed show **STATUS: Processed**, and a transaction confirmation code appears in the CHARGE column. If there was an error processing a payment, an error message will appear. Each payment is processed independently, so errors for one bidder do not impact the charges for others.

There is an option to [Send Statement On Payment](#) which will generate the Bidder Statement and send it to the bidder. The **Bidder Statement** email is the only one ever sent (if selected) during any checkout triggered from the dashboard.

Transfer Payment

The **Transfer Payment** function will allow you to transfer money between bidders. This can be necessary, for example, if the payment was recorded against the wrong bidder or a refund was incorrectly assigned to a bidder.

Transferring funds will not change the event income or affect credit card payments. The amount will simply be debited from one bidder account and credited to the other.

The screenshot shows a web interface for transferring payments. At the top, a blue header contains a money icon and the text 'Transfer Payment' with the subtitle 'Transfer money between bidders'. Below this is a sidebar with a 'Transfer' button and two menu items: 'Bidding/Sales' and 'Checkout'. The main content area has a title 'Transfer Payment' and a subtitle 'Move money between bidder accounts'. It includes a brief explanation of the function and two orange callout boxes: 'Transferring funds will not change the event income or affect credit card payments.' and 'The amount will simply be debited from one bidder account and credited to the other.' Below this is a 'Transfer' form with two dropdown menus for 'Transfer From' and 'Transfer To', both set to 'Choose Bidder'. There are also input fields for 'Amount' (with a '\$' symbol) and 'Notes'. At the bottom, there is a 'Recent Transfers' section with a table header containing columns for 'FROM', 'TO', 'AMOUNT', and 'NOTES'.

Steps to Transfer a Payment:

1. Choose the **Transfer From** bidder (using the "Choose Bidder" finder);
2. Choose the **Transfer To** bidder (using the "Choose Bidder" finder);
3. Enter the dollar **Amount**;
4. (Optional, although recommended) Enter appropriate **Notes**; and,
5. Click the **Transfer** button.


Credit Card Refunds

Occasionally mistakes may occur when charging credit cards and you will need to issue a refund. For example, a bidder may end up getting their card charged twice or for the wrong amount because a purchase was recorded more than once. When you issue a full refund for a charge Auctria's credit card processing fee will be refunded as well.

Steps for Issuing a Refund:

1. Navigate to the **Bidder Details** page and click the **Activity** tab.
2. Scroll down to **Payments**.
3. Locate the **Credit Card** payment that you want to refund and click **Refund** on the same line.
4. A popup **Confirm charge refund** window will appear asking if you want to refund the full charge or a partial amount.
5. Select the correct option, and if necessary enter the amount of the partial refund.
6. When ready, type 'YES' in the text box and then click the **check mark** icon to save the transaction.

Payments ▾

| PAYMENTS | AMOUNT |
|--|--|
| Paid Credit card refund for charge ch_3M06y3G5i4Mmr1IE1dnBpC1e Recorded at 23 Jan 2023 10:57:05 am by [redacted] | \$ -2.00 ×  |
| Paid by credit card ch_3MNMQ0G5i4Mmr1IE0cRPbsle visa ...4242 Recorded at 06 Jan 2023 3:21:38 pm by [redacted] | \$ 50.00 × Refund |
| Paid by credit card (present) ch_3M06y3G5i4Mmr1IE1dnBpC1e visa ...9969 Recorded at 03 Nov 2022 1:12:48 pm by [redacted] | \$ 2.00 × Refunded |
| Paid by credit card ch_3LqLbKG5i4Mmr1IE1TulobJv Visa ...4242 Recorded at 07 Oct 2022 2:48:51 pm by [redacted] | \$ 51.93 × Refund |

When the refund has been successfully processed, the bidder's **Activity** tab will show a *negative* fee charge under purchases and a refund payment. The original payment will show as **Refunded** and not be available for any additional refunds if a full refund was issued.

The refund will show up on the bidder's credit card account in a few business days. In the cases where a **Cash** or **Check** payment needs to be refunded through Auctria to keep the bidder accounts balanced, the essence is to use the Record Payment function with a negative amount equal to the refund you want to issue. Select the same payment method as the initial payment was made as you enter the negative amount. You may also want to add a comment in the Additional Notes field.

Once the **Bidder** and **Payment Method** have been set, clicking the **Make Payment** button will start the refund process. A confirmation pop-up window with the details of the **Payment** will be displayed.

Once a **Negative Payment** has been processed, the bidder account will be put out of balance and will be seen as an **Outstanding Account**. To correct this, an appropriate adjustment needs to be made to an **Activity** tab line item.

- If this was a **Full Refund**, the appropriate line item could be removed from the purchases or won items section of the **Bidder Activity** tab; or, the appropriate line item could also be removed from the **Item Activity** tab.
- If this was a **Partial Refund**, the appropriate line item could be edited to have its amount reflect the non-refunded amount.

Once the **Activity** tab adjustment has been made the account should be back in balance.