

Auction Manager Checklist

There is a lot to do. We're here to help

Table of Contents

☐ Pre-Event

- ☐ Venue check, securing volunteers
- ☐ Auction setup: donations secured, items loaded, auction preview/open
- ☐ Guest list completed

☐ Day of the event

- ☐ Guest list loaded, auction area setup, donation levels loaded, registration area ready, run of show finalized

☐ During the event

- ☐ Volunteers/staff arrive and trained
- ☐ Registration, bidding support, live auction, paddle raise, managing auction, checkout area organized

☐ End of the event

- ☐ Checkout and item retrieval, guest checkout and payment

☐ Post event

- ☐ Finalize unpaid invoices, auction settlement

Verify your Venue's Network Connectivity

Cellular networks are much better these days and data plans are cheap enough that your guests are much more likely to have a good connection using their own data plans. So what do you need WiFi for? Your check-in stations (laptops, ChromeBooks, iPads) and bidding stations (iPads) will need a WiFi connection.



- ☐ **Verify the event space's WiFi quality on your own (don't rely on what they tell you)**

No offense to the venue, but their job is to get you to rent their space. So it is not unexpected that the venue's sales rep will tell you the facility's WiFi is "state of the art". While it may not be terrible, it may also not work well.

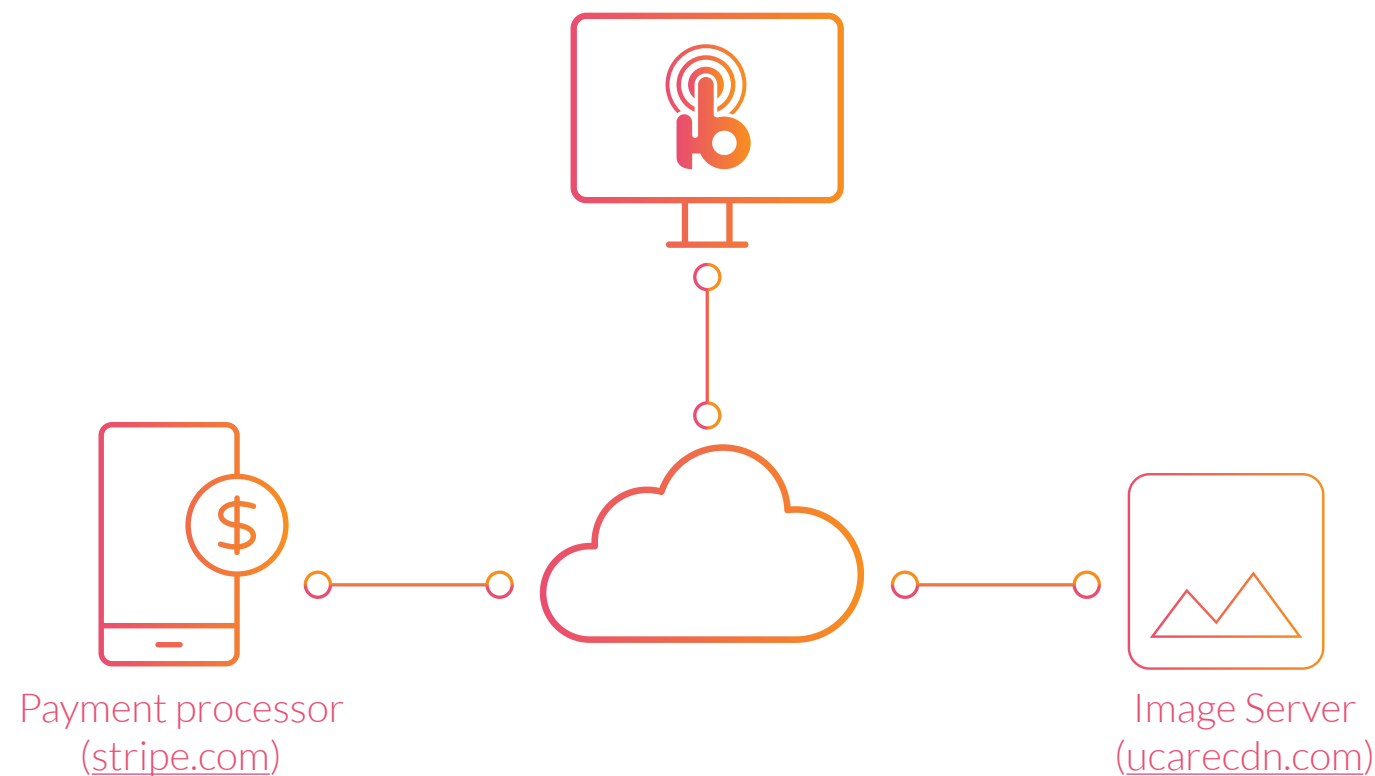
- ☐ **Use our Network Connectivity Testing Guide**

We have a comprehensive guide that you can download that will walk you through the process of check-ing out the venue's WiFi.

- ☐ **Test all spaces where you expect your guests to be!**

Test connectivity in the registration area, bidding area, bar area, ball room... well you get the picture. Make sure you don't have WiFi or cellular network dead spots.

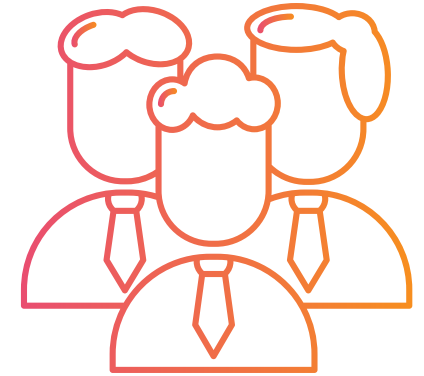
Make sure the venue's WiFi is not blocking Handbid!



Handbid relies on some 3rd party services to provide the complete auction solution. Two of these tend to get blocked by overly zealous IT administrators. If you feel that Handbid is sluggish, check that you can reach these locations first before calling us!

Secure your Volunteers or Staff - Check-in

You are going to need some help to run this event. Make sure you secure **volunteers or staff for registration and check-in**



☐ Secure Registration and Check-in Volunteers

- ☐ Secure 1.5 check-in volunteers for every 100 guests coming (e.g. 600 people will require 9 check-in staff)
- ☐ At least 2 volunteers for greeting and being a line marshal
- ☐ At least 1 volunteer for handing out bidder cards if you are doing an in-room paddle raise

☐ Confirmed that the Check-in Staff meet the following criteria

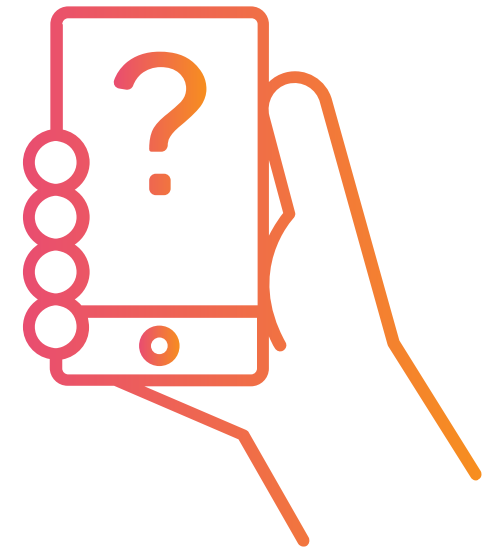
- ☐ Are comfortable using a laptop or tablet (if you are doing an iPad check-in) and are excellent typists
- ☐ Are punctual (will arrive on time - which should be 60 minutes prior to registration start)
- ☐ Have very good hearing and are social as they will be greeting your guests and entering in data
- ☐ Are dressed and presentable (proper attire, groomed and not chewing gum)
- ☐ Are able to stay for the entire check-in period (this is important!)
- ☐ Have reviewed our training videos on how to do a guest check-in PRIOR to arriving

☐ Confirmed that the line marshal meets the following criteria

- ☐ Is comfortable directing traffic and making sure the line stays moving (timid people shall not apply)
- ☐ Is not overly social so they do not get caught up in long conversations with the arriving guests

Secure your Volunteers or Staff - Bid Helpers

You are going to need some help to run this event. Make sure you secure volunteers or staff for **helping your guests get setup to bid or bid from iPads**:



☐ Secure Bid Helpers

- ☐ We recommend at least 1 bid helper for every 50 registered bidders (not guests)
- ☐ Expect that ~1/3 of your guests will register to bid, so a 600 person event would need 4 bid helpers

☐ Confirmed that the Bid Helpers meet the following criteria

- ☐ Are comfortable using a tablet (specifically the Handbid App for iPad)
- ☐ Are friendly and outgoing so that they can not only help guests bid, but encourage them to bid and bid often!
- ☐ Willing to remain in the silent auction area during the entire time
- ☐ Are comfortable helping people get setup to bid on their phones (install apps, register to bid, etc.)
- ☐ BONUS: Encourage bid helpers to take the time to familiarize themselves with the auction items
- ☐ BONUS: Encourage bid helpers to watch the iPad training videos PRIOR to arriving at the event

Secure your Volunteers or Staff - Live & Appeal

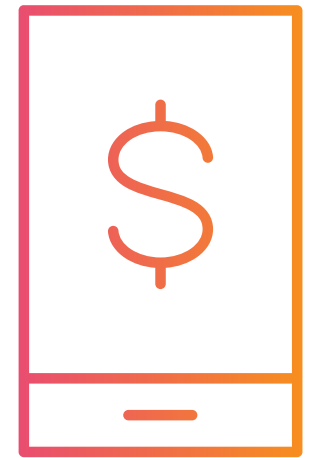


You are going to need some help to run this event. Make sure you secure volunteers or staff to **record paddle raise appeals** (if you have one) **or the live auction winners** (if you have a live auction planned):

- ☐ **Secure Bid Recorders & Data Entry person for the Paddle Raise and Live Auction**
 - ☐ Have a minimum of 2 recorders to write down donations during the paddle raise (*If you have a large room, you may want to opt for more recorders so they can spread out*)
 - ☐ Have 1 person running recording sheets back to a data entry person
 - ☐ Have 1 person doing data entry (runner and data entry person can reconcile sheets collected from recorders)
- ☐ **Confirm that the Recorders & Data Entry people meet the following criteria**
 - ☐ Have good handwriting that can be read by someone else other than themselves
 - ☐ Excellent, focused listeners that can hear & record numbers called out by the auctioneer
 - ☐ Is not easily stressed or flustered in tense situations
 - ☐ For Live items, is able to track the auctioneer and know which items are up for bid
 - ☐ For Live items, is comfortable approaching guests to confirm information and collect payment (if necessary)
 - ☐ Data entry person should be familiar with how to use Handbid auction manager to record bids & donations

Secure your Volunteers or Staff - Checkout

You are going to need some help to run this event. Make sure you secure volunteers or staff to **checkout guests and retrieve items** for winning bidders:



☐ Secure Checkout Volunteers

- ☐ You should aim for 1 runner for every 25 auction items. If most of your items are certificates, you can reduce this
- ☐ You should aim for 1 checkout station for every 50 registered bidders so 200 registered bidders = 4 stations

☐ Confirm that Checkout staff & Runners meet the following criteria

- ☐ Are willing to stay until the very very end of the event
- ☐ Trustworthy enough to handle your auction items and deliver them to winning bidders
- ☐ Able to use Handbid to look up winners (look up invoices), check the paid status of invoices, capture credit cards and process payments
- ☐ Are able to take in non-credit card payments (cash / check). Otherwise, you will need someone authorized to do this if you accept cash or checks.
- ☐ **BONUS: Have watched the Handbid videos on how to run a checkout**

Item Audit

If you have been adding items to Handbid manually, then you will want to make sure they all are in there and accounted for. Best to do this NOW (3-4 days prior, even if your item list is not complete)



☐ Item Audit

- ☐ All items should have 1 or more photos attached
- ☐ All items have complete and accurate descriptions (number of days in a stay, brand of jersey, etc.)
- ☐ All items have complete and accurate fine print (expiration dates, etc.)
- ☐ Every item loaded into Handbid matches to every item you plan to display at your event (**this is important because items missing in Handbid can't be seen to be bid on!**)
- ☐ All items you intend to sell or offer to bidders are either in pending status (if auction is not yet open) or OPEN (if the auction is open)
- ☐ All items you intend to sell or offer to bidders are in a category (we recommend or 10 or less categories if you can)
- ☐ All items you intend to sell or offer to bidders are not hidden
- ☐ All items have the correct starting price and bid increment (see our blog post for recommendations on setting those)
- ☐ All items have an accurate fair market value (FMV)

Setup a plan for Handbid TV

If you want to use Handbid TV (live dashboards and auction activity ticker) then you will want to get that all setup with your venue in advance. If you do plan to use Handbid TV, please follow these steps:



☐ Setup a plan for the displays

- ☐ Determine where Handbid TV data will be displayed and what screens you intend to show
- ☐ Live auction activity (ticker) is great to show in the bidding area and near bars where people are standing a lot
- ☐ Setup a slideshow plugin if you want Handbid to scroll through various display screens
- ☐ Identify someone on your team to manage setup and operation of Handbid TV
- ☐ Make sure you have ChromeBooks or Laptops capable of powering the displays



Venue Walk Through Complete

You may not be able to do this with every vendor, but at a minimum you should do a walkthrough with your key vendors and your team. This should include the venue staff, your caterer, band (if you have one), live auctioneer, and mobile bidding company (if you hired them onSite)



☐ Walk through checklist

- ☐ All vendors that plan to have staff onSite or who are providing services onSite are scheduled for a walkthrough
- ☐ **You have provided all vendors and service providers a documented run of show** that outlines the key timeline of the event (setup, the arrival of key personnel, guest arrival, catering stages, entertainment, media presentations/speeches, silent auction start, live auction, paddle raise, auction close, check out, tear down)
- ☐ You have reviewed this run of show with each vendor, including your Handbid representative (if you have one coming)
- ☐ You have completed the WiFi and network connectivity tests prior to (or during) the walkthrough and discussed those results with the venue representative (and Handbid if necessary)
- ☐ You have identified your check-in and checkout areas and have completed the following
 - ☐ WiFi connectivity has been verified for these areas
 - ☐ Table(s) for check-in staff have been ordered (we strongly recommend high-top caberet style tables)
 - ☐ Power has been ordered or is available in the check-in area



1-2 Days Before the Event

Time to get your game face on!

You have only a few days left, items are still coming in (in fact, your living room may look like this picture), and your guest list is not done (because your sponsors have not turned in their information!)

It is all going to be ok! No need to panic. Keep pressing forward with the following tasks on your checklist

All Donations Secured and Loaded into Handbid

Ok we say “all” in the title because loading all items is ideal; but, it is probably not reality. You may have a few last minute items come in, which is typical. However, we recommend you get the vast majority all ready to go in Handbid so that you can OPEN YOUR AUCTION EARLY!



☐ Getting all Items into Handbid

- ☐ All promised donations have been picked up, delivered or arrived in the mail (*do not rely on your guests to bring items or physical certificates to the event!*)
- ☐ All items are numbered or organized in a way that will streamline checkout (*we have some opinions on how to set item codes or item names to make checkout easy. Review this in our rockstar checkout e-Book*)
- ☐ If items are organized in a spreadsheet, that spreadsheet is loaded into Handbid (please use our template!)
- ☐ All photos of items have been taken and loaded into Handbid (*we recommend you load these manually vs upload*)
- ☐ Display sheets have been printed and checked for formatting (descriptions not fitting on the template), typos, and accuracy
- ☐ All items to be displayed are labeled and the information matches what is in Handbid (*simple cheat: If you use Handbid's display sheet templates, then item data will match!*)

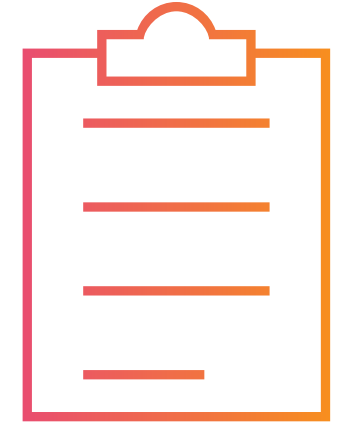
Consider opening your auction NOW!



Letting your bidders warm up to your auction by opening it up a few days in advance will help engage your bidders and improve your revenue. If you are still loading items, that is OK! Let your guests start to browse and bid on items that you have ready to go.

Your Guest list is finalized and ready to upload!

If you are not using the guest list in Handbid, you can refill your wine glass and skip this entire section! Also, if your sponsors or ticket purchasers have managed their own data, then your guest list should be in reasonably decent shape. Otherwise, if you need to upload your guest list, then follow these steps:



☐ Audit your Guest List Data

- ☐ Confirm that all guests are unique (there are no duplicate emails in the guest list)
- ☐ Confirm that all possible slots are accounted for (if you have only 6 names for a table of 8, then create 2 guest slots there for your check-in staff such as Meineke Guest 1, and Meineke Guest 2)
- ☐ Confirm sponsor and table (seating) assignments are correct (if you are assigning tables)

☐ Upload your Guest List Data

- ☐ Spreadsheet finalized and saved as CSV for upload into your auction event
- ☐ Spreadsheet loaded and verified (We have a great knowledge base at service.handbid.com that will walk you through this process)
- ☐ Determine if you plan to pre-assign paddle numbers (we hope you say no), but if you do, you will need to select that on Upload

Your Volunteers are Confirmed

At this point you are focused on which of your guests are coming (or cancelling) but do not forget about your volunteers!



☐ Volunteers are confirmed

- ☐ Call each volunteer and confirm they are still coming.
- ☐ Confirm arrival time and shift times (always tell them to arrive at least 30-45 minutes before you need them)
- ☐ Confirm dress code
- ☐ Confirm equipment (if any) you need them to bring

Your Venue's Network / Wifi is still good!

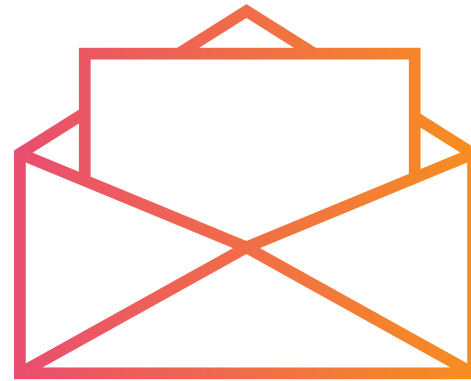
Perhaps you did that walk through and tested the network weeks or months ago. Maybe things have changed (we've seen it happen). So make one more quick walk through to confirm your network needs for your event are still in good shape



☐ Venue Network Confirmed

- ☐ Confirm the venue's WiFi and network connectivity are still working properly (password works, etc.)
- ☐ Confirm that the venue is not blocking any network ports or destinations that Handbid needs (*this includes the Handbid payment processors and image servers... please get this list from your Handbid support rep*)
- ☐ Get the name, email and mobile number of an IT point of contact for the venue that you can contact during your event for network related issues

Send out instructions on how to bid



Why wait until registration to inform your guests about mobile bidding. Encourage them setup their accounts in advance.

The best approach is to setup your auction, open it early and send out invitations / instructions on how to bid. If you can't open early, no worries, we still recommend you send out the setup instructions in advance.

Visit our knowledge base for instructions on how to send out pre-registration invites to guests!



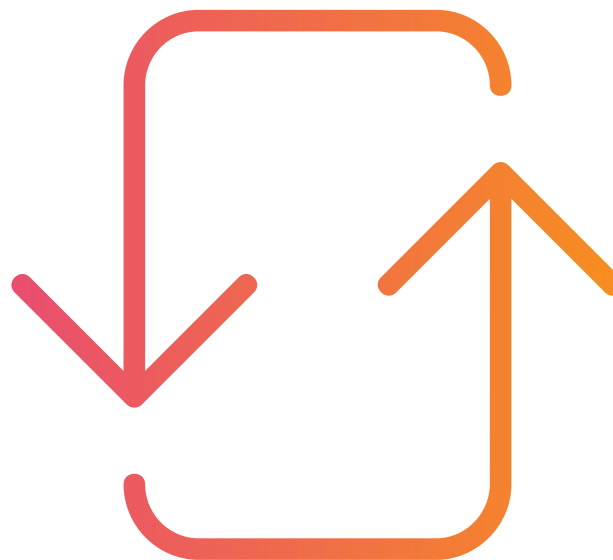
Event Day!

Take a deep breath, we are almost there

It is sort of like getting married or having a baby. There was a lot of planning and now the day has finally arrived. Are you ready? Well you never really are; but it doesn't matter. You will get through it and it is going to be awesome.

But there is a lot of work to do to make this event purr... so let's discuss your event date game plan.

Update guest list with any last minute changes



3-4 hours before registration starts is when things get really busy and stressful, so make sure you have someone designated to update the guest list with any last minute changes if you don't have the time to do it yourself. Since you already uploaded it 1-2 days prior (hint hint), this should be easy to manage inside the manager.

Donations / Paddle Raise levels setup

If you are doing a paddle raise (in room ask for donations), then you will want to have those items loaded into Handbid so that you can enter those donations later. No sense in waiting until the paddle raise starts to add them. Add them now!



- ☐ Donation levels added into Handbid (as Appeal items)
 - ☐ Donation levels (\$1,000, \$500, etc.) are confirmed with the Live Auctioneer (or person conducting the Paddle Raise)
 - ☐ All donation levels are entered into the Handbid auction manager and enabled
 - ☐ Donation recorders (volunteers or staff that will record donations in the paddle raise) are identified and have pen/paper and clipboard for donation recording (recommend at least 2 people)

Registration Area Ready to Go

Most of us fret about the auction area and forget that we need to make sure that the registration area is ready to go. Use these steps to confirm that your registration area is indeed ready:



☐ Registration area is setup

- ☐ All registration tables are setup and power is available for all stations
- ☐ WiFi access still exists (make sure you can login from a device in the area)
- ☐ Any signage for the event, especially signs specific to registration are put up and visible
- ☐ Bottled water and breath mints available to be later given to check-in agents
- ☐ Bidder cards (if these are being used) are organized behind the registration agents
- ☐ All other registration materials (drink tickets, programs, etc.) are available and organized

Let us talk about checkout for a minute...

You are probably thinking.. why are we discussing checkout now?
Well better now than later. Look, you don't need to have every detail vetted out; but, you need to have the following things related to checkout determined at this point:



- ☐ Checkout Plan is Finalized (as much as it can be)
 - ☐ The area where checkout will occur has been identified
 - ☐ A decision has been made on whether items will move to a checkout area or remain where they were in the auction area
 - ☐ A decision has been made on whether to accept non-credit-card payments (cash or check)
 - ☐ A mechanism (repository) has been secured to store any non-credit-card payments (if they are accepted)
 - ☐ Runners (those who will get items) have been secured and they are confirmed



Almost Game Time

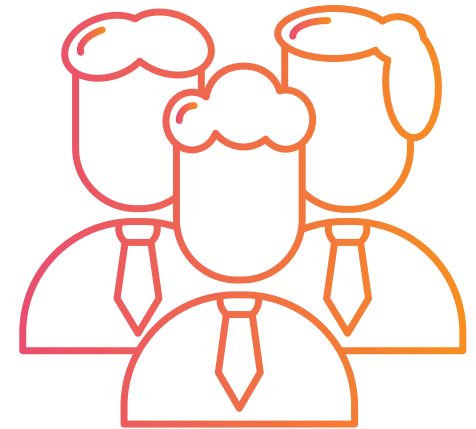
90 minutes from registration start

You have gotten this far! You are feeling good right? (provided your volunteers show up on time).

So what do you do now? This next section covers 90 minutes prior to registration up until guests arrive.
Buckle up, its going to get busy!

Your Check-in Staff arrive & setup

If you have hired Handbid staff, they should be onSite 90 minutes prior to registration start. Otherwise, make sure your check-in team arrives at a similar time.



- ☐ Check-in Team (or Handbid staff) setup registration
 - ☐ All check-in stations are turned on and connected to the venue's WiFi or identified hotspot
 - ☐ All WiFi connections are verified (stations can access Handbid auction manager and Handbid services)
 - ☐ All stations are logged into either the Handbid auction manager or iPad app (if using iPads for registration)
 - ☐ Any credit card readers being used are connected to check-in stations and verified to be working
 - ☐ All stations are connected to power sources (if needed)
 - ☐ All registration elements organized (drink tickets, bidder cards, programs)
- ☐ Registration lead walks venue and confirms all relevant parts of the run of show
 - ☐ Registration lead confirms run of show and planned time for silent auction close and timer start
 - ☐ Registration lead given an escalation point for registration issues, auction questions and decisions (e.g. lowering bids, changing auction close times)
 - ☐ Registration lead has met with live auctioneer (if there is one) and confirmed live auction time, live items (including any possible double sales), paddle raise time and levels

Registration Team Organized

Your entire registration team has arrived and roles and responsibilities have been defined. If you hired a Handbid lead, they typically handle organizing the team. If you have not, you will want to identify someone in charge of registration who can organize and manage the team



- ☐ Check-in Team Organized and Roles and Responsibilities Set
 - ☐ Check-in / registration lead identified
 - ☐ Roles and responsibilities set for check-in team (check-in agents, line marshals, greeters, bid card retrievers)
- ☐ Registration Staff Trained and Ready
 - ☐ All check-in stations are on, connected to the Internet and logged in (this should already be done)
 - ☐ All staff properly dressed (or changed into appropriate clothes)
 - ☐ All staff trained on the check-in process (how to check-in through Handbid, how to find guests, add cards, swap or change paddle numbers, and what items to hand out to guests (programs, drink tickets, etc.))
 - ☐ All staff informed on how to handle guest escalations (moving tables, changes to guest list names, people not found in the guest list, etc.)

Bid Helpers Trained

Your bid helpers have arrived and are ready to be organized. Hopefully they have watched some training videos prior to coming; but if not, do not worry. Using the Handbid iPad app is really intuitive.



☐ Bid Helpers are Trained

- ☐ Bidding helpers are trained on how to help guests install or get setup with Handbid
- ☐ Bidding helpers are trained on how to register guests on the iPad
- ☐ Bidding helpers are training on how to place bids on behalf of guests in the bidding area
- ☐ Bidding helpers are trained on how to sell event only items from the iPad (if you have those to sell)

☐ Bid Helpers given the following Tips

- ☐ Helpers are encouraged to walk around and engage with guests (not just stand like a potted plant in the corner)
- ☐ Helpers are encouraged to ask people if they need help (*don't let them assume that the bidder knows what they are doing, even if the bidder is staring at their phone. Always best to ask: "Sir/Ma'am, do you have any questions on how to bid?"*)

It's Showtime

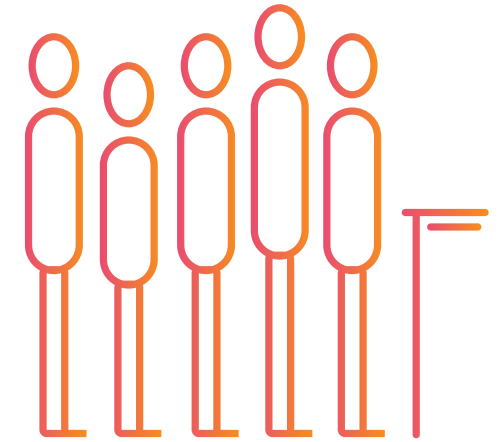
Guest are Arriving

So guests are arriving (no, not the early birds or your board members! They have already checked-in!)
We are talking about the main crowd.

Deep breath! It has started! What do we need to be doing now? Read on to find out...

Registration has started

Guest are arriving and people are started to get checked in. You have planned for this moment for quite some time, so what should be happening right now?

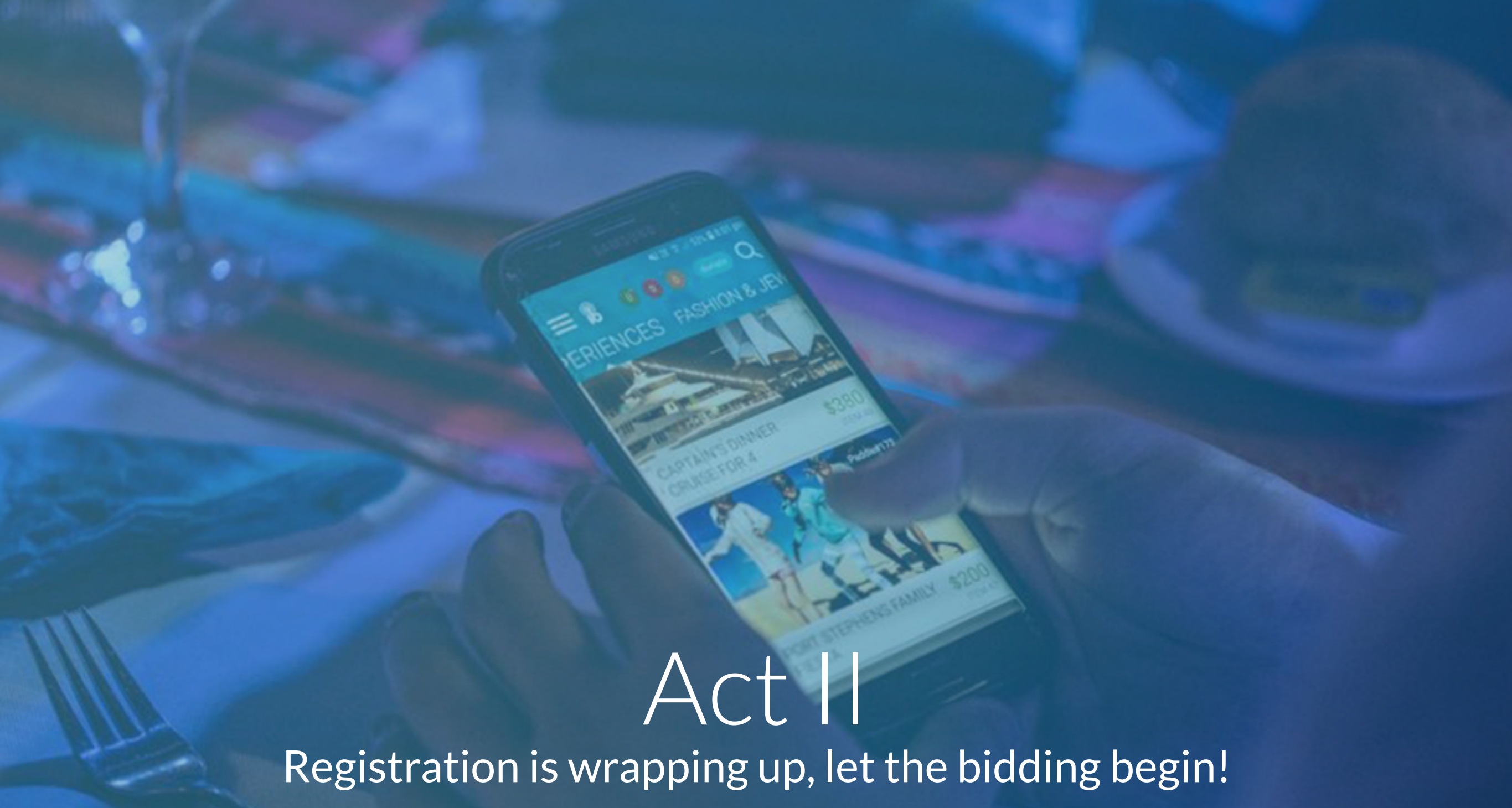


☐ Registration team underway

- ☐ Greeter is in place and welcoming guests and prepping them for check-in (mobile bidding, credit card)
- ☐ Line Marshal is routing guests to the next open agent
- ☐ Staff is check-ing in guests and bid card retriever is providing a bidder card

☐ Bid Helpers located in the auction area to help newly registered bidders

- ☐ Helpers are roaming the area and helping guests orient themselves with Handbid and the auction
- ☐ Helpers are placing bids for non-smartphone bidders and selling event-only items from iPads
- ☐ iPads not held by bid helpers are located in the auction area in places visible to bidders



Act II

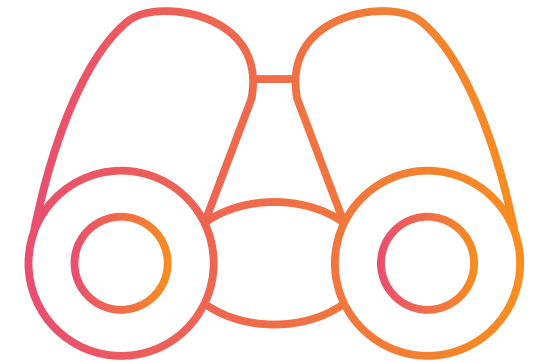
Registration is wrapping up, let the bidding begin!

Most of your guests have arrived and checked in. A remnant of your check-in team remains to check-in the late arrivers while the rest organize for the next portion of your event: Live Auction and/or Paddle Raise

This section will provide a checklist of how to manage this portion of your event

Auction Manager Watching the Auction

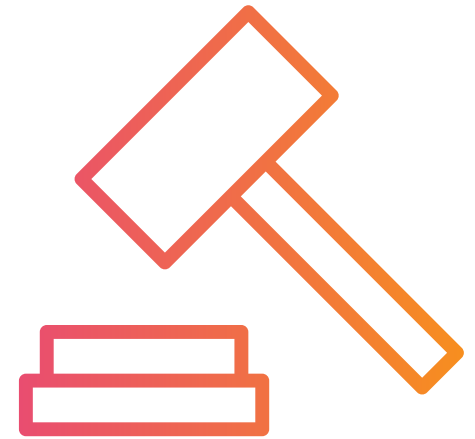
Guests have arrived and are bidding, mingling, eating, drinking and having a great time. While this is happening they are getting acquainted with the auction and bidding on items. Your team should be supervising the auction during this time.



- ☐ Manager observes bidding and directs staff to support bidding effort
 - ☐ Bid helpers are in place and helping people get setup to bid
 - ☐ Send out broadcast announcing that bid helpers will be available to help bidders in auction area or dining room
 - ☐ Bid helpers roam dining room to see if anyone has any questions or problems bidding
- ☐ Manager watches the auction progress & sends out broadcast messages
 - ☐ Send out message promoting items with NO BIDS
 - ☐ Send out messages to update guests on any timeline changes
 - ☐ Encourage bidding on specific items that need more bids

Team prepares and executes Live Auction

If you are having a live auction and have hired a live auctioneer, please make sure they are connected with your auction team running Handbid.



- ☐ Auction lead has met with auctioneer
 - ☐ Order of items up for bid in live auction has been set
 - ☐ Auctioneer and auction manager have agreed on a bid recording plan (who is going to bid record)
 - ☐ Auctioneer has identified any potential multi-sales to auction manager (which items can be sold more than once)

- ☐ Auction team records winning LIVE bids into Handbid
 - ☐ Auction staff thanks winners after having them sign live auction form (if used)
 - ☐ Staff enters in live auction winner into mobile bidding system
 - ☐ Staff captures payment info from winning bidder (if needed)

Team prepares and executes Paddle Raise

A paddle raise (appeal) is a live (in-room) ask for donations. If you plan to do one of these, you need to make sure you have coordinated this with your auction team. Please follow these steps:



- ☐ Auction team is prepared for the paddle raise
 - ☐ Paddle raise levels are loaded into Handbid (this should already be done)
 - ☐ Donation recorders, runners and data entry person roles are established and ready
- ☐ Team executes paddle raise
 - ☐ Recorders placed strategically in the room to be able to record bids (on paper) and hear the Paddle raise host call them out. *(You may want to consider videotaping the paddle raise to make sure no numbers are missed)*
 - ☐ Recorders write down paddle numbers for each pledge at each level.
 - ☐ Donation recorder confirms sheets (compares entries from multiple bid recorders) and enters in paddle raise pledges to the mobile bidding system.
 - ☐ Donation recorder reconciles totals in mobile bidding software with pledges on sheets.
 - ☐ Donation recorder makes a digital copy of all sheets (photo using cell phone camera) and hands physical sheets to auction host.

Silent Auction Closing Time?

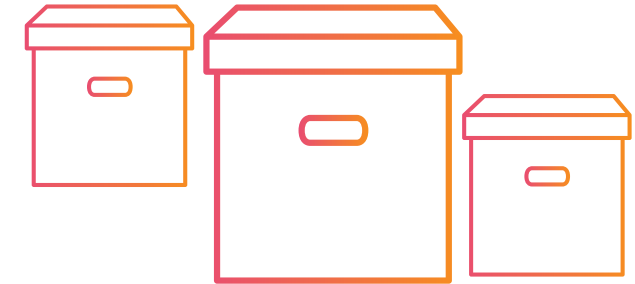
You can close your silent auction at any time. In most cases we think the later the better, but it has to “work” with your schedule. Just because we put the page after the paddle raise and live does not mean this has to close after those.... When you are ready to close, follow these steps:



- ☐ Auction team closes the silent auction
 - ☐ Closing time is confirmed once more with event host (probably you)
 - ☐ Timer is set to start at a specific time so that the auction closes at a specific time (give bidders 20 min if you can)
 - ☐ Close of silent auction is announced to bidders through the mobile bidding system
 - ☐ Staff or volunteers monitor the auction close and confirm that all bids and results are final
- ☐ Auction team keeps bidders informed of closing process
 - ☐ Recognize that the closing process can take a few minutes depending on the number of items
 - ☐ Team notifies bidders of when close is complete and when checkout will begin

Getting ready for checkout

Before you start checkout, you should have your silent auction closed and results FINAL, and paddle raises and live auction bids entered into the system. However, while those things are going on, go ahead and get things ready for checkout!



- ☐ Auction team prepares checkout area
 - ☐ Staff or volunteers move items to checkout area (if the plan is to move the items)
 - ☐ Staff organize checkout area (laptops and iPads to accept payment), cash/check collection box
 - ☐ Bags are available to help winning bidders carry their items and protect them from the elements

- ☐ Runners organized and trained
 - ☐ Runners arrive and are given instructions on where items are located for retrieval
 - ☐ Runners (if allowed) are trained on how to help guests carry items to their car or room



The Auction is Over!

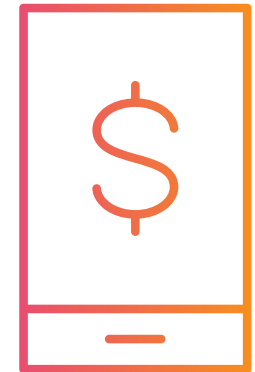
Let Checkout Begin!

Whew! You made it.

The timer has started and the auction is closing ... you are ready to celebrate (or pass out), but don't pour that glass of champagne yet! We have a few more things to do,

Checkout Underway!

The auction has closed and you are read for the mad rush. But wait! There is no mad rush. Why? Because people can review what they purchased on their phones and pay for it. No need to rush over to checkout. Your guests head to the bar one more time and your team sits there ready and eager to check people out



☐ Auction team checks out guests

- ☐ You execute your plan. Your guests pay and you get them your items
- ☐ Runners are given items to retrieve (*hint: use our numbering system to make it easy for runners to find items!*)
- ☐ Guests who pay by cash or check (if you allow that) can pay and pick up their stuff

☐ Person assigned to process non-auction item invoices

- ☐ Staff person authorized to find and process invoices for those that made donations or purchased items but did not win any auction items that require pickup or delivery
- ☐ Staff person processes payments (online) for donation or forSale items on unpaid invoices

A person is sleeping in a bed, covered with a white blanket. A digital clock on the left shows 7:00 in red. In the foreground, a pair of red and blue sneakers is visible, with the soles facing up. The background is a blurred blue wall.

Post Auction Recovery

Well, more cleanup than real recovery

So you are in recovery (or in some cases “memory erasing” mode).

Your auction event has ended and you are ready to relax for a few months (or years).

But not all invoices are paid yet. You still have some money to collect before you put this event to bed...

Closing out remaining payments

It is time to celebrate (with the beverage of your choice or a quick happy dance). Your auction is over! But, your team left you last night with 5-10 unpaid invoices that you need to figure out. So your celebration is well-deserved but tempered with a bit more work to do.



☐ Guests with unpaid invoices contacted

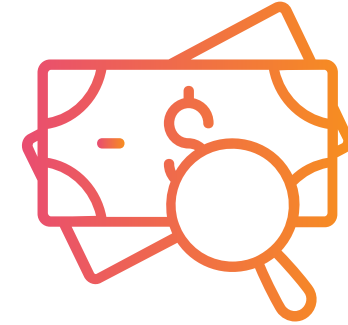
- ☐ Guests with declined or missing cards are contacted and credit card information added
- ☐ Guests with issues with their invoice are managed (refunds given, invoices corrected)

☐ Guests with unclaimed auction items contacted

- ☐ All guests who did not pickup their auction items are contacted about their winnings/invoice
- ☐ Shipping, delivery or pickup terms negotiated and set for all uncollected items

Ready to reconcile

If you are on top of things, you will be ready to reconcile your auction 5-7 business days after the auction closes. Most payment gateways require at least 5 days to complete transactions and credit them to you, so you are “on-time” if you are at this point. When all payments have cleared, its time to reconcile:



- ☐ **All payments through mobile bidding system finalized**
 - ☐ All payments have been finalized and transactions settled (*not all invoices have to be paid, but any remaining ones post reconcile will need to be collected offline*)
 - ☐ Remaining unpaid invoices are collected offline (see, we said it again!)
 - ☐ Payments are no longer accepted from guests/bidders through the software
- ☐ **Reconcile request submitted to Handbid**
 - ☐ We can't read your mind! So if you are ready to reconcile your auction, just tell us!
 - ☐ You have told Handbid how you want to receive funds (electronic or paper check) if Handbid owes you funds
- ☐ **Auction Reconciled**
 - ☐ Net proceeds (auction revenue less any fees) are determined
 - ☐ Settlement report sent to manager for review and signature
 - ☐ Net proceeds deposited or sent via check
 - ☐ Auction marked as reconciled in software

Whew! That is all!



You have made it!

Your auction is over and you have collected all payments and submitted a reconciliation request!

You are officially a ROCK STAR and deserve a vacation (but not for long, you need to get started on next year!).