## INSTRUCTIONS FOR AUCTION VOLUNTEERS

<ol> <li><u>Checking in attendees</u></li> <li>Search for attendee's name on the Attendees tab</li> <li>If attendee's name is not listed</li> <li>Click Check In in the Status column, confirm attendee details, set Notification Preferences, and send tickets, if needed</li> <li>Click Check In if you don't need to add a payment method, or click Check In + Payment</li> <li>Click Swipe Credit Card and swipe with magnetic strip away from light</li> <li>Enter Zip Code and Submit Payment Method</li> </ol>	<ul> <li>If attendee's name is not listed</li> <li>2a. Search for Sponsor's name</li> <li>2b. Click on <i>Guest of Sponsor Name</i></li> <li>2c. Complete information on <b>Registration</b> tab and <b>Save</b></li> <li>2d. Follow remaining check-in steps</li> </ul>
<ul> <li><u>Checked-in attendee needs link for Givi app</u></li> <li>1. Click on name on <b>Attendees</b> tab</li> <li>2. From here, you can <b>Text</b> a link to download Givi</li> <li>3. Attendee clicks first link to download Givi</li> <li>4. Once downloaded, click second link in text message to create a password</li> </ul>	<ul> <li>To place a bid on behalf of attendee</li> <li>1. Go to ltems tab and search for item name</li> <li>2. Click on View Item Details</li> <li>3. Search for attendee</li> <li>4. Click Place a Bid</li> </ul>
<ol> <li>To add Fund-a-Need items or donations</li> <li>Go to Items tab and select Fund-a-Need Items in drop-down</li> <li>Search for item name or donation level</li> <li>Click on View Item Details</li> <li>Search for name or bidder number</li> <li>Select Purchase</li> <li>If applicable, use + or – to adjust number of items or donation amount</li> <li>Click Donate or Confirm</li> </ol>	<ol> <li>To cancel a bid</li> <li>On Attendees tab, search for name or bidder number</li> <li>Click on bidder's name</li> <li>Go to Activity tab</li> <li>Select item and click Cancel Bid</li> </ol>
<ol> <li>To process Checkout</li> <li>Go to Checkout tab</li> <li>Click on green Open Checkout button</li> <li>At this point, bidders can begin checking themselves out</li> <li>Complete these steps for each auction category</li> </ol>	To update payment method beforeCheckout1. Go to Checkout and search for name2. Select pencil next to name3. Update payment method
<ol> <li>To review winner's items before checkout</li> <li>Go to Checkout and search for name</li> <li>Click on attendee's name</li> <li>From here, you have the option to remove any items they have purchased and/or won</li> </ol>	<ol> <li>To review winner's items after checkout</li> <li>Go to Checkout and search for name</li> <li>Click on attendee's name</li> <li>Click View Transactions</li> </ol>

## <u>TIPS</u>:

- 1. If an item needs to be duplicated, an organization admin will need to clone the item from the control panel for it to appear in the Virtual Terminal.
- 2. Best user experience is to use the **text message links** to download Givi and set up password.
- 3. You can reassign tickets before they're checked in by changing the **Registration** info. After check-in, tickets cannot be reassigned.
- 4. You can add Store and Fund-a-Need items to attendees in bulk by selecting the item and then clicking **Bulk Purchase** or **Bulk Contribution** at the top of the page.

