



Getting Started Guide

For use with MaestroAuction 5

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Install MaestroAuction

To install MaestroAuction visit <http://maestrohelp.com> and login using your organization name and serial number. The installation instructions are located on the download page.

System Requirements

MaestroAuction operates with very low system requirements.

Maestro suggests a well-maintained computer.

- Running Microsoft’s currently supported operating system(s)
- Windows Updates regularly run

Creating a New Event

There are two ways to start a new event. You may “start from scratch” using an empty event with no data in it, or you may “roll over” a prior event and keep names and addresses. Either route allows you to later import items and people from Excel.

Create New Event	Create Event from Previous
<ol style="list-style-type: none"> 1. Click File at the top of the screen. 2. Click Create New Event. 3. Follow the three steps displayed. 4. Click Create New Event 	<ol style="list-style-type: none"> 1. Click File at the top of the screen. 2. Click Reset Database for Next Event 3. Enter your Event Date. 4. Modify the name of your new database. 5. Click Prepare New Event.

Setting Up Basic Event Details

Start by going to the **2|Setup** tab at the top of the screen

Set Auction Date and Goal  1 Set Auction Date and Goal	Organization Information  4 Organization Information
<ul style="list-style-type: none"> • Confirm your event date and name • Your optional procurement goal is the combined fair market value of all items. • Your total goal is the gross revenue generated by the event and includes ticket sales, table sponsorships, event sponsorships and ‘night of event’ revenue 	<ul style="list-style-type: none"> • Confirm your address, contact info, legal name and tax ID. • The statement tax memo and statement letter or catalog memo may be edited now or closer to the event.

Managing People

In MaestroAuction, a “person” is anyone or anything that interacts with your event. This includes individuals, businesses, couples, corporations, and organizations. Once a person is in the database, they can become an attendee, donor, sponsor, etc.



Your “viewers” allow you to see some or all of your people depending on their activity.

- View People shows you every person in the database.
- View Attendees shows you every person that’s been registered to attend the event.
- View Donors shows you every person that’s been assigned to an item as a donor.
- View Sponsors shows you every person that’s purchased an event sponsorship.

Registering Attendees

To register someone to attend your event, you go directly to their people record.

Go to **People > Enter People and Register Attendees**



Getting AMPro Ready for Registration



In the Event Registration section at the top, set up your ticket names, prices, and values. The ticket value will be used to provide tax information to your guests.



In the Event Registration section at the top, set up your meal names and values. The meal value will be used to provide tax information to your guests.

Register Your Attendees

1. Go to **People > Enter People and Register Attendees**
2. Locate their record using the **Find** area or **Add Person** if they are not in your database.
3. Enter their name and contact info using the **Home Information** fields. Taking the time to complete their record with address, phone, and email will lead to more complete reports and better functionality later.
4. In the **Event Registration Tab**:

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1. Select Primary and/or Spouse as attendees.
2. Adjust their ticket level and meals as needed.
3. Upon payment, mark their registration as “Paid” and enter optional payment information.

Registration Tips

- ✦ The **Employer Match** field is a yes/no toggle that allows you to later generate a list of people that you’ve marked as having employer matching programs.
- ✦ Be sure to explore the common reports found by clicking the reports tab.



Adding Items and Assigning Donors

Consistent and detailed item entry will lead to better reports, catalogs, letters, and displays.



1| Enter Items Assign Donors

1. Go to Items > Enter Items and Assign Donors.
2. Click Add Item.
3. Enter the item Name, Description, and Restrictions.
4. Enter the Fair Market Value (FMV) for letters, statements, and bid sheets.
5. The Catalog and Bid Sheet Fields are typically left alone until closer to the event.
6. The Category will be used in yield reports and to make packaging easier.
7. The Solicitor is the person who procured the item, and is optional to track.
8. Show Value Text is used to hide the FMV from “public facing” materials like bid sheets.
9. Select **Auction to Print Award Certificate** if you want AMPro to print a certificate for this item when you print certificates. The **Certificate Contact’s Phone/email** will be printed on the certificate. If this contact field is left blank, the donor’s information will be automatically printed.
10. Click Add Donor.



Add Donor

11. Search for a record by **company name** or **last name**. If a matching donor is found, click **OK** to assign the donor. If the matching donor is incorrect, you may always remove them and add a new donor to the item.
12. The **Alternate Donor Name** is used for catalog and bid sheet displays, and is commonly used to accommodate requests for special name listings and anonymous donations.

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Reporting

Report shortcuts are located throughout MaestroAuction in the ribbon navigation. You may also locate a report using the search function on the main menu.

1. Click Home to return to the Main Menu.
2. Use the Search for Tasks & Reports box to find the Report you are looking for.
3. Click the Reports tab to view the list of reports that match your search criteria.
4. You can also click the Show All Button  to browse the complete report list.
5. To view a report, click the Print Preview button  or double click the report name.

Search for Tasks & Reports <input type="text" value="income"/>				
News and Information		Tasks (0)	Reports (8)	Night of Event <input type="text" value="Night of Event"/>
Favorite	Report Name	Report Type		Report ID
<input checked="" type="checkbox"/>	Auction Summary - Income by Auction	Income		157
<input type="checkbox"/>	Auction Summary - Income by Auction - QC Only	Income		457
<input type="checkbox"/>	Auction Summary - Income by Item	Income		158
<input type="checkbox"/>	Auction Summary - Income by Item Highest to Lowest	Income		159
<input type="checkbox"/>	Income - Auction Purchase Reconciled by Bidder Number	Income		426
<input type="checkbox"/>	Income - Auction Purchase Reconciled by Payment Method	Income		290
<input type="checkbox"/>	Income - Auction Purchase Reconciled by Purchaser	Income		291
<input type="checkbox"/>	Income by Payment Method	Income		232