

Conduct the Event

Prepare, Practice, and Conduct

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For use with MaestroAuction 5

Leading up to your event

Event night backup support



Maestro provides after-hours support for questions while at your event. The after-hours number is different than our normal support number. We will contact you during the week leading up to your event to provide the number.

- › The phone number is intended for unforeseen circumstances. Please conduct a practice run before the event and plan ahead to help us keep the support line open for urgent issues.
- › Register your event date at maestrosoft.com/register

Register your event for Text2Bid



Text2Bid provides bidders with the opportunity to bid using any cell phone and receive instant notifications when they're outbid. If you've made the wise decision to use Text2Bid for your event, we ask that you notify us at least two weeks before your event to register your event and complete the paperwork. We recommend registering your event and completing the paperwork as early as possible. There's no fee to change your event date.

qCheck account and USB card readers

Checkout is your final opportunity to impress your guests as they walk out the door. qCheck software enables express checkout at the event, and allows you to batch process the charges post-event after double-checking your work in the days following the event.



- › You must have an active account with our partner iATS Payments to use qCheck. If you're not sure if you have an account, please contact them at 866-300-4287 x2.
- › Maestro provides free USB card reader rentals.
- › You must request the USB card readers at least two weeks before your event by phone or our online form at maestrosoft.com/contact if you wish to qualify for free shipping. They will arrive about one week before your event.
- › Maestro has a harmonized system in place for shipping free card readers. If you request readers within two-weeks of your event, expedited shipping charges will apply (\$35.00 minimum).

Night of event training



Clients with current MaestroCare are invited to attend our free webinar trainings. The Night of Event training walks you through the quick audit, qCheck setup, and checkout. Night of Event webinars are scheduled every week.

- › The training is accessible online from any computer.
- › You may attend multiple times and invite others from your team to join.
- › Read more details and register at **maestrohelp.com**.

Networking computers



MaestroAuction has the ability to be used on multiple computers on the night of your event. If you choose to use multiple computers with MaestroAuction, you will need to set up a Windows File Sharing network at the event.

Networking is accomplished using Microsoft Windows, and Microsoft has videos and guides for using their product to set up a network.

- › Tips can be found at **maestrosoft.com/networking**.
- › **NOTE:** We at Maestro provide phone support for our products (MaestroAuction, qCheck, and Text2Bid). Our support team is unable to support your printers, network, laptops, sound system, or other non-Maestro technology.

Obtaining the latest MaestroAuction software



Download the software from maestrohelp.com. This download is free for MaestroCare subscribers, and assures you're installing the latest version.

Conduct a Quick Audit

As you near your event, we recommend auditing your data to check if it's "event ready" – meaning that the essentials are in place for the event to run smoothly.

Open MaestroAuction, and go to the **Run the Event [7]** tab.

Audit the readiness of items and attendees

The **Enter Actual Bids** screen will list all of your biddable auction items. It will also list all of your bidders when you click the arrow button for **Bidder #**.

- › If items are missing from this list, go to **View Auction Items [4,2]** and make sure that biddable items have **names, catalog numbers**, and are marked as **Saleable Item**.
- › In the **Enter Actual Bids** screen, explore the bidder number pick list. If attendees are not present in this list, then you either do not have bidder numbers assigned and/or attendees are not registered for the event. Guests are registered at **Enter People Register Attendees [3,1]** and bidder numbers assigned in **View Attendees [3,3]**.

Audit the readiness of the “raise the paddle” and merchandise

The **Enter Merchandise screen** is used to enter sales of items at set prices, such as raffle tickets, sign-up parties, logo merchandise, etc.

- › To customize the items in your pick list, click **Setup Merchandise** in the ribbon. Edit the **Merchandise Name, Price, and Value**. The difference between Price and Value will show as tax deductible on statements. The **Item Category** is optional.
- › Print the **Bid Sheet** or **Ticket List** to record sales.

The **Enter Fund-an-Items screen** is used to enter cash donations from the “raise the paddle” portion of the live auction.

- › To customize your pick list, click **Setup Fund-an-Item** in the ribbon. Edit the names and default amounts.
- › Keep the names of each purpose identical, and change only the default amounts.
Disregard the Fund Name, Fund ID, and TSP unless you are a user of Raiser’s Edge or eTapestry.

You’re done with the quick audit once these three tabs display your items, bidders, FAI amounts, and merchandise in the exact way you want them to look on the night of the event!

Night of Event Data Entry

Go to **Run the Event [7]**. We recommend using an external USB 10-Key numeric keypad to accelerate data entry. **qCheck users must pair this guide with the color coded documentation in the qCheck kit.**

Enter Actual Bids



1. Enter the item number, and press the **Enter** key.
2. Enter the bidder number, and press the **Enter** key.
3. Enter the bid amount, and press the **Enter** key.

Splitting a Bid



Enter the TOTAL bid into the blue **Bid Amount** box, and click the **Split Sale** button.

Select how many purchasers to split between, fill in bid numbers, and click **Close Save Data for Invoices**. To edit or delete the sale, click the **Split Sale** button again.



Duplicating an item that sold twice

Click **Add New Item** and select an existing item to copy. Click **Yes**. You may enter the winning bidder information now or later.

Enter Merchandise

To edit items and print recorder sheets, click **Setup Merchandise**.



1. Choose a **Merchandise** item.
2. Enter the bid number, and press the **Enter** key.
3. Enter the quantity, and press the **Enter** key.

If you want the item added to their statement balance, do not mark it paid.

Enter Fund-an-Items

Print the **Fund-an-Item Recorder Sheet** to record bid numbers.



1. Select a level from the **Choose a Fund-an-Item** list.
2. Enter a **Bidder #** in the yellow field and press **Enter** twice.

Checkout using qCheck

Checkout takes many forms depending on the event. The checkout procedures below are recommended for a traditional event. Use these instructions in conjunction with the qCheck **Orange Sheet** instructions. The only computer you need at checkout is a single qCheck station.

Print Statements

Step 1: Print statements for all bidders with credit cards on file

- All QuickChecked
- Statements with Balance
1. Select **All QuickChecked**
 2. Select **Statements with Balance**
 3. Click the button with the printer icon, and take the statements to item pickup.
Bidders may leave immediately with their statement and items.



Step 2: Print Statements for all bidders without credit cards on file

- All Not QuickChecked
- Statements with Balance
- Copies
2
- Select **2** for copies.
1. Select **All Not QuickChecked**
 2. Select **Statements with Balance**
 4. Click the button with the printer icon, and take the statements to item pickup. } If the bidder pays by **cash or check**, staple the cash or check to one copy. Use a "Paid" stamp on the other copy, and hand it to them with their items.
} If the bidder pays by **credit card**, swipe their card into a qCheck station. Write "QC" on one copy of the statement. Use a "Paid" stamp on the other copy, and hand it to them with their items.

After the event is over

In MaestroAuction, record the **cash** and **check** payments collected at checkout. **DO NOT** enter credit card payments. Credit card payments will post automatically when you process cards.

For cash and check payments collected at checkout:

1. Enter a bidder number into **Find by Bidder #** and press **Enter**.
2. Click the **Pay in Full** button to automatically create a payment equal to the balance due **OR** Click **Add Auction Payment** to type in a custom cash or check amount and leave a remaining balance that will charge to their card.

A few days after the event, process qCheck charges using the **Green Sheet**.

Checkout for events *not* using qCheck

There are a variety of ways to run checkout when not using qCheck.

Method 1: Traditional Checkout

This method is slower, but results in statements that show zero-dollar balances. This method requires each bidder to checkout one at a time. You will need computers and printers at checkout for this method.

1. Enter a bidder number into **Find by Bidder #** and press **Enter**.
2. Run their credit card through your third party terminal, or accept their cash or check.
3. Click the **Pay in Full** button to create a payment equal to the balance due.
4. Ensure that **Single** is selected, and click the button with the printer icon.

Method 2: Expedited Checkout

This method is faster, and results in statements that show balances with a “Paid” stamp. You will not need computers at checkout for this method.

1. Select **All Statements**
2. Select **Statements with Balance**
3. Select **2** for copies.
4. Click the button with the printer icon, and take the statements to item pickup.
 - If the bidder pays by **cash or check**, staple the cash or check to your copy of the statement. Use a “Paid” stamp on their copy, and hand it to them with their items.
 - If the bidder pays by **credit card**, run their credit card through your third party terminal. Staple the terminal receipt or write “CC” on your copy of the statement. Use a “Paid” stamp on their copy, and hand it to them with their items.

Method 2 Post Event

After the event is over, record the cash, check, and credit card payments collected at checkout into MaestroAuction in the **Print / Review Statements Tab**:

1. Type in a bidder number into **Select Bidder # to Review Purchases**, and press **Enter**.
2. Click the **Pay in Full** button to automatically create a payment equal to the balance due.
3. Fill in optional payment details such as payment method and reference number.