



## **AUCTION SOURCE CHECK-OUT CHAIR RESPONSIBILITIES AND PROCEDURES**

Thank you for volunteering your time to learn the Auction Source scanning and check-out process. You have received personal training on the procedures and this checklist is provided to help you remember the process at the auction site.

### **YOUR RESPONSIBILITIES**

1. Solicit 2-person teams of volunteers (one team per check-out computer) for scanning winning bids and serving as cashiers (i.e.: if you are using 5 computers, you will need 10 volunteers).
2. Solicit additional volunteers known as “tearers” (one per check-out computer) to prepare bid sheets for scanning and to sort bid sheets after the scanning process (i.e.: for 5 computers, you will need 5 volunteers).
3. Solicit 1-2 volunteers to assist with distribution of gift certificate envelopes.
4. Supervise check-out teams during the scanning and cashiering process.
5. Send volunteers to gather Bid Sheets as each section closes.
6. Schedule with your Auction Source representative a 1½ hour block for training the 2-person teams during the week before the auction.
7. Handle, along with Auction Chair, any purchase discrepancies.
8. Bring cash box and change for cash purchases.

### **CREATING THE IDEAL SETTING**

You are present to manage volunteers, answer questions, and resolve problems or discrepancies. At least 15 minutes before the first silent auction section closes, be sure that:

1. There are no food or drinks in the check-out area.
2. Live auction items have been entered.
3. All multi-item bid sheets have been scanned (while it is recommended that these are turned in prior to silent auction closings, they absolutely must be turned in no later than halfway through scanning of silent auction items).
4. All scanner/reader teams are present and seated at the computer stations.
5. Tearers/sorters are present and ready to be trained.
6. Runners have been instructed to bring bid sheets to the front tables only.

## **SCANNING THE WINNING BIDS (WHO BOUGHT WHAT)**

1. Work is done in two-person teams. Volunteers stay in the same job for which they were trained.
2. The winning bid should be on the top page of each item's bid sheet.
3. The "Scanner" will scan the barcode representing the item number, then the winning bidder number and then the winning bid amount.
4. The "Reader" will call out each number as it is scanned.
5. The "Scanner" verifies the number scanned into the system was the number intended.
6. If an error occurs, use the mouse or Tab key to highlight the incorrect field and scan or type in the correction. The computer will prompt you to verify your change, so the "Scanner" must be sure to allow time to respond to this prompt before moving on to the next item.
7. Proceed through all bid sheets that have been given to you (numerical order doesn't matter).
8. In the case of a damaged bidder label that won't scan, use the keyboard instead of the scanner to input the value.
9. If there is no bidder label on the bid sheet, scan the bar code representing the item number, and then the bar code at the bottom of the bid sheet.
10. There may be a few minutes of waiting between Silent Auction section closings.

## **CASHIERING**

1. Each member of the check-out team will alternate customers ready to check-out.
2. Ask the customer for his or her bidder number. (There will be an alphabetical list of guests with bidder numbers beside each computer for those who don't know their bid number.)
3. Key the bidder number into the system and press enter.
4. Verify the customer's name and communicate the total of the customer's purchases.
5. Ask if he or she would like to leave the purchase on the credit card provided at check-in (if it is in the system) OR ask how he or she would like to pay for the purchases.
6. If paying by credit card that was not scanned at check-in, scan the credit card positioning the magnetic strip down and to the left. Slide the card from front to back.
7. Verify that the card number, customer's name and the expiration date are now filled in the appropriate fields on the screen.

8. If you need to erase credit card information that previously has been filled in, click on the Clear Credit Card button
9. Clicking on the Print Bill-Payment button will automatically print two identical copies of the customer's itemized invoice.
10. For credit card purchases, ask the customer to sign one copy of the invoice.
11. For check purchases, write "Paid By Check" and the check number on one copy of the invoice. Staple the check to the invoice.
12. For cash purchases, write "Paid by Cash" and the amount on one copy of the invoice. Place cash in a Cash Box provided by the Check-Out Chair.
13. For dual payment methods, process as noted above and very clearly write on the invoice exactly how the transaction was paid.
14. Stamp both copies "Paid."
15. Verify with the customer that the phone number on the invoice is accurate. Write corrections on the signed or marked copy.
16. Place the signed or marked copy of the invoice in the wire basket.
17. Review the customer's copy of the invoice for any item that is marked with a double asterick \*\*. This indicates the item is a gift certificate and it should be retrieved and given to the customer.
18. Hand the "Paid" receipt and any gift certificate envelopes to the customer.
19. Tell the customer to pick up items bought from the table and show the Paid receipt to the table or door monitors.
20. While one team member is processing the paper work, the other team member should begin helping the next customer.
21. If there is a problem-customer, or anything out of the ordinary, the customer should be sent to the "trouble desk". Keep the check-out lines moving!

#### **SUGGESTIONS FOR A SUCCESSFUL CHECK-OUT**

1. **The checkout chair should refrain from doing the work of check-out teams** – It is important that the chair remain available throughout the process to solve problems and answer questions. Issues often arise during checkout that only the chair can resolve. For example, a bidder won an item but says he did not bid on it and refuses to pay until it is removed from his bill. Chair should also remain available to monitor volunteers and ensure that proper procedures and guidelines are followed (for example, no drinks at the computers).
2. **Be sure volunteers are ready and able to work** - It is critical that all intoxicated volunteers are immediately asked to leave their stations. They make costly errors by entering incorrect data. These mistakes often can take a great deal of time to correct and, in general, slow the entire process down.

3. **Have only one checkout line until all items have been scanned** – While the line of guests waiting to check out can grow and be a distraction, it is important to quickly finish scanning all items. Bidders who check out early often end up buying additional items and must be contacted during follow-up. Fewer bidders that check out before all items are scanned results in less follow-up.
4. **Establish a clear method for distributing gift certificates** – Whether guests get gift certificates when they pay or they take their receipt to a separate table and retrieve gift certificates there, the process must be clear to the cashiers. Though well-intentioned, volunteers who didn't know better have sent guests away without gift certificates, to the wrong place, or even back behind the computer tables creating crowding and confusion. Auction Source recommends giving gift certificates to guests when they pay, as this option requires guests to only stand one line. Also, the gift certificate volunteer needs to be present the moment checkout begins.
5. **Design a well laid-out tearing area** – Make sure there is plenty of room to tear bid sheets so the process can progress quickly and efficiently. This will allow scanners to begin working sooner.
6. **Provide adequate sorting space** – Bid sheets should be easy to access after they have been sorted. Bid sheets often need to be pulled to verify or change winning bid numbers.

Our Technical Support Team will be present throughout check-out to assist you and your volunteers and to handle any systems issues that arise. Good luck!