



AUCTION SOURCE FOLLOW-UP CHECKLIST

As the auction ends, your job begins! There will be many people who leave your event early and don't check out, and some who check out before all items are scanned into the system and end up purchasing additional items. You will need to "follow-up" with all of these people to make arrangements for payment and item pick-up as soon as possible after auction night. Your job may also include reconciling the invoices with cash, checks and the credit card statement, as well as phoning in credit card numbers to your bank. Below are some steps to be considered in order for this important function to run smoothly. The Follow-up Chair will get several reports at the end of the auction from the Auction Source Technical Support Representative. These include all the information you need to perform your job.

1. Determine a place to put un-claimed items and a way to transport them there after the auction.
2. You will need a computer and printer available for check out after the auction (that has Auction Source software installed). You will get a disk with the final data from the auction that will need to be restored onto this computer. If you are uncomfortable with the restore function, please call your Auction Support Representative. It is critical that, as soon as you restore the data, you print a Category Count Report and verify that it is identical to the one given to you in your stack of reports from auction night. If it is different, STOP and call your Auction Support Representative.
3. Organize volunteers to call those who didn't check out, and those who purchased additional items after they checked out the first time. If you are missing a real phone number for a buyer, because it wasn't entered during the reservation process, use the Bid List to find the table number of the winner. Then use the Table List to find those at the winner's table with real telephone numbers. Call until you find someone who knows the winner's phone number.
4. Determine hours/place for item pick-up after the auction.
5. Be sure you have access to bid sheets for those instances when someone refuses to pay. You will then need to contact the next-highest bidder.
6. If you do change purchaser, go into the *Who Bought What* screen, enter the item number, type the new purchaser's bidder number, and change the price. This action now changes two invoices and you may want to re-print both invoices.
7. It is possible to mail gift certificates to those who will give phone authorization to charge a credit card and who purchased no physical items.
8. Order (by bidder number) paid invoices. Reconcile this stack of invoices with the credit card report and checks and cash stapled to individual invoices.
9. Be sure to go into the *Check Out* screen, type in a bidder number and "Print Bill – Payment" when someone checks out. This is the only way that the database knows they have paid.
10. Reprint the Outstanding Balance Report periodically; it will be shorter each time you print it!

11. Credit card numbers can be typed in (because you will no longer have a scanner) if they weren't scanned at check in. Type just the numbers – no dashes. The expiration date is 4 characters – MMY Y (no slash).
12. Credit card numbers can be called in to the bank at any time. Be sure to use the signed invoices rather than the credit card report when doing this. There are times when a buyer will split credit card/check, or pay using 2 credit cards. This information is written on the invoice, not the credit card report.