

Admin Auction Guide

A step-by-step guide on how to create an auction in Bid Beacon

Step 1 - Register and Login

Admin access to Bid Beacon is **only** available on a web browser from any device (phone, tablet, computer).

The downloadable app is great for guests but can not be used to access the Admin Dashboard or create an auction.

Admins and guests create accounts the exact same way. Go to App.BidBeacon.com and click **Create an Account**.

Fill in:

Email Address: Used as your log in and for communications about your auctions.

Password: Can be changed later if you forgot or mistyped

First Name: Your first name

Last Name: Your last name

Display Name: Can be a version of your name, or something more unique

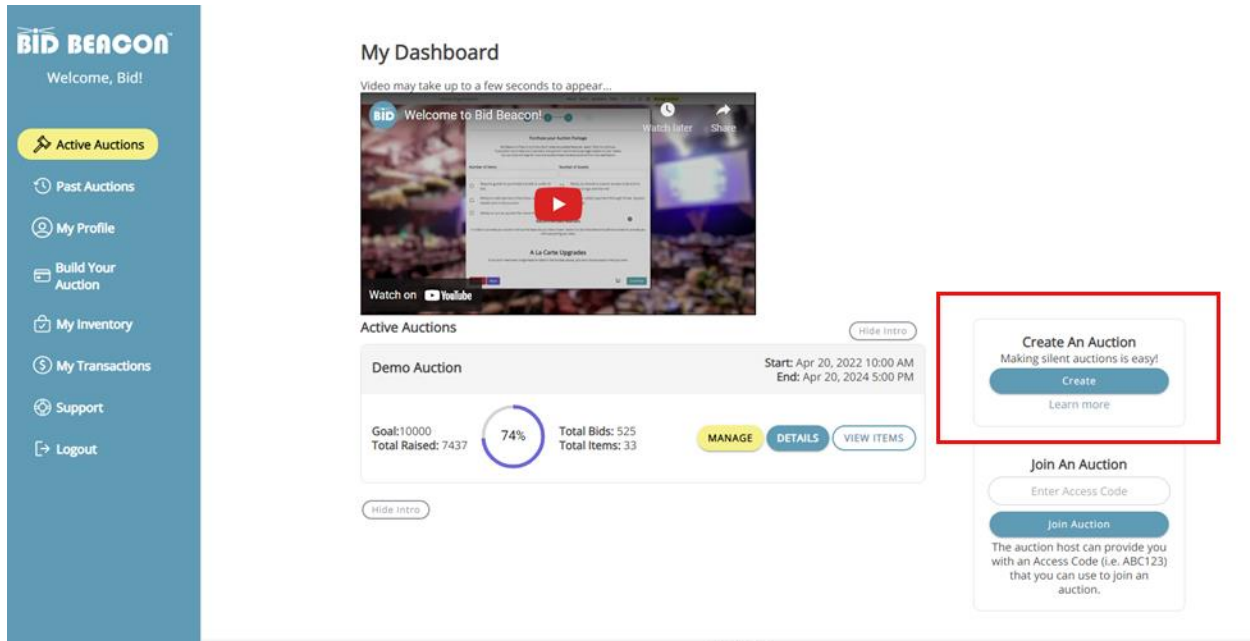
Mobile Phone Number: Optional, if used you will receive text message notifications.

Auction Access Code: Leave blank.

Click **Create Account**

Step 2 - Create Auction

If it's your first time on our dashboard, you can view the Bid Beacon Intro video for a quick overview on both the guest and admin experience in the app.



To start building an auction click the **Create Auction** button. Follow the steps from the setup wizard to create your auction. Details provided within the wizard can be changed later in the Auction Dashboard.

Wizard Step 1: About Auction

- Auction Name
- Auction Start Date & Time
- Auction End Date & Time (max 30 days, can be edited later if you need)

Wizard Step 2: About Organization

- Organization Name
- Organizers Name
- Organizers Email
- Country **this determines the currency of your auction*
- State or Province: **if in Canada or USA*

Wizard Step 3: Choose Auction Type

- Ultimate Risk Free** – unlimited access to all premium features, no restrictions.
- Build Your Auction** – buy just what you need and get started.
- Skip For Now** to check out the full dashboard free.

Wizard Step 4: Review

Confirm your details and then click **Go To Dashboard** to view your auction's dashboard.

Step 3 – Set Up Auction

From your auction dashboard, work through each of the setup screens on the left.

The screenshot shows the Bid Beacon admin dashboard. On the left, a navigation menu titled 'Wizard Step 1' is highlighted with a red border. The menu items are: Overview, Manage Auction, Manage Organization, Add Custom Branding, Guest Instructions, Payment Settings, Manage Sponsors, Manage Items, Manage Guests, Send Notification, Connect Raffle, Reports, and Promote. The main dashboard content is divided into three sections: 'Auction Overview' with statistics (1/10 Active Users, 1/1 Admins, 0/5 Images, 0/5 Items), 'Quick Actions' (Invite Guests, Add Items, Add-Ons, Auction Ending Options, Bid For Guest, Send Notification), and 'Enabled Features' (Branding, Sponsors, Online Payment, Extended Auction, Ticketing, Item Videos). The 'Inactive Features' section is empty. The 'Auction Details' section on the right shows 'Free Trial' status, event name 'Wizard Step 1', start and end dates, currency 'USD', and a QR code for sharing the auction details.

Quick Actions take you to pages you'll frequent more often but all screens have important info you need to fill out to get the most out of your auction.

Some premium features are locked if running a Free Trial or Build Your Auction plan and haven't added that feature. All premium features are included in Ultimate Risk-Free auctions.

Bid Beacon Premium Features:

- **Custom Branding:** Change the auction color theme, add a banner image, customize the link/access code, and add your logo to the header.
- **Manage Sponsors:** Recognize your sponsors with their logo, a description, and the link to their website. Optionally, add sponsor tiers.
- **Payment Settings:** Including collecting payment online through one of 4 options:
 - **Express Banking** – only available with Ultimate Risk-Free auctions. Payments get direct deposited into your account.
 - **Stripe Integration** – no Bid Beacon fee applies
 - **PayPal Integration** – no Bid Beacon fee applies
 - **Square Integration** – no Bid Beacon fee applies

The remaining pages are included for all auctions. Additional Premium Features can be found throughout set up on other screens, don't miss them!

- **Video Promotions** – adding a video link to each item in addition to images allows you to create engaging promotions for your items
- **Additional Administrators** – adding additional admins to help with setup
- **Ticket Sales** – Make paid tickets a requirement prior to being able to bid
- **Remote Support** – available if you need more hands-on help

Included Features for Any Auction (Free, Build your Auction, Ultimate Risk-Free):

Making Admins Lives Easier

- Copy From Past Auctions your org name, past items, past payment setup, and even past guests.
- Multi-Currency Support run auctions in CAD, USD, GBP, EUR, AUD and NZD
- Customer Support by email – we're here to help at support@bidbeacon.com
- Invoice & Receipt Generation automatically
- Unlimited Set Up Time before the auction start date

Ways to Raise More

- Set a Fundraising Goal and watch your funds raised grow
- Collect Surcharges & Taxes available if necessary
- Donation Collection to just request straight donations
- Merchandise Sales if you have a set quantity of things selling for a set price
- Live Item Promotion & Invoicing for those items you auction with an emcee or auctioneer

Increase Bidding Activity

- Staggered Item End Times allow you to have some items end earlier than others
- Bidding Extensions keep the bidding going when items are bid on in the last 30 seconds
- Proxy Bidding or "bid as guest" in case someone doesn't want to do it themselves
- Max Bidding so guests set their max, and the system bids for them
- Printable Item Sheets with QR codes direct to items, for in person events

A Unique Guest Experience

- QR Code to Auction for placing on posters, programs, and all over the place
- Free Downloadable Guest App in Google Play and Apple app stores

- Automated & Custom Notifications by text, push and email
- Connect a Raffle with Raffle Rocket
- Promote Screens: Live Event Presentation

Step 4 - Payment Settings

From the **Overview** screen, click on **Payment Settings** to configure how guests will pay. This is a pretty important step – so much so it has its own guide!

Go to Payment Guide: <https://bidbeacon.com/bid-beacon-payment-guide/>

Step 5 – Manage Items

The screenshot shows the Bid Beacon Admin interface. The left sidebar is titled 'Giving4Good' and contains a list of navigation options. The 'Manage Items' option is highlighted with a red box. The main content area is titled 'Manage Items' and shows 4 items and 4 images. There are three tabs: 'MANAGE ITEMS' (active), 'MANAGE CATEGORIES', and 'MANAGE FEES & TAXES'. Below the tabs are optional settings for all items, including 'Hide Items After Auction Ends' and 'Disable Max Bid'. There is a search bar and three buttons: 'EXPORT ALL AS PDF', 'COPY PAST ITEMS', and 'ADD ITEM' (highlighted with a red box). Below the buttons is a table of items.

| Featured | Item Name | Lot Number | Category | Current Bid Amount | Current Winner | Last Bid | Manage |
|----------|-------------------------------|------------|--------------|--------------------|----------------|--------------|--------|
| ☆ | Chefs Table for 4 | | Experiences | \$3000 | BidBeacon | Sep 27, 2022 | EDIT |
| ☆ | Romantic Night at Home Basket | | Gift Baskets | \$0 | | | EDIT |
| ☆ | The Morning Person Basket | | Gift Baskets | \$0 | | | EDIT |
| ☆ | Trip for 2 to Mexico! | | Experiences | \$1300 | BidBeacon | Sep 27, 2022 | EDIT |

You can't host a silent auction without any items. From the **Overview** screen, click on **Manage Items**.

From here, we can manage existing or create new items. Get started by clicking the **Add Item** button.

You have the option to create 5 types of items:

- **Bid Items** – 95% of all items auctioned on Bid Beacon are these ones. Set the starting bid, and the increment and off you go.
- **Blind Bid** – these items require bidders to place their highest bid right off the bat. All bids are kept secret (even from admins), and at the end, the highest bidder takes the prize. If two tie, the highest bid placed first would win.
- **Buy It Now** – this is for things like merchandise, tickets, or anything with a set price and limited quantity.
- **Donation** – this is for if you want to collect donations. You can make multiple of these items.
- **Live Item** – for an item you'll be auctioning off live with an auctioneer. It showcases the item, but bids are not placed within the app. The winner can be invoiced for it through the app.

For an in-depth guide on creating an item, check out the article [Add Your Items](#).

Placing items into **categories** helps bidders navigate and find items they are interested in quickly.

Manage Categories

- Add New Categories here, or within an item creation.
- Edit or Delete Category
- Sort or Re-Order Categories
- Customize Categories with custom background images
- Hide entire categories until bidding opens. Admins will see them, but guests will not.

Manage Fees & Taxes

- If you are required to charge Sales Taxes, you can configure the tax amounts here and they will be applied to every purchase. You complete the set up on each item.
- If you want to charge a set fee, such as a shipping fee, you can configure the fee name here, and will need to set it on each item.

Step 6 - Share Your Auction

The screenshot displays the Bid Beacon Admin interface. On the left is a navigation menu for 'Giving4Good' with 'Overview' highlighted. The main content area is titled 'Auction Overview' and shows statistics: 2 Active Users, 1 Admins, 13 Images, and 4 Items. Below these are 'Quick Actions' (Invite Guests, Add Items, Auction Ending Options, Bid For Guest, Send Notification) and 'Enabled Features' (Branding, Sponsors, Extended Auction, Ticketing, Item Videos). On the right, the 'Auction Details' section includes: Auction Type (Ultimate Risk-Free Auction), Event Name (Giving4Good), Event Description (All funds raised will go towards improving the lives and wellbeing of those in our community!), Start Date and Time (Sep 27, 2022 12:55 PM), End Date and Time (Oct 08, 2022 2:59 PM), and Currency (CAD). A red arrow points to the 'Share your Auction!' section, which contains the text: 'Below is the Details Link, Access code, and QR Code. Share these with your guests so they can join your auction!'. It lists the Auction Details Link (<https://app.bidbeacon.com/#/auction/RNBGBK/details>), Access Code (RNBGBK), and an Invite QR Code.

In addition to directly inviting your supporters and network to join, be sure to share and promote your auction a variety of ways.

On the **Overview** screen, check out the **Share Your Auction!** section.

- The **Info URL** is great for buttons on websites, posting to your social media channels or adding to emails.
- If your guests are familiar with the Bid Beacon app, sharing the **Access Code** is another way for them to quickly join your auction after logging in.
- Click **Save QR** to download your auction's unique QR code which can then be added to printed materials like programs, posters on golf carts or placed around your venue.

A few tips and tricks we've seen others do:

- Share the page link from the item itself with that items donor to suggest they cross promote with their supporters too.
- Invite guests from your last Bid Beacon auction on the "Manage Guests" Screen

- Use Custom Notifications to create a buzz
- Cross promote your Raffle Rocket and Bid Beacon events on each unique page

Step 7 – During the Auction

During the auction there are many things admins and volunteers can do to help things along.

- Use Bid As Guest to place bids for a guest who does not have access to a mobile device, or who may be having trouble using our system.
- Use Notifications to create fun messages bringing people back into the app
- View progress and success in your reports with up to date information each time you export them
- Share item links and promote on social media, big screen or other means

What not to do during the auction:

- We recommend not messing with the payment settings during the auction, too much could go wrong!
- Don't end the auction if you're not truly ready for it to end, there is no going back live once it's over
- Don't forget if you've set reserves on items to confirm before the auction ends that you are still OK with it. If the bid is "close enough", you can remove the reserve before the auction ends and a winner will be declared.

Step 8 – Auction End

When the auction end time comes, Bid Beacon will automatically close all bids, review the auction data and within a minute declare winners and send out personalized emails to each guest. With Express Banking we'll even automatically charge all winners for the items they won.

Winners will receive:

- A push notification and text message declaring the auction over and linking them to View Results
- Email listing what they've won and sharing the payment and pickup information you provided on the Guest Instructions screen in your dashboard.

Non-Winners will receive:

- A push notification and text message declaring the auction over and linking them to View Results
- Email thanking them for participating and letting them know they did not win any items.

Admins will receive:

- A push notification and text message declaring the auction over and linking them to View Results
- Email declaring the auction over and providing next steps
- A new Auction Closeout Report becomes available on the Reports screen, you can export it as often as you want, and it will update each time with new info as people pay and pick up their items.

In addition, a **Results** screen becomes available:

The screenshot shows the 'Auction Results' page for a guest user. At the top, there is a navigation bar with 'About', 'Items', 'FAQs', and a 'Manage Auction' button. Below the navigation bar, there is a 'Pay for Guest' button. The main heading is 'Auction Results'. Below this, there are three tabs: 'Your Winnings' (selected), 'Guest Results (1)', and 'Complete (0)'. A yellow box prompts the user to 'Rate your experience with Bid Beacon' with five stars. The 'Your Winnings' tab shows a table with one item: 'Test Max Bid 1' with a price of '\$110'. To the right of the table, there is a 'Prize Claim' box that says 'pick up at my house'. Further right, there is a user profile for 'Laurie Matheson' with her username, email, and phone number. Below the profile, there is a summary of the bid: 'Bid Total: \$110.00', 'Sub Total: \$110.00', and 'Grand Total: \$110.00'. A blue button says 'PAY \$110.00 NOW'. Below that, there are 'Instructions' on how to pay and a 'Download Invoice' link.

On the Results screen, guests will only see the **Your Winnings** tab.

Admins will see 3 tabs as pictured above:

- **Your Winnings**
- **Guest Results**

- **Complete**

Your Winnings includes:

- Items the user won and totals after any taxes, fees or surcharges set by admins.
- **Prize claim instructions** as written by auction admins on the Guest Information screen in the admin dashboard
- **Payment instructions** as written by auction admins on the Guest Information screen in the admin dashboard.
- A **Pay** button if Alternate Online Payments was set up for this auction
- An option to **download** their Invoice or Receipt. Invoice if unpaid, receipt once paid in full.

Guest Results includes:

- A **Pay for Guest** button that opens the results on behalf of a guest in case you need to assist them with making their payment in the app.
- A list of every winner and what they won, how much they owe and their contact email.
- Filters by: **View All, Paid or Unpaid**
- A search bar to search for someone by name, email, or phone number
- A **download all receipts** link to download PDF copies of every invoice and receipt in the list. Invoices if unpaid and receipts if paid.
- An option to **Save Offline Payment** if you aren't using Express Banking and the guest pays you outside of the app (cash, cheque, e-transfer, Venmo, etc.)
- A button to **Mark As Picked Up** when the winner claims their prize.

Complete includes:

- Any winner who has paid and picked up their item.
- An option to mark as "not picked up" if you made a mistake.