Classy Resource Guide

Auctions Workbook

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Auction planning

This workbook will help you in setting up your auction for success.

The first step is planning well in advance. We recommend starting as early as possible, at least three months before your event.

To get started, answer these questions:

What types of items will we have at our event?

Mark all that apply - for more help with items view our article.

- [ ] Silent
  An auction item attendees can bid on and win through the online auction page.

- [ ] Paddle raise
  Also known as a “fund-a-need” or direct appeal, supporters can pledge donation amounts towards a specific program or purpose.

- [ ] Live
  An auction item attendees can bid on in-person with the help of an auctioneer.

- [ ] Fixed price
  An item sold to supporters for a set price.

Do we still need to get any of the items?

- [ ] Yes
- [ ] No

How will we get the items?

Leave blank if you do not need to get any more items.

How will people receive their items?

- ☐ In-person at the event
- ☐ By mail
- ☐ By email (digital items like gift cards)

Will we allow bids, purchases, and donations before the event date?

- ☐ Yes
  Set your items to **Open** when adding them.
- ☐ No
  Set your items to **Closed** when adding them.

Will we allow external bidders?

External bidders are supporters who don't purchase a registration but still participate.

- ☐ Yes
- ☐ No

How many event staff will we need?

Classy recommends having 1 staff member for every 50-75 attendees.

What will we use for paddles?

Leave blank if you don't have paddle raise items.

How will items be displayed?

Displayed on tables, printed on item sheets, etc.

When will we collect attendee payment methods?

Classy Live requires a payment method to participate in auctions online.

- [ ] Before the event

  Send a call to action to add payment methods on file.

- [ ] At check-in

  Consider purchasing card readers to help.

Auction setup

If you need to set up your Classy Live account, please view this checklist first.

Auction details

To edit your auction details, go to your event and select **Auction**. Then, select the **Details** tab.

- [ ] Set how Classy Live assigns bidder numbers
- [ ] Add an auction page description and terms & conditions
- [ ] Add a receipt message

→ This will appear on all Classy Live transactions. To add a message, go to **Email Templates**.

→ For item specific messages, add purchase notes when creating the item.

- [ ] *(Optional)* Create a display or thermometer

→ Displays and thermometers display fundraising activity at your event in real-time. To learn more about displays, view our article.

Items

- [ ] Add auction items
  Mark this complete when you are done adding your auction items.

To add items:

1. In your Classy Live event, go to **Auction**
2. Select the **Items** tab
3. Select **+ Add**

TIP

If you don't want to allow bidding before the event date, toggle off **Open** to keep your items closed.

QA your attendee experience

Mark the items off as you test them.

- [ ] Register for the auction (ticket purchase)
- [ ] Visit the Event page
- [ ] Visit the Auction page
- [ ] Bid on an item
- [ ] Add an item to a cart
- [ ] Checkout

If everything looks good, the next step is to share the event page with supporters.

→ Turn on the **Welcome message** to send automatically to new registrants

→ Or, send the message via the **Attendees** menu when you're ready

Learn more about messaging attendees on Classy Live

Train your event staff

If you haven't already, add your event staff to Classy Live. To make sure your staff learn how to use the essential auction features, send them our Classy Live course.

NOTE

We strongly recommend training your event staff to ensure a smooth check-in and checkout experience for your attendees. Staff may also need to assist with live auctions, paddle raises, and troubleshooting.

Day of event

As you prepare day-of, mark the items off at your event.

Must haves:

- [ ] Check-in staff are at their stations
- [ ] Checkout station for attendees
  To help attendees with payments or accept cash and checks.
- [ ] Information or help desk
  To help answer attendee questions (can combine with another station).

If applicable:

- [ ] Staff has card readers
- [ ] Staff has paddles to hand out
- [ ] Printed item sheets are available
- [ ] Auctioneer is present

For help scheduling your staff on event day, view our template.

Checkout

When the time for checkout comes, send a reminder to attendees to complete payment. To send a payment reminder:

1. In Classy Live, go to **Alerts**
2. Select **Send** and **Send Call to Action**
3. Set the action to **Link to cart**
4. Choose to send to **People with unpaid balances**
5. Send the message

Splitting payments between cash/check or card

To split payment between payment methods, enter the cash/check payment first. Then charge the rest to the card.

After your event, learn how to view your transaction reports.