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# **Auctioneer Handbook - Sharp Auction Engine**

This document is the official Auctioneer's reference guide for Sharp Auction Engine. You can navigate to various sections and topics in the index to the left.

# Getting Started

## Creating an Account

Signing up as an auctioneer with SAE is easy with our [Auctioneer Signup](#) form. After completing the Auctioneer Signup form, you can immediately begin customizing your auction house and creating your first listing.

The actual signup process takes less than five minutes and requires minimal information. Below are some notes on the type of information you will be asked for:

### **Username**

Auctioneer usernames are never displayed to the public, so this username will simply be used by you to sign in to your account (although you can also sign in with your email address). Auctioneers are identified by their real names and auction house names, so displaying the auctioneer username is not necessary. Bidders, however, are primarily identified by their usernames.

Choose a username that reflects your own name (ex: "thomas") or your auction house name (ex: americanauctionco) or anything else you would like it to be. The username must be at least 3 characters and cannot contain special characters.

*Once your account is created, you cannot change the username. If there is a problem, please contact us at [help@sharpauctionengine.com](mailto:help@sharpauctionengine.com) for help.*

### **Email Address**

This should be the email address where you would like to receive all auction house correspondence. It will be displayed in the footer of your auction profile page along with other contact information. You can also sign in with this email address (in addition to your username).

*If you would like to change your auction house email address, go to the Profile tab in your House Settings.*

If you have multiple auctioneers, clerks, or sellers for your auction house, and if you would like to receive correspondence at multiple email addresses, you will have the option to set that up once you have created your account. For more information on creating new users and managing email settings, go to the SAE Manual section on [Users](#).

### **Auction House Name**

Enter the name of your Auction House. This is how your house will be identified to users.

*If you would like to update your auction house name, go to the Profile tab in your House Settings.*

### **SAE Auction House URL**

This field autopopulates based on what you entered for the Auction House Name, but you are welcome to change this to whatever url you would like (as long as it is available). All auction houses receive a free SAE auction house url, which will end in *.sae.bid*, but you will have the option after you create your house to [set up a vanity domain](#).

*If there is a problem, please contact us at [help@sharpauctionengine.com](mailto:help@sharpauctionengine.com) for help.*

### **Password**

Create a strong password to protect your account. There are no requirements for your password; it can be whatever you would like it to be. We recommend, however, that it be a minimum of seven characters and includes numbers and special characters. Most importantly, make sure that your password is something that you can easily remember.

Once your password is set, you can rest assured that your information is safe. Sensitive data (like your password) is encrypted over AES/bcrypt to protect against unauthorized access.

*If you would like to change your password, go to the Settings tab in your Profile. If you forget your password, click the "Forgot Password" link when attempting to sign in, and we will email you instructions on how to change your password. Refer to the [Password Reset and Recovery](#) section within this manual.*

## **Setting Auction House Terms and Conditions**

One of the first steps in customizing your auction house is to set your default Terms & Conditions. Once these terms are set, they will automatically be inherited by each new auction listing you create. However, you will have the option to edit or replace them for each new auction listing.

You will also need to set your site Terms & Conditions and Privacy Policy. A free set of Terms & Conditions is automatically included with any new site by default. Auction House owners are able to change and adapt these terms to suit their business by visiting their house settings."

*Set your default Terms and Conditions by visiting the Terms and Conditions tab in your House Settings.*

## Uploading a House Profile Image

Although not required, we recommend that you upload a house profile image after you create your auction house. This should be your auction house logo, but if you do not currently have a logo, it can be any image you would like to use.

Later, When you apply your theme and customize your auction profile, you will have the option to display the house profile image on your auction front page.

Please note that when if you do wish to display the house profile image on your auction front page, it will display in the size of the original uploaded image. This leaves the choice up to you as to how large you want your house profile image to be displayed. If your logo is showing up too big or too small, open it up in your computer's graphics software and resize it to the desired size.

*To upload a house profile image, visit the Profile tab in your House Settings.*

## Applying a Theme

Whether your SAE auction profile is integrated into your existing website or whether it is a standalone site, you have the option to fully customize the appearance to reflect your company's branding by applying custom themes and colors, header and footer links, an image carousel, and much more. You can do all this by visiting the Theme tab in your House Settings.

## Adding Addresses

When you created your account, you provided a primary address for your auction house. Visit the Addresses tab in your House Settings to confirm this address and add any other applicable addresses. You may choose from this list of addresses when are setting preview details for each of your auction listings.

## Setting Up a Vanity Domain

SAE offers a free profile and a free SSL for auctioneers. Our software easily integrates with your existing website, but if you don't have a website, your free SAE profile can even stand alone.

Adding a vanity domain to an auction house gives you the ability to direct your customers to your online auctions through your existing web address (if you have one). For instance, if your company's website is currently "www.auctioncompany.com" you can create a web address of "auctions.auctioncompany.com" and have it point directly to your online auction house through the Sharp Auction Engine. It is a technical process, so your website's administrator would be a handy person to keep close. All you need, however, is to log in to your web hosting account and make a few simple changes.

Before you go to your web hosting account and make changes, send us an SSL Request. Sign in to your SAE account, go to your Auctioneer Dashboard (by clicking the icon in the top right hand corner of the screen), then navigate to the "Account" tab. From here, click the "SSL Request" link on the right hand side of the page and provide us with some basic information associated with your domain hosting account. Then sign in to your web hosting account and follow the steps below.

### **Step 1 – Locate DNS Settings**

Once you have logged in to your web hosting account, you will need to locate the area where DNS settings can be changed. DNS stands for Domain Name Server, but your hosting company may refer to it as Hosting, Redirect, DNS Maintenance, Domain Management or Name Server Settings. Each hosting account handles it differently, so you may have to look through advanced features before you find your DNS Management options.

#### *Option A – Direct A Record To Our Server*

You will need to create an A Record for the domain of your choosing (e.g. example.com) to 198.74.52.167 (our server) IP Address. After doing so, you'll want to create a cname record for your domain. An example would be www.example.com. You're adding the preceding www. Optionally, you can add A records for the www.domain.com to 198.74.52.167 IP address. Be sure not to do both said options, only one is required.

#### *Option B – Emails Associated With Your Domain*

If you have emails and/or other services set up through your domain, set up your DNS zone file/information first. Set your domain's nameservers to ns1.linode.com, ns2.linode.com, ns3.linode.com, ns4.linode.com, ns5.linode.com.

#### *Option C – Point Your Domain Name to Your .sae.bid Domain*

When you create your account with us, you are given a domain that ends with .sae.bid. You can create a cname record (e.g. example.com) to this domain (yourauctionhouse.sae.bid).

### **Step 2 – Contact Us, and We'll Finish the Process**

Once you've set up a new CNAME and directed it to our servers, contact us, and we'll get the rest sorted out. That includes getting you a free SSL license, so your customers know they are browsing securely.

By using a vanity domain, your customers can bid on your online auctions without feeling like they have ever left your website. Your website. Your brand. Look Sharp with SAE.

## Enabling Payments

Visit the Payments tab in your House Settings if you would like to accept credit card payments from bidders for won items. SAE integrates with both [PayPal](#) and [Stripe](#) to make this possible.

### Stripe

Create an account with Stripe to enable credit card payments. Follow our [related support article](#) for a step by step process.

### PayPal Express

Accept PayPal Express payments by connecting your account.

## Customizing Invoices

SAE provides you with a fully developed invoicing and payments feature. You can customize your auction house invoices in a number of different ways by visiting your [Invoice Settings](#).

## Using the Auctioneer Dashboard

The Auctioneer Dashboard is an auctioneer's central hub for auction creation and management. You can navigate to it by clicking the dashboard icon in the navigation bar in the upper right hand corner of your screen. This will bring you to the Listings Page of your dashboard. This page displays all of your listings, and each listing includes links to access Invoices, Payments, Reports, and more. In addition, there is a green button in the top right corner of the Dashboard that you will use to create new auction listings.

To help you keep track of your listings, there is a Statistics module in the lower left corner that displays the total number of listings for each status (draft, live, upcoming, closed, and archived). These totals are links that, when clicked, filter your listings to display the listing status that you would like to view.

To navigate to the other pages of your Auctioneer Dashboard, simply click one of the other page tabs in the navigation header above your house profile image.

## Editing Your Auction House Profile

The first tab in your House Settings is the Profile tab. This tab contains different information about your auction house, including your auction house name and description along with contact information such as the auction house email address and phone number. You can also upload a new House Profile Image (as a .jpg or .png file) from this tab.

## Adding Users

It often takes a team to oversee an auction house, and we want to make sure that your team is fully equipped with the access needed to successfully carry out all of your online needs. SAE gives you the ability to share your account with key members of your team, while remaining in control of what those users can do.

The Users tab is a centralized location in your House Settings where you can add, edit, and remove users for your auction house.

Each type of user (auctioneer, clerk, and seller) has different access and capabilities within the system. When you add additional users to your auction house, you can choose their roles to be Auctioneer, Clerk, or Seller. The type of role you assign the new user determines what they can and cannot do within the system.

- Auctioneers have full access to the online auction house. They can create, edit, and publish catalogs and fully access and edit Auction House Settings.
- Clerks work closely with auctioneers, and thus have similar access with one main exception: clerks cannot edit the owner's settings in the Users tab.
- Sellers, which may be real estate agents, brokers, or property owners, have unique and limited permissions; they can only create "For Sale" listings. They can publish, edit, and delete these types of listings only. They also do not have access to the Auction House Settings or additional auction house features such as invoices, messages, and notifications. This type of user is great for additional staff members who help sell assets using the traditional "For Sale" method, such as real estate agents.

From the Users tab, you can also control which users receive house emails. Regardless of the role (auctioneer, clerk, or seller), a user can be assigned to receive or not receive house emails.

*To access the new Users tab, simply visit your House Settings and click on the tab titled "Users." Please keep in mind that in order for someone to be added as an seller or a clerk, he or she must have an SAE user account. You will use that person's username to add him or her as a user. For security purposes, only the primary auctioneer on the account may edit the primary auctioneer's user role and settings.*

## Adding Categories

The Categories tab allows you to manually add classifications with which to sort your listings. This feature makes it easier for your bidders to sort through listings and search for things within a given category. These can also be added from the Listing Creation page.

**\*Note:** *Categories can only be CREATED through the Categories tab. To assign a category to a specific listing, visit the Basic Info module on the listing's Catalog Manager.*

## Adding Consignors

The Consignors tab is where you can add, edit, and delete consignors. This tab resembles and functions similarly to the "Users" tab. For each new consignor, you can establish a default rate of commission. To add a new consignor, click the "Add New Consignor" button and fill out the required information in the form provided. To edit or delete a consignor, use the green or red icons. The green "notepad" icon will allow you to edit an existing consignor's information, while the red "trash" icon will allow you to delete a saved consignor from your auction house. *(These buttons are located to the right of the consignor's name on the Consignors Tab.)*

Once your consignors have been added, when creating new items you have the option to select a specific consignor to associate with each item using the new Consignor Details module on the Item Manager. Using a helpful typeahead tool, you can easily select from your list of consignors. The default rate of commission will populate when the consignor is selected, but this can be changed per item if needed.

If you are creating items using the Bulk Import Template, you can also easily select consignors for your items. New fields have been added to the Bulk Import Template to make this easy and seamless. One tool we have incorporated to make this feature easier to use when bulk importing is the Consignor Code. You can assign a specific Consignor Code to each consignor, and you can simply enter this code on the Bulk Import Template. Keep in mind when bulk importing that the consignor must exist within the system before you can use the Consignor Code on the Bulk Import Template.

Once you have created your items and assigned your consignors, you can track commissions using the new Consignor Settlement Report. Unlike previous reports this one is unique in that auctioneers will need to be able to run the report to show all consignors or an individual consignor. When selecting the report, there are three different actions to choose from: View, CSV, or PDF. When you select an action, a modal will pop up to confirm whether you would like to show the report for all consignors on the report or an individual consignor.

Please note that consignors are currently only available for two auction methods: "Online Only" and "Online + On-site Event." This feature is not currently available for "On-site Event" or "For Sale" listings, but we will consider adding this option to these auction methods in the future.

## Bidders Tab

The Bidders tab in your House Settings displays all users who have created bidder accounts for your auction site.

Along with the username and email address of the bidder, you can also see which catalogs the bidder has registered for. You can view all bidders for the auction house or you can filter by catalog to view bidders who have registered for specific catalogs. Bidders can be searched for in the "Bidders" tab by their real name, their auction house username, or their on-file email address.

**\*Note:** Any section of the "Bidders" tab that is highlighted yellow when hovered over is an editable section. You may edit Preferred Paddle Numbers, Tax Exempt Status, and the Allow/Block List by clicking the highlighted text and entering in your desired information.

*Allow List/Block List*

You can set automatic allowance or blocking settings for bidders on the Bidder page as well. In the "Allow List/Block List" column, click the "n/a" text to reveal a drop down menu that will allow you to set either permanent Allow or Block status for that bidder, which they will automatically inherit for every listing.

### *Tax Exempt Bidders*

You can control a bidder's tax exemption status from this screen, by simply clicking the word under the "Tax Exempt" column and setting it as either Yes or No.

### *Verifying Email for Bidders*

Sometimes bidders will have difficulty with verifying their email address in order to participate in your auctions. If this happens with any of your bidders, you can help them out by manually verifying their email. Simply click their username from the Bidders tab, and then hover over the word in the "Email Verified" section. Clicking the word there will allow you to set it to either Yes or No. Please be aware that this is different than the "Registration Step" section above it, which refers to whether or not they have fully completed their bidder profile information, such as physical address, etc.

## **Managing Bids**

The Bids tab in your House Settings shows all bids that have been placed on your auction listings. If you have multiple auctions going at once, this is a great location to view your most recent bids.

Each bid is displayed alongside the item name and thumbnail with the high bidder's username and high bid amount. Clicking the blue icon next to the bidder's username will redirect you to that bidder's user information page.

In addition to viewing these bids, you can even retract bids from the Bids tab.

## **Addresses Tab**

From the Addresses tab you can add or manage the addresses associated with your auction house. You can set a primary address for the physical location of your auction house, as well as add additional addresses for other locations that your bidders may need to know (such as on site previews for real estate auctions of estate sales). Addresses can also be added on a per listing basis on the Catalog Management page. If a physical address is not available, the latitudinal and longitudinal coordinates of the location can be substituted.

## Documents Tab

The Documents tab allows you to quickly review any files you have uploaded to your auctions house, such as .csv files for bulk imports. From this page you can also download, edit, or delete documents, as well as make spreadsheets of other files publicly available, should you so choose.

## Photos Tab

With the Photo Manager you can edit, reorder, and upload photos. All photos that have been uploaded to your auction house will be displayed here, including those uploaded as media for listings as well as those uploaded as house profile images. On the left these are further categorized into photos for Drafts, Upcoming listings, Live listings, Closed listings, and Archived listings. The tools at the top of the main module allow you to organize the display of the photos to your liking. You can check the box in the upper left corner of each image's thumbnail to then choose a further action for the selection, including deleting or moving between catalogs. You can also choose to filter between photos that have been assigned to specific listings, and those that have been uploaded but not yet assigned.

## Terms and Conditions

From here you can set your site-wide terms and conditions, as well as default listing T&Cs and privacy policy. We include samples that you are free to use, but it is best to personalize these yourself. Bidders will be required to accept these T&Cs before bidding on any auctions on your site. They can also be adjusted on a per-listing basis.

## Theme Tab

The Theme Tab allows you to customize various features of your auction house.

### Header Logo

You can upload a logo to be displayed in the navigation header on your site. We recommend using a photo with **250 w x 75 h** for optimal display quality.

### Favicon

A Favicon is the small logo that appears next to the name of the webpage in the tab of your browser. SAE supports custom Favicons, provided they are uploaded in the `.ico` file format. You can easily make any image an `.ico` file by Googling ".ico converter" and uploading your

image through one of those services.

## Navigation Menu

You can easily add internal or external links to the navigation bar at the top of your house. Click [here](#) for a video demonstrating how to use the Dual Navigation option for the menu.

## Widgets Tab

This page allows you to generate codes to place "widgets" of your different listings directly onto another webpage. These widgets are simply small modules that act as an extension of your auction house and provide additional exposure for your listings.

*A support article expanding on this feature will soon be available.*

## Marketing Tab

The Marketing tab allows you to connect any social media accounts you might have to your auction house, for both advertising as well as ease of sharing listings on those platforms. You can also integrate [Google Analytics](#) and [Facebook Pixel](#) with your auction house from this page.

### Syndication

SAE has direct integration with the following auction syndication websites: [AuctionLook.com](#), [GlobalAuctionGuide.com](#), [AuctionGuy.com](#), and [BirdDog.bid](#). Syndication to each of these services can be individually controlled under the Marketing tab of your Auctioneer Dashboard. Please note that syndications to BirdDog and AuctionGuy are free and active by default (unless manually disabled), and require no initial setup on the part of the auctioneer. Syndication to AuctionLook and Global Auction Guide will require some small initial setup and registration with those services.

In order for your listings to be displayed in the correct category on Birddog.bid, it is important that you create the following categories on your own house, and assign listings to one of them. Your categories must match these exact spellings:

antiques

automobile

benefit-and-charity

coins-and-currency

computers-and-electronics

estate-and-personal-property

farm-and-heavy-equipment

jewelry

livestock

real-estate-commercial

real-estate-residential

## Reports Tab

The Reports tab allows you to view or download detailed reports of your Registered Bidders, Bidder Balances, and Payments. These can either be viewed in itemized form online, or you can download CSV or PDF versions as well.

## Invoices Tab

The Invoices Tab provides a quick overlook of all invoices that have been generated (from completed auctions) on your house. You can see a quick breakdown of the invoices charged to each bidder, along with information on the payment status for each of these. You can edit all information concerning these invoices from this page, as well as view in full, delete, and send to their respective bidders.

## Account Tab

The Account tab will give you an overview of the status of your SAE membership, including your payment plan, account status, join date, and date of last renewal. There are also links to change your payment plan, should you need to expand your operation, or enable SSL certifications.

## Payments Tab

The payments tab allows you to integrate various services to help you with credit card or online payments. Click the "Add Payment Method" button to add PayPal, Stripe, or TSYS integrations.

### Stripe

Stripe is a service that allows you to safely and reliably process credit card payments. To activate this feature, follow our [related support article](#) for a step by step process.

## **TSYS**

TSYS is a service very similar to Stripe, with the benefit of allowing auctioneers much more leeway with regard to transactions involving firearms and weaponry. If you feel TSYS may be a better fit for your business model, contact a Sharp Auction Engine representative to find out more!

# **Advanced Tab**

## **Revealing Registered Bidders and View Counts**

Auctioneers can choose whether or not to display the number of registered bidders and the number of views on a listing. Under the Advanced tab of the House Settings there is now a "Show # of Registered Bidders and Views on All Listings?" section, which can be set to Yes or No. This can be a great tool to drive competition, but if you wish to hide this information, simply choose no. Regardless of which option is chosen, the information will always be displayed to you, the auctioneer.

## **Revealing Max Bids to Auction Staff**

You can choose to see max bids placed on items by turning this setting on. Note that these will only become visible to Auction Staff accounts on your house.

## **Money Format**

You can change all currency terms used on your house with this option. Note that this does not convert preexisting values via exchange rate, it simply changes the denomination type. This setting should only be changed when you do not currently have any auctions actively running.

## **Setting Custom Email and Notification Preferences**

It is possible for auctioneers to choose what emails and in-house notifications you and your registered bidders receive. Auctioneers can listen to feedback from bidders and adjust the types of emails and notifications that are sent out according to their own needs.

On the right hand side of the Advanced tab you will find a section labelled "Notification Preferences," and below that another section called "Email Preferences." By default all of these are enabled, but you can simply uncheck the boxes next to each once to disable it. Be sure to click the "Save Changes" button at the bottom of the page when you are finished.

### *Notifications*

To Bidder: Request Approved (Alerts bidder that their bid request has been approved)

To Bidder: Request Denied (Alerts bidder that their bid request has been denied)

To Bidder: Request Revoked (Alerts bidder that their bid request has been revoked)

To Bidder: Invoice Received (Alerts bidder they have received an invoice)

To Bidder: Question Answered (A question the bidder asked on an item has been answered)

To Bidder: Highest Bidder (Alerts user they are the highest bidder for x item)

To Bidder: You've Been Outbid (Alerts bidder they've been outbid on x item)

To Bidder: Card Declined (Alerts bidder their card has been declined)

To House: Auction Ended (Alerts you (auctioneer or clerk) that one of your auctions has ended)

To House: Bid Placed (Alerts you that a bid has been placed on x item)

To House: Bidder Auto Approved (Alerts you that a bidder has been auto-approved to bid)

To House: Bidder Request Pending (Alerts you that a bidder is waiting for your manual approval)

To House: Question Received (Alerts you that a question has been received on x item)

To House: Payment Received (Alerts you that you have received a payment for x invoice)

To House: Bidder Started Watching Item (Alerts you that a bidder has Watchlisted x item)

### *Emails*

To Bidder: Auction Starting (An auction the bidder has registered for is starting soon)

To Bidder: Request Approved Receipt (Official record-keeping receipt of approval)

To Bidder: Request Approved (Generic notification of approval)

To Bidder: Highest Bidder Receive (Alerts user that they are currently the highest bidder for x item)

To Bidder: You've Been Outbid (Alerts user that they have been outbid for x item)

To Bidder: Message Received (Alerts user that they have a new message in their house inbox)

To Bidder: Question Answered (Alerts user that a question they asked of the auctioneer has now been responded to)

To Bidder: Watchlisted Item Starting (Alerts user that an item they have put on their Bidder Watchlist is now live)

In addition to the auctioneer being able to turn off certain emails on the global level, individual bidders and other users can also select which emails and in-house notifications they receive on an individual level. This can serve to further ensure that all of your bidders are satisfied with their individual experience participating in your auctions.

### **Settings Custom Bid Increment Charts**

It is now possible for auctioneers to set their own customized, dynamic bid increments that increase as the bid on an item goes up, to whatever range specified. On the bottom of the Advanced tab, you will find a layout of the current increment chart, with options to remove, add, or replace various values. Clicking the red “-” icons next to each row will delete that row, and the blank fields at the bottom allow you to enter a specific increment value (percentage or currency-based), as well as the price point at which that value will be triggered. The green “+” symbol will then add this value to your chart

Any listings that you create that are assigned “chart” increments will now follow this personalized chart.

# Customization

## Themes

Sharp Auction Engine offers something unique for auctioneers. Auctioneers can conduct their own timed online auctions right from their own website domain. Furthermore, auctioneers can fully customize their auction page with a variety of customization options.

We've now taken that further with even more customization options! You can now set your default view to a grid or a list view, add a photo carousel, add header links, and even rearrange these new elements to your liking. All of these options are located under the Theme tab in the Auction House Settings.

First, let's take a look at the exciting new photo carousel option. Auctioneers can select photos to showcase on their auction home page in a sliding carousel. This is a great way for auctioneers to draw attention to specific catalogs. For each slide, you have the option to add a photo, a caption, and a call-to-action button.

In addition to the photo carousel, auctioneers can now also add header links to their auction pages. We previously implemented footer links, but we found that auctioneers also need the option to have navigation links displayed at the top of their auction home pages. This allows for a more seamless integration with the auctioneer's existing website, and it makes it easier to navigate to and from other pages that already exist.

These two new options, along with the logo and the front page message, are now able to be rearranged on the page. There are three new positions: Top Section, Showcase Section, and Feature Section. Each element—the photo carousel, logo, front page message, and header links—can be assigned to whichever position you want to display them in.

In addition to the updated text editors, auctioneers will also notice new options for customization. First, auctioneers now have the option to remove Sharp Auction Engine branding from sign in modals. Currently, when a user signs in to your auction site, he or she sees a short message below the username and password fields that shows that your auction house is a partner with Sharp Auction Engine. If you would like to remove this, however, you now have the option to do so. Simply visit the Settings tab in your House Settings and for the option titled "Allow Branding," change the option to "disabled."

When it comes to your site's theme and color scheme, we have made some changes to ensure that whatever colors you choose, your site will be easily readable by all users. In the past, some auctioneers have had difficulty when selecting white or other light-colored fonts

for their sites. We have scanned through the software and have made adjustments to any problem areas to ensure that light-colored fonts are readable for all users.

We work hard to make sure that our software allows you to customize your auction site to wholly reflect your company's branding. Just take a look through our past releases, and you will see that each one has brought new customization options for our auctioneers.

With V. 1.1.9, we continue this by now providing the option to select custom colors for your site's hyperlinks and buttons. Additionally, we have made some slight adjustments to improve the pre-loaded themes, such as the "Neutral" and "Sunshine" themes.

For V. 1.1.7, we have once again enhanced our custom theme options. With SAE, you can fully customize your website with custom colors, images, themes, and more. These options are now more expansive and intuitive thanks to new enhancements.

Specifically, we have improved the way that custom font colors are displayed on your website. We have added a new option to allow you to select separate font colors for your navigation and footer menus, and we have changes to ensure that the Sign In modal, the Terms and Conditions modal, and others are not negatively affected by the changes you make for your font colors. You now also have the option to use different font colors for you catalog and item descriptions.

We will continue to enhance our theme options in the future because we strongly believe that your website should be fully customizable so that it can fully reflect your brand.

## Page Title

Auctioneers have full control over the page titles for their auction sites. The page title is what is shown in your browser tabs and in search engine results. By default, the page title will show the auction house name. However, if you would like to change this to provide a more descriptive title, you can do so.

*To change your page title, visit the Theme tab in your House Settings.*

## Item Sorting

Due to feedback we received, combined with the need to optimize new features such as staggered ending, grouped items, and custom dynamic bid extensions, items within catalogs are sorted based on the end date and time by default. This ensures that, regardless of the lot number, the item or group of items that will be ending soonest is always displayed first.

Despite this default, auctioneers have the power to choose their own default sorting option: Ending At, Lot Number, or Item Order Number.

*To set your default item sorting, visit the Theme tab in your House Settings.*

## Text Editors

In an effort to allow more customization, we have ensured that the text editors used within the software provide many different options to auctioneers.

For example, our text editors allow auctioneers to use different text colors, font families, and sizes. This means that you can now choose to use one of seventeen different fonts, including Georgia, Helvetica, and Book Antiqua. You can also choose to use font sizes all the way up to 36px, giving you many new formatting options.

*You can find these text editors in the following locations: the Profile tab (“About Your Company”), the Theme tab (“Front Page Message”), the Catalog Manager (“Catalog Description”), and the Item Manager (“Item Description”).*

## Custom Pages

SAE provides branded auction pages for our auctioneers, allowing them to conduct timed online auctions from their own websites. These branded auction pages integrate with the auctioneers’ existing websites or serve as stand-alone web pages.

Auctioneers can create custom HTML web pages to go along with their branded auction pages. For example, if you wanted to add an “About Us” page or any other type of informational web page, you can easily create the page using the SAE auction software and connect it to your auction page. This is particularly useful for those auctioneers who don’t have existing websites.

For those auctioneers who do have existing websites, this is still a very useful tool. If you decide that you need an additional page for your website, instead of having your web developers create a new page, you can easily do it yourself.

*Creating new pages is easy! Just go to the Theme tab in your Auction House Settings and you will see a module at the bottom left of the page titled “HTML Pages.” With our WYSIWYG editor, you have many different editing options for the new page, including adding photos and videos.*



# Creating an Auction

Auctioneers have many different needs when it comes to catalog and item creation, depending on the type of auction they are conducting. One auction may have hundreds of items while another may have only one. Now whenever you create a new auction (or “listing”), you will choose whether or not the listing is a catalog or an item. If you are an estate sale auctioneer and have many items up for auction, for example, you will create a catalog. If you are a real estate auctioneer and have only one item, such as a home or a property), you will create an item.

You will still provide the same type of information for each listing (basic details, bidding rules, terms and conditions, etc.), but the overall process is now more streamlined and user-friendly. Whether you have a “For Sale” single item or an “Online Only” catalog with many items, our software will guide you through the listing’s creation.

## Listing Types

### Catalog Listings

Catalog listings are the most commonly used of the two types of listings. If you wish to have multiple items in one auction, then you should select a catalog as the type of listing.

All changes to your catalog are done from the Catalog Manager. The Catalog Manager is a centralized location where you can view, edit, and manage all aspects of your catalog. When you create a new catalog, you will automatically be taken to the Catalog Manager where you will enter the details of the catalog. If you wish to return to this page later on, you can do so via the Auctioneer Dashboard or by going to the Catalog Detail page and clicking the "Manage my catalog" button.

The Catalog Detail page is what bidders see. All of the changes that you make to the catalog via the Catalog Manager will be reflected on the Catalog Detail page. This page lists basic details about the catalog and displays all of the items within the catalog. Bidders can place bids on the items right from this page.

*All of your listings, regardless of whether they are catalogs or single items, are displayed on your Auctioneer Dashboard. To create a new catalog, click the button titled "Create new listing" on the Auctioneer Dashboard.*

### Single Item Listings

Single item listings should be used when your auction has only one item. This is particularly useful for those that deal primarily with real estate or automobile auctions.

All changes to your item are done from the Item Manager. The Item Manager is a centralized location where you can view, edit, and manage all aspects of your item. When you create a new single item listing, you will automatically be taken to the Item Manager where you will enter the details of the item. If you wish to return to this page later on, you can do so via the Auctioneer Dashboard or by going to the Item Detail page and clicking the "Manage my item" button.

The Item Detail page is what bidders see. All of the changes that you make to the single item via the Item Manager will be reflected on the Item Detail page. This page lists basic details about the item along with photos and bid history. Bidders will place bids on the item from this page.

*All of your listings, regardless of whether they are catalogs or single items, are displayed on your Auctioneer Dashboard. To create a new single item listing, click the button titled "Create new listing" on the Auctioneer Dashboard and then select "Single Item".*

### **"To Be Announced" Listings**

Auctioneers can publish catalogs and items without a set start or end date and time. This is perfect for those auctioneers who wish to allow bidders to view future auctions that do not currently have a set start or end date, allowing more time for bidders to gain interest in the auction while it is being prepped and while the dates are being finalized.

*Simply leave the Start Date and Time and the End Date and Time fields blank in the Basic Details module on the Catalog or Item Manager and make sure your listing is published. Bidders will be able to view your listing, but the dates and countdown timer will display as "To Be Announced."*

## **Auction Methods**

Auctioneers can add their On-site Events to their sites in addition to their Online Only auctions. This is an important feature for auctioneers because it allows you to post all of your auctions in one centralized location. Bidders can simply visit your site and bid in all of your online auctions as well as preview items available in your upcoming On-site Events.

Each auction method is prominently displayed on the catalog and item so that bidders know exactly what type of auction they are viewing. The Event Date and Location of an On-site Event are also prominently displayed.

### **Online Only**

Online only auctions are simply those whose lots are only available to online bidders.

### **Online + On-Site Events**

For any auctions that share online lots with those being presented at a live event.

### **On-Site Events**

You can also use SAE to simply advertise your live, in-person events. You can post pictures and descriptions of your lots if you choose, but they will not be open for online bidding.

### **For Sale**

This is to be used for a (usually real estate) property that is not up for auction, but instead is for sale. It is intended to be used by sellers to allow them to post property listings. Approved sellers are allowed to create, edit, and publish “For Sale” real estate listings.

These listings are very different than auction catalogs, so when the new auction method is selected, both the Catalog Manager and the Item Manager automatically update to show only applicable fields. Auction-specific fields such as Bidding Rules are hidden, and additional fields such as “List Price” and “Agent Details” become available.

What the bidder, or in this case the buyer, sees is much different as well. We have updated our Item Detail pages to properly showcase the “For Sale” listing, removing auction-specific fields and highlighting the auction method, list price, and agent details. This will eliminate any confusion bidders and buyers may have in distinguishing auctions from “For Sale” listings.

## **Buy It Now**

By special request, we have now implemented a new Buy It Now feature! With this new feature, auctioneers can offer a Buy It Now option on selected items. Once enabled, auctioneers can set a specific Buy It Now price via the Item Manager. On the Item Detail page, registered bidders who have accepted the listing's Terms and Conditions (as well as been approved, if you have manual approval activated) will then see a blue button that says “Buy It Now.” Clicking this button takes the bidder directly to an invoice where he or she can make a payment for the item. Until the item is paid for in full, bidding remains open. The Buy It Now button will automatically disable if bidding surpasses the BIN price for any reason.

If you are interested in offering a Buy It Now option on your items, please contact an SAE team member at [help@sharpauctionengine.com](mailto:help@sharpauctionengine.com) for more information.

## **Item Display**

You can choose whether you wish to display your items within a catalog in a grid view or a list view.

*This option is located in the Basic Details module on the Catalog Manager.*

## "1 at a Time" Lot Creation Wizard

With v3.2.0 of Sharp Auction Engine, we've made it easier than ever for auctioneers to make their lots "on the fly"!

*How does it work?*

After you create your catalog, click on the "Manage Items" button located on your Catalog Details page. From there, click the green "+Create New Item" button to open the new Lot Wizard.

The new Lot Wizard is very similar to the old one, but allows the auctioneer to add more information to a lot directly, instead of having to navigate back and forth between the Item Detail page, Photo Upload page, and the Manage Items page. The new Lot Wizard gives you the option to add your:

- Lot name
- Lot Description
- Starting and Reserve Value
- Categories
- Photos

To a lot all at once, whereas before you were limited to only the Lot name. The best part of the new Lot Wizard is that it's optimized for mobile devices! You can quickly enter your lot name and description with voice-to-text functionality, and upload your pictures directly from your camera reel. You even have the option to take the photo right there and upload it immediately without leaving the Lot Wizard! After you've finished editing your new lot, hit the "Save" button to finalize your new Lot. From there, you'll immediately be prompted to create your next lot, but if you're done, just hit the "Exit" button instead of filling out any details for your next lot.

## Bulk Importing

*What is Bulk Importing?*

Bulk Importing is an important feature for auctioneers. For catalogs with many items, adding each one individually can be a lengthy process. Our Bulk Importing feature allows auctioneers to compile items into a simple spreadsheet and add all of the items at once.

It's simple, really. Auctioneers can download a template from the site, fill it out with the item information, and then upload it to the system. The system then processes the document and creates new items. This feature is especially helpful to those auctioneers who have catalogs with many items. It helps to streamline auctioneers' work loads and make the entire process more efficient.

Our software supports three different versions of the template. Depending on which type of program you will be using to edit the spreadsheet, you can download a Microsoft Excel (.xlsx), Microsoft Excel 97 (.xls), or a CSV (.csv) version of the template, ensuring compatibility no matter which program is used.

### *How do I bulk import items?*

When you are creating your catalog, you will see an Items module on the Catalog Manager. Within this module is a light blue button titled "Bulk Import Items." Click this button and you will be taken to the Bulk Import screen. From this screen, you can download the template to your computer to begin adding your items.

We have tried to make the process as easy as possible. On the Bulk Importing Template, auctioneers will find helpful guides for exactly what should be entered into the different item fields.

Once you have finished adding items to your spreadsheet, save the file and then upload it on the same screen that you were previously on. From there, our system will walk you through the process step by step.

### *Bulk Importing Rules*

To bulk import items into a catalog, you can fill in the information on the spreadsheet that is downloadable on every bulk import page on your SAE site. However, the system will also recognize any Excel-type spreadsheet that matches the following rules, and is imported with the UTF-8 character set.

Create the following columns, and fill in the appropriate answers in each. Each row beneath these columns will be the information for a different lot. The system will match the info in each column to the appropriate field in the SAE environment.

Column A: Lot Number. Type in the lot number you would like to assign to the item. Leave blank if you would like the system to auto assign lot numbers.

Column B: Name. Type in the name of the item. This is a required field

Column C: Description. Describe the item in less than 30,000 characters.

Column D: Group Name. Type in a group name if you plan on having group closing times for your items.

Column E: Has Preview? Type "Yes" if there is a preview available for the item. Type "No" if there is no preview available for the item. Leave blank if you would like the item to use the preview settings from the catalog.

Column F: Preview Description. Describe the time period for the preview (i.e. "Mon - Friday, 9am to 5pm"). Leave blank if there is not a preview available or if you would like the item to use the preview settings from the catalog.

Column G: Reserve Value. Type in the reserve amount (i.e. "\$25" or "25"). Leave blank if there is no reserve amount.

Column H: Start Value. Type in the starting bid amount (i.e. "\$100" or "100"). Leave blank if there is no starting bid, and bidding will start at \$0.

Column I: Increment Type. What type of bid increments should be used for the item? Type "default" or "chart" to use the Sharp Auction Engine Bid Increment Chart. Type in a dollar amount ("25") to use a custom dollar increment. Type in a percentage amount ("10%") to use a custom percentage increment. Leave blank to use the settings from the catalog.

Column J: Estimated Low. Describe the low estimated value. Leave blank if they have no estimated value.

Column K: Estimated High. Describe the high estimated value. Leave blank if they have no estimated value.

Column L: Are Estimates Public? "Yes" if these values can be seen by the public. Type "No" if they should not be seen by the public. Leave blank if they have no estimated values

Column M: Shipping Type. Describe the shipping options, if any. Type "yes" if shipping is available, "no" if pickup only, "free" for free shipping, or "no text" to display no shipping details.

Column N: Shipping Weight. If shipping is available for the item and you would like to display a shipping estimate to bidders, type in the weight of the item in pounds (i.e. "15"). Currently, our system only accepts pounds (lbs.) Leave blank if shipping is not available for the item or if you do not wish to display a shipping estimate to bidders.

Column O: Shipping Text. Describe additional shipping information for the item.

Column P: Consignor. Type in the first and last name or ID of the consignor for this item. Leave blank if there is no consignor for this item

Column Q: Consignor Rate. (A consignor must be set first) Type in a commission rate for the consignor for this item. Enter a percentage (e.g. 10%) or a dollar amount (e.g. \$5.00). Leave blank if there is no consignor for this item or you wish you use the default rate on file for that consignor.

### *Bulk Importing Photos*

It is also easy to bulk upload and auto-assign photos to your catalog or listing. Simply dragging and dropping a folder of pictures into the bulk import applet will upload all of your photos at once. If you are adding to a catalog that you have already added lots to, the photos will auto-assign to respective lots based on their naming convention. Name your files "1-1", "1-2", "1-3", "2-1", etc. to automatically assign them to lots. The number in front of the dash represents the lot where you want to assign the photo, the number after the dash represents the order in which you want photos to display within that lot. For instance, a photo named "1-1" will assign to lot number 1 and will be the featured photo for that item. Please note that this naming convention **must be followed exactly, with the dash in place.**

If a lot item has 10 or more photos, the first 9 photos MUST be numbered with a 0 in front of the position spot. So for an item with 15 photos, the naming convention should be as follows:

1-01

1-02

1-03

1-04

1-05

1-06

1-07

1-08

1-09

1-10

1-11

1-12

1-13

1-14

1-15

If the zero is NOT present in the example above, the 10th photo will become the 1st photo.

[See our support article for further help.](#)

## Grouped Items and Endings

*What are grouped items?*

Item groups allow multiple items to close as one. This is particularly useful if you have large catalogs and would like certain items to be grouped together.

When adding items to catalogs, you can create a new group name for the item or assign it to a previously established group. Let's say you have 100 items in your auction and 10 of those are cars. You can group those as "cars" and our system will automatically recognize them as a group.

When it comes to closing, groups act as one item. If one item in the group receives a last minute bid, all items in the group will extend.

When used in conjunction with Staggered Endings, all items within the same group will be displayed alongside one another since items within a group close together and since all items within your catalog are sorted based on the end time although you do have the option to change this if needed.

*How do I add assign items to groups?*

The option to assign items to groups is in the Basic Details module on the Item Manager. If you are bulk importing items, there is a column on the Bulk Import Template for item groups.

## Staggered Endings

Staggered Endings is a feature that allows auctioneers to select closing intervals for items within a catalog. Instead of all of the items closing at the same time, the items are staggered and close based on a predetermined interval. Many bidders prefer this method because it simulates a live auction and allows them to place bids on each item as it closes.

Each new catalog that you create has the option to set Staggered Endings for the items within it. In the Bidding Rules module on the Catalog Manager, you will now see the following: "Starting at Lot #1, close auction for (1, 2, 3, 4, 5, or 10) item(s) every (1, 3, 5, or 10) minute(s) until all lots are closed."

Each item within your catalog comes with its own countdown timer, so bidders will be able to see when each item ends. Furthermore, by default all items within your catalog will be sorted based on the end time [although you have the option to change this if needed](#).

When an item within a catalog closes, the page dynamically refreshes to reflect that change so that the action happens in real-time and so that bidder don't lose their place.

*To enable staggered endings for your catalog, visit the Bidding Rules module on the Catalog Manager. Please be sure to enter a valid future end date and time for your catalog when using this feature to ensure that the countdown timers display correctly. When making changes to staggered endings, please allow additional time for the countdown timers to update to reflect the changes.*

## Categories

Categories are your own personalized groupings. These can be whatever you would like, and can be set from the "Categories" page of your auctioneer Dashboard. Assigning categories to your listings will allow bidders to sort and find specific auctions more easily from your homepage, and can also help your SEO.

## Meta Keywords

Adding meta keywords to your auction listing can improve its return in search engine results. With SAE, adding these to your auction listing is simple.

*To add meta keywords to your auction listing, visit the Basic Details module on the Catalog or Item Manager.*

## Address and Preview

We understand that real estate auctioneers sometimes need to auction off “raw” property that may not have an address yet, and sometimes even if it does have an address, Google Maps is not always able to accurately pinpoint the correct location of the property. With our new Latitude and Longitude feature, this isn't a problem!

You now have the option to enter either a physical address or the latitude and longitude for a property, and the location will display on a map under the Map & Preview tab on the catalog and item!

When you go to add a new address, you will see a new section titled “Advanced Options” - this is where you will enter the latitude and longitude for the property.

Please note that while there is an option to enter an embed code (which can be obtained from Google Maps or another map provider like Apple or Bing), this field is entirely optional. Additionally, maps are currently only displayed for items with previews.

## Bidding Rules

The Bidding Rules module allows you to set various bidding guidelines, such as Bidder Approval settings, pre-authorization amounts, bid extensions, and more.

### **Bid Increments**

There is an option in the Bidding Rules module to select your "Bid Increment Type." This field is auto-filled to use the default bid increments ('chart'), but you can enter a dollar amount (e.g. '\$5.00') or percentage (e.g. '10.0%') to use custom bid increments.

If you are creating a catalog listing with multiple items, you may choose to use different bid increments for different items. When you set the bid increment type at the catalog level, all new items will automatically inherit that bid increment type. However, you can change that bid increment type on an item-by-item basis in the Bidding Rules module on the Item Manager.

Please note that if you are using a custom percentage for bid increments, the next minimum bid will round up to the closest dollar amount. For example, if the current bid is \$150.00 and the bid increment is set to 5%, the next minimum bid would be \$158.00 instead of \$157.50.

The "Chart" option follows the following logic:

<b>Bid</b>	<b>Increment</b>
\$0.01 - \$0.99	\$0.05
\$1.00 - \$4.99	\$0.25
\$5.00 - \$24.99	\$0.50
\$25.00 - \$99.99	\$1.00
\$100.00 - \$249.99	\$2.50
\$250.00 - \$499.99	\$5.00
\$500.00 - \$999.99	\$10.00
\$1,000.00 - \$2,499.99	\$25.00
\$2,500.00 - \$4,999.99	\$50.00
\$5,000.00 - \$9,999.99	\$100.00
\$10,000.00 - \$24,999.99	\$250.00
\$25,000.00 - \$49,999.99	\$500.00
\$50,000.00 - \$99,999.99	\$1,000.00
\$100,000.00 - \$224,999.99	\$2,500.00
\$225,000.00 - \$499,999.99	\$5,000.00
\$500,000.00 - \$999,999.99	\$7,500.00
\$1,000,000.00 - \$2,499,999.99	\$10,000.00
\$2,500,000.00 - \$4,999,999.99	\$15,000.00
\$5,000,000.00 - \$9,999,999.99	\$20,000.00
\$10,000,000.00 - \$24,999,999.99	\$50,000.00
\$25,000,000.00 - \$49,999,999.99	\$75,000.00
\$50,000,000.00 - \$99,999,998.99	\$100,000.00
\$99,999,999.00 and up	\$250,000.00

### Setting a Custom Bid Increment Chart

It is now possible for auctioneers to set their own customized, dynamic bid increments that increase as the bid on an item goes up, to whatever range specified. On the bottom of the Advanced tab of your Auctioneer dashboard, you will find a layout of the current increment chart, with options to remove, add, or replace various values. Clicking the red “-” icons next to each row will delete that row, and the blank fields at the bottom allow you to enter a specific increment value (percentage or currency-based), as well as the price point at which that value will be triggered. The green “+” symbol will then add this value to your chart

Any listings that you create that are assigned “chart” increments will now follow this personalized chart.

*How do I view bid increments for a particular item?*

For bidders, the bid increments are easily viewed on the front end. On each Item Detail page, there is a link below the bid box titled "View Bid Increments." Click this link to see which bid increment type is in use. If it is a custom dollar amount or percentage, that information will be displayed, but if the Sharp Chart is in use, the full chart will be displayed.

### **Paddle Numbers Mode**

Auctioneers can choose to display anonymous, auto-generated paddle numbers for bidders instead of usernames. Paddle numbers can be utilized on any auction by selecting the option under the “Paddle Display Mode” section of the “Bidding Rules” module from a catalog’s management page. Auctioneers have the ability to choose what number to start at, and the system will incrementally issue anonymous numbers to bidders as they register for the given catalog or listing.

In addition to fostering more active bidding, paddle numbers allow auctioneers to hide bidders’ personal details, should this be a concern they wish to address.

## **Inherited vs. Not Inherited Bidding Rules**

There are certain situations where an auctioneer may want items within a catalog to have unique Bidding Rules. For example, in a large estate sale, you may want the catalog to be automatic approval but require separate credit card pre-authorization for one of the higher dollar items within the catalog.

This is possible with SAE because you have the option to choose whether the item inherits the catalog’s Bidding Rules or whether the item has its own unique Bidding Rules.

When the Bidding Rules are inherited, bidders who are approved to bid on the catalog are also approved to bid on the item. When the Bidding Rules are not inherited, bidders must be approved separately for the item.

The option to choose whether the item is inherited or not inherited is located in the Bidding Rules module on the Item Manager for items within catalogs.

## **Seller's Premium**

The seller's premium is a confidential percentage of the winning bid that is paid by the seller to the auction house.

*To set the seller's premium, visit the Accounting module on the Catalog or Item Manager.*

## **Bidder Verification and Registration**

While you can require your bidders to register a valid credit card upon registration on your site, this is not necessary. You can instead choose to require this on a listing by listing basis. To do so, simply type in a pre-authorization amount under the "Bidding Rules" section of your listing's management page. This will place a temporary hold for the amount set on the bidder's card, verifying that they have used a legitimate card. If they do not have a card on file with your auction house, they will be prompted to do so before being allowed to bid on this listing.

The bidder will be required to fill out the following fields when registering their card:

*Card Number*

*Expiration Date*

*Name on Card*

*CVC number*

*Zip Code*

Additionally, you can choose to require a bidder's billing address for additional verification security.

### **Checking Card Types**

Once a bidder has registered their card, you can verify the card type (credit or debit) that they registered. In order to see the card type of a registered bidder, simply navigate to their bidder profile (visible only to auction staff). You will now find a row called "Card Funding Type" in the information column on the right. It will read either 'Credit' or 'Debit.' When new bidders register on your house, you can check this information. We are currently working on a feature that will let you set a preference to allow Debit users to bypass the pre-auth, if desired.

## **Estimated Values**

*What are estimated values?*

Estimated values are dollar amounts set by the auctioneer to provide bidders with an idea of the actual value of an item up for auction. If enabled, the estimated values are displayed as a range below the bid box on the Item Detail page. There is both a lowest estimated value

and a highest estimated value (i.e. \$350.00-\$550.00). The range of estimated values serves as a guide for how much to bid on items.

*How do I set estimated values for an item?*

For each item, there is an Estimated Values module on the Item Manager. There is a field for the Lowest Estimated Value as well as for the Highest Estimated Value, along with a checkbox to select if you wish to display these amounts on the front end for bidders to see.

Please note that if you wish to display a near-zero number for the Lowest Estimate Value, enter \$0.01 instead of \$0.00.

## Shipping

Auctioneers can update shipping information on all items. By entering in the weight of the item, our Shipping Calculator will display on the Item Detail Page and provide an estimate for shipping costs based on the bidder's location. Auctioneers can also select to provide Free Shipping or mark an item as Pick-Up Only if desired. Additionally, auctioneers can select in their house settings whether or not the shipping is subject to sales tax, and they can edit invoices to include shipping costs.

For auctioneers selling real estate, automobiles, and other items that cannot be shipped, we have added the option to hide all shipping details on an item.

Furthermore, we have added the option to add custom shipping instructions on items. If you choose to display shipping options on your item, you now have the ability to add customized text to the display, setting clear expectations for bidders.

*Auctioneers will find all of these options in the Shipping module on the Item Manager.*

## Editing Lot Numbers

To edit the lot numbers of existing items, first navigate to the "Manage Items" page of the catalog in question. Next, simply click the small biplane icon under the "Actions" column next to the item you wish to edit. This will open the Clerk on the Fly interface. Click "Quick Edit Panel" to reveal the field where lot numbers can be edited. These can include letters, numbers, and special characters. Be sure to hit "Save" when finished.

## Uploading Photos

*Bulk Importing Photos*

It is easy to bulk upload and auto-assign photos to your catalog or listing. Simply dragging and dropping a folder of pictures into the bulk import applet will upload all of your photos at once. If you are adding to a catalog that you have already added lots to, the photos will auto-assign to respective lots based on their naming convention. Name your files "1-1", "1-2", "1-3", "2-1", etc. to automatically assign them to lots. The number in front of the dash represents the lot where you want to assign the photo, the number after the dash represents the order in which you want photos to display within that lot. For instance, a photo named "1-1" will assign to lot number 1 and will be the featured photo for that item. Please note that this convention **must be followed exactly, with the dash in place**. [See our support article for further help](#).

### *Photo upload size limit*

Our recommended photo size is anything below 2 MB, although photos can be up to 24 MB. Photos larger than 2 MB may take longer to upload.

There is no current limit to the number of photos you may assign to an item. Providing multiple photos for items is a great way to entice bidder interest!

## Editing Photos

We recently overhauled our Photo Manager with a completely new design and loads of new features. Now for V. 1.1.2 we have snuck in one last feature: photo cropping! Auctioneers can now easily crop photos with our software, eliminating the need for additional photo editing applications.

## Featuring Photos

Auctioneers have the option to feature photos for both catalogs and items. We improved the display of Featured Photos so that they stand out in the Photo Manager from the other photos.

## Uploading Documents

For documents, we enhanced the auctioneer's ability to edit privacy settings. This will ensure that only public documents are visible to bidders. We also made some changes to the documents interface to improve usability.

## Adding Videos

In addition to photos, documents, and text descriptions, SAE allows auctioneers to add videos to their listings. Whether it is a video tour of a home for sale, a video demo of a item, or an informational video about your auction company, you have the option to display it on your catalogs and items.

*To add a video to your catalog or item, visit the “Photos, Documents, and Video” module on the Catalog or Item Manager. Simply copy and paste the YouTube url of the video into the field and save. The video will be displayed on the Catalog or Item Detail page.*

## "1 at a Time" Lot Creation Wizard

With v3.2.0 of Sharp Auction Engine, we've made it easier than ever for auctioneers to make their lots "on the fly"!

### *How does it work?*

After you create your catalog, click on the "Manage Items" button located on your Catalog Details page. From there, click the green "+Create New Item" button to open the new Lot Wizard.

The new Lot Wizard is very similar to the old one, but allows the auctioneer to add more information to a lot directly, instead of having to navigate back and forth between the Item Detail page, Photo Upload page, and the Manage Items page. The new Lot Wizard gives you the option to add your:

- Lot name
- Lot Description
- Starting and Reserve Value
- Categories
- Photos

To a lot all at once, whereas before you were limited to only the Lot name. The best part of the new Lot Wizard is that it's optimized for mobile devices! You can quickly enter your lot name and description with voice-to-text functionality, and upload your pictures directly from your camera reel. You even have the option to take the photo right there and upload it immediately without leaving the Lot Wizard! After you've finished editing your new lot, hit the "Save" button to finalize your new Lot. From there, you'll immediately be prompted to create your next lot, but if you're done, just hit the "Exit" button instead of filling out any details for your next lot.

# Managing an Auction

## Answering Questions

When a bidder asks a question about an item, you will receive an email notification alerting you. You can either answer directly from the email, or by visiting the "Manage Questions" page of the item. From here you can also delete and reorder questions. Questions will not appear publicly on the item's page until they have been answered.

## Your Customers: Guests, Spectators & Bidders

There are three types of customer that SAE recognizes: *guest*, *spectator*, and *bidder*. Below is a description of each type.

A *guest* is a user who is viewing your auction but is not currently signed in to his or her account. This may be because the user has not yet created an account. Guests cannot place bids, ask questions, or participate in the auction in any way; guests can only view the auction.

A *spectator* is a user who has not completed his or her registration. SAE requires that all users complete a registration process, which includes providing their contact information and confirming their email addresses. If a user has started but has not finished this process, then he or she is a spectator. Similar to guests, spectators can only view the auction.

A *bidder* is a user who has fully completed registration by confirming his or her email address. Bidders may participate in the auction by accepting Terms and Conditions, asking questions, and placing bids.

## Bid History

A button to Manage Bids has been added to the Bid History tab on items, allowing auctioneers quicker access to the Manage Bids screen, where auctioneers can view and retract bids.

## Reveal or Hide Views and Number of Registered Bidders

Auctioneers have the ability to choose whether or not the number of registered bidders and views in a listing is publicly revealed. These numbers are shown in the first information box (above the media field) on a listing's page. This can be a great tool to drive competition, but if you wish to hide this information, you can do so easily. From your Auctioneer Dashboard, click the "Manage my house" button. On the "Advanced" tab, at the bottom of the page, you will see the "Show # of Registered Bidders and Views on all Listings," option, which can easily be set to Yes or No. Regardless of which option is chosen, the information will always be displayed to you, the auctioneer. Remember to click "Save changes" after making your selection.

## Managing Bidders

SAE utilizes four different types of bidder approval: automatic approval, manual approval, conditional approval, and credit card preauthorization.

Each different type of bidder approval works best for different scenarios. Review the following descriptions of each to determine which type of bidder approval is best for your auction.

### **\*Automatic Approval\***

Automatic Approval is the default type of bidder approval for all listings. If you select Automatic Approval, bidders will be automatically approved to bid on your listing. Bidders are required to view and accept the Terms and Conditions that you have set for the listing, but once they accept them, they can begin bidding immediately.

The primary advantage to using Automatic Approval is that you don't have to worry about bidders returning to your auction after you have had the time to approve them. Since they are automatically approved, they can begin bidding immediately.

Many auctioneers who are auctioning high dollar items such as real estate or auctioneers who are beginning to grow bidder bases may prefer to use alternate types of bidder approval, but know that there are safeguards in place if you should encounter any suspicious bidder activity.

First, even though the listing is set Automatic Approval, you still have the option to reject bidders. You also have the option, as always, to [retract bids](#) as needed. Finally, you can always contact SAE at [help@sharpauctionengine.com](mailto:help@sharpauctionengine.com) for further assistance.

### **\*Manual Approval\***

The opposite of Automatic Approval is Manual Approval. When Manual Approval is selected, you must manually approve bidders on a case-by-case basis. You will have the option to approve or reject each bidder as he or she accepts the Terms and Conditions for the auction.

We do provide certain information to assist you in determining whether or not you want to approve or deny the bidder, such as the bidder's registration date and bid history. However, if you would like to request more information from the bidder or simply make contact prior to approving him or her, you can always [send a message](#) with our built-in message system.

### **\*Conditional Approval\***

Conditional Approval is a combination of Automatic and Manual Approval. With Conditional Approval, bidders must meet certain requirements in order to be automatically approved. Users who do not meet the requirements will be left with the status "pending" until you manually approve or reject them.

Currently, the only requirement that can be selected for Conditional Approval is that bidders must have a phone number on file. With this requirement checked, bidders with a phone number on file will be automatically approved, but bidders without a phone number on file will be subject to manual approval.

Although having a phone number on file is the only requirement currently able to be checked, there are many other requirements that must be met before a bidder can bid. All bidders must fully complete the registration process and they must confirm their email addresses.

For example, if bidders who have not completed registration try to bid, they are unable to do so until they complete registration. In this situation, our software displays a link to "Please complete your registration that takes the bidder directly to where he or she left off in the registration process.

### **\*Credit Card Pre-authorization\***

The last type of bidder approval is credit card preauthorization, in which the bidder's credit card must be preauthorized for a predetermined amount prior to the bidder being approved to bid. With this feature, you can ensure that your bidders have intent to buy as well as the funds to participate.

If you wish to enable credit card preauthorization for your auction house, you will first need to [enable Stripe payments for your auction house](#). When enabling this option, you can also designate a dollar amount as your default credit card preauthorization amount. Each new listing you create will automatically require preauthorization for that designated amount, but you have the option to change it from one listing to another.

If Stripe credit card payments are enabled for your auction house, each new bidder who creates an account will be prompted to provide credit card information. This step is optional during account creation, but if a bidder does not have credit card information on file, he or she cannot accept the Terms and Conditions for a listing that requires preauthorization. The bidder will be prompted to enter credit card information before being able to accept the Terms and Conditions.

While other online auction softwares provide a similar feature, ours takes it one step further. Instead of authorizing a bidder's credit card once when he or she first creates an account, we provide auctioneers with the option to authorize the bidder's credit card for each auction he or she registers for. We empower the auctioneer to set the rules for preauthorization. Our flexibility considers that not all auctions require such qualifications, and we are authorizing the card closer to the time the transaction may happen. Hopefully this means the bidder truly has the funds to pay at the time of his catalog registration.

*To set or change the bidder approval for a listing, visit the Bidding Rules module on the Catalog or Item Manager.*

### **Accepting Terms & Conditions on Behalf of Bidders**

In the event that a bidder is unable to accept the T&Cs for a given listing, and has requested that you assist them in doing so, you can do this by first navigating to the Manage page of the listing in question, and then going to the "Manage Bidders" page you can see linked on the right hand side of the screen.

Next click the "Needs to accept T&Cs" button, where you will see a list of all bidders who have been prompted to accept Terms and Conditions but not yet done so. By clicking the icon under the "Actions" column, you will see the option to either Accept or Reject them, bypassing the need for them to accept the T&Cs.

### **Adding or Editing a Street Address on Behalf of Bidders**

In v2.4 we've added the ability to add a bidder's street address to their bidder profile page. The auctioneer can do so by navigating to their Auctioneer Dashboard, and selecting the Bidders tab. From here, enter your bidder's username, real name, or email address into the search bar.

Once you've located your bidder, click their name to view their bidder profile page. Scroll down to the address section. If an address hasn't been entered yet, do so. If it's already been entered, and it's incorrect, don't worry! You can add a new address and set it as the primary address for that bidder as well.

## **Allowing and Blocking Bidders**

You can set automatic allowance or blocking settings for bidders on the Bidder page of your Auctioneer Dashboard. In the "Allow List/Block List" column, click the "n/a" text to reveal a drop down menu that will allow you to set either permanent Allow or Block status for that bidder, which they will automatically inherit for every listing.

## Managing Bids

The Bids tab in your House Settings shows all bids that have been placed on your auction listings. If you have multiple auctions going at once, this is a great location to view your most recent bids. Each bid is displayed alongside the item name and thumbnail with the high bidder's username and high bid amount. The Bids tab now provides auctioneers with access to bidder information. Hover text has been added to quickly display bidder information, and each bidder username has been turned into a link to the bidder profile.

Auctioneers will find that the Clerking History module on the Catalog Manager now displays the most recent bids on items within the catalog.

You can also manage bids from the "Manage Items" page of a given catalog. All public, non-retracted bids for items in the catalog will be displayed in a column. You can click the "Bid History" button in the drop down menu under the "Actions" column as well to receive a fuller picture of each item's bids, including the retracted bids and secret, max bids (should you have the Reveal Max bids option activated for your house).

## Managing Items

You can monitor the status of all of the items in your catalog by visiting the "Items" page of your catalog, which can be accessed by clicking the pencil icon in the top right corner of your catalog's module on the Listings section of your Auctioneer Dashboard. From here you can see the Starting and Reserve values of all of your items, along with the current highest bids and max bids (should you have the function enabled). You can also see the total number of bids placed on each item. You can unpublish, delete, or close individual items early, as well.

*Please note that you cannot delete an item which currently has a bid placed on it. In order to delete an item with bids placed, you must first retract the bids, either from the "Bids" tab or in the drop down menu behind the gear icon next to each item on the Item page.*

### Retracting Bids

Auctioneers can now retract bids from the Manage Items page. Previously, this option was only available on the Manage Bids page, but for easier access, we have added it to the Manage Items page, as well.

## **Editing Consignors**

You can easily add, replace, or remove consignors from your items from this page. To do so, simply click the checkbox next to each item you wish to simultaneously change, then type in the name of the consignor you wish for those items to have in the upper right corner of the page, then click "Add." You can remove consignors in the same method by simply leaving the field blank then clicking "Add."

## **Bid Increments**

*What are bid increments?*

Bid Increments are pre-selected amounts that determine the next minimum bid for items in an auction. Auctioneers have the option to choose a custom dollar amount or percentage for bid increments, or they can choose the default bid increments ("Chart," or "Default"), which provide bid increments based on a proportional algorithm. This "Sharp Chart" is a feature unique to Sharp Auction Engine. When you use this feature, your bid increments will dynamically increase as the high bid of the item increases.

The Sharp Chart is as follows:

<b>Bid</b>	<b>Increment</b>
\$0.01 - \$0.99	\$0.05
\$1.00 - \$4.99	\$0.25
\$5.00 - \$24.99	\$0.50
\$25.00 - \$99.99	\$1.00
\$100.00 - \$249.99	\$2.50
\$250.00 - \$499.99	\$5.00
\$500.00 - \$999.99	\$10.00
\$1,000.00 - \$2,499.99	\$25.00
\$2,500.00 - \$4,999.99	\$50.00
\$5,000.00 - \$9,999.99	\$100.00
\$10,000.00 - \$24,999.99	\$250.00
\$25,000.00 - \$49,999.99	\$500.00
\$50,000.00 - \$99,999.99	\$1,000.00
\$100,000.00 - \$224,999.99	\$2,500.00
\$225,000.00 - \$499,999.99	\$5,000.00
\$500,000.00 - \$999,999.99	\$7,500.00
\$1,000,000.00 - \$2,499,999.99	\$10,000.00
\$2,500,000.00 - \$4,999,999.99	\$15,000.00
\$5,000,000.00 - \$9,999,999.99	\$20,000.00
\$10,000,000.00 - \$24,999,999.99	\$50,000.00
\$25,000,000.00 - \$49,999,999.99	\$75,000.00
\$50,000,000.00 - \$99,999,998.99	\$100,000.00
\$99,999,999.00 and up	\$250,000.00

Bid increments work not only for regular bids, but also for maxbids.

### Setting Custom Bid Increment Charts

It is now possible for auctioneers to set their own customized, dynamic bid increment charts that increase as the bid on an item goes up, to whatever range specified. On the bottom of the Advanced tab, you will find a layout of the current increment chart, with options to remove, add, or replace various values. Clicking the red “-” icons next to each row will delete

that row, and the blank fields at the bottom allow you to enter a specific increment value (percentage or currency-based), as well as the price point at which that value will be triggered. The green “+” symbol will then add this value to your chart

Any listings that you create that are assigned “chart” increments will now follow this personalized chart.

#### *How do I set bid increments for my auction?*

For each new listing, there is an option in the Bidding Rules module to select your "Bid Increment Type." This field is auto-filled to use the default bid increments ('chart,' as defined on the Advanced tab of your Auctioneer Dashboard), but you can enter a dollar amount (e.g. '\$5.00') or percentage (e.g. '10.0%') to use custom bid increments.

If you are creating a catalog listing with multiple items, you may choose to use different bid increments for different items. When you set the bid increment type at the catalog level, all new items will automatically inherit that bid increment type. However, you can change that bid increment type on an item-by-item basis in the Bidding Rules module on the Item Manager.

Please note that if you are using a custom percentage for bid increments, the next minimum bid will round up to the closest dollar amount. For example, if the current bid is \$150.00 and the bid increment is set to 5%, the next minimum bid would be \$158.00 instead of \$157.50.

#### *How do I view bid increments for a particular item?*

For bidders, the bid increments are easily viewed on the front end. On each Item Detail page, there is a link below the bid box titled "View Bid Increments." Click this link to see which bid increment type is in use. If it is a custom dollar amount or percentage, that information will be displayed, but if the Sharp Chart is in use, the full chart will be displayed.

## **Bid Qualifications**

We understand that with some auctions, particularly real estate and other high-dollar auctions, bidders must meet additional qualifications prior to being approved to bid. This might be a credit card advance or deposit to ensure the bidder has real intentions and has the funds to purchase the property.

To facilitate the process of pre-qualifying bidders, we have added a new option to our Listing Manager. When you create a new listing, in the Bidding Rules section you will see the option to enter Bid Qualifications. In this section, you can list the specific qualifications that must be met, and these details will be displayed on the catalog and item.

If you do not wish to display Bid Qualifications, simply leave the section blank, and it will not be displayed.

## Buyer's Premium

A buyer's premium is an advertised percentage of the winning bid that is added to the winning bid to determine the total contract price to be paid by the buyer.

*To set the buyer's premium for your auction listing, visit the Accounting module on the Listing Manager.*

## Dynamic Bid Extensions

*What are dynamic bid extensions?*

Dynamic bid extensions ensure that when last minute bids are placed on items, those items extend to allow bidders more time to place additional bids. This prevents auction sniping.

By default, each item in your auction will automatically follow a 3/5 rule for dynamic bid extensions. This means that when a bid is placed within 3 minutes of auction close, that item (or group if groups are in use) extends for an additional 5 minutes.

Although this is the default, we allow for auctioneers to set their own custom bid extensions. You may choose from 2, 3, 5, and 10 minute intervals for your bid extensions, and you can choose whether or not that one item (or group) extends or if `_all_items` within the catalog extend.

*What makes the bid extensions "dynamic"?*

With SAE, your items dynamically refresh when they are updated. Unlike other online auction platforms, your bidders don't have to manually refresh the page. When an item is extended due to last minute bidding, the countdown timers dynamically refresh to reflect the changes.

In addition, bidders will see a red alert at the top of the page that notifies them whenever an item is extended. This eliminates any confusion for bidders by letting them know why the item was extended.

*How do I set dynamic bid extensions for my listing?*

Dynamic Bid Extensions can be set on the Catalog Manager (or the Item Manager for single item listings) in the Bidding Rules module.

## Clerk on the Fly™

Clerk on the Fly™ is SAE's live clerking feature that allows auctioneers (or their clerks) to place bids on behalf of bidders. As of v2.2, it is in beta mode.

From any standard catalog item page, you can now easily add or edit items (or have them pre-loaded) as well as their lot numbers as they are brought out onto the floor, and place bids on behalf of selected bidders (usernames or paddle numbers). Clicking the new fighter jet icon next to every item will now reveal a new drop-down module that displays the current bid, the next minimum bid, and fields for the clerk to enter new bids and select users.

The "Override" checkbox beneath the bid field automatically retracts all previously entered bids that were above the value entered, allowing for quick fixes to any clerking errors. The "Quick Edit Panel" button reveals a further drop-down that allows for the editing of actual item details.

While Clerk on the Fly™ is mainly intended as a clerking component of a live auction, it can also be used to quickly and easily fix mistaken bids in any of your auctions, including online. In the case of live auctions, the auctioneer is currently still (as of v2.2) required to make bidder accounts in order to place bids on behalf of specific people.

With release 2.4, we've also added the ability to use Clerk on the Fly™ for single-item listings! Now, you can enjoy the ease of use Clerk on the Fly™ offers, no matter how many items you're auctioning off!

## Re-Opening a Closed Listing

Sometimes a listing may close earlier than expected due to a mistakenly set End Time. To make a closed listing live again without having to start over, simply change the Start and End Times to reflect the actual dates, and hit the "Save" button at the bottom of the Basic Details module.

If the listing contains Items you will also need to go to the Manage Items page on the right hand side of the screen and check their statuses. If they are closed as well, click to Select All and then hit the "Reopen" button.

## Sharing Your Listings on Social Media

If you wish to advertise a listing on a social media account, you can easily do so by visiting the listing's page (as it would be viewed by a bidder). In the first information box above the media field, you will see "share" icons for various websites. Simply select which website you

would like to share your listing to, and click to generate an automatic post on that site. The post will include the catalog or item's description, so we encourage you to add a description to your listing before posting if it does not already have one.

You can either post to your personal account or to your business's social media page, should you have one. To link an official social media page to your auction house's overall settings, visit the "Marketing" tab of your Auctioneer Dashboard.

## Google Analytics

Second, auctioneers with Google Analytics accounts can now easily link their GA account to their multi-instancing page to track traffic and gather data. To link your GA account, simply go to the Theme tab in your Auction House Settings and you will see a new field where you can enter your GA UA Tracking ID. Not familiar with Google Analytics? Sign up online for free to begin collecting valuable insights and data on your web traffic:

<http://www.google.com/analytics/>.

# Closing an Auction

## Declaring Winners

The Item Manager is the page where auctioneers can view and edit their items. It is a centralized location for an auctioneer to fully manage all aspects of the item. We have enhanced this page to now include carets (navigation arrows) that easily allow auctioneers to move from one item to the next. We have also added a Manage Winners module in the second column for closed items. This provides even more information to the auctioneer on this page, but it also gives him or her the ability to declare a winner right from this page. Now, auctioneers can declare winners from the Manage Winners page or they can do it from the Item Manager, using the carets to move on to the next item.

Once an auction has ended, auctioneers must process the items by declaring winners. The Manage Winners page serves as a helpful central location for declaring winners. From our first auction, we received some feedback on how we could enhance this page to make it easier for auctioneers to declare winners.

First, we have added bulk actions to this page. Auctioneers can now declare winners for multiple items at once, making the process much more time efficient. Second, we have added a visual to let auctioneers know when the reserve has not been met. This allows auctioneers to make a more informed decision when declaring a winner for items whose bids did not meet the reserve. Third, we have added more options for filtering and sorting items on the Manage Winners page. Auctioneers can now filter items to show all "Declared" and/or "Not Declared" items. This is helpful for auctioneers who have many items in their catalog. Auctioneers can also sort the items by "Bid Count" to see which items received the most and least bids. Finally, each item name now links to that item's Item Detail page, making it easier for auctioneers to navigate from page to page.

Auctioneers will find buttons at the top of the Declare Winners page labelled "Auto Declare" and "Declare Highest." Auto Declare executes all selections you have made below simultaneously, regardless of whether or not the bidder you selected to win was the highest bidder. Declare Highest simply declares all winners who had the highest bid, assuming it met the reserve price. You can read more [here](#).

On the Manage Winners page, there is an Actions column with many options listed. We have added a link to the Manage Invoices page for each item to make it easier to toggle between the two pages.

## Invoices

With our built-in accounting system, auctioneers will find it easy to generate and send customizable invoices to bidders right from the Sharp Auction Engine site. After an auctioneer officially declares a winner on a closed item, an invoice can then be generated and sent to the bidder with the simple click of a button.

Bidders and auctioneers have the options to view and/or download these invoices. Invoices are downloaded as PDF files with unique identifying names. For bidders, invoices can be viewed from either the Items I've Won page or the Bids page.

Once payment is received from the bidders, auctioneers can mark items as paid. This helps auctioneers and bidders keep track with payments for their items and catalogs.

Auctioneers will find an "Invoices" tab on the dashboard. This is where an auctioneer can view and manage invoices and invoice settings. The invoices are highly customizable, giving auctioneers options to edit a variety of fields including shipping and payment details. With the options to include an auction house profile image and custom headers and footers, invoices will reflect the branding of the Auction House. The "Default Internet Purchase Fee" field at the bottom of the Invoice Settings page is an optional fee that behaves similar to a Buyer's Premium, although it is a separate, additional fee. It is primarily used for, but not limited to, marketplace-type auction houses, with the main house receiving this amount from bidders participating in auctions on the lower houses within the marketplace. It can however also be used as an additional route for any desired fees (such as a credit card payment fee) that may be needed to help cover expenses, without affecting the Buyer's Premium. The Internet Purchase Fee and the Buyer's Premium will appear as separate items on bidders' invoices.

Auctioneers can add custom invoices charges as well. From the Edit page of any invoice, simply click the blue button on the left hand side that reads "Click here to add a custom invoice charge." You can enter a name and edit the cost and quantity of this custom charge, as well as add a description of what the charge is for. This amount will then be added as a line-item in the invoice.

Auctioneers can also download all invoices in a given auction as a single PDF, allowing for bulk printing and other management. From the invoice management page on a given catalog, simply press the green "Download all invoices" button.

## Payments

### *Enabling Payments*

Visit the Payments tab in your House Settings if you would like to accept credit card payments from bidders for won items. SAE integrates with both PayPal and Stripe to make this possible.

## Stripe Credit Card Payments

For V. 1.1.5, we are happy to introduce a new automated payment integration with Stripe, a company that over the past five years has grown from a small startup to an international leader in its field, used by over thirteen thousand companies in fourteen different countries. Stripe has proven to be an innovative and reliable way for businesses to accept payments over the Internet.

What exactly does this mean for SAE auctioneers? It means less hassle and less work. With our Stripe integration, you can now add your billing information online, and your monthly plan charges will be automatically drafted. It means that when you sign up as an auctioneer with SAE, you can enter your billing information up front, getting you one step closer to conducting your first timed online auction.

With Stripe's highly developed storage infrastructure and encryption methods, you can rest assured that no one has access to your information, but for any auctioneers who are not comfortable providing billing information up front, this section of the signup process remains optional. Manual invoice billing will remain available by request.

In addition to the updated auctioneer signup process, you will now notice a new option in your House Settings to update billing information. Visit your Account tab to view your plan information, including your next billing date, and you will now see a new button that says "Update my payment method." Clicking this button allows you to easily review and edit your current payment method.

In the past with SAE, auctioneers have been given two options for bidder approval: automatic approval and manual approval. In addition to those two options, we now offer bidder approval by credit card preauthorization. You want to ensure that your online bidders actually have the funds to participate, and with this new feature, you can do just that.

This means that when you create a listing, you can choose whether or not bidders are required to have a credit card on file, and you can select a specific dollar amount to be preauthorized on that bidder's credit card.

To accomplish this, we have extended our integration with Stripe, who we previously integrated with for automated payments. If you wish to enable credit card preauthorization for your auction house, you will first need to create a Stripe account. Luckily, Stripe has one

of the simplest signup processes you will find. Registration takes under a minute, and its user interface is well-organized and user-friendly. For more information about Stripe and to create your account, visit [stripe.com](https://stripe.com).

Once your Stripe account is set up, you can visit the new Payments tab in your Auction House Settings to connect your Stripe account and enable credit card preauthorization. From this page, you can also designate a dollar amount as your default credit card preauthorization amount. Each new listing you create will automatically require preauthorization for that designated amount, but you have the option to change it from one listing to another.

For bidders, adding credit card information is simple. If you have the credit card preauthorization feature enabled for your auction house, whenever bidders create new accounts, they will automatically be prompted to provide their credit card information. However, this step is optional, so bidders can skip this step if desired. Bidders can update their credit card information at any time by visiting their Bidder Dashboards and clicking on the Payments tab.

This new feature, in conjunction with the new listing model, allows you to set different bidder approval rules for different items in an auction. For example, if you are auctioning an estate that includes a home, you can set the catalog to automatic approval but require credit card preauthorization for the home. Bidders could automatically start bidding on the items within the catalog, but they would have to be preauthorized via credit card before being able to bid on the home.

While other online auction softwares provide a similar feature, ours takes it one step further. Instead of authorizing a bidder's credit card when he or she first creates an account, we authorize the bidder's credit card for each auction he or she registers for. We empower the auctioneer to set the rules for preauthorization. Our flexibility considers that not all auctions require such qualifications, and we are authorizing the card closer to the time the transaction may happen. Hopefully this means the bidder truly has the funds to pay at the time of his catalog registration.

In our last release, we unveiled a new feature that allowed auctioneers to preauthorize bidders. For listings utilizing this feature, bidders must have a credit card on file, which is authorized for a specific amount that is set by the auctioneer before being approved to bid.

With V. 1.1.8, Bidders now have the option to actually pay for items with that same credit card on file! In addition to accepting payment via PayPal Express, auctioneers can now accept credit card payments online via Stripe.

As an auctioneer, in order to accept Stripe payments, you must first enable this feature in your House Settings. Visit the Payments tab, where you will be able to enter information from your Stripe account to activate the feature.

Afterwards, bidders can enter and save credit card information either through the registration process when they first create an account or by visiting the bidder Payments tab. To access this tab, just click on “Manage my bidder account” in the user drop-down menu.

Additionally, we allow auctioneers to specify exactly which types of credit cards they are willing to take. For example, you may not wish to accept American Express or another card type. When you enable Stripe payments, you can deselect this option, and bidders will not be able to pay with this card type. When a bidder adds payment information, he or she is shown which cards are accepted.

Over the course of our past two releases we have worked to allow auctioneers to accept credit card payments for their items, and now we have made that easier than ever. Before we elaborate on our newest development for credit card payments, however, let’s recap.

For V. 1.1.7, we introduced the Stripe integration and the preauthorization feature. This allowed auctioneers to preauthorize bidders’ credit cards for a designated amount in order to approve the bidder to bid on the listing.

For V. 1.1.8, we expanded the feature to allow bidders to pay their invoices with their credit cards on file. Because of this, when an auctioneer declares a bidder as the winner and sends an invoice, the bidder then has the option to choose to pay the balance with the credit card on file.

Now, for V. 1.1.9, we’ve made the process more efficient by removing the extra steps. Auctioneers can now automatically charge bidders’ credit cards on file for won items. After you declare a winner and send an invoice, you have the option to automatically charge the card that was preauthorized.

As an auctioneer, to enable credit card payments, visit the Payments tab in your House Settings. Once Stripe has been enabled, bidders can add their credit card information either during the registration process or by visiting the bidder Payments tab. To access this tab, bidders can click the “Manage my bidder account” link in the user drop-down menu.

For listings that require credit card preauthorization, we’ve added a notation to the Accept Terms and Conditions modal to inform bidders that the listing requires preauthorization and what the preauthorization amount is.

Follow our [related support article](#) for a step by step process on how to integrate Stripe into your auction house.

## Sales Tax

There are many options for auctioneers when it comes to sales tax. First, and most importantly, you have the option to set your own sales tax. This varies from state to state, so we have given you the option to charge sales tax based on the state in which you are doing business.

There are other variances from state to state for sales tax, also, such as whether or not the sales tax applies to the buyer's premium. Therefore, we also provide options to set whether or not the sales tax for each listing applies to the buyer's premium and shipping costs.

Finally, there are certain auctioneers that may be tax-exempt. Our system supports these auctioneers as well.

For all the sales tax settings, you have the option to set them at the house level or the listing level. If you set them at the house level, all future listings will automatically inherit those settings. However, each listing can be altered at any time on a case-by-case basis.

*To set your default sales tax settings for your auction house, visit the Settings tab in your House Settings. To set your sales tax amount and to view and edit your sales tax settings for a listing, visit the Accounting module on the Catalog or Item Manager.*

## Reports

The Registered Bidders report shows all bidders who have accepted the Terms and Conditions for your listing. It displays the bidders' real names and contact information.

The Bidder Balances report shows all outstanding balances for your listing along with the bidders' contact information.

The Payments report provides details of all payments received for your listing. Find out who, when, how much, and the method of each bidder payment.

The Auction Detail report is an itemized report that provides detailed information for each item in your listing, including the current bid, highest bidder, and status. (a.k.a. Clerking Summary)

The Auction Summary report provides the basic totals for your listing. It shows the hammer bid totals and grand totals, including buyer's premium and sales tax, for all items.

In addition to the new Watchlist, another helpful page that has been implemented for V. 1.0.3 is the Reports page. On the Catalog Manager, auctioneers will now see a link to the Reports page in the Reports module at the bottom of the right column. The Reports page displays all of the reports available for that Catalog, including the Catalog Summary Report and the Payments Report. These reports will open in a new window in a printer-friendly format and are available for pdf download.

In our last milestone, we developed a new Reports page where auctioneers can view and access a variety of helpful reports on their auctions. For V. 1.0.4, we have continued to add to the list of reports available.

The first new report is the Registered Bidders report. Auctioneers can now easily access a printer-friendly document that lists all of the registered bidders for a specific catalog. This informative report includes bidder names, usernames, email addresses, the date the bidder accepted the Terms & Conditions for the catalog, and more.

The second new report is the Bidder Balances report. This is particularly helpful to auctioneers who are attempting to collect payments on closed catalogs. The report lists the names, usernames, and email addresses of bidders who have an outstanding balance along with the invoice number and the total balance.

Access to these reports is available through the Reports module, located in the second column on the Catalog Manager. The Reports page includes descriptions of each report, as well as the option to either view, print, export, or download the report.

SAE auctioneers have access to a number of helpful reports for each of their auctions, including a Registered Bidders Report and a Catalog Summary. These two reports in particular have been enhanced to provide even more information for auctioneers.

The Registered Bidders Report now displays bidders' phone numbers and addresses so that auctioneers have easy access to contact their bidders if necessary, whether it be to answer questions about items or facilitate the pick-up of items.

The Catalog Summary now displays additional bid information for items, including the start value and reserve (when applicable) as well as high bidder information.

All reports are easily accessed via the Reports module on the bottom left side of the Catalog Manager.

Did you know that SAE provides detailed reports for each of your auctions, including Registered Bidders, Bidder Balances, Payments, and Auction Detail reports? These reports provide tons of helpful information, and our newest report, the Auction Summary report, may be the most helpful of them all.

The Auction Summary report is your no-frills brass-tacks one pager that provides your auction totals. It displays the hammer bid total, buyer's premium total, sales tax total, and grand total for all items and for all processed items. With this new report, you can easily drill down to the basic and most important stats from your auction.

# Emails, Messages, and Notifications

## Emails

*What Types of Emails Will I Receive As a Bidder?*

### **Please confirm your email address.**

This is the first email you will receive from Sharp Auction Engine. To become a bidder, you must create an account and confirm your email address. This email is sent when a new account is created, and it provides you with a link to click to confirm your email address.

### **You're ready to start bidding.**

This email is sent after you have successfully created a new account and confirmed your email address to let you know that your registration is complete and that you are ready start bidding!

### **Password Reset**

If you ever forget your password, you can request this email, which includes a link to click to reset your password.

### **Password Reset Confirmation**

Whenever your password is changed, you will also receive an email confirmation. This is a courtesy email to ensure that you were actually the one who requested the password change.

### **You have a new message.**

This email is triggered whenever you receive a new internal message in your bidder inbox. The email displays the full content of the message, and it also provides a link to reply to the message.

### **An auction that you registered for is about to start.**

Any auction for which you have previously registered will trigger a notification email to remind you when the auction is about to start.

### **An auction with items on your Watchlist is about to start.**

If you place an item on your Watchlist, you will receive an email notification that the auction containing your Watchlisted item is about to start.

**You have been outbid on an item.**

We want you to know whenever another bidder outbids you on an item, so that you can increase your bid and win the item! This email provides all of that information, and it provides a link to the item where you can increase your bid.

**Your payment has been processed.**

This email is sent whenever an auctioneer enters a cash or check payment on one of your invoices. It serves as a type of receipt, confirming that the payment has been entered.

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*What types of emails will I receive as the auctioneer?*

**Please confirm your email address.**

This is the first email you will receive from Sharp Auction Engine. To become an auctioneer, you must create an account and confirm your email address. This email is sent when a new account is created, and it provides you with a link to click to confirm your email address.

**You're ready to start bidding.**

This email is sent after you have successfully created a new account and confirmed your email address to let you know that your registration is complete and that you are ready start bidding! Remember that all auctioneer accounts are also bidder accounts.

**Getting Started**

When you first sign up for your account, you will receive an email with tips on how to set up your auction house.

**Password reset**

If you ever forget your password, you can request this email, which includes a link to click to reset your password.

**Password reset confirmation**

Whenever your password is changed, you will also receive an email confirmation. This is a courtesy email to ensure that you were actually the one who requested the password change.

**You have a new message**

This email is triggered whenever you receive a new internal message in your auctioneer inbox. The email displays the full content of the message, and it also provides a link to reply to the message.

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**You have a new question.**

Whenever a user asks a question on one of your items, you will receive this email, which displays the question and provides a link where you can provide an answer to the question.

**You have a new bidder.**

When a bidder registers for one of your auctions, an email will be sent to notify you of their registration. A link in the email will take you directly to the page where you can manage your registered bidders.

**Your auction has ended.**

When one of your scheduled auctions closes, the system will remind you to review the bids and select winners for each lot.

**You received a payment.**

Whenever a winning bidder makes a PayPal payment on an invoice that you have sent, this email will be sent to you to notify you of that payment.

**Bidder approval receipt.**

This email is sent to your bidders upon approval, in order to provide them with a copy of the Terms and Conditions at the time of approval. A copy is ALSO sent to the Auctioneer for their records.

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One of the areas where we received the most feedback was in regard to email. We want to make sure that our users are always informed of important activities, so we previously developed a series of emails that are sent out to users when certain activities occur. Based on the feedback that we received from our first auction, we have refined our email system by making several improvements.

We currently send an email to users whenever they receive new messages, but we have enhanced this email to now display the full message text in the email. This eliminates the need for the user to log in to the site to check the message. Furthermore, if the user wishes to reply to the message, there is a "Reply" button within the email.

In addition to that enhancement, we created and implemented three new emails that users will now receive. The first is an email sent to bidders when they have been outbid. The second is an email sent to auctioneers when they receive a payment, and the third is an email sent to a bidder when an auctioneer logs a cash or check payment on his or her invoice.

The last thing we want to do is clutter your inbox with unnecessary emails. With that being said, we didn't just add emails; we also removed emails. We found that by displaying the full message text in the email that users receive when they receive new messages, we no longer needed to send some of our other emails. This ensures that each email that you receive from Sharp Auction Engine is worth your time.

In addition to having auction house emails sent to multiple recipients, another request we have received from auctioneers is for an email to be generated whenever a new bidder registers for a catalog. For V. 1.1.6, we have implemented this new feature! This means that whenever a new bidder registers for one of your catalogs, we will notify you via email. Right from that email, you can simply click a button to view and manage all of your bidders for that catalog!

We didn't want to leave our bidders out, though, so we have implemented a new email for those users, as well. Now whenever a bidder registers for an upcoming catalog, we automatically send them emails to notify them when that catalog goes live.

Finally, we have also updated many other emails with a focus on clarity and ensuring a call to action!

If you'd like to receive email updates about news and upcoming releases, make sure to sign up for the Sharp Auction Engine mailing list.

## Messages

The message system is one of many tools that our auctioneers have in their arsenal, but it is an important one because it allows them to quickly and easily stay in contact with their bidders. Whether it be to answer inquiries from bidders or to send updates about upcoming auctions, auctioneers can use this valuable tool to build and maintain a loyal bidder base.

The updated message system includes new features that allow users to more effectively organize and manage their messages. Users can now mark messages as read or unread, and they can also archive and trash messages. Trashed messages are automatically deleted after thirty days. These new functions can be applied to individual messages or in bulk.

Auctioneers also now have the option to send messages to multiple bidders at once. They can then review sent messages by clicking the Sent Mail tab. All messages are also now threaded, so replies include original message content. With a new design, auctioneers can more easily distinguish between auctioneer and bidder inbox and switch from one to the other.

Another important new feature of the message system is the updated message icon. This icon now dynamically displays the number of unread messages in a user's inbox. Not only do users receive alerts and emails when new messages are received, they can also tell at-a-glance from any page whether or not they have unread messages in their inboxes.

As of V. 0.6, we have made two additional enhancements to our message system. First, we have added date and time stamps to each message, which will help users keep track of when their messages were received. Second, we have added a preview option for each message, so users can now preview their messages before sending them.

We've made many changes to our internal message system over the past few months, including a complete redesign of the system. V. 0.7 builds upon these past improvements with additional usability and design changes.

First, we added a "Select All" button so that auctioneers can send messages to all of their bidders with just the click of a button. Also, we made a small change to the default Inbox for auctioneers. Auctioneers have both a Bidder and an Auctioneer Inbox, but we made a change to make the Auctioneer Inbox the primary one since it is the one auctioneers will mainly use. Similarly, we enhanced the Bidder Inbox to include a typeahead feature so that bidders can more easily find the Auction House they wish to message. Aside from these changes, we added the option to "Save as draft" when sending a reply, and we improved the display of sent messages.

Our enhancements for the message system for V. 0.7 also extended to our email service, as well. We made several changes to improve deliverability and functionality of the emails that we send to our users.

We've added a "Contact Auction Support" button to our message system to make it easier for users to contact support.

## Notifications

For both auctioneers and bidders working in timed online auctions, it is important to always be informed of site activity in real-time, and our notifications system was developed to do just that. For bidders, our notifications system will keep you updated on all of your bids; whether you've just been approved to bid on a catalog or whether you've just been outbid, a notification will pop up on your screen to let you know. Similarly, for auctioneers, our notifications system will keep you updated on all of your auctions. We'll notify you in real-time to let you know when new bidders has requested to bid on your catalogs, when bidders have placed bids on your catalogs, and even when bidders have requested additional information on your items.

With Sharp Auction Engine 0.1, we further developed and refined our notifications system. We added notifications to let bidders know when catalogs and items that they have bid on are ending soon. We've enhanced our notifications to include more links so that you can quickly access the items or catalogs in question just by clicking on the notification. Finally, we've improved the overall performance and display of our notifications by adding polling and pagination.

We enhanced the pop-up notifications that appear in bottom left of the site, particularly in the display of dollar amounts. In these pop-up notifications, all dollar amounts will now display the appropriate dollar symbols and commas.

We added a read/unread functionality to notifications, so users can now mark notifications as read in order to distinguish new notifications from previously viewed notifications.

### **What Types of Notifications Will I Receive As an Auctioneer?**

In order to keep you up-to-date with all of your account activity, we developed a notification system that notifies you whenever certain activities occur.

To view your notifications, simply click the bell-shaped notification icon in the top right corner of your screen whenever you are signed in to Sharp Auction Engine or any Sharp Auction Engine-powered site.

Below is a list of the different types of notifications that you will receive as an auctioneer:

- A bidder has registered to bid in your catalog. (Automatic Approval) [User] has just accepted the terms of service for [Catalog] and can now bid.
- A bidder has requested to bid on your catalog and needs your approval. (Manual Approval) [User] has just accepted the terms of service for [Catalog] and needs your approval to bid.
- A bidder has asked a question about one of your items. [User] asked a question (" [Question]") on [Item] of [Catalog].
- A bidder has added one of your items to his or her Watchlist. [User] is now watching your item [Item].
- Your auction has ended. [Catalog] has ended. You can now declare your winners.
- You have received a payment. You received a payment from [User] for [\$ Amount] for Invoice [#].

### **What Types of Notifications Will I Receive As a Bidder?**

In order to keep you up-to-date with all of your account activity, we developed a notification system that notifies you whenever certain activities occur.

To view your notifications, simply click the bell-shaped notification icon in the top right corner of your screen whenever you are signed in to Sharp Auction Engine or any Sharp Auction Engine-powered site.

Below is a list of the different types of notifications that you will receive as a bidder:

- You have been approved to bid on a catalog. [Auction House] has approved your request to be a registered bidder on [Catalog].
- You have been denied registration to a catalog.
- [Auction House] has denied your request to be a registered bidder on [Catalog].
- You have been outbid on an item. [User] has outbid your bid of [\$ Amount] on [Item].
- Your question has been answered by the auctioneer. [Auction House] has answered your question ("[Question]") on [Item]. Answer: "[Answer]"
- A catalog you have registered for is ending in 24 hours. You only have 24 hours remaining to place a bid on the items in [Catalog]!
- An item you have bid on is ending in 1 hour. You only have 1 hour remaining to place a bid on the [Item]!
- Your payment method has been rejected.
- The payment information you recently submitted, card ending in [Last Four Digits], was rejected. Please verify your information and [Link to Manage Payments].
- You have received an invoice for an item that you have won. [Auction House] has just emailed you an invoice for won items from [Catalog].

## Custom Preferences for Emails and Notifications

It is possible for auctioneers to choose what emails and in-house notifications you and your registered bidders receive. Auctioneers can listen to feedback from bidders and adjust the types of emails and notifications that are sent out according to their own needs.

On the right hand side of the Advanced tab you will find a section labelled "Notification Preferences," and below that another section called "Email Preferences." By default all of these are enabled, but you can simply uncheck the boxes next to each once to disable it. Be sure to click the "Save Changes" button at the bottom of the page when you are finished.

### *Notifications*

To Bidder: Request Approved (Alerts bidder that their bid request has been approved)

To Bidder: Request Denied (Alerts bidder that their bid request has been denied)

To Bidder: Request Revoked (Alerts bidder that their bid request has been revoked)

To Bidder: Invoice Received (Alerts bidder they have received an invoice)

To Bidder: Question Answered (A question the bidder asked on an item has been answered)

To Bidder: Highest Bidder (Alerts user they are the highest bidder for x item)

To Bidder: You've Been Outbid (Alerts bidder they've been outbid on x item)

To Bidder: Card Declined (Alerts bidder their card has been declined)

To House: Auction Ended (Alerts you (auctioneer or clerk) that one of your auctions has ended)

To House: Bid Placed (Alerts you that a bid has been placed on x item)

To House: Bidder Auto Approved (Alerts you that a bidder has been auto-approved to bid)

To House: Bidder Request Pending (Alerts you that a bidder is waiting for your manual approval)

To House: Question Received (Alerts you that a question has been received on x item)

To House: Payment Received (Alerts you that you have received a payment for x invoice)

To House: Bidder Started Watching Item (Alerts you that a bidder has Watchlisted x item)

### *Emails*

To Bidder: Auction Starting (An auction the bidder has registered for is starting soon)

To Bidder: Request Approved Receipt (Official record-keeping receipt of approval)

To Bidder: Request Approved (Generic notification of approval)

To Bidder: Highest Bidder Receive (Alerts user that they are currently the highest bidder for x item)

To Bidder: You've Been Outbid (Alerts user that they have been outbid for x item)

To Bidder: Message Received (Alerts user that they have a new message in their house inbox)

To Bidder: Question Answered (Alerts user that a question they asked of the auctioneer has now been responded to)

To Bidder: Watchlisted Item Starting (Alerts user that an item they have put on their Bidder Watchlist is now live)

In addition to the auctioneer being able to turn off certain emails on the global level, individual bidders and other users can also select which emails and in-house notifications they receive on an individual level. This can serve to further ensure that all of your bidders are satisfied with their individual experience participating in your auctions.

# Technical

## Marketplace Functionality

Recently, we've made a few changes and additions to our Marketplace functionality. Below is a list of new additions and changes, added in v3.3.0!

### Changes:

- Make Stripe the only payment processor useable on a Marketplace. This payment gateway/processor was selected due to it's easy set-up and ability to connect Stripe accounts between users for seamless payment
- Changes to archiving a "sub-house"; now when a sub-house is archived, any Staff users with enhanced permissions on the sub-house will be given "Bidder" status. In addition, all listings attached to the sub-house will be reverted to draft mode if live, and archived if closed

### Additions:

- Finalize Stripe Connect setup for Marketplace owners to easily collect their "Marketplace Convenience Fee" whenever a sub-house processes a transaction
- The Marketplace Convenience Fee amount received by the Marketplace Owner is now displayed on the Payments tab of the main house (House 1)
- If you're interested in creating an online marketplace with Sharp Auction Engine, reach out to us at [help@sharpauctionengine.com](mailto:help@sharpauctionengine.com) to start our discussion, or give us a call at 256-261-3159!

## Vanity Domains

SAE offers a free profile and a free SSL for auctioneers, starting at the Plus Branding Plan. Our software easily integrates with your existing website, but if you don't have a website, your free SAE profile can even stand alone.

Adding a vanity domain to an auction house gives you the ability to direct your customers to your online auctions through your existing web address (if you have one). For instance, if your company's website is currently "www.auctioncompany.com" you can create a web address of "auctions.auctioncompany.com" and have it point directly to your online auction

house through the Sharp Auction Engine. It is a technical process, so your website's administrator would be a handy person to keep close. All you need, however, is to log in to your web hosting account and make a few simple changes.

Before you go to your web hosting account and make changes, send us an SSL Request. Sign in to your SAE account, go to your Auctioneer Dashboard (by clicking the icon in the top right hand corner of the screen), then navigate to the "Account" tab. From here, click the "SSL Request" link on the right hand side of the page and provide us with some basic information associated with your domain hosting account. Then sign in to your web hosting account and follow the steps below.

### **Step 1 – Locate DNS Settings**

Once you have logged in to your web hosting account, you will need to locate the area where DNS settings can be changed. DNS stands for Domain Name Server, but your hosting company may refer to it as Hosting, Redirect, DNS Maintenance, Domain Management or Name Server Settings. Each hosting account handles it differently, so you may have to look through advanced features before you find your DNS Management options.

#### *Option A – Direct A Record To Our Server*

You will need to create an A Record for the domain of your choosing (e.g. example.com) to 45.79.223.211 (our server) IP Address. After doing so, you'll want to create a cname record for your domain. An example would be www.example.com. You're adding the preceding www. Optionally, you can add A records for the www.domain.com to 45.79.223.211 IP address. Be sure not to do both said options, only one is required.

#### *Option B – Emails Associated With Your Domain*

If you have emails and/or other services set up through your domain, set up your DNS zone file/information first. Set your domain's nameservers to ns1.linode.com, ns2.linode.com, ns3.linode.com, ns4.linode.com, ns5.linode.com.

#### *Option C – Point Your Domain Name to Your .sae.bid Domain*

When you create your account with us, you are given a domain that ends with .sae.bid. You can create a cname record (e.g. example.com) to this domain (yourauctionhouse.sae.bid).

### **Step 2 – Contact Us, and We'll Finish the Process**

Once you've set up a new CNAME and directed it to our servers, contact us, and we'll get the rest sorted out. That includes getting you a free SSL license, so your customers know they are browsing securely.

By using a vanity domain, your customers can bid on your online auctions without feeling like they have ever left your website. Your website. Your brand. Look Sharp with SAE.

If you would like to upgrade to the Plus Branding Plan, please contact us at [help@sharpauctionengine.com](mailto:help@sharpauctionengine.com)

## Free SSL

At Sharp Auction Engine, we work with auctioneers to give them the ability to conduct their own timed online auctions from their own website. Setting up this new auction page and integrating it with an auctioneer's existing website is something that we help with every step of the way. One important step in this process is securing the new page. To do this, we install an SSL.

As of V. 1.0.3, we have refined and automated our SSL process, and we're happy to announce that all new auctioneers will now receive an SSL automatically and at no additional charge.

Each auctioneer that signs up with SAE receives an SSL certificate for his or her auction page at no additional cost. In order to streamline the acquisition and installation of the SSL certificate, we have added an optional section to the Auctioneer Signup Form to automate the process. This eliminates an extra step and helps auctioneers get their first auctions up and running more quickly.

Each auctioneer that signs up with SAE receives an SSL certificate for his or her auction page at no additional cost. In order to streamline the acquisition and installation of the SSL certificate, we have added an optional section to the Auctioneer Signup Form to automate the process. This eliminates an extra step and helps auctioneers get their first auctions up and running more quickly.

## Auction Support

Users may visit [support.sharpauctionengine.com](http://support.sharpauctionengine.com) to access the Sharp Auction Engine Support Portal. This portal serves as the hub for all of our support services; it is where users will go to find solutions such as Frequently Asked Questions and "How To" guides.

Our support isn't limited to just the portal, though. We have also added help text to other areas. For example, whenever a user is using an unsupported browser (such as outdated versions of Internet Explorer), he or she will receive an alert at the top of the screen that includes links to update the browser. Also, auctioneers will now have a link on the Catalog and Item Managers to view more information about bid increments.

If you can't find the answer you're looking for in the Support Portal, seven day a week personalized support is always available at [help@sharpauctionengine.com](mailto:help@sharpauctionengine.com). One of our Support Associates will respond to you promptly.

### **Video Support**

In addition to our FAQs and visual How To guides, we also have a YouTube channel that provides step by step assistance with many common SAE questions. These videos can be viewed through the Support Portal, or directly through our [Youtube Channel](#).

## **Creating Bidder Accounts on Behalf of a Bidder**

Sometimes, for whatever reason, a bidder is unable to create a bidder account. This can happen for a few reasons, but the most common is simply not following the guidelines for successfully creating a bidder account (for example, incorrectly entering an email address or using an invalid bidder username).

In the event this happens, you can assist your bidder in creating a bidder account by following the steps outlined below:

1. Log in as your auctioneer account and navigate to your Auctioneer Dashboard
2. Click your "Bidders" tab
3. Click the green "+Create New Bidder" button

From there is as easy as coordinating with your bidder to determine what they want their username and password to be! Note: Bidders will still need to complete the remaining registration steps before they will be able to bid on an auction.

## **Billing and Payments**

Pay as you grow with our new pricing plans. With Automated Growth Protection and hourly billing for exceeding plan limitations, you can rest assured that your auctions are stable and secure while paying a fair and competitive price.

Start by selecting a plan based on the number of concurrently active bidders you expect for your auctions, and we'll take care of the rest. You will pay your monthly plan premium at the start of each month, and then you will be billed at the end of each month in hour increments for any overage activities only for the hours you used.

With our built-in business intelligence statistics, you can easily monitor your active bidders. With this information, you can track bidder trends and activities, and you can adjust your plan as needed. You will be able to monitor any overages, so there will be no surprise charges at the end of the month.

We've done our best to create straightforward billing and payment policies. Click below to learn more about how our hourly billing works and how to make payments, update your billing information, get referral credits, and remove services. Still have questions? Please feel free to contact us.

## Search Engine Optimization (SEO)

Without bidders, you can't have a successful auction. With Sharp Auction Engine, you're not alone in marketing your auctions. We want to make sure that our auctions attract as many bidders as possible. That's why we have enabled meta tags and meta descriptions for auction houses and catalogs. Auctioneers can now go to the Marketing tab under their Auction House Settings and add meta tags and meta descriptions. For catalogs, meta tags are automatically pulled from the catalogs description and category.

SAE provides auctioneers with the ability to conduct their own branded timed online auctions right from their own website. Now we take that even further with new search engine optimization (SEO) features to improve the visibility of these timed online auctions in search engine results. These new SEO features allow auctioneers to easily customize the page titles and meta descriptions for their auction pages, and they can add custom keywords to their auction houses, catalogs, and items.

First, let's take a closer look at page titles. Conveniently located in Auction House Setting under the Theme tab, auctioneers can now update page titles at any time. Updating this field will change the text that is displayed in internet browser tabs and in search engine results. This new feature allows auctioneers to ensure their auction pages are branded and descriptive, such as "Bid in Timed Online Auctions | ABC Auctions, Inc."

Meta descriptions work similarly. Search engine results display the page title as well as a description. SAE now provides auctioneers the ability to edit this description. A thorough and clear description helps search engines to determine your relevancy to online searches and helps attract more potential bidders to click on your site in search results. To edit your page's meta description, click on the Marketing tab in your Auction House Settings.

Finally, by request, we have implemented keywords on the auction house, catalog, and item level. This means that auctioneers can add keywords to their auction page, to each new catalog, and to each new item. These keywords further help to improve visibility in search

engine results. To add keywords to your auction page, click on the Marketing tab in your Auction House Settings. To add keywords to your catalogs and items, simply go to the corresponding Catalog and Item Managers.

In addition to these new features we have implemented for auctioneers, we have also implemented SEO practices for our own sites. For example, we have made keywords searchable on the SAE site. This means that if a bidder searches for a specific word, if that word is a keyword on your catalog or item, it will be displayed in the results.

Furthermore, we have updated our own page titles, meta descriptions, and keywords, and we have verified our sites with Google and Bing Webmaster Tools. We have also improved our overall URL structures and created sitemaps for better search engine indexing.

Please note that, in order to deter black hat SEO practices and to comply with search engine guidelines, we have applied limits to page titles, meta descriptions, and keywords. For example, meta descriptions are limited to 160 characters because anything beyond that is truncated in search engine results.

## Syndication

SAE has direct integration with the following auction syndication websites: AuctionLook.com, GlobalAuctionGuide.com, AuctionGuy.com, and BirdDog.bid. Syndication to each of these services can be individually controlled under the Marketing tab of your Auctioneer Dashboard. Please note that syndications to BirdDog and AuctionGuy are free and active by default (unless manually disabled), and require no initial setup on the part of the auctioneer. Syndication to AuctionLook and Global Auction Guide will require some small initial setup and registration with those services.

In order for your listings to be displayed in the correct category on Birddog.bid, it is important that you create the following categories on your own house, and assign listings to one of them. Your categories must match these exact spellings:

antiques

automobile

benefit-and-charity

coins-and-currency

computers-and-electronics

estate-and-personal-property

farm-and-heavy-equipment

jewelry

livestock

real-estate-commercial

real-estate-residential

## Bidder Invoices

Auctioneers will find it easy to generate and send customizable invoices to bidders right from the Sharp Auction Engine site. After an auctioneer officially declares a winner on a closed item, an invoice can then be generated and sent to the bidder with the simple click of a button.

Bidders and auctioneers have the options to view and/or download these invoices. Invoices are downloaded as PDF files with unique identifying names. For bidders, invoices can be viewed from either the Items I've Won page or the Bids page.

Once payment is received from the bidders, auctioneers can mark items as paid. This helps auctioneers and bidders keep track with payments for their items and catalogs.

The Auctioneer Dashboard has been enhanced to include these accounting changes. Auctioneers will now notice an "Invoices" tab on the dashboard. This is where an auctioneer can view and manage invoices and invoice settings. The invoices are highly customizable, giving auctioneers options to edit a variety of fields including shipping and payment details. With the options to include an auction house profile image and custom headers and footers, invoices will reflect the branding of the Auction House.

We have updated the way that payment comments are displayed. For easier access, memo comments are now displayed directly below the payment itself, while private comments are still displayed at the bottom of the invoice, now in a collapsed section that expands when clicked.

## Wavebid Optimization

While it is important to note that Sharp Auction Engine is a standalone product – one that allows you to create and manage your online auction from beginning to end—we have found that many auctioneers choose to use our software in conjunction with others, such as Wavebid.

Wavebid is a well-known and trusted name in the auction industry, and we want to support our customers in whatever capacity they choose to use SAE. That's why we have optimized our product to work directly with Wavebid. Specifically, we have enhanced our listing reports

so they can be exported to Wavebid, allowing you to seamlessly move from one product to another.

## Automated Growth Protection

AGP kicks in when you are Growing your Brand and Bidder List. We want to make sure your website is always up and running at high performance. That's why we have designed an automated scaling program to keep you looking good. With us, you can see how many people are watching your auction (while they are watching!) and know your website is ready to handle anything.

## Password Reset and Recovery

A new password recovery feature has been implemented ensuring that both auctioneers and bidders are able to reset their passwords securely.

## Supported Browsers

Because SAE is located entirely in the cloud, there is no installation necessary to use our product. All you need is an internet connection and a browser and you're good to go. See below for a list of browser versions that work with SAE. There are links in this solutions category to free downloads of supported browsers.

### **Supported browsers for Sharp Auction Engine:**

*Windows Vista, 7, 8, and 10:*

IE 9.0 and newer

Firefox version 19 and newer

Google Chrome version 25 and newer

*Mac OS X 10.4, 10.5, and 10.6:*

Firefox version 19 and newer

Safari version 4.0 and newer

Google Chrome version 25 and newer

We recommend upgrading your browser to its latest non-beta version for the optimal experience.

## Time Zone Compatibility

SAE will automatically adjust the time displayed on listings according to information sent by the user's browser. Thus, you don't have to worry about any confusion over the start and end dates of your listings, as these will reflect the appropriate time based on where the user is accessing your site from.

## Security

We are committed to providing our users a secure and stable product.

To do that, we've upgraded our servers and altered how we push new changes to the product. While these changes aren't fun new features or sleek new design changes, they are, perhaps, the most important changes we could make. You may never actually see these changes in action, but you can feel assured knowing that your information is secure and stable.

Security is always a top priority for us; we worry about it so you don't have to! For this release, we made many changes to improve our security. First, we updated our security license for our sales site, and we implemented a procedure for ensuring that our multi-instancing are also secure. The most important change, however, is that we moved to a better performing and more stable and secure server.

We currently have an 'A' rating on all of our SSL Security Tests per <https://www.ssllabs.com/ssltest/>

We replaced our permission system and changed systems for our validation management. These are significant changes that will improve our overall performance and security.

Security is one area that we are always looking to improve. For V. 1.0.4, we have restricted guest access to bidder profiles. Guests can now see a bidder's username and the number of bids placed, but nothing else.

Furthermore, we have added a security notation to the page that auctioneers use to connect their Paypal accounts to their auction house. This notation serves to let auctioneers know that their information is safe. After all, we do not store or view any bank account or password credentials, and any third party or Payment Gateway connection with us is read-only. This means it can't be used to move money into or out of bank accounts.

# Marketplace Functionality

Recently, we've made a few changes and additions to our Marketplace functionality. Below is a list of new additions and changes, added in v3.3.0!

## Changes:

- Make Stripe the only payment processor useable on a Marketplace. This payment gateway/processor was selected due to it's easy set-up and ability to connect Stripe accounts between users for seamless payment
- Changes to archiving a "sub-house"; now when a sub-house is archived, any Staff users with enhanced permissions on the sub-house will be given "Bidder" status. In addition, all listings attached to the sub-house will be reverted to draft mode if live, and archived if closed

## Additions:

- Finalize Stripe Connect setup for Marketplace owners to easily collect their "Marketplace Convenience Fee" whenever a sub-house processes a transaction
- The Marketplace Convenience Fee amount received by the Marketplace Owner is now displayed on the Payments tab of the main house (House 1)
- If you're interested in creating an online marketplace with Sharp Auction Engine, reach out to us at [help@sharpauctionengine.com](mailto:help@sharpauctionengine.com) to start our discussion, or give us a call at 256-261-3159!

## Creating Bidder Accounts on Behalf of a Bidder

Sometimes, for whatever reason, a bidder is unable to create a bidder account. This can happen for a few reasons, but the most common is simply not following the guidelines for successfully creating a bidder account (for example, incorrectly entering an email address or using an invalid bidder username).

In the event this happens, you can assist your bidder in creating a bidder account by following the steps outlined below:

1. Log in as your auctioneer account and navigate to your Auctioneer Dashboard
2. Click your "Bidders" tab
3. Click the green "+Create New Bidder" button

From there is as easy as coordinating with your bidder to determine what they want their username and password to be! Note: Bidders will still need to complete the remaining registration steps before they will be able to bid on an auction.

# Bidding

## Placing Bids

Users place regular bids simply by inputting the desired bid into the bidding field and clicking "Bid," or hitting Enter on the keyboard. The current bid will refresh in real time, even from other bidders, with no need to hit the Refresh button in your browser.

## Max Bids

A max bid, or maximum bid, is the highest price a bidder will pay for an item, submitted in confidence to Sharp Auction Engine's automated bidding system to facilitate proxy bidding. You tell us how much you are willing to spend on an item, and we will automatically bid on your behalf up to that maximum amount.

Users may place Max Bids in the same field as the regular bid, but must click the "Max Bid" button instead of the regular bid button. With v2.4, we've made some enhancements to the Max Bid functionality.

Now, once an auction begins, the "Bid" button will be removed from the winning bidder's view. This means a winning bidder can **only** place a MaxBid (to try to protect their winning status should someone attempt to outbid them).

To avoid confusion due to our MaxBid and Bid button changes, we've added a hover hint to the MaxBid button. The hover hint is viewable by positioning your mouse cursor over the MaxBid button, and will be available even if a bidder isn't winning. The hover hint reads:

*"Congratulations! You're currently the winning bidder on this item. You can now enter a new Secret MaxBid value to protect your status."*

### Retracting Max Bids

In the event that you mistakenly place a max bid that you did not intend to, you can override it by simply placing a new max bid under the value of the former. As long as the higher max bid had not already been activated by the system, the new, lower max bid will be used instead. To fully retract a bid, you will have to contact the auctioneer.

## Pre-Bids

A pre-bid is a bid accepted on an upcoming auction. Prior to the start of an online auction, auctioneers often will display their upcoming listing so that bidders can preview the items. When auctioneers set up their catalogs, they will see an option to allow pre-bids during the upcoming phase. This means that while the catalog is upcoming, or in “preview mode,” bidders will be able to place pre-bids on the items. Pre-bids are very similar to regular bids, but they are placed before the catalog actually goes live.

*If you would like to allow pre-bids for your auction listing, visit the [Bidding Rules](#) module on the [Catalog or Item Manager](#).*

## Absolute vs. Reserve

An absolute auction is one where the property is sold to the highest qualified bidder with no limiting conditions or amount. A reserve auction is one in which the seller retains the right to establish a minimum price.

## Bidder Dashboard

The Bidder Dashboard is a centralized location for bidders to view and manage all of their bidding activity. From the Bidder Dashboard, bidders can view their watchlists, notifications, approved listings, invoices, and account information all in one place. The modules for each of these sections are expandable and collapsible, allowing bidders to expand the modules most pertinent to their needs for easier viewing.

*To access the Bidder Dashboard, simply click on the “My Bidder Dashboard” link in the user drop-down menu.*

## Approved Listings

Each bidder has a page that displays his or her approved catalogs. We have added breadcrumbs to this page to make it easier for users to navigate to and from this page.

## Watchlist

After signing in to your account, click on the gavel icon. This takes you to your Watchlist, where you will find the total amount of bids you have open in the upper right corner of the page. You can narrow your results by selecting the individual auction house by clicking the

"All houses" button. Once you've selected the individual auction house, you can select an individual catalog by clicking the "All catalogs" button.

We're excited to announce that we have implemented a new Watchlist feature! Now, if you're interested in an item--but not quite sure if you want to place a bid yet--you can add it to your Watchlist where you can monitor bid activity and revisit the item to place bids.

Here's how it works! You'll notice that in the user drop-down menu, there is now a link to "My Watchlist." You can click on this link or click the gavel icon to navigate to your Watchlist. On this page, you will find a list of all of the items you are currently watching. Each item on this page has various information listed to make it easy to monitor the item at-a-glance, including the item name and photo, bid information, and the auction end date.

Adding items to your watchlist is easy! Whether you are on the Catalog Detail page, the Item Detail page, or your Watchlist, you'll notice that each item has a star icon by the item name. Clicking on that star adds the item to your Watchlist. If the star is filled in it means that the item is already on your Watchlist, so clicking on that filled in star removes the item from your Watchlist. For both actions, a confirmation alert will pop up at the top of the screen. The alert includes a link to your Watchlist for quick access. Furthermore, items that you bid on are automatically added to your Watchlist!

This new page works in tandem with the already existing Current Bids page. A button has been added to both pages to allow you to easily toggle between the two pages. This has been added for when you wish to only view items that you have bid on.

The new Watchlist is also beneficial to auctioneers! Providing bidders with the ability to watch items allows them easier access to bid on those items. Additionally, auctioneers are notified whenever an item is added to a bidder's Watchlist. This lets the auctioneer know which items are generating the most attention.