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## Adding Email Address to Location Template

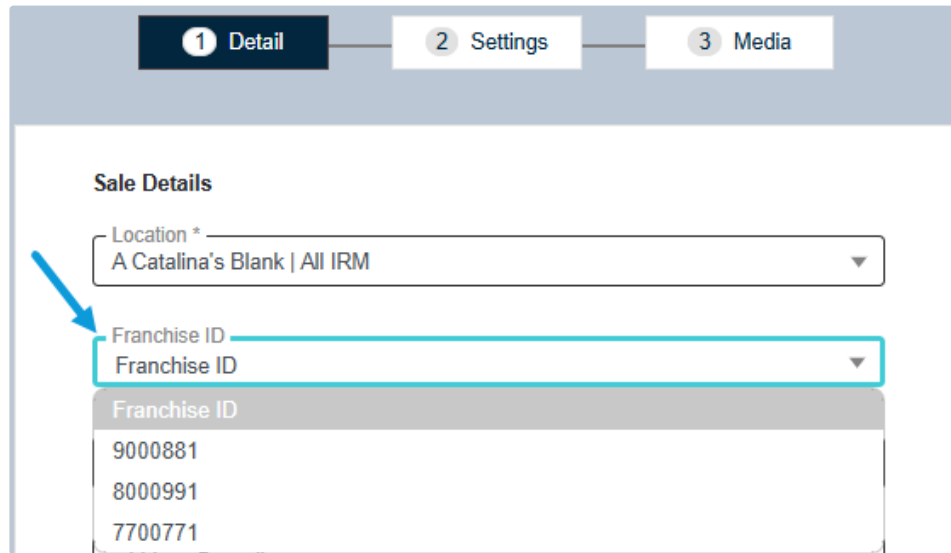
To add an email address to your Location Template, please copy and paste the email address directly into the body of the description.

 Please do not use the hyper-link function to insert an email. This function is for web pages only.

## Franchise ID Field on CTBIDS

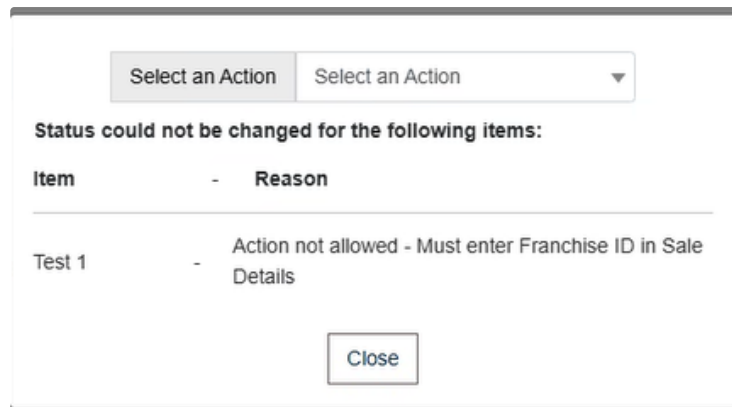
There is a new required field for Franchise ID number

- **You will now be required to enter your Franchise ID to your sale before moving items from Pending to Ready**
- There will be a new field drop down below your location name on the sale settings screen
  - Right now this is only on [Seller.ctbids.com](https://Seller.ctbids.com) and is not available on the Seller App



The screenshot shows the 'Sale Details' section of the CTBIDS interface. At the top, there are three tabs: '1 Detail' (selected), '2 Settings', and '3 Media'. Below the tabs, the 'Sale Details' section contains a 'Location \*' dropdown menu with the value 'A Catalina's Blank | All IRM'. Below the location dropdown is a 'Franchise ID' dropdown menu with the value 'Franchise ID'. A blue arrow points to this dropdown. Below the dropdown is a list of Franchise ID options: 9000881, 8000991, and 7700771.

If you are trying to move your items from Pending to Ready and you have not set your Franchise ID, you will see this error message:



The screenshot shows an error message dialog box. At the top, there are two 'Select an Action' buttons. Below the buttons, the text reads: 'Status could not be changed for the following items:'. Below this text is a table with two columns: 'Item' and 'Reason'. The table contains one row with the item 'Test 1' and the reason 'Action not allowed - Must enter Franchise ID in Sale Details'. At the bottom of the dialog box is a 'Close' button.

Item	Reason
Test 1	Action not allowed - Must enter Franchise ID in Sale Details

- If you have only one Franchise ID, you will still be required to select it in the drop down
- If you have more than one Franchise ID, you will be able to select from the drop down whichever ID you would like associated to that sale.

- 
- 
- This is just for informational use below.
  - If your Franchise ID is not correct, please contact [CTBidshelp@caringtransitions.com](mailto:CTBidshelp@caringtransitions.com)
  - Located in the 'Location Details' for all locations is the Franchise ID field, this is for Admin use

Location Details

Franchise ID # \*  
Please enter value

Location Title \*  
Test store

Brief Description \*  
Testing purpose only

- Any, and all, Franchise ID numbers will be entered here.
  - **If an Owner has one Franchise ID number** (they have purchased one Franchise Territory and have been issued one number).
    - Enter that number into this field
  - **If an Owner has more than one Franchise ID number** (they have purchased more than one Franchise Territory and have been issued more than one Franchise ID number, and those territories do not have a separate CT name or CTBIDS name)
    - Please enter the 'Master' ID number **FIRST**, then add other added territory Franchise ID numbers after this number by separating the numbers with a comma.

⚠ When entering in more than one Franchise ID number for multiple territories under one CTBIDS Auction Location Details, whichever number you enter **first** will auto-populate into the "Franchise Master ID" second field box (that second field box will only appear when more than one Franchise ID number is being entered).

Test Location

Location Details

Franchise ID # \*  
36099,36100

Franchise Master ID \*  
36099

Location Title \*  
Test Location

**What is my Master Franchise ID number?**

This will most likely be the first Franchise ID you were issued for that location.

If you purchased surrounding territories that will now be associated with the original location (and auctions will be held under the same Location Name), they will follow after that first original ID in the Franchise ID Field.

- If a second, third, fourth, and so on.... territory is purchased to expand, this field can be edited to reflect the additions.
- If two or more **separate** territory locations are owned, meaning, each have their own CTBIDS Location page and run separate auctions:
  - They were each issued a Franchise ID, that is what is entered into their separate Location Details pages.
    - If more territories are purchased to go with one of those locations, be sure to enter the added Territory Franchise ID to the correct Location.


## Enter Your Auctioneer License

To enter your auctioneer license, please follow the steps listed below:

1. Sign into [seller.CTBids.com](https://seller.CTBids.com)
2. Go to the Locations tab on the left
3. Search your location
4. Select the Pencil Icon to the left of your name
5. Scroll to the Auctioneer License field at the bottom and add your License #
6. Select the Save button

## Field: Location About

The Location About field is a text field that allows you to describe your location to users of [CTBIDS.com](https://www.ctbids.com).

 Tip: Make your location description brief but meaningful to users of CTBIDS. For example:

“We provide trusted liquidation services to clients in the greater *city* area, including offering a wide variety of items to prospective customers in our online store.

We pride ourselves on running a great online store with remarkable customer care. Feel free to contact us with questions on items listed for sale, or for a free consultation on your senior relocation, downsizing or estate sale needs.”

# Editing Location Information

Application: **Seller CTBIDS**

---

Within Seller CTBIDS we can edit and update our location information. Location information is used a wide variety of places but the primary consumer of location information is CTBIDS users through the [CTBIDS.com](http://CTBIDS.com) application.

To edit your location information in Seller CTBIDS, sign in to Seller CTBIDS and go to the “Locations” menu item on the left-hand side of the application. Type in your location, click the ‘Search Icon’ and then click the ‘Pencil Icon’ to edit your location settings.



Your location should be displayed in the provided list. If you are an Administrator in additional locations, those locations will also be listed here.

Select the edit icon located to the right of the location in the list (its a pencil in a square). When selected, the edit location page will be displayed.

Location Details	Settings & Defaults
Location Title * Test Location	Time Zone * Eastern Time
Brief Description * <small>Please enter value</small>	PayPal Email * CTBIDSsupport@CaringTransitions.com
Contact Name * <small>Please enter value</small>	Google Code
Location Email * Email@email.com	FB Pixel
Location Phone * (555) 555-5555	SKU Processing <input type="checkbox"/> Use Automatic SKU's <input type="checkbox"/> Apply Tax On Buyers Premium <input type="checkbox"/> Send Copy of Invoices
External Website * CaringTransitions.com	Item Receipt Methods * <input type="checkbox"/> Pickup <input type="checkbox"/> Delivery <input checked="" type="checkbox"/> Shipping
Country * USA	ctbids.com url https://buyeruat.ctbids.com/estate-sales/catalinablank/4
State * Ohio	
City * Cincinnati	
ZIP * 45242	
About * Test	

Locations have many fields that can be edited on this page. Please note, the “Save” button will only be selectable when all required fields contain information.

The editable fields for a location include:

- **Location Title** - [visible to the public] The location title is displayed in [CTBIDS.com](https://www.ctbids.com) everywhere your location is referenced. For example, “Caring Transitions of Eugene/Springfield”
- **Brief Description** - [visible to the public] A brief description of your location, used as a tagline and often in conjunction with the Location Title. For example. “Serving the Eugene and Springfield Oregon Areas.”
- **Contact Name** - [visible to the public] The contact name can be the name of a person or a generic name that people see through [CTBIDS.com](https://www.ctbids.com). It can be the Owner, a staff member, or even a generic name like “Sales” or “Support”.
- **Location Email** - [visible to the public] The location email is the email address that is provided to users of [CTBIDS.com](https://www.ctbids.com) to contact your location. It can be a direct email address, like [someperson@caringtransitions.com](mailto:someperson@caringtransitions.com) or an email group/list such as [salesupport@caringtransitions.com](mailto:salesupport@caringtransitions.com).
- **Location Phone** - [visible to the public] The location phone number is provided to users of [CTBIDS.com](https://www.ctbids.com) to contact a representative of your location. If you use a calling service, put their number here.
- **External Website** - [visible to the public] The link provided in the external website field is provided to [CTBIDS.com](https://www.ctbids.com) users to direct them to your location website. For example

[www.caringtransitionsofeugene.com](http://www.caringtransitionsofeugene.com)".

- **Country** - The location country should be the country where your location is located. [CTBIDS.com](http://CTBIDS.com) is a global environment so identifying your country helps identify currency, shipping, and representations in other third party applications. Select your location's country by using the dropdown provided.
- **State** - The state is your physical location address state. Select your state by using the dropdown provided.
- **City** - When a state is selected, a list of cities are provided in the dropdown. Select your physical location address city.
- **Zip** - Enter your locations physical zip code (postal code).
- **About** [visible to the public] - The text in the about field supports more characters than the Brief Description field and is presented to the users of [CTBIDS.com](http://CTBIDS.com) to elaborate on your location.
- **Time Zone** - Select the timezone of your location. This timezone setting will be applied to all sales created for your location. Timezones are used throughout the entire CTBIDS ecosystem. We use these timezones when saving information such as sale starts, item closings, etc.
- **PayPal Email** - Payments made through [CTBIDS.com](http://CTBIDS.com) are done using PayPal. Each location has their own PayPal account and this field requires you to provide the email address for the PayPal location in order to receive payments.
- **Google Code** - All location will now be using Google Analytics and have been provided a code to use in websites, which has been entered in this field. This code is activated when [CTBIDS.com](http://CTBIDS.com) users view pages and items that are related to your location. Please Do Not Remove this code unless otherwise asked to do so. There will be more information to come of this in the future. If you require assistance with Google Analytics please reach out to: [marketing@caringtransitions.com](mailto:marketing@caringtransitions.com).
- **FB Pixel** - If you use Facebook pixels for tracking people between [CTBIDS.com](http://CTBIDS.com) and Facebook then add that pixel value here. The Facebook pixel is processed in [CTBIDS.com](http://CTBIDS.com) web pages and items similar to the Google Code.
- **Use Automatic SKU's** checkbox - If your location does not use patterned SKUs and you would like all items to have a SKU automatically given when an item is created then select this checkbox. You can always override an automatically generated SKU.
- **Apply Tax on Buyer's Premium**- Creates a default setting on the sale setup, so that it will automatically apply taxes to the BP for the sale

- **Send Copy of Invoices-** Checkable box to enable all sale invoices to be BCC'ed to an email of choice for keeping records of
- **Item Receipt Method-** Checkable boxes to enable how the customers will receive their item. There will be 3 options to chose from, you can choose as many as you want but at least one IRM must be chosen in order to save your Locations settings.

You can always review the methods each customer selected when you select a Pickup Report for your sale

- **Pickup** - Buyer will come in and pickup their items during designated pickup time
- **Delivery** - If you have a delivery option available, please select this, it is separate from shipping
- **Shipping** - Shipping an item(s) to a customer at a cost you determine

# Editing Location Templates

Application: **Seller CTBIDS**

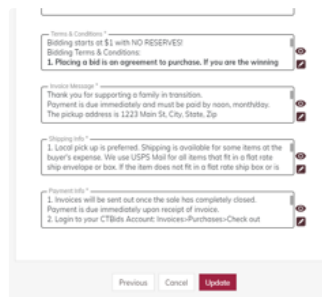
---

Location templates are pre-loaded information to be used in your sales for Terms and Conditions, Invoice Message, Shipping Information and Payment Information.

Access the location templates by following the steps below:

1. Sign in to your Seller account
2. Click 'Locations'.
3. Click 'Location Templates'.
4. Select the 'Eye' icon to view the defaulted information and the 'Pencil' icon to edit. You will need to edit your location templates to update information specific to your location. These templates will be populated into every sale you create.

You can view the templates within your sale by selecting the 'Pencil' icon to edit and navigating to the 'Settings' tab of the sale. Here you can see the templates pre-loaded into the sale details. Select the 'Eye' icon to view or the 'Pencil' to edit if you wish to change the templates for a particular sale only.



When entering generic information into the Invoice Message template, please be sure to include what a customer can expect for BOTH Pickup and Shipping.

- You can include standard pickup information. Then when creating the sale you can just edit the sale settings to include the date/time and any links for signups
- If you use Shipping Saint -this can cover both shipping and pickup information as this process will always be the same for every sale. Please be sure it is clear that all communication will come from Shipping Saint as an outside communication and will not be issued from CTBids.
- You should outline any shipping specific information -customers should not have to return to the item listing to find this information. This should all be included in your invoice messaging.

- How long it takes to receive a shipping invoice
- How long it takes to ship after paying a shipping invoice
- Who to contact with Shipping questions -you, not CTBids Help
- How they will receive tracking information

## Editing Location "About" Information

To edit the "About" section for your Seller Location, do the following:


1. Sign in to your Seller account
2. Select 'Locations' from left-side menu
3. Find your location
4. Click the 'Pencil' icon to edit
5. The 'About' section is found at the bottom left of the page
6. Click 'Save' when finished

## Fields: Staff & Agent

### Field: Staff & Agent Status

The Staff & Agents Status dropdown field allows you to activate or deactivate existing location users. When a user is inactive, they will not have access to your location functionality in the Seller CTBIDS website or CTSeller NG mobile app.

When creating a new Administrator, Staff, or Agent the status of the user will remain inactive until the user has validated their email address and, if necessary, creates their password for Seller CTBIDS.

-  When using part time Staff or Agents don't forget to deactivate the users at the completion of their obligations. If they perform work at a later date you can always activate them again. This helps overall application security.


---

### Field: Staff & Agents Role

The Staff & Agents Role dropdown is where we specify the role that a new user will have when adding them to our location. Available roles to select from are:

- Administrator** - Administrators have access to all functionality and data within Seller CTBIDS website and CTSeller NG mobile app for your location.
- Staff** - Staff has access to Sales, Items, Invoices, Customers, and non-administrative reports within Seller CTBIDS website and CTSeller NG mobile app. Does not have permission to reply to messages on items from the Sale Dashboard (this requires Admin level access).
- Agents** - Agents have access to item creation only using the Seller CTBIDS website and CTSeller NG mobile app. Agents are also able to edit and add photos to a Pending or Ready item. Agents are not able to create a new sale. Does not have permission to reply to messages on items from the Sale Dashboard (this requires Admin level access).

The role for any current Administrator, Staff, or Agent can be changed at any time and takes effect at the users next sign in.

-  Staff & Agent Roles do not have the permission to reply to questions from customers from the sale dashboard (after selecting the eyeball icon). Replying to questions is assigned to only the Administrator Role.

---


**Field: Staff & Agents Mobile Phone Number**

The Staff & Agent Mobile field is where we specify the mobile phone number of the new Administrator, Staff, or Agent. This field is editable only during creating a new Administrator, Staff, or Agent. Once created, this field is no longer editable since the newly assigned user can edit and change their own mobile phone number within the application. If the user already has a Seller CTBIDS profile, this field is ignored and the mobile phone number of the user from their profile will be used instead.

---

**Field: Staff & Agents Email Address**

The Staff & Agents Email address field is where we provide an email address of the user we want to become an Administrator, Staff, or Agent at one of our locations. The email address is important when creating a new user as an email is sent to the new user with a link to validate their addition to your users.

 If a user already has a Seller CTBIDS account then this email address is used to connect that user to your location. If the email address does not exist in Seller CTBIDS, then a new user for Seller CTBIDS is created and that user will have to create a password before they can sign in to your location.

---

**Field: Staff & Agents First Name**

The Staff & Agents First name field is where you enter in the first name of the new Administrator, Staff, or Agent. This field is editable only during creating a new Administrator, Staff, or Agent. Once created, this field is no longer editable since the newly assigned user can edit and change their own profile within the application. If the user already has a Seller CTBIDS profile, this field is ignored and the first name of the user from their profile will be used instead.

---

**Field: Staff & Agent Last Name**

The Staff & Agents Last Name field is where you enter in the last name of the new Administrator, Staff, or Agent. This field is editable only during creating a new Administrator, Staff, or Agent. Once created, this field is no longer editable since the newly assigned user can edit and change their own profile within the application. If the user already has a Seller CTBIDS profile, this field is ignored and the last name of the user from their profile will be used instead.

---

**Field: Staff & Agents Location Dropdown**

The Staff & Agent Location dropdown allows you to identify to which location (if you administrate more than one location) the new Administrator, Staff, or Agent is to be assigned to. If you administrate only one location then this field will default to that location.

This field is only available when creating a new Administrator, Staff, or Agent in Seller CTBIDS. When editing already assigned Administrators, Staff, or Agents this field is not editable and displays the original selected location.

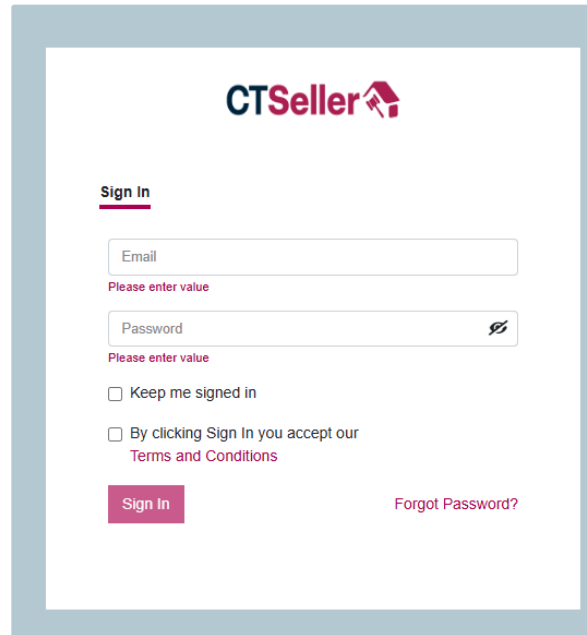
## Forgot Password and Password Requirements for CTBIDS Seller

Application: **Seller CTBIDS**

**Please Note: We do not have access to change or delete a password for Employees/Staff/Owners**

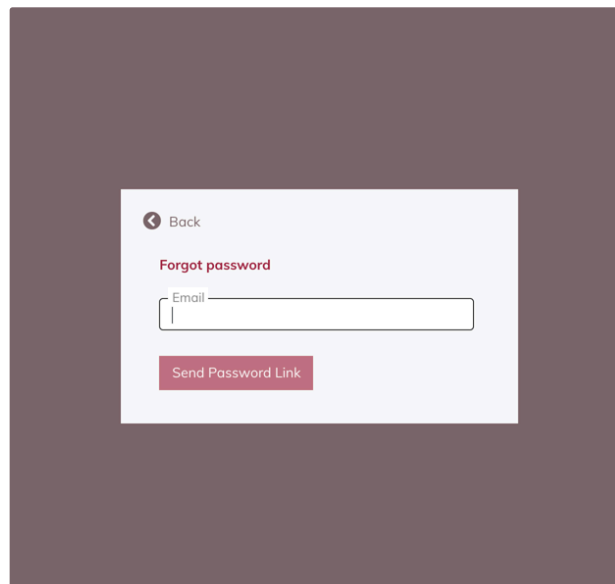
### To Change Your Password:

1. Go to [Seller.CTBIDS.com](https://Seller.CTBIDS.com) using a web browser
2. In the bottom right corner of the white box there is a link labeled **“Forgot Password?”**. Select this link.



The screenshot shows the CTSeller Sign In page. At the top center is the CTSeller logo. Below it, the text "Sign In" is underlined. There are two input fields: "Email" and "Password". Both fields have a red error message "Please enter value" below them. Below the password field is a checkbox labeled "Keep me signed in". Below that is another checkbox labeled "By clicking Sign In you accept our Terms and Conditions". At the bottom left is a red "Sign In" button, and at the bottom right is a red "Forgot Password?" link.

3. A small white box will appear with the label **“Forgot Password”** and a field to enter your [Seller.CTBIDS.com](https://Seller.CTBIDS.com) registered e-mail address. Enter your e-mail address in this field. When your e-mail address has been entered, select the button labeled **“Send Password Link”**.

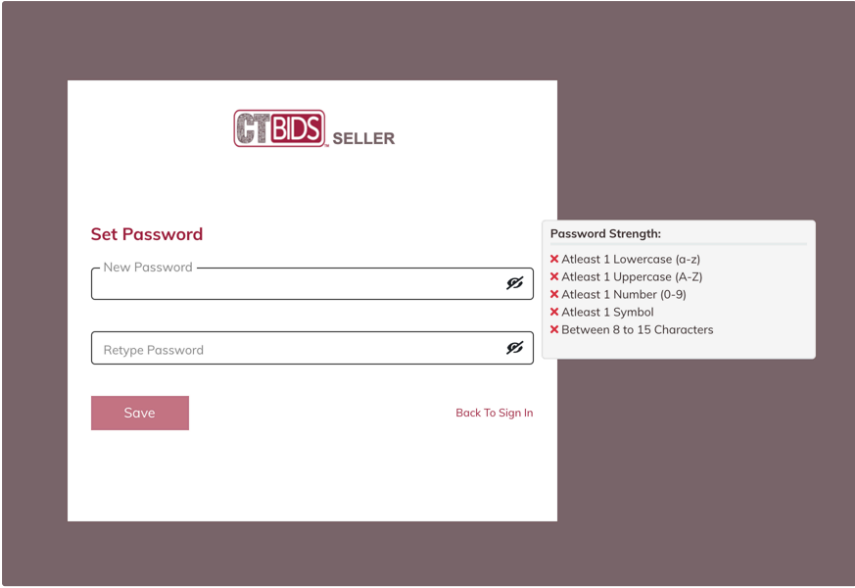


The screenshot shows a "Forgot password" dialog box. At the top left is a "Back" button with a left arrow. Below it is the text "Forgot password". There is an "Email" input field. Below the input field is a red "Send Password Link" button.

4. If the e-mail address exists for an active [Seller.CTBIDS.com](http://Seller.CTBIDS.com) user, an e-mail will be sent to that address that contains a link to a web page where you can change your password.

**i** The link to change your password within the e-mail is active for 15 minutes after being sent. If we were not able to select the link in time, just repeat steps 1-4 to obtain a new link.

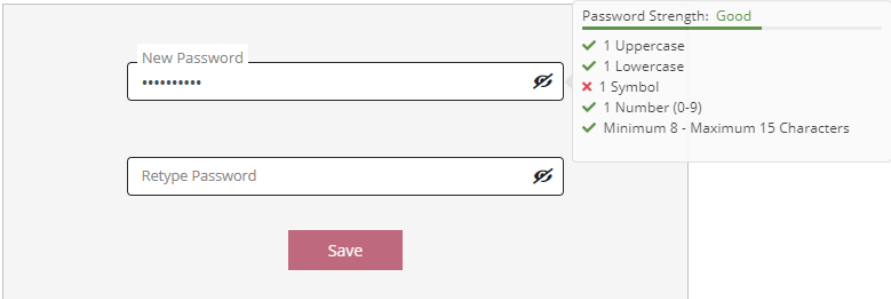
5. When the link in the e-mail has been selected, a web page with a white box labeled “**Set Password**” will be displayed in a web browser. Enter a new password according to the guidelines presented and select the button “**Save**”.



That’s it! You should now be able to sign in to [Seller.CTBIDS.com](http://Seller.CTBIDS.com) with the email address and new password.

**Password Requirements:**

As you type a new password, the password integrity rules will apply. Symbols that are accepted are !@#\$\$%^&\*



## How to create a new staff, agent, or administrator for your location?

---


Within the [Seller.CTBIDS.com](https://Seller.CTBIDS.com) application you can add users to your location which allows them access to your location information. Such users can have one of three different roles:

Administrators, Staff and Agents

- **Location Administrators** have full access to your location information including managing other users, your location data, sales management, item management, invoice management, customers, and all location reports. Location Administrators can be added and removed (inactivated) from your location with one exception, the original Location Administrator can not be inactivated (this is usually the first administrator added to your account).
- **Staff** can be employees, temporary help, or consultants who need access to creating sales, managing items, processing invoices, and pulling reports.
- **Agents** are limited to sale item creation only and have full edit capabilities for sale items.

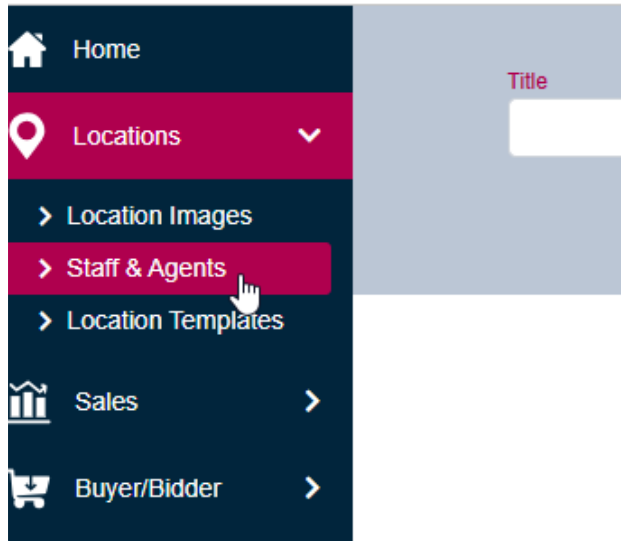
Any [Seller.CTBIDS.com](https://Seller.CTBIDS.com) user can be associated with one or more locations and have different roles per location.

The role for any current Administrator, Staff, or Agent can be changed at any time and takes effect at the users next sign in.

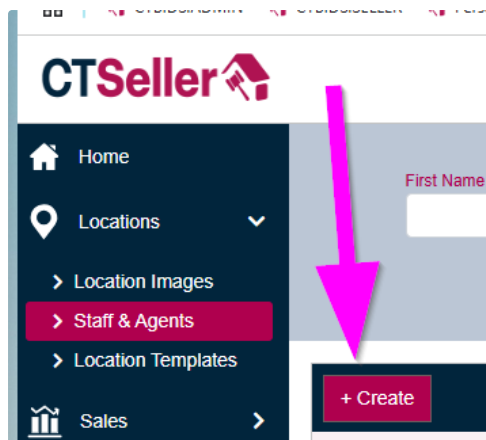
 Staff & Agent Roles do not have the permission to reply to questions from customers from the sale dashboard (after selecting the eyeball icon). Replying to questions is assigned to only the Administrator Role.

To add new staff, agents or Administrators to your location

1. Log into the Seller Site
2. Go to the Locations Tab and select the 'Staff & Agents' sub-tab



3. Select the 'Create' button



4. Please enter all information for the new user into the fields in popup.
  - a. The email entered will be the email that they will use to log into the Seller site and App with.
  - b. Once you select 'save' an email will be sent to the new staff members email address where they will need to click to verify and create a password. This is time sensitive, so please make your staff aware of this emails so they can take action.

Location \*  
Select Locations

First Name \*

Last Name \*

Email \*

Retype Email \*

Mobile \*

Role \*  
Select Role

Cancel Save

When a person is added to your location through [Seller.CTBIDS.com](https://Seller.CTBIDS.com), the form requires you to provide or select the following information:

- **Select Location** - If you are connected to more than one location through your [Seller.CTBIDS.com](https://Seller.CTBIDS.com) account, you will need to select the appropriate Location for which to assign the new person. If you are connected to only one location, this will default to that location for you.
- **First Name** - Enter the person's first name here. If the person you are adding already has a [Seller.CTBIDS.com](https://Seller.CTBIDS.com) account, their existing profile name will be retained. If the person is NOT already a user in [Seller.CTBIDS.com](https://Seller.CTBIDS.com), then this First Name will be the First name of that user until they change it.
- **Last Name** - Similar to First Name, this will be a new user's last name if their profile does not already exist in [Seller.CTBIDS.com](https://Seller.CTBIDS.com).
- **Email** - Enter the person's email address. [Seller.CTBIDS.com](https://Seller.CTBIDS.com) uses this email to first see if a user exists with this email address in [Seller.CTBIDS.com](https://Seller.CTBIDS.com). If it does, the system will use this to connect that person to your location. If the email address is not assigned to a user of [Seller.CTBIDS.com](https://Seller.CTBIDS.com), then this email address will be the person's sign in address and will need to be validated before the person can sign in to [Seller.CTBIDS.com](https://Seller.CTBIDS.com). In the event the person is a new user, they will receive an email to validate their email account - please see steps below

- **Mobile** - Enter the person's mobile number here. If the person is already a user of [Seller.CTBIDS.com](https://Seller.CTBIDS.com), the system will use their current mobile number and will not be changed by this field value.
- **Role** - Select one of the three roles defined above (Administrator, Staff, or Agent).

- i** After information is entered, the employee must set their password via their email
1. The employee must go to their email that was entered in to create their account, and activate their account by setting their password in the link provided in the email
    - a. If the employee does not access their email in the allotted time given, the owner can go in and change their status to 'Active' and the employee should be able to click 'Forgot Password?' button during login to set a new password
  2. Once the password has been set, their account should automatically change to 'Active'
  3. **The staff member does NOT need to create an account with [CTBids.com](https://CTBids.com) – this is completely separate website, and they only need setup for [Seller.CTBids.com](https://Seller.CTBids.com)**
  4. Please note that you can only edit their role and status once entry is completed
- We do this to ensure that we do not inadvertently activate users with access to our information.

**Please Note: We do not have access to change or delete a password for Employees/Staff/Owners**

- i** If you have an employee who is already in the system because they have worked, or still works, with another location please be sure to enter in the email and phone number that they have already established on the site. They already have a profile setup, you will be adding them to your location with this creation. This staff member will use their existing credentials to sign in.
- For this specific scenario, after you have created them and saved, please click on the pencil icon to open their information and change their status from inactive to active.

**If a new staff member did not act in time to create their password and their link has now expired:**

- Please go back to the Locations Tab
- Select Staff & Agents

- Search them with the filters
  - Click the pencil icon to open their details
  - Select the status dropdown and change them to 'active'
  - The staff member can now select the forgot password option on the Seller site sign in page to be sent a new email to set a password.
- 

**EXAMPLES of staff members who work at multiple locations:**

Sally is a consultant who works for three different locations - North Caring Transitions Location, South Caring Transitions, and West Caring Transitions. For the North Caring Transitions, Sally helps John, the Owner, with all administrative activities. Sally is added to John's location in the role of "Administrator" so that when Sally signs in to [Seller.CTBIDS.com](https://Seller.CTBIDS.com) she has access to John's location as an Administrator.

Sally also works with Tina, the Owner of South Caring Transitions, as a Sale Processing Consultant. In this capacity, Sally is given the role of "Staff" so she can access all sale management for Tina without accessing Tina's administrative information.

Sally has taken a small part-time job helping Scott process one of his sale by creating items (either via the CTBIDS Seller mobile application or via the [Seller.CTBIDS.com](https://Seller.CTBIDS.com) website). In this case, Scott has added Sally to his location in the role of "Agent".

## Changing Your Location Profile Picture

To change your profile picture please see the following steps

1. Sign in to Seller
2. Select the Locations tab on the left hand side
3. Select Location Images
4. Select the Change Image link under the Profile segment
5. Select which photo you wish to upload
6. Select the Save button

## How To Edit/Delete Administrators, Staff, and Agents

Within the [Seller.CTBIDS.com](https://Seller.CTBIDS.com) application you can edit and delete users from your location.

Search for the user by entering in their information in the search bars. Once found, select the 'Trash Can' icon to delete.


Role	Name	Email	Location	Status	Last Modified	
Administrator	Hollihan, Tony	thollihan@caringtransitions.com	CT Test Location - Nothing Really for Sale	Inactive	11/09/2021 11:12 AM EST	

After selecting to delete user, you will get a pop up window to confirm your selection.

Are you sure you want to delete this Administrator ?

After selecting yes, you will get a green confirmation that the deletion was successful.

Are you sure you want to delete this Administrator ?

 Administrator has been deleted successfully

If the user has access to more than one location, you will get an error, and only Admin will be able to delete this user.

Are you sure you want to delete this Staff ?

User cannot be deleted as the user belongs to multiple locations

To edit the user, select the 'Pencil' icon

Role	Name	Email	Location	Status	Last Modified	
Staff	tonc.kay	kaytonk4755@gmail.com	CT Test Location - Nothing Really for Sale	Active	01/07/2022 10:34 AM EST	

Once selected, you will get a pop up window to edit the users information. The only thing you will be able to edit is their role, and their status. Hit save when completed.

Location \*  
CT Test Location - Nothing Really for Sale

First Name \*  
kay

Last Name \*  
tonc

Email \*  
kaytonk4755@gmail.com

Mobile \*  
(937) 555-1234

Role \*  
Staff

Status \*  
Active

Cancel

Save


## Changing your Account Email Address

Application: **Seller CTBIDS**

Email is an important piece of data for your account. We sign in with them and we receive communications through them. As a result, CTBIDS email addresses must be validated before they can be used. Follow the instructions below to change your account email address in [Seller.CTBIDS.com](https://Seller.CTBIDS.com).

### To Change Your Email Address:

1. Sign in to [Seller.CTBIDS.com](https://Seller.CTBIDS.com)
2. Select the Account menu icon in the upper right-hand corner of the screen. This icon is the one that has 9 red dots and is located to the right of the sign out button.
3. From the sub menu, select the “My Profile” menu item which will open the My Profile data form.
4. Select the yellow button labeled “Change Email”. When we select this button, a small white dialog will be displayed where you can type in a new email address. After typing, select the button “Submit”.
5. An email will be sent to the new email address for verification. In this email there is a link that validates this email address. Select this link within 15 minutes to validate this email account as your primary email address in [Seller.CTBIDS.com](https://Seller.CTBIDS.com).

 The link to validate your email address within the e-mail is active for 15 minutes after being sent. If we were not able to select the link in time, just repeat steps 1-5 above to obtain a new link.

6. Selecting the validation link in the email will open a confirmation page in your browser and the email on your account has been successfully changed.

## Access and Edit My Profile

Within Seller CTBIDS every user has a profile that can be edited. We can add a picture or avatar of ourselves, change our first and last name, change our email address, and update our phone number.

### To Access and Edit Your Profile:

1. Sign In to the Seller CTBIDS application
2. In the upper right-hand corner of the web page is a section that displays your first and last name and your current profile image. To the very right is a square icon with several red dots. This icon is the menu we will use to go to the “My Profile” edit page. Hint: we can also select our profile image to open the “My Profile” page as well.



3. You may edit your first name, last name, and phone number and additionally upload a profile picture using this page. You can also change your email address but keep in mind that email addresses MUST be validated before they can be used to sign in to Seller CTBIDS.

## Issue: Cannot Edit Other User Profiles

When an Administrator, Staff member, or Agent is created for your location, [Seller.CTBIDS.com](https://Seller.CTBIDS.com) either creates a new user if the email address is not found in [Seller.CTBIDS.com](https://Seller.CTBIDS.com) or links your location and role to an existing [Seller.CTBIDS.com](https://Seller.CTBIDS.com) user. Some important things to keep in mind:

1. All user accounts in [Seller.CTBIDS.com](https://Seller.CTBIDS.com) allows the account owner to edit their own profile.
2. Users cannot modify the profile of other users in [Seller.CTBIDS.com](https://Seller.CTBIDS.com).

As a result, when you go to edit an existing Administrator, Staff, or Agent for your location the profile fields, first name, last name, email address, and mobile phone number will not be editable. **Profile changes can only be made by the users themselves.**

## Edit a Sale

To edit settings in your sale before it starts or while it is active, do the following:

1. Sign in to your Seller account
  2. Click on 'Sales' on the left-side menu
  3. Use the search functions to find the sale
  4. Click on the 'Pencil' icon to edit sale settings
  5. The address that you enter should be the address of the pickup location as it will show as the pickup address on your invoices for that sale.
  6. The email that is entered here is the email address that will receive all the questions asked by customers when they choose to use the 'Ask Seller a Question' button.
- 

Sale details can be edited before and during an active sale. Note: once a sale begins, the start day/time cannot be changed.

Any items that are in 'Ready' status will be active in the sale when the start day/time begins. 'Pending' items will not be shown in an active sale.

There is no way to manually edit individual listing times now, everything is edited on the sale level for those details.

## Changing a sale end date

1. Changing a sale end date after bids have been placed will render a warning message “Please Note: Changing the sale end date may impact payment processing due to Customer card expiration dates”
2. Sellers will not be able to process the payment if the default card used to place the bid during the original sale end date is expired

## Item Reserves

You can list the reserve price in the description of the item. This used to be encouraged on our Legacy site for reserves to be included in the description with text similar to this wording, “the reserve is \$, however, please make your highest bid as we will consider selling for less than the reserve price should it not be met.”

Please note - if a reserve has not been met, their Max Proxy will automatically be their bid when placed. customers will be able to ‘bid against themselves’ by placing bid after bid if they choose to. Once a reserve has been met, normal bidding will take place (Max Proxy, etc.) If the reserve price is not met, the item will not be sold.

# Cloning Items/Group Clone

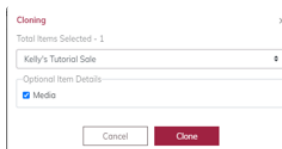
Application: **Seller CTBIDS**

---

Cloning is a helpful feature to duplicate an item from a previous sale into an upcoming sale.

Items can be cloned individually or in a group. To clone an individual item, do the following:

1. Sign into your Seller account.
2. Select 'Items' from the left-side menu.
3. Search for the item you would like to clone using the filters.
4. Once the item populates, select the 'square' icon. A window will pop up to ask you what sale you would like to clone the item to and if the media details are required.
5. Select 'Clone' and the item will be cloned to the designated sale.
6. You can now clone an item to the same sale it was created in, so that you can have duplicate items when needed.



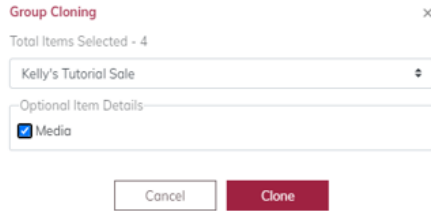
7. Cloning items will reset the Item Receipt Method settings to the sale level settings of the newly assigned sale.
  - a. For example: Item #1 is in Sale A. The IRM methods selected at the item level for Item #1 are pickup and shipping. I clone Item #1 to Sale B. Sale B's IRM settings are pickup, shipping, and delivery. When I go to edit the settings for Item #1 in Sale B, all of the IRMs are automatically selected.

To clone a group of items, do the following:

1. Select 'Items' from the left-side menu.
2. Search for items you would like to clone using the filters.
3. When items populated, use the boxes to the left of the items to select various items or the box within the headings bar to select all items.
4. After items are selected, click on the red 'Group Cloning' button in the bottom right of your screen.



5. A window will pop up to ask you what sale you would like to clone the items to and if the media details are required.



Group Cloning ×

Total Items Selected - 4

Kelly's Tutorial Sale ▾

Optional Item Details

Media

Cancel Clone

6. You can now clone items to the same sale it was created in, so that you can have duplicate items when needed.

You cannot clone items from a sale into a sale at a **different** location. This error can occur for staff members who work at multiple locations. Cloning items will reset the Item Receipt Method settings to the sale level settings

- i The SKU number for a cloned item will be the same SKU as the original item with the word 'Clone' in front of it.

## Sale Pickup Date

The Sale Pickup Date Field will now be **mandatory** when you are moving items from Pending to Ready. You are not required to enter this information in during sale setup, but you can enter it in at that time if you know the date. This will not be on the Item Level Settings, it is on the Sale Level Settings.

Please note: This is not visible to the buyer, it is only for internal use at this time. You will still need to enter in the Pickup Information like you normally would in the Pickup Information Field.


The screenshot shows the 'Sale Settings' form with the following fields and values:

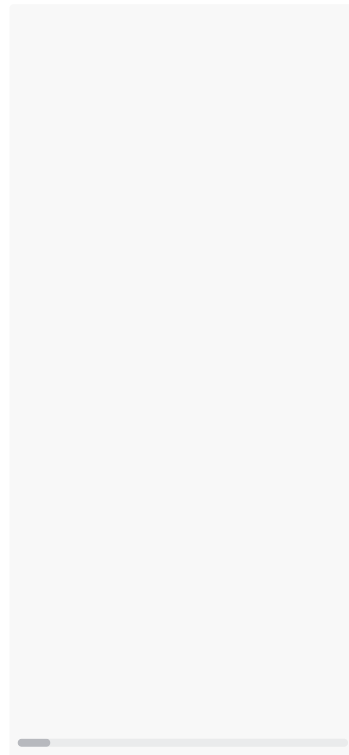
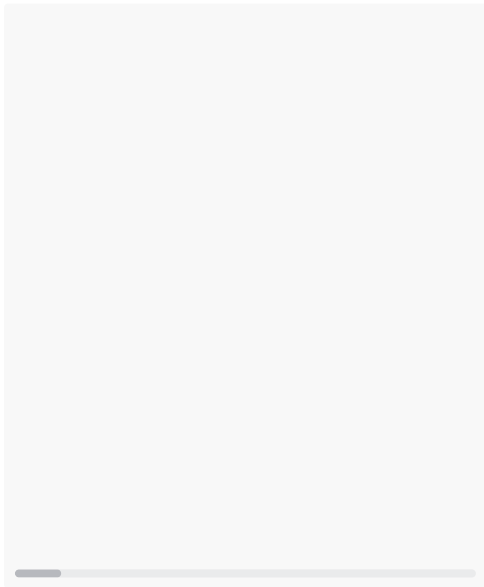
- Time Zone \*: US/Eastern
- Start Time \*: 06/04/2024 08:00 AM
- End Time \*: 06/04/2024 09:00 AM
- Close Duration (minutes) \*: 90 minutes
- Tax (%) \*: 0.000
- Buyers Premium (%) \*: 0.000
- Apply Tax On Buyers Premium
- Item Receipt Methods \*:  Pickup  Delivery  Shipping
- Pickup Information: 500/500
- Scheduled Pickup Date \*: 06/07/2024
- Sale Provenance \*: 749/750
- Sale Provenance: 0

**i** If you have more than one Pickup Date - please enter the latest date of pickup that you are offering.

## Item Condition Field

Item Condition will now be a mandatory field when creating an item. You will have a drop down menu to choose from. This will be for both on the Seller App and [Seller.com](#)

 Please note: This will NOT be visible to the buyer, this is only for internal use



# Item Receipt Method- As a Seller

## 1. Location Level Settings

The IRM settings that are saved at your location will affect the settings available at the sale and item levels. If you wish to always have all IRMs available at the sale level, then check all the IRMs at your location level. In the current state of the Location level settings, there is a Shippable Items checkbox that creates a default setting on the sale setup. This setting has been removed and any item marked shipping or delivery will automatically have the Shippable icon displayed in the sale. You cannot save your Location template without selecting at least one IRM.

SKU Processing

- Use Automatic SKU's
- Apply Tax On Buyers Premium
- Send Copy of Invoices

Item Receipt Methods \*

Pickup  Delivery  Shipping

## 2. Sale Level Settings

The IRM settings that are saved for your sale will affect the settings available at the item levels. If you wish to always have all IRMs available at the item level, then check all the IRMs at your location level and sale level. In the current state of the Sale level settings, there is a Shippable Items checkbox that creates a default setting on the item level setup. This setting has been removed and any item marked shipping or delivery will automatically have the Shippable icon displayed in the sale. You cannot save your Sale settings without selecting at least one IRM.

Apply Tax On Buyers Premium

Item Receipt Methods \*

Pickup  Delivery  Shipping

## 3. Item Level Settings

The IRM settings that automatically render are based on the settings that are selected at the Sale level. In the current state of the Item level settings, there is a “Item is shippable” checkbox that turns on the “Item is shippable” icon on the buyer site. This setting has been

removed and any item marked shipping or delivery will automatically have the Shippable icon displayed in the sale. You cannot save your item settings without selecting at least one IRM.

#### Item Settings

Item is featured  Item not taxable

Item Receipt Methods \*

Pickup  Delivery  Shipping

4. During a sale creation, you will have the option to create Item Receipt Methods (IRM). The options that are available are dependent on the options selected at the Location Level Settings.
  - a. **Pickup** - Customer will come in and pickup their items during designated pickup time
  - b. **Delivery** - If you have a delivery option available, please select this, it is separate from shipping
  - c. **Shipping** - Shipping an item(s) to a customer at a cost you determine



When you are creating items in a sale, they will automatically render the IRMs that were selected at the sale level. If you go back to the Sale level settings and edit/change the IRMs offered after some items have already been created, the update will NOT affect items that were previously created in the sale but only the items moving forward.

Example:

I created items on the app when the sale settings were set to pickup and shipping and some items had both shipping and pickup checked, then later I updated the sale settings to pickup only (deselected shipping). New items I create will only show pickup selected, but the previous items, that were created while both were an option, still retained it's shipping and pickup IRM status.

In the screenshot below you will see that on the item created when shipping and pickup was initially set at the sale level but the sale IRM settings were later changed to only Pickup, shipping is still selected but is now 'grayed out'.

\*If you change your mind and want to now deselect shipping from this item, it will need to be done on the CTBids Seller Site and cannot be done on the seller app. \*

[← Edit Item](#)


---


Description >


---

Item Type \*  
Auction


---

  
 Capture Photo

  
 Capture Video

  
 Gallery

You can upload a maximum of 39 Images/Videos per Item

  
 Display Image

Item is Featured

Item Not Taxable

Item receipt method \*

Pickup

Delivery

Shipping

Starting Price (\$) \*  
1.00

---

Reserve Price (\$)

✔ Please note selecting at least one IRM for your sale is mandatory for it save.

Item Receipt Methods

Pickup  Delivery  Shipping

500/500

Pickup Information

500/500

Sale Provenance \*

### During a Live Sale

⚠ You can add or remove IRMs **as long as there are NO BIDS placed on the item** in a live sale.

Once bids have been placed on an item you cannot select to add another IRM option or remove one.

Example 1: You notice after the sale went live that an item is listed for pickup only and you want the item to also be shippable. The item has bids placed. -You will not be able to add shipping as an IRM to the item since bids are already placed.

Example 2: You notice after the sale went live that an item is listed for pickup only and you want the item to also be shippable. The item does not have bids placed. -You will be able to select and add shipping to the item.

Options for Example 1:

1. -Retract bids, place the item in pending, add the additional IRM, and then place the item back into Ready so bidding can start again.

---

### Cloning Items or Moving an Item From One Sale to a Different Sale

Cloning items or moving an item from one sale into a different sale will reset the Item Receipt Method settings to the sale level settings of the newly assigned sale.

For example: Item #1 is in Sale A. The IRM methods selected at the item level for Item #1 are pickup and shipping. I clone or move Item #1 to Sale B. Sale B's IRM settings are pickup, shipping, and delivery. When I go to edit the settings for Item #1 in Sale B, all the IRMs are automatically selected.

---

### After the Sale Closes

Once your sale closes and invoices are generated, the item receipt method will be auto populated on the invoice for each item. You do not have to direct the customer to select an IRM after invoices are generated. If a customer wishes to change the IRM, the seller/staff can go in and edit the method if the invoice has not been paid for. The IRM options available when a seller/staff edits an invoice are based on the IRM settings at the item level.

The screenshot shows a form for editing an invoice item. On the left, there is a red 'X' icon. The form contains a dropdown menu with 'Item 5' selected, followed by the item ID 'TCTD04HHBZ3Y'. To the right, there is a dropdown menu for IRM options with 'Pickup' selected. Below this dropdown, a list of options is visible: 'Pickup' (highlighted in blue), 'Delivery', and 'Shipping'. To the right of the IRM options, there are two price fields: '\$ 1' and '\$ 4.00'.

If a customer wants to surrender an item they won, and the seller creates an invoice for another customer who also bid on an item, the IRM option the customer choose when they placed the bid is what will render on their newly created invoice.

Example: Customer A bids on Item #1 and selects Pickup as their IRM. Customer B bids on Item #1 and selects Shipping as their IRM. Customer B wins Item #1, then wants to surrender it. Customer A wants Item #1. The seller creates an invoice for customer A and adds Item #1 to the invoice. When the newly created invoice is submitted, Pickup will automatically render as the IRM since that was the original option customer A chose.

## Item Receipt Method (IRM) Seller Tips

### Item Receipt Method Updates

Changes for Sellers/Staff	Changes for Customer
The item receipt method (IRM) will now auto populate on every invoice at the item level when the invoices are generated- owners will not have to wait for customers to choose an IRM after a sale closes.	Customers will have to select an IRM for every initial bid they place on an item.
It will be mandatory for all items to have at least one IRM (Pickup, Shipping, Delivery) selected. A location, sale, and item will not be saved in CTBIDS without at least one IRM selected at each level.	Customers will have to confirm their shipping address before placing an initial bid if they select Shipping or Delivery as their IRM.
IRM settings will be hierarchical – Location level settings will affect IRM options at the Sale level settings and Sale level settings will affect IRM options at the Item level.	Emails received about invoices will not prompt the customer to login into their account and select an IRM.
The Shippable Items checkbox will be removed from the Location, Sale, and Item level settings. Any item marked as Delivery and or Shipping will automatically have the “Item is Shippable” label render on the buyer site and app.	Customers will not have to return to their Invoice tab to select an IRM after the sale closes.

### How the IRM Update Impacts Sales

The IRM updates will ultimately make the checkout process smoother for sellers by minimizing the time spent waiting for customers to choose an IRM. To make this process as organized and quick as possible, new settings will be implemented. First, the IRM decision process will work in

a hierarchical fashion. This means that any IRM selected at the location level will auto populate the IRM choices at the Sale level, which will then populate at the Item level. You can deselect an IRM that was selected at the previous level, but you cannot add IRM if it is not selected at the previous level. Location level à Sale level à Item level. If you intermittently use all IRM options throughout your sales, it might be easiest to have all three options always selected at your Location level settings.

For example: At the Location level settings, I selected Shipping and Pickup as IRM options. Whenever I create a sale at this location, the Pickup and Shipping IRM options will be automatically selected at the Sale level. If I don't want Shipping as an option for this specific sale I can deselect Shipping at the sale level. If I want to add Delivery as an option at the sale level, I will have to update my Location Level IRM settings and select Delivery as an option. A sale cannot be saved unless one IRM is selected at the Sale level.

### **How the IRM Update Changes Bidding**

When a customer places their first bid on an item, a message will render that will prompt them to select an IRM. These options are based on that is selected on the Item Level details. If they return to the same item to place another bid, they will not receive an IRM pop-up message again. If all bids are retracted on an item, customers who bid on the item will have to select an IRM again. All other bidding logic is to remain the same.

### **After the Sale Closes**

Once a sale is closed and the invoices are generated, the IRM selected for every item won will appear on each item line. To maintain the invoice formatting, the IRMs will be abbreviated when the invoice is printed. P represents Pickup, S represents Shipping, and D represents Delivery. There will be a key on every printed invoice that explains the abbreviations. You do not have to direct the customer to select an IRM after invoices are generated unless all their bids were placed before the IRM update. If a customer wishes to change the IRM, the seller/staff can go in and edit the method if the invoice has not been paid for. The IRM options available when a seller/staff edits an invoice are based on the IRM settings at the item level.

If a customer wants to surrender an item they won, and the seller creates an invoice for another customer who also bid on the item, the IRM option the customer chooses when they placed the bid is what will render on their newly created invoice.

Example: Customer A bids on Item #1 and selects Pickup as their IRM. Customer B bids on Item #1 and selects Shipping as their IRM. Customer B wins Item #1, then wants to surrender it. Customer A wants Item #1. The seller creates an invoice for customer A and adds Item #1 to the

invoice. When the newly created invoice is submitted, Pickup will automatically render as the IRM since that was the original option Customer A chose.

If the item is being assigned to a customer who never placed a bid on that item, but won other items in the same sale and already has an invoice generated, no IRM will render when the item is added to the invoice. The seller can go back and manually add the IRM once it is agreed upon with the customer.

Example: Customer A wins Item #1. Customer B wins Items #2-4. Invoices are generated. Customer A wants to surrender Item #1 and Customer B wants to buy the surrendered item. When Item #1 is added to Customer B's invoice, no IRM selection will auto populate. Once the seller and customer agree upon a price and IRM, the seller can manually edit the IRM option for Item #1 on the invoice.

## **Training for Owners**

### **Location Level Settings**

The IRM settings that are saved at your location template will affect the settings available at the sale and item levels. If you wish to always have all IRMs available at the sale level, then you will need to check all the IRMs at your location level. In the current state of the Location level settings, there is a Shippable Items checkbox that creates a default setting on the sale setup. This setting has been removed and in the future state any item marked shipping or delivery will automatically have the Shippable icon displayed in the sale. You cannot save your Location template without selecting at least one IRM.

### **Sale Level Settings**

The IRM settings that are saved for your sale will affect the settings available at the item levels. If you wish to always have all IRMs available at the item level, then you will need to check all the IRMs at your location level and sale level. In the current state of the Sale level settings, there is a Shippable Items checkbox that creates a default setting on the item level setup. This setting has been removed and any item marked shipping or delivery will automatically have the Shippable icon displayed in the sale. You cannot save your Sale settings without selecting at least one IRM.

### **Item Level Settings**

The IRM settings that automatically render at the item level are based on the settings that are selected at the Sale level. In the current state of the Item level settings, there is a "Item is shippable" checkbox that turns on the "Item is shippable" icon on the buyer site. This setting has been removed and any item marked shipping or delivery will automatically have the

Shippable icon displayed in the sale. If you mark an Item Type as Onsite, the Delivery and Shipping options will automatically be disabled and the item will display as Pickup Only. You cannot save your item settings without selecting at least one IRM.

### **Cloning Items**

Cloning items will reset the Item Receipt Method settings to the sale level settings of the newly assigned sale.

For example: Item #1 is in Sale A. The IRM methods selected at the item level for Item #1 are pickup and shipping. I clone Item #1 to Sale B. Sale B's IRM settings are pickup, shipping, and delivery. When I go to edit the settings for Item #1 in Sale B, all the IRMs are automatically selected. If I want Item #1 to have the same settings it had in Sale A, I will have to manually deselect delivery.

### **Adding an Item Receipt Method After Items have been Created**

You might create a sale thinking you only want one IRM applied to the entire sale. After creating a handful of items, you may realize you want to add more than one IRM to an item in the same sale. You can add an IRM, without affecting any previously saved items, to a new item in this sale.

For example: A seller has a sale that consists of mostly furniture and extremely heavy items. They originally decided they want all items in this sale to be marked as pickup only. The seller/staff only checks Pickup as the available IRM. They create and save 100 lots of furniture. They realize the client had some jewelry they wanted to sell, and that this jewelry can be marked as pickup and shipping. The seller/staff can go back into the Sale Level settings and also check Shipping as an IRM. This will give the options of Pickup and Shipping of any future items created in the sale. Adding an IRM after items have already been created and saved will not affect the IRM options on those items. If they were marked Pickup only before, that will not change unless manually done so.

### **Bidding Scenarios**

#### **What Happens if the IRM Update is Implemented While My Sales are Live or in Pending?**

It is anticipated that many locations will have live sales or items in pending status when the IRM update is implemented. Below are documented scenarios that can happen, as well as what is to be expected and/or what steps you will need to take.

Scenario: My Sale is in Pending While the IRM Implementation Happens

1. If your sale is in Pending and you did not select any IRM at the sale level, all the IRMS will render Pickup Only when you move your Pending items to a Ready status.

2. It is strongly advised to review the IRM of every item, at each item level, and update as needed before changing the status to Ready.

Scenario: My Sale is Live and I Never Selected Any IRM at the Item Level

1. If you did not select any IRM at the item level and your sale is still live after the IRM update, those items will be marked as Pickup Only on the buyer sit

Scenario: My Sale is Live and I Selected “Item is Shippable” before the Update

1. The table below outlines what will render as IRM options based on what you chose at the sale and item level before the IRM update.

<b>Settings Checked in Pre-IRM Update</b>	<b>IRM Options that will Render for the Customer Post-IRM Update</b>
Shippable Items box at Sale Level Pickup box at Sale Level Delivery box at Sale Level Shipping box at Sale Level Shippable Item box at Item Level	Pickup Delivery Shipping
Pickup box at Sale Level Nothing selected at Item Level	Pickup Only
Nothing selected at the Sale Level Nothing selected at the Item Level	Pickup Only
Nothing selected at the Sale Level Shippable Item box at Item Level	Pickup Shipping
Shippable Items box at Sale Level Delivery box at Sale Level Shipping box at Sale Level Shippable Item box at Item Level	Delivery Shipping
Shippable Items box at Sale Level Pickup box at Sale Level Delivery box at Sale Level	Pickup Delivery

Shippable Item box at Item Level	
Shippable Items box at Sale Level Delivery box at Sale Level Shippable Item box at Item Level	Delivery Only
Shippable Items box at Sale Level Shipping box at Sale Level Shippable Item box at Item Level	Shipping Only

1. The “Item Is Shippable” and “Shippable Items” checkboxes will be removed at the Sale and Item levels after the update.

### **What Happens When Customers Place Bids in Sales that were Created Before the IRM Update?**

Scenario: Customer Places Bid in a Sale that Started Before the IRM Update

1. Customer will not have to select an IRM option before placing a bid if the IRM update has not been implemented yet.
2. If the customer wins this item after placing all their bid/bids before IRM update, they will have to return to their invoice and select an IRM even if the implementation happened.

Scenario: Customer Places Initial Bid in a Sale that Started Before the IRM Update, then Returns to Item After the IRM Update\_to Place Another Bid

1. If the customer is returning to the same item to place another bid after the IRM update has been implemented, they will not be prompted to select an IRM.
2. If the customer wins this item, they will have to return to their invoice and select an IRM.

Scenario: Customer Places Initial Bid After the IRM Update in a Sale that Started Before the IRM Update

1. Customer will be prompted to select an IRM before placing their bid.
2. If they win this item, they will not have to return to their invoice to select an IRM, as it was chosen when they placed their initial bid

Scenario: Customer Wins an Item that They Bid on Before the IRM Update and Another Item They Bid on After the Update (Same Sale)

1. Customer will not be prompted to select an IRM before placing an initial bid on an item before the IRM update
2. Customer will be prompted to select an IRM for the item they place an initial bid on after the update- this is the second item they are bidding on from the same sale
3. The hierarchical logic will apply for the item that was bid on before the IRM update. If Pickup was available as an IRM option for this item, it will automatically render Pickup on the invoice for that item. If Shipping and Delivery were the only options available, then Shipping will automatically render. These IRMs can be changed as long as the invoice has not been paid for. [IRM Job Aide \(AutoRecovered\) \(AutoRecovered\) \(1\).docx](#) [Training for Owners \(AutoRecovered\) \(1\).docx](#)

## Pending to Ready Status for Items (Activating Items)

Application: **Seller CTBIDS**

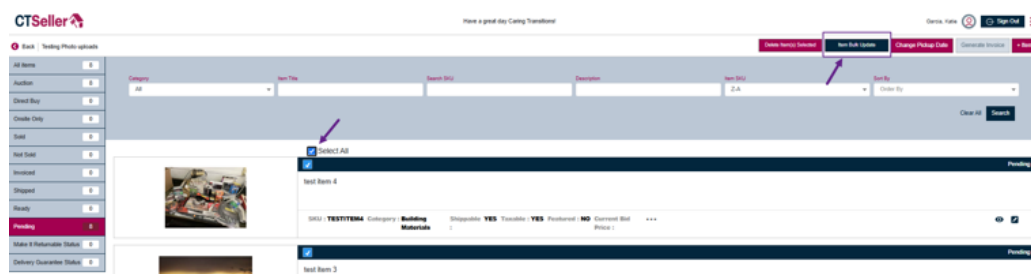
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To move items from 'Pending' to 'Ready' follow the steps below. This will activate the items in the sale to be live when the sale starts.

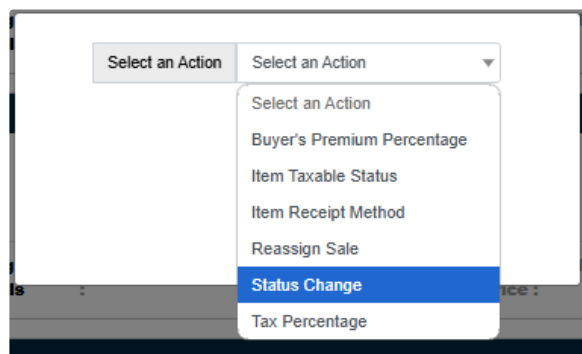
All items that are published from the mobile queue will have a status of 'Pending' and will need to be reviewed before setting the status to 'Ready'. *There are no longer mobile postings.*

When creating items from a computer, item status can be selected in the 'Detail' field.

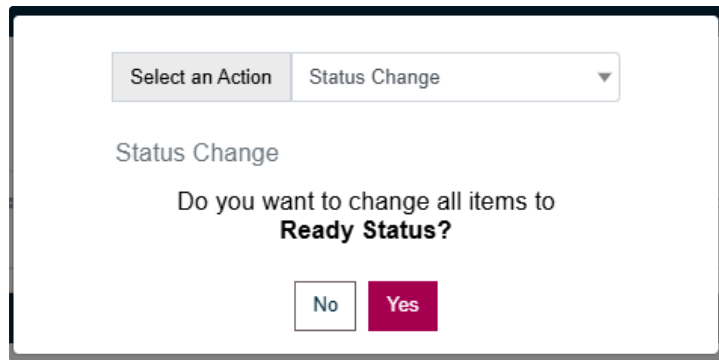
Items can be changed from a 'Pending' to 'Ready' status, and vice versa, by also navigating to 'Sales' on the left-side menu. From here, find the sale that is being worked on, select the 'Dashboard' icon and you will see 'Pending' - select the Pending tab and then you will see a 'Select All' box - check that, or you can select all of the items you would like to move from Pending to Ready. Then select 'Bulk Item Update'



Once you select 'Bulk Item Update' you will see a pop-up window and you can select an action. Select 'Status Change'



Once you've selected Status Change, it will now have you confirm you want to move all items to Ready status. Select Yes. All items will be moved from Pending to Ready.



You can complete these same steps when moving items from Ready to Pending. Just make sure to repeat the process from the 'Ready' tab on the left side of the Dashboard.

**i** Only items with a 'Ready' status will display in a sale.

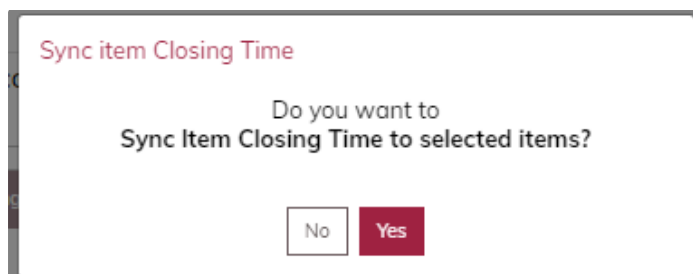
## Order of Items Closing

Sellers now have the ability to adjust the order of items/lots closing in a sale.

1. Find the sale you want from [Seller.ctbids.com](https://Seller.ctbids.com)
2. Select the sale Dashboard
3. Make sure all items are in 'Ready' Status
4. There will be a dropdown button on the left hand side of each item, you can choose the order in which you would like the items to close in your sale
5. **ALL items in your sale must be numbered** (you cannot just number the top 10 items, 1-10, and expect those items to be the first 10 listed -this feature is not designed this way. Please see #7 below for further information on how closing order logic works). Once all items are in the order you would like, **select Sync Item Closing Time**

The screenshot shows the Seller Dashboard interface. On the left is a sidebar with item status filters: All Items (8), Auction (8), Direct Buy (0), Onsite Only (0), Sold (0), Not Sold (0), Invoiced (0), Shipped (0), Ready (8), and Pending (0). The main area displays a list of items. The top item is 'Test 8' with SKU 'FREBCCGEEZLW'. A dropdown menu for 'Item Closing order' is open, showing options 0 through 8. A purple callout box points to this dropdown with the text: 'You can now change the order of items closing. Once all items are in order, select Sync Item Closing Time to save.' Another purple arrow points from the callout to a green button labeled 'Sync Item Closing Time' located at the top right of the item listing area. The interface also includes search filters, a 'Sort By' dropdown set to 'Item Closing Order Asc', and various action buttons like 'Change all item status', 'Item Status Change', 'Send/Resend Unpaid Invoice to Buyers', 'Generate Invoice', and '+ Item'.

6. A pop up window will appear, select Yes to save and proceed



7. Your items will now close in the order that you selected for the sale
  - a. Please note that items will close in the same increment of minutes of the 'Close Duration' that you selected when you created your sale. These will go in blocks of the amount of items vs the amount of minutes selected.
    - i. Example: If you have a 90 minute Close Duration set for your sale, they will go in blocks of 90 items/lots.

ii. Example #2: If you have a 90 minute Close Duration for your sale and you have 180 items/lots, you will have two items close per minute. These items will go in blocks of 90 with each block closing two items/lots per minute (ex: item 1 and item 92, item 2 and item 93 will be closing at the same time whereas item 91 is the start of the second block of closings).

1. In this scenario other logic applies to whether Item 1 or item 92 will appear first in your sale once your sale is live.

When two items close at the same time (#1 and #92), the item that was created & uploaded onto Seller .com site will be the first item seen on the sale by the customers. If item 92 was created and uploaded before item 1, then item 92 will be the first item showing on your live sale (even if you change the sync order of the items -make #1 now #92 and #92 now #1, since they are still paired the item creation/upload logic will be applied and the item that was created first will still be the first item in the sale that customers see).

b. The number that you order your items/lots will affect the order that they appear in in your sale based on the block that they are in. For example: If there are 270 items/lots in your sale and you selected a 90 minute Close Duration period then you will have 3 blocks of 90 items. (Items numbered with the order of 1, 92, 182 will appear next to each other in your sale).

8. If you did not save to Sync Items, or the items are not showing in the correct order for your sale, you will need to re-sync the items.

a. To re-sync the items, you will need to change one item to zero, and then back to the original number you had it set at. Once that is completed, you will need to click the green Sync Item Closing Time

## Item Tags

Tags can be used to increase search visibility on items. For example, if a listing is titled ‘2010 Chevy Pickup Truck’, the tags for the item can be “car”, “vehicle”, etc. The search item bar will pick up on words from the title, description, and item tags.

**Item Settings**

Item is shippable  Item is featured  Item not taxable

Sale Type \*  
Auction

Starting Price (\$) \*  
1

Reserve Price (\$)

Buy it now Price (\$)

Buyers Premium (%)  
1

Dimensions & weight

Width (inches) Height (inches) Depth (inches) Weight (lbs)

Shipping (\$)

Handling (\$)

Goal (\$)

Valuation (\$)

Tax (%) \*  
0

Tag (Press Enter to add Tag)

The current character count is 300 for tags on the Seller site and Seller mobile app

Tag (Press Enter to add Tag)

Maximum characters 300

Tags must be a single word and cannot contain spaces or special characters.

## Editing Items/Lots with Bids

Once an item or a lot has a bid placed on them, some editable features are no longer available. The only way to edit these features is to view the items/lots carefully before publishing/changing them to ready, **OR** you can retract all current bids, and the item will become editable again.

Examples of what is not editable/delete-able once bids have been placed:

- **Condition Field** - you cannot change the condition of an item once bids have been placed
- **Images**- you cannot delete an image once a bid has been placed
  - Please note, you can always ADD images, but you cannot remove them
- **Reserve**- you cannot change the reserve or add a reserve once bids have been placed
- **Buy Now Price** - you cannot change or add a Buy Now Price once bids have been placed
- **Tax Status**- you cannot change the tax status once bids have been placed

Field	<a href="https://Seller.CTBIDS.com">Seller.CTBIDS.com</a>	<a href="https://Seller.CTBIDS.com">Seller.CTBIDS.com</a>	<a href="https://Seller.CTBIDS.com">Seller.CTBIDS.com</a>
Data Item	<b>Pre Sale Start</b>	<b>Sale Started, Not Closing, No Bids on Item</b>	<b>Sale Started, Not Closing, Bids on Item</b>
Buyer's Premium	Y	N	N
Category	Y	Y	Y
Dimensions and Weight	Y	Y	Y
Direct Price	Y	Y	N
Handling Fee	Y	Y	Y
House Area	Y	Y	Y
House Location (e.g. Kitchen)	Y	Y	Y
Item Closing Date	N/A	N/A	N/A
Item Closing Time (hms)	N/A	N/A	N/A

Item Condition	Y	Y	N
Item Description	Y	Y	Y
Item Images and Video Edit	Y	Y	Y - Adding images and videos
			N- Remove images or video unless retract bids
Item Images Display Order	Y	Y	Y
Item is Featured Flag	Y	Y	Y
Item is NOT Taxed Flag	Y	Y	Y
Item Revenue Goal	Y	Y	Y
Item Shippable Flag	Y	Y	Y
Item Status	Y	Y	N
Item Tags	Y	Y	Y
Item Title	Y	Y	Y
Item Type	Y	Y	N
Item Valuation \$	Y	Y	Y
Real-Time CTBIDS Customer Messages	Y	Y	Y - Hide or Unhide only
Reserve Price	Y	Y	N
Sale Address	Y	Y	Y
Sale End Time	Y	Y	Y
Sale Front Door Image	Y	Y	Y
Sale Page Banner Image	Y	Y	Y

Sale Provenance	Y	Y	Y
Sale Start Time	Y	N	N
Sale Tax %	Y	Y	Y
Sale Time Zone	Y	Y	Y
Sale Title	Y	Y	Y
Sale Zip Code	Y	Y	Y
Shipping	Y	Y	Y
Staggered Duration	Y	N	N
Staggered Time	Y	N	N
Starting Price	N/A	N	N

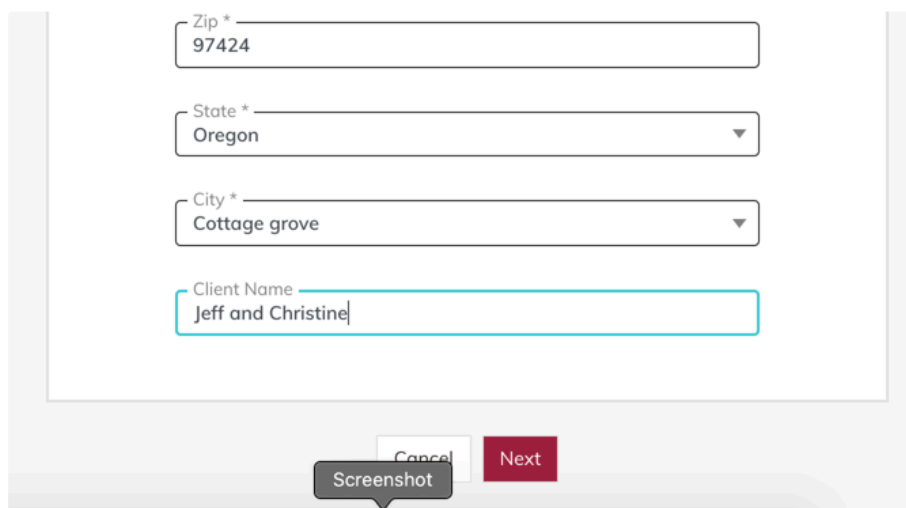
## How to Create a Sale

Creating a sale is easy in Seller CTBIDS.

1. Sign in to Seller CTBIDS
2. Select the left-side menu item “Sales”
3. Select the button “+ Create” in the upper left-hand corner of the sale listing table
4. Creating a sale has two tabs required to complete, Detail and Settings, and one tab optional, Media. You will start creating your sale using the “Detail” tab. Enter in all required field information - only the address 2 field is optional in this tab but the address is the address that will show on invoices as the pickup address - and select the button “Next” to go to the Settings tab.

**⚠** Please note, filling out the first tab “Detail” and selecting the Next button does not save your sale. It is only when you complete filling out the second tab “Settings” and selecting “Save” on that tab will the sale actually be created.

**i** Tip: On the sale “Detail” tab, if you enter a zip code into the Zip Code field the state and city will attempt to auto-populate for you. If the zip code spans multiple cities, you will need to select the correct city from the drop down selection.



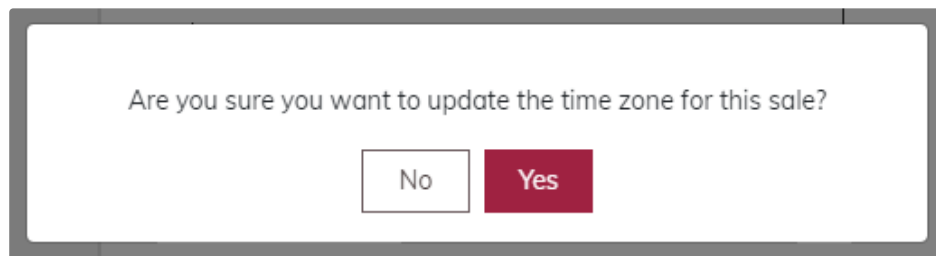
The screenshot shows a form with the following fields and values:

- Zip \*: 97424
- State \*: Oregon
- City \*: Cottage grove
- Client Name: Jeff and Christine

At the bottom of the form, there are two buttons: "Cancel" and "Next". A "Screenshot" tooltip is visible over the "Next" button.

5. After selecting the Next button from the sale “Detail” tab you will be presented with the sale “Settings” tab.
6. Select the time zone for the sale. This selection corresponds to the date and time selectors below this field and will store the sale start and end times based on the time zone selected.

a. Please note, if you select a time zone different from the location setup there will be a popup - Are you sure you want to update the time zone for this sale?



7. Select the sale start and end date and time by using the date and time selector. You can open these date and time selectors by clicking on the corresponding start time or end time fields.

⚠ When entering a sale start date/time consider setting the date out further into the future when you do not yet know the exact start date/time.  
Once a sale start date/time has been achieved, you will no longer be able to edit the start date/time.

If the start date/time is now in the past and you are unable to edit this, you can still make your sale 'live' by moving all items from Pending to Ready and the sale will immediately go live. This may require added planning to be available at the exact start date/time for moving the items.

This is why we encourage you to extend the sale start date/time to avoid this limitation. You are able to adjust the start date/time if the date/time has not yet been achieved.

8. Select the desired closing duration that you wish your item closings to be distributed. Your available selections are 90, 120, 150, and 180 minutes. Starting with the sale close date and time, your items will be distributed to close every minute over the duration of time selected after the time of sale closing.

9. Enter the tax percentage in accordance with your tax laws. "0" is a valid value for this field.

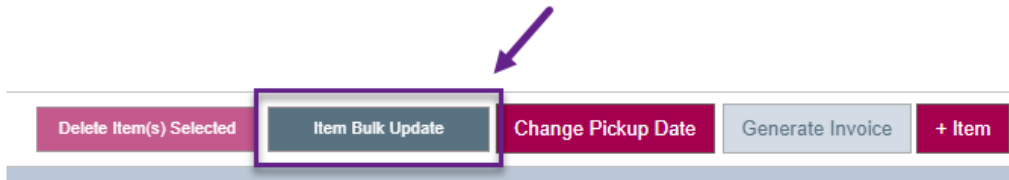
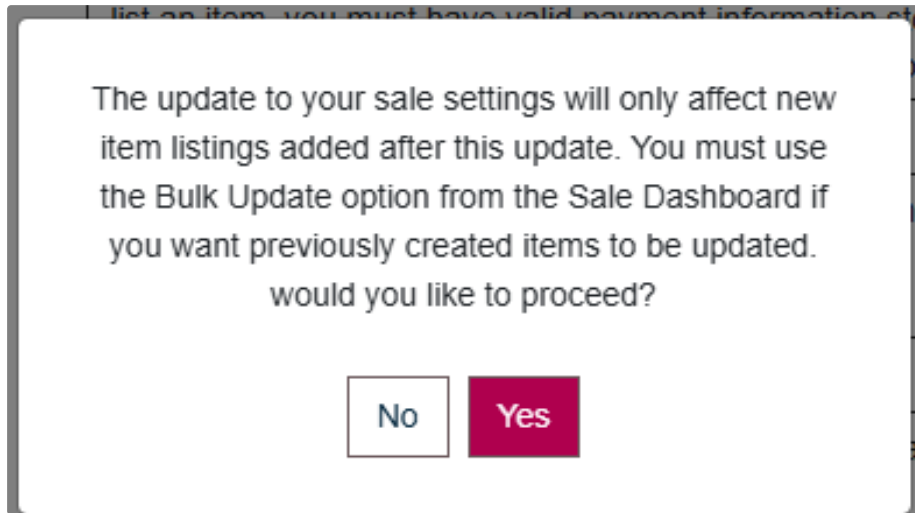
10. The buyer's premium defaults to 15% but can be changed in this form. This can also be marked as "0".

11. Select if you want to Apply Tax on Buyers Premium

⚠ **If you edit your sale settings after item creation, this will not apply to any previously created items, it will only apply to new items moving forward. To update the item settings (Tax, Tax %, BP %, IRM, etc.) you will need to use the Item Bulk Update. Please see information below.**

To help with reminding all Seller Site users that changing the Sale Setting after items have already been created for BP, Tax, and IRM and this action will NOT update already created items; you will now see an alert message for those fields when you go to update them on your sale settings.

This is a reminder that to update BP, TAX, or IRMs on items already created and in your sale, you must use the Item Bulk Update feature on your sale dashboard.



## 12. Select the Item Receipt Methods you want available at the Sale Level

Tax (%) \*

Buyers Premium (%) \*

Apply Tax On Buyers Premium

Item Receipt Methods \*

Pickup  Delivery  Shipping

13. Item Receipt Methods - this is the option given to customers when they place their initial bid on an item.

**a. The IRM enhancement is removing the action to select an IRM after a sale is closed.**

**b. A sale will not save until at least one IRM is selected**



When you are creating items in a sale, they will automatically render the IRMs that were selected at the sale level. If you go back to the Sale level settings and edit/change the IRMs offered after some items have already been created, the update will NOT affect items that were previously created in the sale but only the items moving forward.

Example:

I created items on the app when the sale settings were set to pickup and shipping and some items had both shipping and pickup checked, then later I updated the sale settings to pickup only (deselected shipping). New items I create will only show pickup selected, but the previous items, that were created while both were an option, still retained it's shipping and pickup IRM status.

In the screenshot below you will see that on the item created when shipping and pickup was initially set at the sale level but the sale IRM settings were later changed to only Pickup, shipping is still selected but is now 'grayed out'.

\*If you change your mind and want to now deselect shipping from this item, it will need to be done on the CTBids Seller Site and cannot be done on the seller app. \*

[← Edit Item](#)


---


Description >


---

Item Type \*  
Auction

---


  
 Capture Photo

  
 Capture Video

  
 Gallery


---

You can upload a maximum of 39 Images/Videos per Item



✕  
✎

Display Image



Item is Featured       Item Not Taxable

Item receipt method \*

Pickup       Delivery       Shipping

---

Starting Price (\$) \*  
1.00

---

Reserve Price (\$)

14. Enter pick up information for this sale in the Pick Up Information text field. This field accepts plain text only as it is presented to the customers through the CTBIDS website.
15. When selecting the Scheduled Pickup date, the system will not allow you to select a date prior to the sale end date. You will need to adjust the sale end date first and then update the scheduled pickup date when editing these fields on your sale. You do not need to enter a the scheduled pickup date at sale creation, but if you go to move all items into Ready and have not selected the pickup date, the system will give you an alert on your sale dashboard that this needs to be done prior to items being moved into Ready.
16. Enter the sale provenance (description) in the Sale Provenance text field. This field accepts plain text only as it is presented to the customers through the CTBIDS website.
17. The Terms & Conditions, Invoice Message, Shipping Info, and Payment Info fields are editable only by using the “pencil” icon next to the field. These fields contain formatted text for

display in invoicing and are also displayed within CTBIDS to customers. You can review the formatted text in these fields by selecting the “eye” icon next to the field.

18. Invoice Message- This is what will display on your invoice that goes out to all customers, and is where you will want to enter all payment and pickup information (payment due date, pickup dates, time and address)

1 Detail2 Settings3 Media

### Sale Settings

Time Zone \* ▼

US/Eastern

Start Time \* 📅

02/25/2022 02:00 PM

End Time \* 📅

04/28/2032 03:00 PM

Close Duration (minutes) \* ▼

90 minutes

Tax (%) \* 👁

8.880

Buyers Premium (%) \* 👁

15.000

Apply Tax On Buyers Premium

Item Receipt Methods \*

Pickup  Delivery  Shipping

Pickup Information 488/500

testing save

Scheduled Pickup Date 📅

05/01/2032

746/750

Sale Provenance \*  
test

Terms & Conditions \*  
**1. Placing a bid is an agreement to purchase. If you are the winning bidder, you are committed to purchasing and picking up your item(s) or making shipping arrangements. Please do not bid if you**

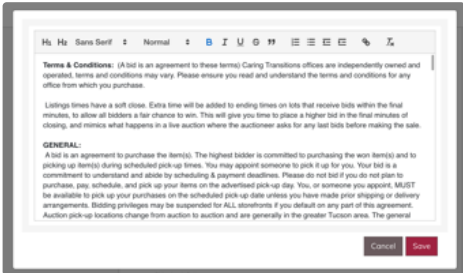
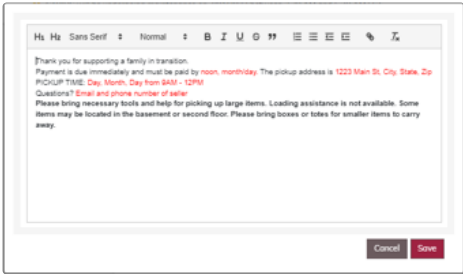
Invoice Message \*  
Thank you for supporting a family in transition.  
Payment is due immediately and must be paid by **noon, month/day**. The pickup address is **1223 Main St, City, State, Zip**

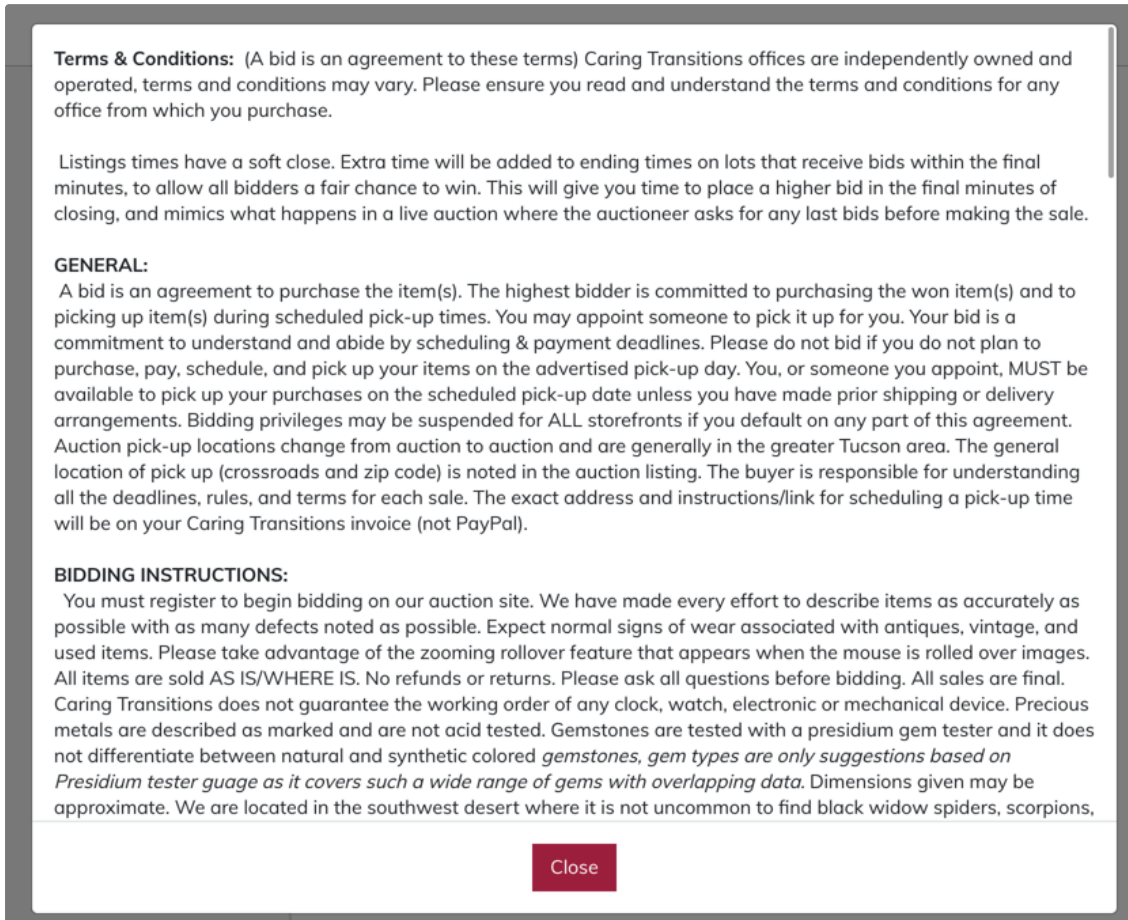
Shipping Info \*  
**1. Local pick up is preferred. Shipping is available for some items at the buyer's expense. We use USPS Mail for all items that fit in a flat rate ship envelope or box. If the item does not fit in a flat rate ship box or is fragile,**

Payment Info \*  
**1. Invoices will be sent out once the sale has completely closed. Payment is due immediately upon receipt of invoice.**  
**2. Login to your CTBids Account: Invoices>Purchases>Check out**

Staff Checkpoint  
Select Staff Checkpoint

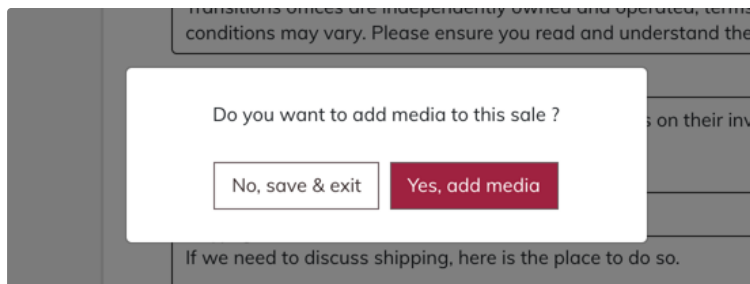
Previous    Cancel    **Update**





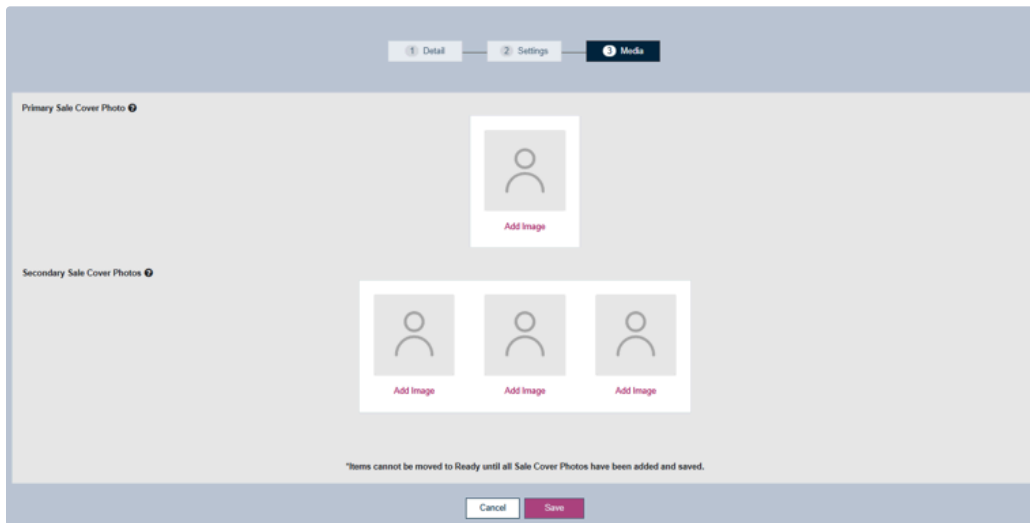
The formatted text viewer

19. When you have entered all required information, select the “Save” button at the bottom of the “Settings” tab. When selected, you will receive a small pop-up dialog asking if you would like to add media. Select Yes or No depending on if you would like to add sale cover images now or if you would like to add them later before the sale items are moved to Ready.

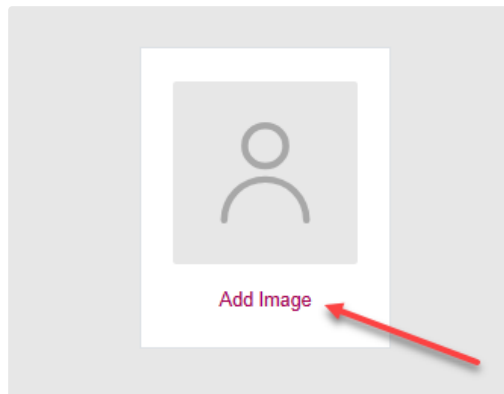


20. Sale media can be added at a later date but must be added prior to your sale items being moved from pending to Ready. You can always edit these images, even if the sale is live, as needed.

21. If you select “Yes, add media” you will need to have 4 images ready to add as your cover images for your sale, please see below for image sizing:



Select the Add Image link on each template to add or change an image.



The Primary Photo is the largest image to display and works almost like a “background” on your sale display. The recommended size for the Primary Photo is 600W x 400H or larger. The Secondary Photos are the three smaller images that display in the front of the Primary Sale image. The recommended size for the Secondary Photo is 400W x 400H or larger.

Please note that you can still create items and put them in Pending if you do not have any Primary or Secondary images selected yet. **However, you cannot move items from Pending to Ready without these images uploaded to your media tab.**

You can change these images at any time whether or not your sale is live and bids are placed.

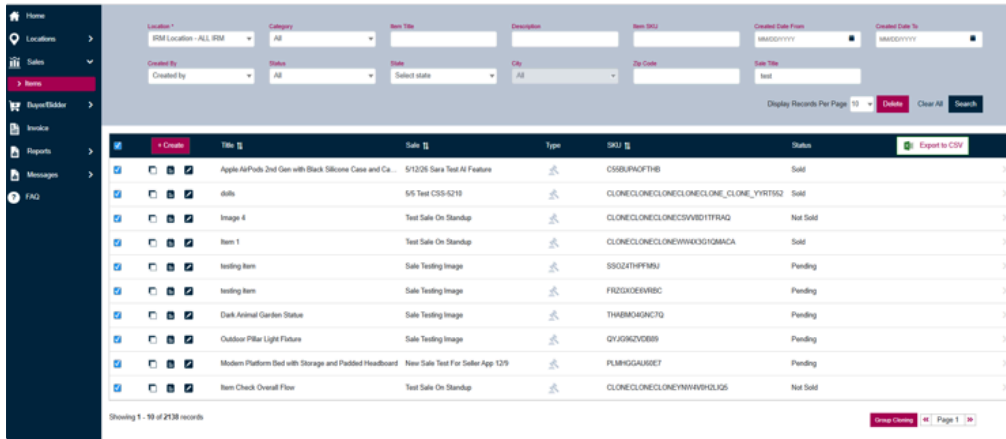
**i** Please use images of items in your sale. Do not use premade collages or portraits of yourself, staff, or clients. CT Marketing has the right to go in and edit your sale display if they choose to.

# Moving an Item to a New Sale

To change items to a different sale, the item will need to be cloned and put into a new sale. The item SKU can be edited to remove the word 'clone' from the start of the SKU. Legacy listings CANNOT be cloned.

Click on 'Sales' and then 'Items' from Seller.Ctbids

1. Use search functions to find items in question
2. Select item(s) that you need moved to new sale. If it is a single item, select the 'Clone' button. If it is multiple items, check the white square and select red 'Group Cloning' button from bottom right. **\*If doing a group clone, must group clone page by page, if you check boxes from different pages, it will not move all of them at once.\***
3. Cloning pop up window appears, select new sale from drop down and check the media box. Then click red 'Clone' button.



4. Use 'Items' tab to search for items OR new sale dashboard to edit the SKU of the items to remove the word 'CLONE' from it.
5. Click 'Update'

**Item Details**

Location \*  
IRM Location - ALL IRM

Sale \*  
5/5 Test CSS-5210

Category \*  
Dolls

Area  
Kids Playroom

Aa Title \*  
dolls

Lot #(SKU) \*  
CLONECLONECLONECLONECLONE\_CLONE\_YYRT552

Condition \*  
FAIR

Description  
Click edit icon to add text

Status \*  
Sold

Item will be cloned into new sale.

## Featuring an Item

Application: **Seller CTBIDS**

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Featuring an item in your sale will trigger your sale to appear in 'Today's Featured Estate Sales' on the CTBIDS homepage in a random order.

To feature an item, do the following:

1. Sign in to your Seller account
2. Select 'Sales' from the left-side panel and then select 'Items' from the dropdown
3. Create a new item or click the 'pencil' icon next to an item you would like to edit
4. On the settings tab, you can check or uncheck 'Item is Featured'

### Item Settings

Item is featured  Item not taxable

### Item Receipt Methods \*

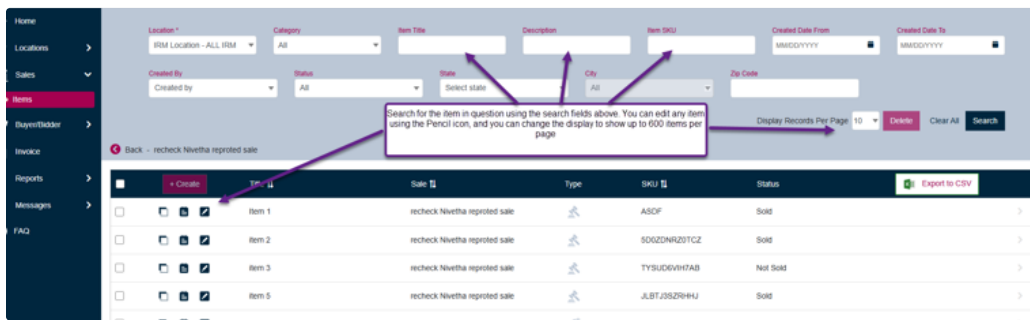
Pickup  Delivery  Shipping

## Missing Item in Pending Status

If you ever have an item that is missing in Pending Status, you can always find it by searching for your sale, and clicking the items number as seen below:



Once you click on the blue image number, it will bring up all the items from the sale:



From here you can search for the item, change how many items you want displayed at a time up to 600 items per page, and you can edit the item

If you click edit on the item and you render a 'No Data Found' or 'No Results Found' it is most likely a Display Image Issue, and will need to be resolved on the backend. Please contact [Ctbidshelp@caringtransitions.com](mailto:Ctbidshelp@caringtransitions.com) or calling **844-OWNER-411 (844-696-3741)**



**No results found**

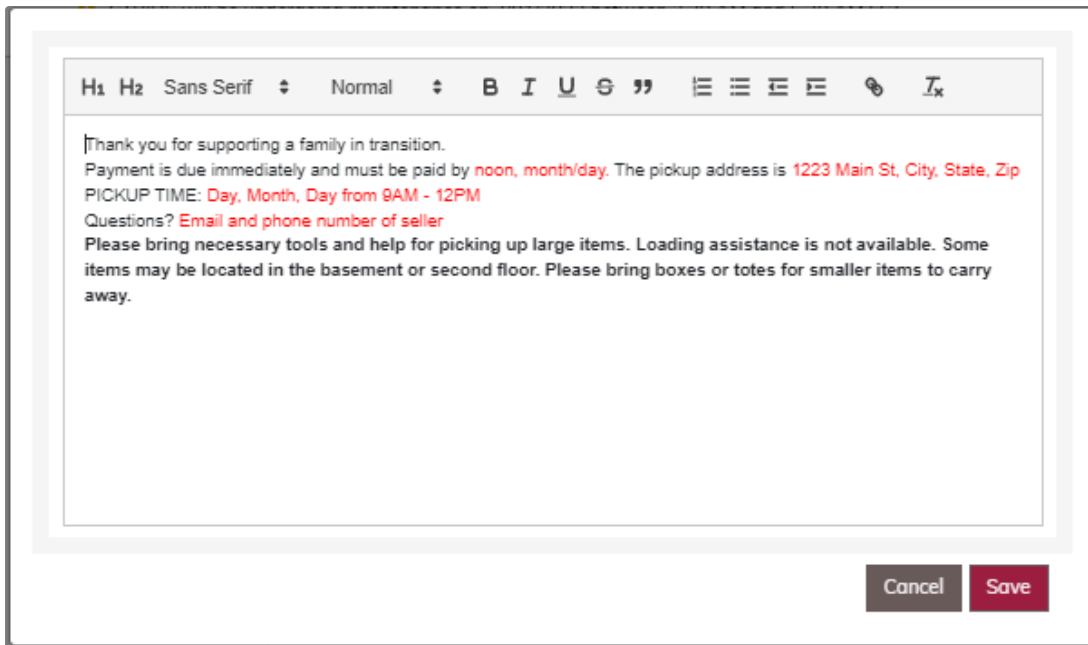
We couldn't find what you're looking for.

## Invoice Message - Creating a Sale

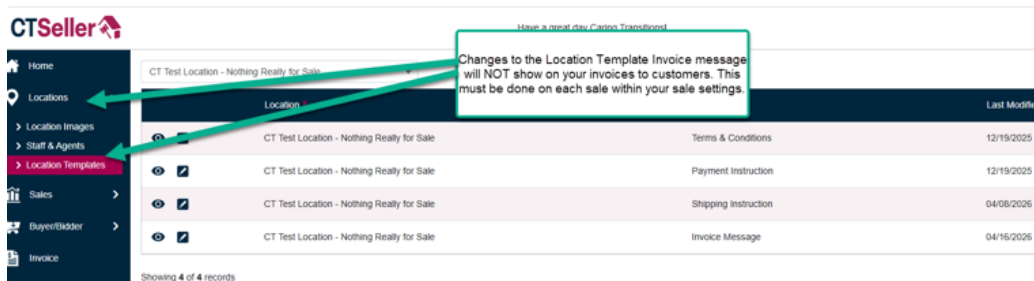
The Invoice Message is a customizable field where you will click on the pencil icon to edit. This is where the information will be entered and **displayed on the invoices** once they are sent. You will enter the:

- Payment Due Date/Time
- Pickup Address
- Pickup Date/Time
- Seller information to be reached at for any questions
- Information about shipment. Any information that can be helpful
  - Timeframe for when they will receive an invoice
  - Timeframe for how long it typically takes for your location to ship items after the invoice is paid
  - If you use Shipping Saint or another vendor and whether or not the customer should be looking for an outside email/communication from that vendor.
  - If they will receive tracking information -how they will receive tracking information
  - Outline that they should contact you directly with any questions about shipments.
- **Any changes to the Invoice Message MUST be done before the sale ends. Any changes to the invoice message after a sale has ended will not be saved.**

The screenshot shows three text input fields, each with a title, content, and a pencil icon for editing. The first field is titled "Invoice Message \*" and contains the text: "Thank you for supporting a family in transition. Payment is due immediately and must be paid by noon, month/day. The pickup address is 1223 Main St, City, State, Zip". The second field is titled "Shipping Info \*" and contains the text: "1. Local pick up is preferred. Shipping is available for some items at the buyer's expense. We use USPS Mail for all items that fit in a flat rate ship envelope or box. If the item does not fit in a flat rate ship box or is". The third field is titled "Payment Info \*" and contains the text: "1. Invoices will be sent out once the sale has completely closed. Payment is due immediately upon receipt of invoice. 2. Login to your CTBids Account: Invoices>Purchases>Check out". Below these fields is a light gray bar containing three buttons: "Previous", "Cancel", and "Save".



⚠️ Changing the Invoice Message within the Location Template **WILL NOT** override the Invoice Message that is within your Sale Setting. (As shown below)  
 The invoice message that you have listed within each of your Sale Settings is what the customers will receive on their invoices. Invoice Messages within your Sale Settings override the invoice message located in your location template.



# Create an Item Desktop & Seller App, Item Creation Checklist, & Editing Photos/videos on items/lots

Application: **Seller CTBIDS**

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## Seller Desktop

1. Sign into Seller account on a desktop
2. Select 'Sales' and then 'Items' from left-side menu. For mobile devices, select the 'Item' box'.

3. Select the red 'Create' button on the right.
4. Item details will appear to fill out necessary fields and place the item in your sale.

### Implied Decimal on Sale, Item, and Buyer Premium sale settings:

Implied decimal has been added to Sale tax setting, individual item sale tax setting, buyers premium percentage setting

- [seller.com High Value and Premium Domain Names](#) users will now see an implied decimal to help reduce tax percentage and Buyer Premium percentage entry mistakes.
5. Click 'Next' to go to 'Item Settings'. Input necessary fields for the item.

**Item Settings**

Item is featured  Item not taxable

Item Receipt Methods \*

Pickup  Delivery  Shipping

Item Type \*  
Auction

Starting Price (\$) \*  
1

Reserve Price (\$)

Buy it now Price (\$)

Buyers Premium (%)

Dimensions & weight

Length (inches) 8	Width (inches) 5	Height (inches) 13	Weight (lbs) 1
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Shipping (\$)

Handling (\$)

Goal (\$)

Valuation (\$)

Tax (%) \*  
0.000

Tag (Press Enter to add Tag)

6. You can enter Dimensions & Weight, but this is currently not a required field
7. SKU Field limitations (for .com and app)
  - a. To help prevent accidental duplicate SKUs (example: LR\*125 & LR125 or LR125 & LR 125). These could end up in the same sale and may cause confusion.
  - b. SKU field is limited to alphabetic and numeric characters only
    - i. Special characters and spaces will not be accepted
8. Click 'Next' to go to 'Item Media'. You can also choose to add media at a later time if you are creating items on your desktop.
9. Upload images and videos for your item and rearrange the order of media. To change the display image, click and drag the image you want to be the display to where it says 'Display Image'.
  - a. **You can now upload images larger than 5MB, but smaller than 100MB on the Seller site.**
  - b. Limit on uploading photos from a mobile device gallery using the NG app is 40 photos
  - c. You can add new photos/videos (and edit them) **AND** delete unwanted photos/videos on an item all in one action before clicking save at the end (implemented On 8/25/23 software

release).

10. Select 'Save' when finished.

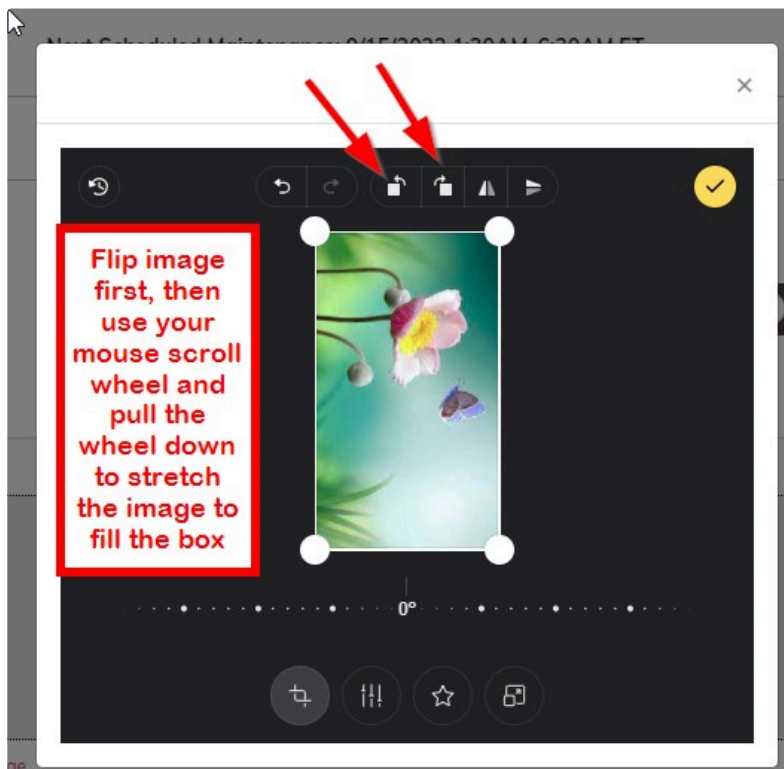
- Creating items in the mobile app will place them in Queue where they can be uploaded to the sale with a 'Pending' status.

### Editing Media (photos/videos) on an item Desktop:

- You can add new images or videos to an item (even if the item has bids placed).
- You can edit & delete images or videos from an item up until a bid gets placed.

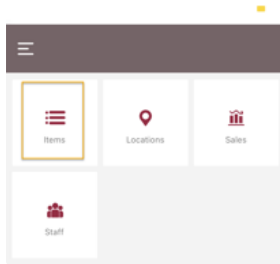
- Once there is a bid on an item, you can no longer remove media.
- Once a sale has closed, you can no longer edit information about the sale or an item - including media.

- When editing a photo from a horizontal layout to a vertical (portrait) layout follow these steps:
  - Click on one of the rotate buttons at the top to first rotate
  - Use your mouse scroll wheel to scroll/pull down on the image to get the image to fit inside the edit box. (implemented 8/25/23). See image:
    - If you do not have a mouse, use your fingers on your mouse pad and squeeze your fingers together or slide them apart to quickly adjust the image into the crop field full sized.



## Adding Items on the Seller Mobile App

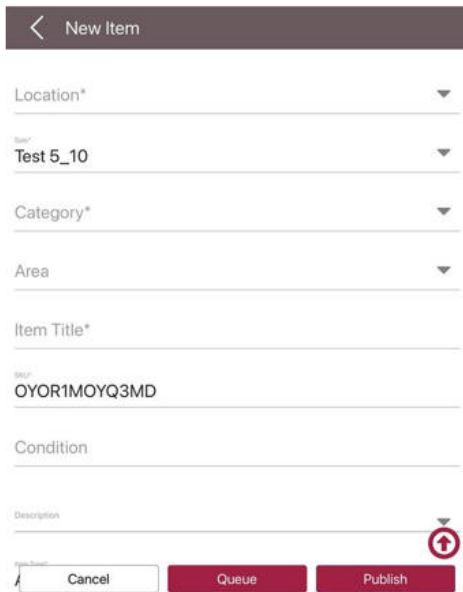
1. Login to the CT Seller NG app (mobile device)
2. Select the 'Item' box



3. Select the red 'Create' button on the top right corner
  - a. Everything will now be on one continuous page to create items



4. Fill out necessary item details in fields needed and place the item in your sale
  - a. Mobile Devices will need to tap the keyboard icon button when they adding a detailed description at the top of your screen to see the 'Save' button at the bottom of the screen and proceed to the next step

A screenshot of the Seller Mobile App 'New Item' form. The screen has a dark header with a back arrow and the text 'New Item'. Below the header, there are several input fields: 'Location\*' (dropdown), 'Test 5\_10' (text), 'Category\*' (dropdown), 'Area' (dropdown), 'Item Title\*' (text), 'OYOR1MOYQ3MD' (text), 'Condition' (text), and 'Description' (text). At the bottom of the form, there is a keyboard icon button (a red circle with a white keyboard icon) and three buttons: 'Cancel', 'Queue', and 'Publish'.

5. SKU Field limitations (for .com and app)

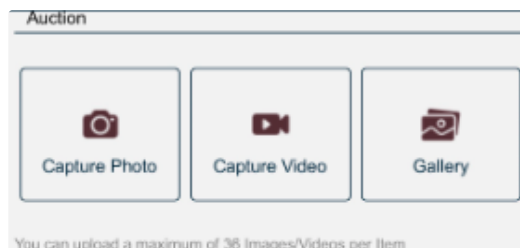
- a. To help prevent accidental duplicate SKUs (example: LR\*125 & LR125 or LR125 & LR 125).  
These could end up in the same sale and may cause confusion.
  - b. SKU field is limited to alphabetic and numeric characters only
    - i. Special characters and spaces will not be accepted
6. You can now select how you want to upload your images:
- a. You can capture a photo directly from the app - it will allow multiple shots, and you will have the option to edit your photos before saving, you can take 20 images at a time

**⚠** When your device is facing downward at an item the device will not sense if it is landscape or portrait position. This may result in the need to rotate your images. \*Especially when your device is turned into the landscape position to shot the image facing downward. When facing downward the image will appear in portrait position and then the need to rotate the image.

1. For your device to sense the orientation, the device must be pointing forward at the item, especially when taking images in landscape position.

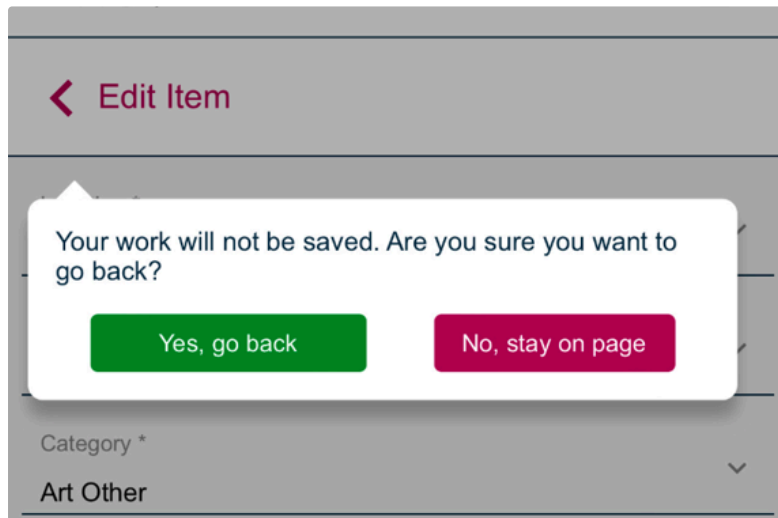
**ℹ** When using the in-app camera, to engage the auto-focus physically move your device forward and back some until the device auto-focuses in on the subject prior to taking the shot. If you point your device at a subject and it initially appears blurry, this means that the auto-focus has not been activated yet. Moving your device towards and then away from the subject will trigger the focus.

7. Upload images and videos directly from your device. To change the display image, click and drag the image you want to be the display to where it says 'Display Image'.
- a. Limit on uploading photos from a mobile device gallery using the NG app is 20 images
  - b. Limit of one video per item of 15 seconds or less
  - c. Limit on images/videos per item is a total of 40



6. Fill out all necessary information

7. You will not be able to swipe off of the current screen without saving the item information by selecting 'queue' or 'publish'. If you select the back arrow accidentally and had not saved entered information to 'queue' or 'publish', you will receive a popup warning reminding you to save by one of those two options:



**Note: For Duplicate SKU's**

A Duplicate SKU warning will be issued to the user once they have selected to PUBLISH the item.

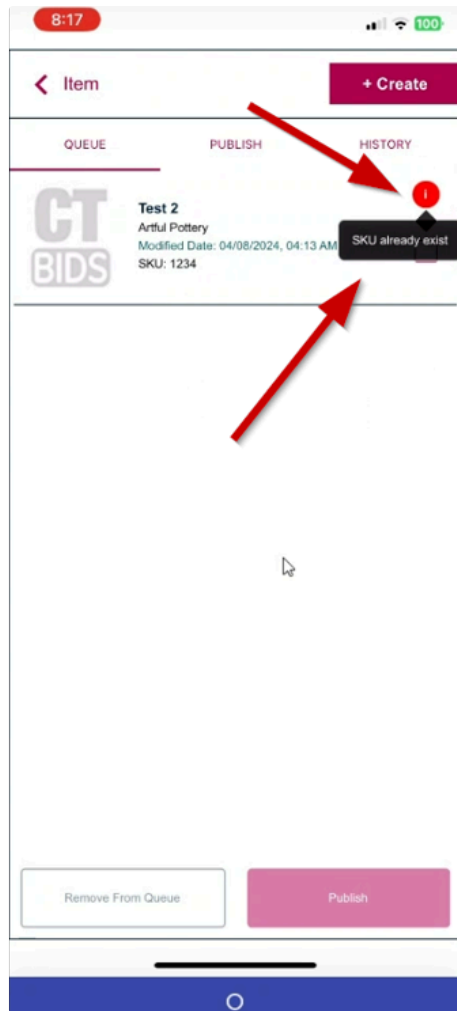
Any duplicated SKU items will NOT publish and will have a visible icon with message included (screenshot below).

The item that was created first with the SKU WILL publish, leaving the duplicate behind with the red icon and the message with that icon.

The callout here is that this will happen once the user goes to publish the item, not while they are being created and stored in queue.

**i** SKU Field limitations (for .com and app)

1. To help prevent accidental duplicate SKUs (example: LR\*125 & LR125 or LR125 & LR 125). These could end up in the same sale and may cause confusion.
2. SKU field is limited to alphabetic and numeric characters only
  - a. Special characters and spaces will not be accepted



6. After all information is entered you will have 3 options to proceed:

a. Cancel - to exit

b. Queue - to send the item to the queue (the queue is helpful when WIFI is not available. Items can be stored in the queue and published later when there is good WIFI available).

i. **We recommend no more than 40 items be left in queue at any given time**

ii. The **queue is an offline feature**. Lots/media stored in the queue are stored **ONLY** on the device they were created with.

1. Queue lots/media are not visible on Seller CTBIDS .com or on other devices connected with the location.

2. Lots/Media have to be published before they can be accessed by someone on the Seller's dashboard (in pending) or visible in the published tab.

3. You do not want to update the Seller App if items are still remaining in Queue. All of the information will be lost

4. It is recommended that Sellers provide staff with devices to use so that the device is easy to troubleshoot, maintain, and will always be your property. If a staff member

leaves suddenly and had lots/media in the queue on their personal device -you have lost all of that information.

c. Publish - If you are on Wifi and have a good enough connection to publish the item to the site, you can select this option. \*Please be aware that if your connection is poor media items may not fully upload to the site. Check the item in the published tab to see if you notice the 'sync' icon. If the sync icon is present, then not all media items uploaded. You can read about the sync button in another article for troubleshooting.

7. Editing an item while in Queue or when items area already Published

a. Click to edit an item

b. If you need to edit the photo, click the pencil edit icon on the photo you wish to edit

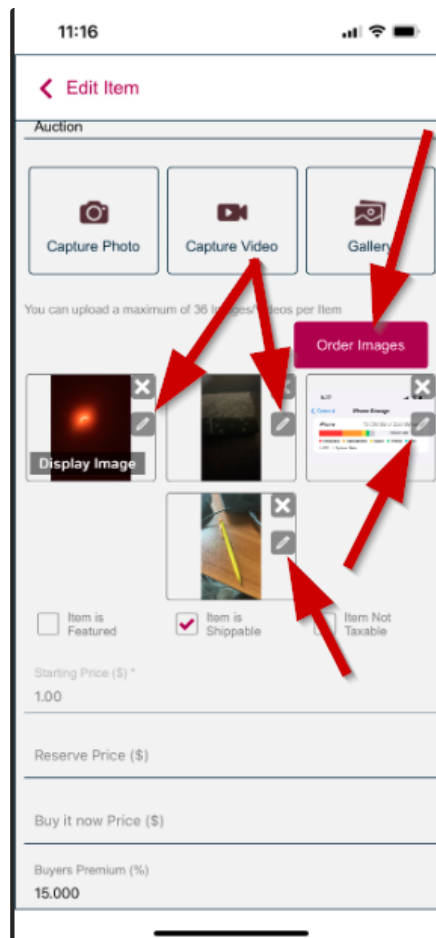
c. You can rotate/flip with the top options and there are other edit options below the image

d.



e. You can also change the item order with the 'Order Images' button.

i. Once you are on the page to reorder images, press and hold the image and drag it to the new location



8.

a. Publish - to publish/upload the item

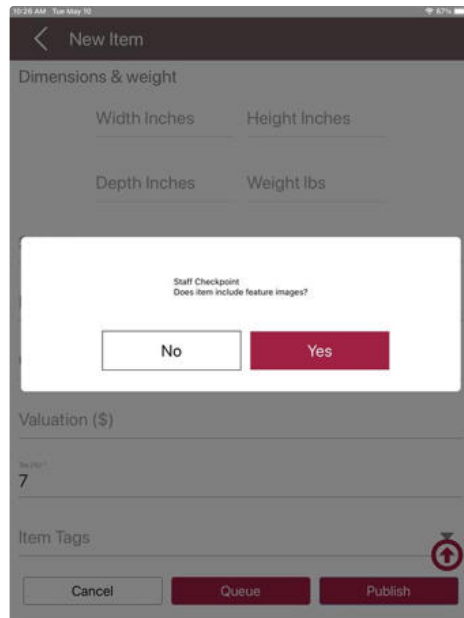
i. **You can not select more than 5 items at a time to publish**

ii. If the item has a video, we recommend that you publish that by itself

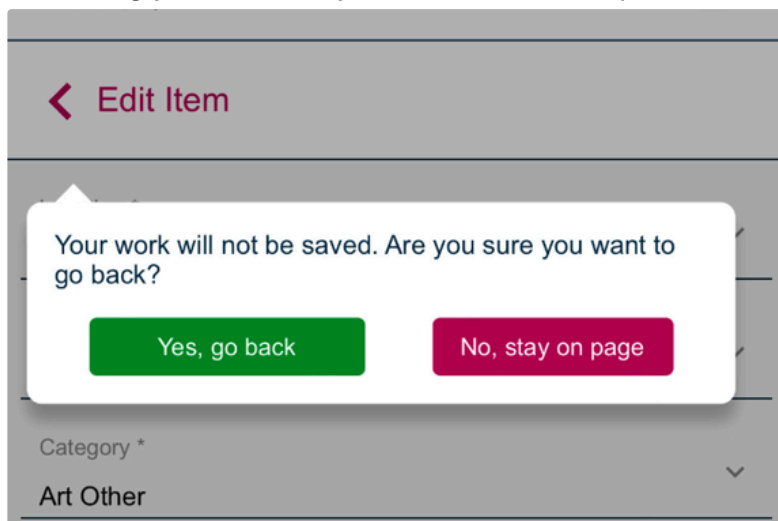
iii. Please note that by selecting Publish - it will not make the items go live or Ready - they will still be in Pending status until you move them over to Ready status on the desktop

iv. After selecting 'Publish' you can select the Publish or History tab so that the successful publish could be verified.

9. If the sale has a Staff Checkpoint Selected - when the employee is adding the item to Queue or Publish, they will be prompted with a Staff Checkpoint Question - In order to proceed they must select Yes, if they select No - they will be brought back to the previous continue working or fix what is needed.

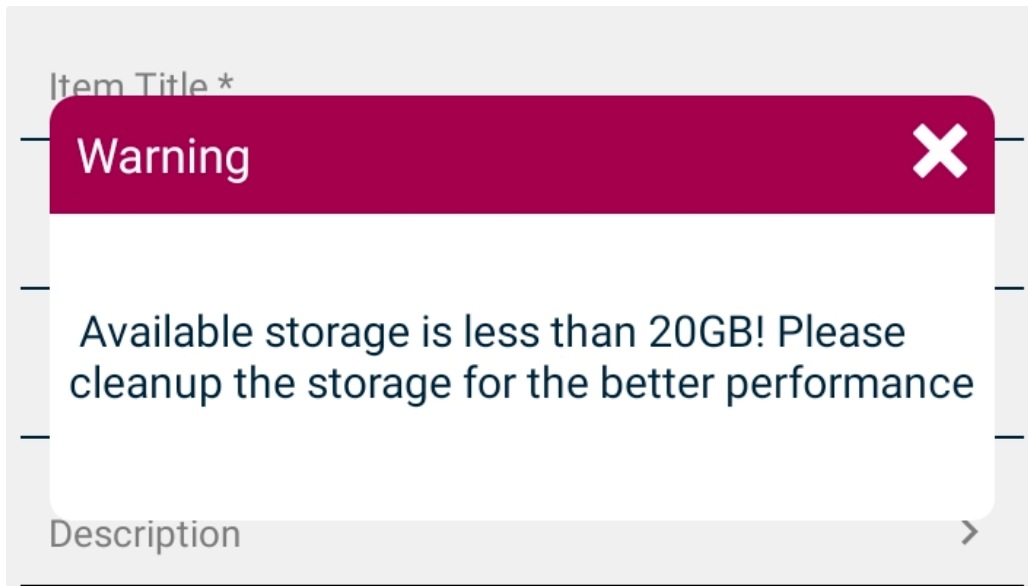


10. You will not be able to swipe off of the current screen without saving the item information by selecting 'queue' or 'publish'. If you select the back arrow accidentally after making edits and had not saved entered information to 'queue' or 'publish', you will receive a popup warning reminding you to save by one of those two options:



#### Low Available Storage Warning

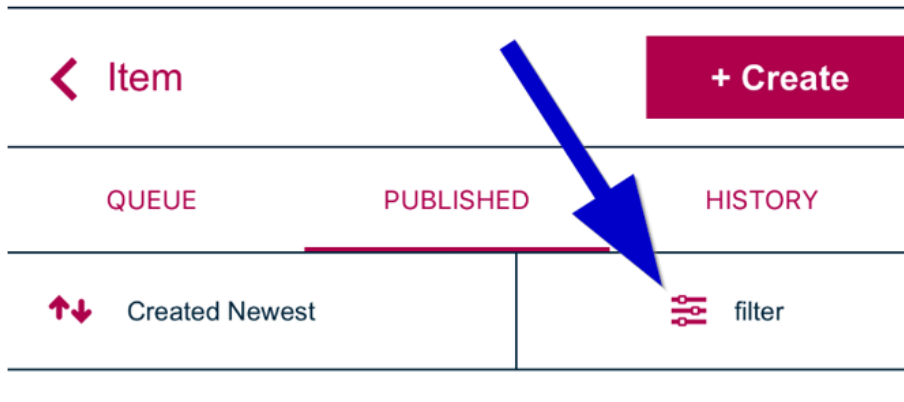
If you receive the Warning on the Seller App telling you that your 'Available storage is less than 20GB! Please cleanup the storage for better performance' as shown here:



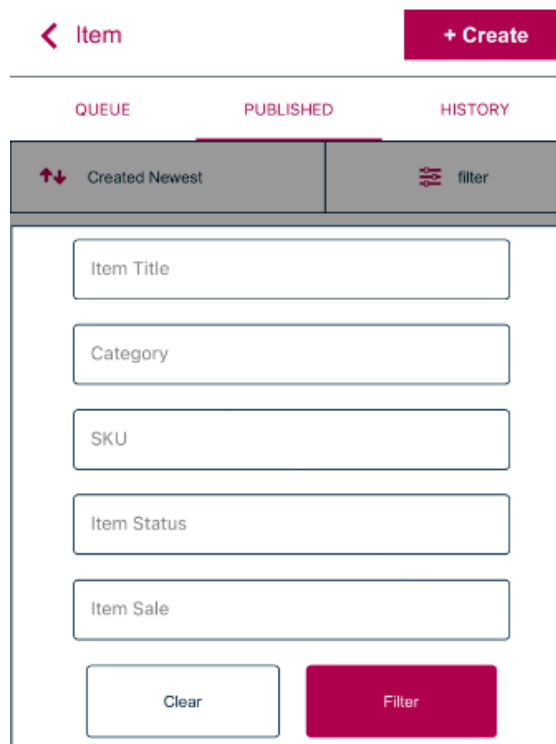
- Please check the amount of available storage that you have on your device (not cloud storage). If your device is low on available storage you may run into processing issues with the app. As you continue to create items with large image files your device storage will continue to decrease. This warning is to ensure you know that you are getting low on available storage and there is now a need to free up more space.
  - To free up more space on your device for processing:
    - Delete unused apps
    - Delete old messages
    - Delete old media (video and photos)
- Also check to be sure that the in-app History tab is cleared out regularly.
  - Too many items in your history tab will use in-app available storage and may prompt this message as well.
    - Deleting the History items will not remove them from your published tab and will not remove them from your sale.

#### **Searching or Filtering within the Published Tab**

In the published tab you have a 'Filter' option to search for items/lots that have been published.



Once you click on the Filter option you can enter different criteria to search and select 'filter' at the bottom:



**All photographers need to be properly equipped to do the job.**

- a. Professional photographing lighting – lights, light box.
- b. Current version of CT Seller NG app installed on mobile device with updated operating system.
- c. Each photographer set up to have their own login to CT Seller NG.
- d. CTBIDS Ruler/yardstick preferred and if a non-CTBIDS ruler or yardstick is used do not use one that advertises another business.

- e. Tape measure
- f. Tags, tape, marker to denote SKU.
- g. Bags or boxes to contain item listings in an orderly fashion.
- h. Jewelry scale, jeweler's loupe (small strong magnifier), diamond tester, metal chemical testing kit, magnet for gold testing
- i. Non-wrinkle and non-lint holding dark and light tablecloths.
- j. Props for jewelry or clothing
- k. Portable Table
- l. Heavy duty power cord with power strip to check items that power on.
- m. Cleaning supplies: rags, paper towels, window cleaner, mold remover, wood cleaner, dark and light wood scratch remover.
- n. A copy of the prohibited items list

**Group items in such a way to sell each lot for \$40 to \$60 (In a liquidation sale, we get 10-20% of the retail or appraised price).**

- a. Low value items such as clear glassware, partial sets of dishes, mugs, linens, towels, hand tools, silver plated items, random glass, "knick-knacks", storage containers, most books should be sold in bulk or in a pickers sale.
- b. Review results after every sale and consider how to avoid creating future item listings that sell for \$15 or less.

**Use the CT Seller NG app to create item listings.**

- a. If the location where photography will be done has no internet connection, login and create a test listing (can be edited onsite to an actual listing) using the location sale title while you have an internet connection.
- b. Once a sale has been found and an item created, the CT Seller App will remain on the selected sale so subsequent items can be created and added to a sale even in places where there is no internet connection.

Be sure to select the correct sale (Mandatory fields are noted by an asterisk)

**Select an appropriate category.**

- a. The Area will automatically be filled in based upon the category selected. There is no need to adjust the Area as this is a room shopping designation for bidding customers.

**Create a meaningful title (voice to text recommended to save time) maximized for SEO.**

- a. The title will become part of the item SKU.
- b. When possible include the brand and model, product type plus key attributes (do not create funny or clever titles, save the humor for the description).

For example, Apple iPhone 8, 64 GB Gold - Towle Place Sterling Silver Candlelight Place setting for 8 – Canon DS126151 EOS Rebel XTI DSLR Digital Camera, Zoom Lens and Charger.

Each title word will be automatically capitalized.

**Employ a strategic SKU.**

- a. An SKU that can quickly demonstrate which photographer took the photos, and where it is located and possibly who was the owner can save time at pickup.

For example, JR001B might designate the item was taken by Joel Roadruck and located in the Basement.

Each photographer could be assigned a series of numbers such as 0 to 99 and 100 to 199 to remove the need for photographer initials.

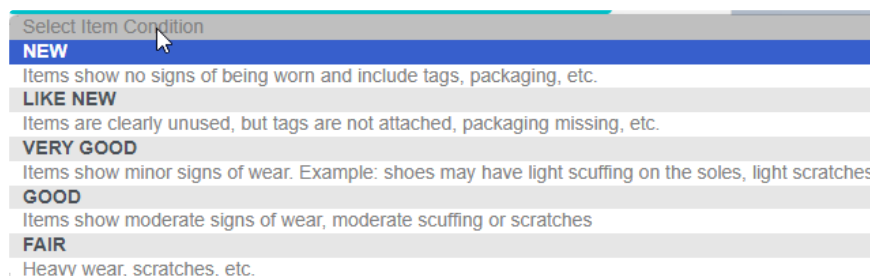
Client initials could be added at the beginning of the SKU in cases where more than one client has items in a sale.

Clockface numbers could be added to designate where in a room an item was located – JR001B3 would designate halfway down the right side of the basement. Six O'clock is the entry door to the room.

- b. Adhere the SKU to the item in a way that will ensure the SKU remains on the item listing but will not damage finish or leave residue.

**Condition is a required field, and this is not displayed to the customer.**

- a. Use your best judgement when making the selection, definitions are below the selection:



**Description (is not mandatory)**

- a. Do not repeat what you used in the title and if you have nothing more to add leave the description blank.
- b. Use the description for more details not contained in the title such as features, defects, number of items (voice to text recommended to save time)
- c. Denote imperfections, chips, dings, dents, scratches, or non-working features.
- d. All furniture needs to include dimensions either in the description or in the dimension fields.
- e. Descriptions need to be factual and not opinions.
- f. When known, include material types such as solid wood (include wood type if known), particle board, plastic, concrete.

**Take meaningful photos that fill the device image screen by using landscape and portrait shots strategically so that cropping is not needed.**

- a. The first image (cover photo) should include all items in the listing.
- b. The first image must be a photo and not a video.
- c. Subsequent images should include close ups of individual items, makers marks, model/serial numbers, features, defects, all sides including the top and bottom when possible.
- d. Take photos of legs, feet, arms, hardware, inside of drawers to show construction such as Dovetail joints. Photograph the back of furniture as it will reveal solid wood vs laminate. Be sure to photograph makers mark, scratches, water stains, carvings, seat cushions and any labels.
- e. Fake name brand items are illegal to sell and not having an item authenticated or stating that the item is imitation or a reproduction or does not make it ok. Name brands can be authenticated using [Luxury Designer Authentication Services - Real Authentication](#) . If authenticated, be sure to include this in the description.
- f. Take a minimum of ten information filled photos/videos – you can take 20 at a time for a total of 40 – 3 photos or less is unacceptable.
- g. Use video(s) to show if item functions – 10 to 15 seconds per video. You can include multiple videos.
- h. Be aware of mobile device auto-rotation when taking photos downward over a table or on the floor. When pointing your device downward the image will save in ‘profile’ orientation and not landscape. You can edit the item image to rotate it into a landscape position. The side of the device closest to the item will be designated as the bottom of the photo.

- i. Use supplemental professional lighting when shooting items indoor and the lighting is low. Added professional lighting when lighting is low will help to improve photo quality. When images are taken in low-light environments, the camera will increase the ISO to force light into the image -a higher ISO means that the image will have more grain and will be less sharp (quality decreases as ISO increases).
- j. Use a non-wrinkled, non-lint filled tablecloths and backdrops to create appealing item listings. If a backdrop is not possible, have a solid wall in the background.
- k. Move distracting items out of view from items being photographed.
- l. When photographing groups of items arrange taller items in the back or use a box under tablecloth to create a shelf – use a CTBIDS ruler/yardstick to show scale. A measurement or size indicator must be included in every item listing.
- m. Dust or clean dirty items before photographing (exception for tools and outside items)
- n. Strive to create an average listing in 10 minutes – 6 per hour is the goal – high value items may take longer.
- o. For upholstered furniture, note if house was smoker free or not and pet free or not. If the pets were known state what they were. This will help customers who may have allergies.
- p. For Beds, photograph the bed with the bedding on it first (if nice and in good condition). Remove and shoot the mattress/box springs (if nice and in good condition). Take photos of labels. Shoot bed frame, headboard, footboard.
- q. Note on framed artwork if it is a watercolor, painting, oil on canvas, (paintings are typically not under glass) embellished print, signed print, artist proof or print. Take photos in a way to minimize glare. Be sure to get the back of art and close ups of artist signature, print number and close ups of features in the artwork and the frame.
- r. Distinguish sterling silver from silver plated items (very low value) – never state sterling silver unless you see the .925 or other silver designation marks. (There is a foreign mark of .825 and it is 19K gold.) Never make a claim of sterling silver or gold if you are not sure.
- s. Distinguish costume jewelry from silver and gold by markings (use jewelers loupe to see marks) or by using metal test kit.
- t. Include a photograph of silver and gold items on a jewelry scale (do not include knives if the blade is stainless steel)
- u. Note if large items are in a location with steps such as on a second floor or basement.

v. Note if items must be disassembled or removed from a wall or if special tools or equipment will be required for removal. Note if the item is extremely heavy.

w. For large comic book collections, be sure to include the issue number usually located upper left side plus the title usually shown at the top. Cascade the issues in groups to show all.

x. For China sets be sure to get close ups of the markings on the bottom and then show photos of stacks of plates, bowls, cups, saucers to show the total number of each.

y. Most clothing is donated or sold in bulk but for vintage items, designer items, leather and fur will do best when photographed hanging or on a standing form. Take photos of tags, sizes, collars, sleeves, pockets, buttons, front, back, inside lining, close ups to show texture and color.

z. Purses will photograph better in a cover photo when stuffed with paper. Photograph trim, handle, interior, label, closures and all sides.

Jewelry should be put on lint free forms or stands. Photograph hallmarks (i.e. 585 or 14K indicates gold content equal to 58.5%, marks of HGE, GE and GF indicated Heavy Gold Electroplate, Gold Filled) on fine jewelry, measure chains and show sterling and gold on a jewelry scale.

Electronics/appliances should be turned on to verify working condition. Take video when possible. Photograph model/serial numbers, controls, cables, cords, remotes.

Lamps should include one photograph being turned on, photograph the base, lampshade, harp, finial, plugs (if old)

For rugs be sure to get a closeup of the pattern, the label, the edges and a corner of the backside.

First edition or old or collectible books and magazines should include photos of the publication date, title page, inside pages as well as showing any wear. For lower value books, consider listing an entire bookcase as one item listing.

Clocks and watches need to include closeup photos of the maker, the clock works, frame, face, and hands.

Antique dolls should include photos of the body under the clothes, maker, face, clothes and any damage.

Glass/ceramics/porcelain or dishware or collectibles should include closeup photos of item details, labels, signatures, etched maker's mark and any damage.

Do not include any photographs with handwritten SKUs or other notes about the listing, doing so makes the item listing appear unprofessional.

- The Item is Featured box should be clicked for four to five items in every sale. Please do not click all items as being featured.
- The Item is Shippable box should be checked for any item that can be shipped.
- Item Not Taxable box should only be checked for sales that require collection of sales tax and the item being sold is not subject to tax such as coins (in some states) or in a case of a motor vehicles, boats, trailers where the buyer must register and pay the tax when doing so.
- Starting Price for all auction items is \$1 and cannot be changed
- A Reserve Price can be entered, but should be used sparingly and only used in cases where you have an assured buyer. Never use a reserve on an item of less than \$100. Optimum results are achieved when sales can be advertised as all items starting at \$1 with NO RESERVE.
- Buy It Now Price can be added but is not recommended for typical liquidation sales. This option works better in long-term inventory sales.
- The Buyer's Premium is set at the sale level setup but could be modified for an item if desired. Some sellers use a different BP when selling cars. The lower number should be included in the description.
- Item Tags do not need to include any words already included in the title or description. If you have a good title or description, Item Tags may not be necessary. However, they could be used in cases where you feel an item might be found with a search word. Maybe you are selling a 1987 Chevrolet KS Blazer and did not use the word "Car". You might add "Car" or "SUV" as a tag. You might add a tag if an item has a common misspelling and include the misspelled word. Or maybe you have a designer Longines watch and enter "Rolex" as a tag so that your item will appear in a search for Rolex even though it is not a Rolex.
- Dimensions can be added in this area if not already included in the description or represented by a unit of measure in the photos.
- The fields of Shipping, Handling, Goal, Valuation should be left blank.
- The tax field will auto-populate from the sale setup.
- An item listing created from the CT Seller NG will be designated as Pending and cannot be changed to Ready during creation. It must be Published first and then Items can be made Ready in bulk from the Sale Dashboard or could be marked as ready one by one from the Published tab or from the Sale Dashboard.
- If you are in a location that has a good (2 bars or more) and fast internet connection (2Mbps or greater) you can click to Publish but if your internet connection is not good, you can opt to put an item listing in Queue. You can Publish later once you are in a place with a good and fast connection. You can click up to ten at a time to Publish in a batch. It is recommended that

items be Published daily, if possible, and that there are 50 or less in Queue. In either case, you can continue to make edits from Queue or the Published tab.

- Reminder to check the Published tab for the 'Sync' Icon if any media items did not publish. Pushing items to publish is uploading the item details and all images/videos to the Seller Site database. If your upload had a connection interruption and not all media made it, the sync button will be present and you will need to click the sync button to attempt to publish the missing media.
- The items History tab just shows what each user has sent over to be Published. It does not have any editing options so it should be cleared after every sale. If not, it can take up a large amount of storage on the device and could cause the CT Seller NG app to malfunction.
- Items can be found quickly on the Published tab by using the search/filter option located on the top and is labeled 'filter'. Search can be narrowed using SKU, the first words of a sale title, first few words of the item title, Item status, and Category. This option can be useful to see photos of items quickly during pickup or shipping.
- Once all photos have been taken and the SKU secured to the item, the lot should be placed in a way that makes it clear as to what is included in the lot to make pickup or shipping efficient. Secure in a box, bag, container or mark an area off with tape. Full packing should not be done. Buyers need to be able to inspect at pick up. It is the buying customer's responsibility to pack for transportation home.

## Automatic vs Manual SKUs

Application: **Seller CTBIDS**

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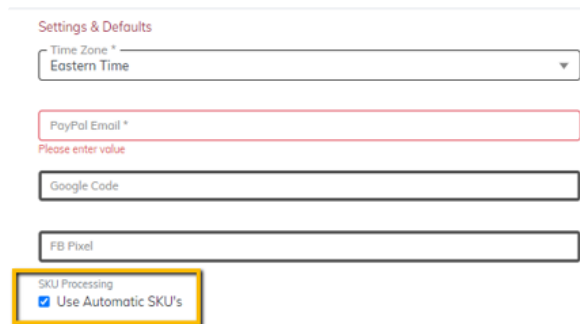
1. Sign into Seller CTBIDS on a computer or mobile device
2. Select 'Locations' from the left-side panel, find your location and click on the 'Pencil' icon to edit. On mobile, select 'Locations' and click on the location name and select 'Edit'.



The screenshot shows a table with the following columns: Title, Contact, State, City, Status, and Last Modified. The first row contains the following data: [checked box], CT Test Location - Nothing Really for Sale (with a URL below it), Joel Roadruck, Alaska, Anchorage, Active, and 04/14/2026 08:04 AM EDT. Below the table, it says "Showing 1 of 1 records" and "Page 1".

Title	Contact	State	City	Status	Last Modified
<input checked="" type="checkbox"/> CT Test Location - Nothing Really for Sale <small>https://www.carringtonhomes.com</small>	Joel Roadruck	Alaska	Anchorage	Active	04/14/2026 08:04 AM EDT

3. This will bring you to the settings & defaults for the sale. Check or uncheck the box for automatic SKUs. On mobile, select 'Settings & Defaults' in the top right corner.



The screenshot shows the 'Settings & Defaults' section of a form. It includes a 'Time Zone' dropdown menu set to 'Eastern Time', a 'PayPal Email' field with a red border and the text 'Please enter value', a 'Google Code' field, and an 'FB Pixel' field. At the bottom, there is a 'SKU Processing' section with a checked checkbox for 'Use Automatic SKU's', which is highlighted with a yellow box.

**i** This setting will enable or disable automatic SKUs for every sale under the location you make the edit to.

---

If 'Use Automatic SKU's' is disabled the user will have to manually enter an SKU when creating a new item

1. Sign into Seller CTBIDS on a computer or mobile device
2. Navigate to the sale you need to add an item to
3. Click the "+ Create" button
4. You will be redirected to the Item Details page where you will need to manually enter an SKU in the field

**Item Details**

Location \*  
Coshocton Ohio

Sale \*  
Sara Test iOS.78.12.21

Category \*  
Select Category

Area  
Select Area

Aa Title \*

Lot # (SKU) \*  
TEST123

Condition

Description  
Click edit icon to add text

Status \*  
Select Status

Auto SKU generation not enabled

## Scenarios of duplicate SKUs

- SKU Field limitations (for .com and app)
  - a. To help prevent accidental duplicate SKUs (example: LR\*125 & LR125 or LR125 & LR 125).  
These could end up in the same sale and may cause confusion.
  - b. SKU field is limited to alphabetic and numeric characters only
    - i. Special characters and spaces will not be accepted
- Scenario 1: Owner Has 'Automatic SKU' off in Location Settings and Creates Items in App
  - Owner Creates Item 1 with Manual SKU of 'SKU1' and adds to Queue
  - Owner Creates Item 2 with Manual SKU of 'SKU1' and adds to Queue
  - Owner attempts to publish Item 1 and Item 2
  - App splashes a message that there are duplicate SKUs
- Scenario 2: Owner has 'Automatic SKU' off in Location Settings and Creates Items in App
  - Owner Creates Item 1 with Manual SKU of 'SKU1'
  - Owner Publishes Item 1
  - Publish Successful
  - Item is in Pending on <http://Seller.CTBIDS.com>

- Owner Creates Item 2 with Manual SKU of 'SKU1'
- Owner attempts to Publish Item 2
- Seller App will splash an error message to User that there is a duplicate SKU
- Scenario 3: Owner has 'Automatic SKU' off in Location Settings and Creates Items in App
  - Owner Creates Item 1 with Manual SKU of 'SKU1'
  - Item 1 goes to Queue
  - Owner Creates Item 2 with Manual SKU of 'SKU1'
  - Item 2 goes to Queue
  - Owner attempts to Publish Item 1 and Item 2
  - Item 1 will publish successfully
  - Item 2 will not publish
  - Seller App will splash an error message to User that says "Publish Completed!" Any unprocessed items will remain in Queue with noted failure message
- Scenario 4: Owner has 'Automatic SKU' off in Location Settings and Creates Items in <http://Seller.CTBIDS.com>
  - Owner Creates Item 1 with Manual SKU of 'SKU1' and adds to Queue
  - Owner Creates Item 2 with Manual SKU of 'SKU1' and adds to Queue
  - Owner attempts to publish Item 1 and Item 2
  - System splashes a message that there are duplicate SKUs
- Scenario 5: Owner has 'Automatic SKU' off in Location Settings and Creates Items in <http://Seller.CTBIDS.com>
  - Owner Creates Item 1 with Manual SKU of 'SKU1'
  - Owner Publishes Item 1
  - Publish Successful
  - Item is in Pending on <http://Seller.CTBIDS.com>
  - Owner Creates Item 2 with Manual SKU of 'SKU1'
  - Owner attempts to Publish Item 2
  - System will splash an error message to User that there is a duplicate SKU/or SKU Already Exists
- Scenario 6: Owner has 'Automatic SKU' off in Location Settings and Creates Items in <http://Seller.CTBIDS.com>
  - Owner Creates Item 1 with Manual SKU of 'SKU1'
  - Item 1 goes to Queue

- Owner Creates Item 2 with Manual SKU of 'SKU1'
- Item 2 goes to Queue
- Owner attempts to Publish Item 1 and Item 2
- Item 1 will publish successfully
- Item 2 will not publish
- System will splash an error message to User that says "Publish Completed!" Any unprocessed items will remain in Queue with noted failure message

⚠ If you are manually entering SKU's and **publish** an item, you will not be able to create another item in that sale with the identical SKU. If you manually enter an SKU and move that item to **Pending** status, then add a new item with the same SKU as the item in **Pending**, the items will not be able to be published but will instead continue to sit in the Queue. No error message will render about identical SKU's if the items are in **Pending** since SKU's are not tracked in the system until the item is in **Published**.

## Where are my older sales/ items?

In order to enhance numerous actions within CTBids Seller, all data prior to 2022 has been moved to a data warehouse. If you need to retrieve any data prior to 2022, please email at [ctbidshelp@caringtransitions.com](mailto:ctbidshelp@caringtransitions.com) and include as much detail as possible about what you need, and the dev team will retrieve that for you.

## Delete an Item

You can now delete items multiple ways. Firstly, items can be deleted if they are in a PENDING status only. Navigate to the Items dropdown and search for any items that need to be deleted. Check the box of the item and click the red 'Delete' button. This can be used to clean up any of the test items that may have been created over the past months or if an item was created in error. Once deleted, it is erased from the item list and the sale dashboard. Please note, if you do not want to permanently delete an item, the item can remain in a pending status and it will not be active when the sale is live.

Title	Sale	Type	SKU	Status
Test Item 12.7	Test Sale On Standup		CLONECLONECLONECLONE9R07GGRA9Y6	Pending
Test Item 12.7	Test Sale On Standup		CLONECLONECLONECLONE9R07GGRA9Y6	Pending
Image 3	Test Sale On Standup		CLONECLONECLONERYQBZTZ8OVUY	Pending
Test Item For Seller App Check 1	Test Sale On Standup		CLONECLONECLONEGGKDMF9LVP6W	Pending
Item Check Overall Flow	Test Sale On Standup		CLONECLONECLONEYNW4V9H2LIQ5	Pending

Your second option is to delete an item from the Sale Dashboard.

- Always confirm that the items are in Pending status before you delete them
- Check the box at the top left corner of the item you want to delete (you can select multiple items at once)
- Click the Delete Items Selected button at the top of the page

Title	Sale	Type	SKU	Status
Image 3	Test Sale On Standup		CLONECLONECLONERYQBZTZ8OVUY	Pending
Item Check Overall Flow	Test Sale On Standup		CLONECLONECLONEYNW4V9H2LIQ5	Pending

## Selling Apple Devices

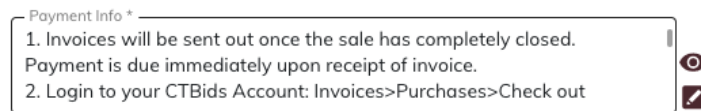
**Do you ever wish to sell an Apple Watch, iPhone or iPad?** Be sure your client can turn off the Activation Lock. Do not sell any Apple device if you cannot. Apple has added this feature as a theft deterrent. Here is a [link to an article](#) on what to do BEFORE you sell an Apple watch. And here is a [link to an article](#) on what to do BEFORE you sell an iPhone or iPad. If the previous owner cannot provide the information to take these steps then you cannot sell the item as it will be useless.

## Sale Fields

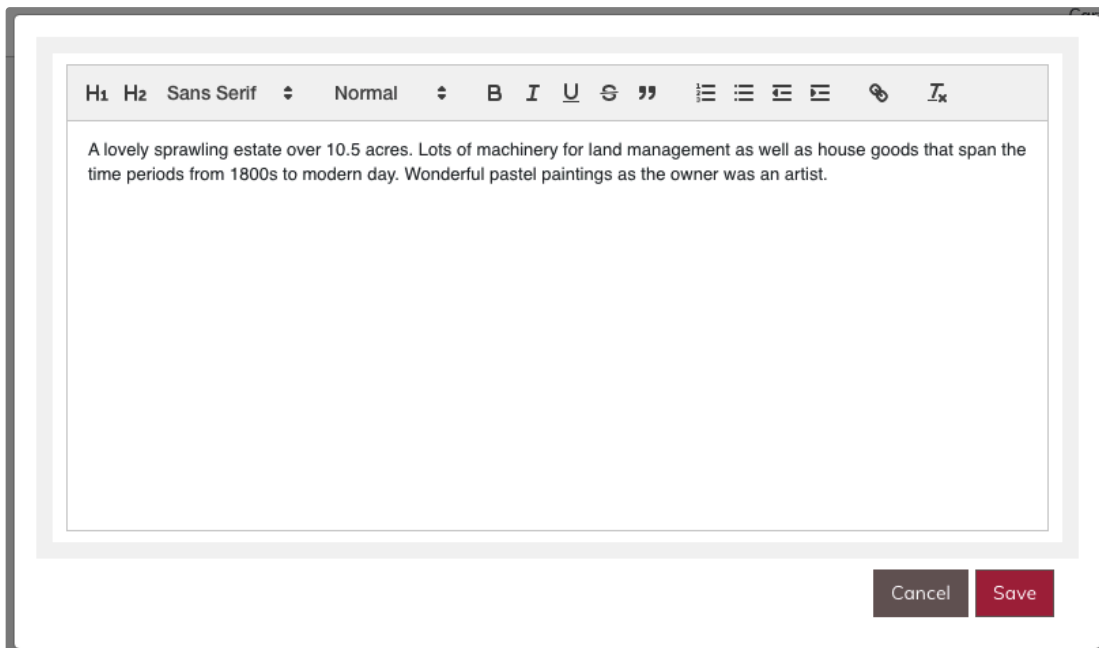
### Field: Sale Payment Message

The required, rich text field Payment Message is where we add payment information to our items and invoices. The contents of this field are provided to users of CTBIDS.

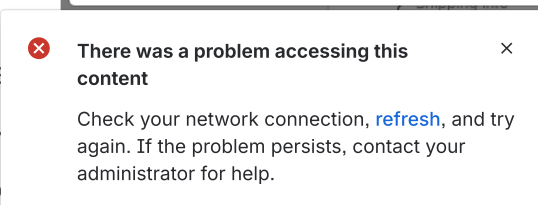
Rich text fields, such as Payment Message, are not editable directly. You can edit the contents of this field by selecting the pencil-in-a-box icon.



Upon selecting the pencil icon, an editor will pop up allowing you to edit the contents of this field. Supported formatting elements include font size, font styles such as bold, italics, underline, and strike through. You can also create bullet and numbered lists and indent or outdent sections of your text.



When  
text  
To v

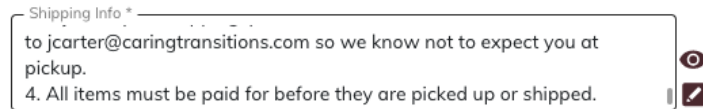


Message just select the "Save" button to save the  
just select the eye icon.

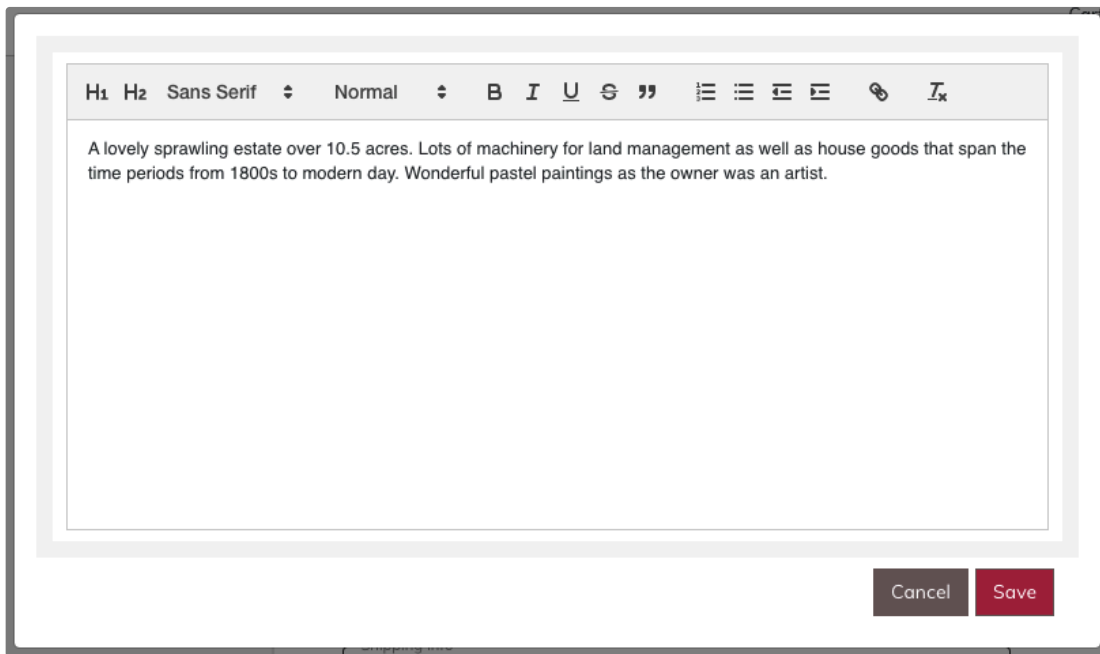
**Field: Sale Shipping Message**

The required, rich text field Shipping Message is where we add shipping information to our items and invoices. The contents of this field are provided to users of CTBIDS.

Rich text fields, such as Shipping Message, are not editable directly. You can edit the contents of this field by selecting the pencil-in-a-box icon.

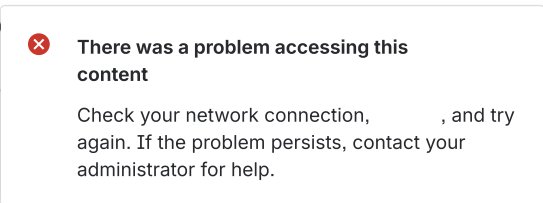


Upon selecting the pencil icon, an editor will pop up allowing you to edit the contents of this field. Supported formatting elements include font size, font styles such as bold, italics, underline, and strike through. You can also create bullet and numbered lists and indent or outdent sections of your text.



When you have created your sale Shipping Message just select the “Save” button to save the text.

To view the Shipping Message, just select the eye icon.



**Field: Sale Location**

The Sale Location field is a dropdown that allows you to select the location that is managing this sale. If you have only one location assigned, this dropdown field will default to that one location.

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**Field: Sale Contact Phone Number**


This required field is where we enter the sale contact phone number that is displayed to users within CTBIDS for this sale. You can enter a phone number as (XXX) XXX-XXXX or just type the 10 digits.

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**Field: Sale Contact Email**

The required field Contact Email is where we specify the email address that is presented to users of CTBIDS for a given sale.

 This email address is where any 'Ask Seller a Question' customer-questions will be sent to.

 The email address that you have entered in your CTBIDS Location Details is what will be seen in other contact information areas for your location on CTBIDS: Under the Locations tab, on a sale in the top right side that says 'Caring Transitions Location', and at the bottom of every item listing titled 'Seller Details'.

---

**Field: Sale Contact Name**

The required field Contact Name is to identify the contact person, department, or group who will receive contact from users of CTBIDS for this sale.

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**Field: Sale Title**

This required field is the title of your sale as displayed to users through CTBIDS.

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**Field: Sale Address 1 and Sale Address 2**

The required field Sale Address 1 and the optional field Sale Address 2 is where we put the address where the sale is conducted. Neither Sale Address 1 or Sale Address 2 are displayed to the

 **There was a problem accessing this content**  
Check your network connection, \_\_\_\_\_, and try again. If the problem persists, contact your administrator for help.

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**Field: Sale Zip**

The required field Zip is where we enter the zip code for the sale. This zip code is used in CTBIDS search and is also displayed for a sale.

**i** Tip: Seller CTBIDS recognizes zip codes and will attempt to autofill the state and city for you. If the zip code spans multiple cities, you will have the ability to select the correct city for the zip code in the sale City edit field.

---

**Field: Sale State**

The required dropdown field State is where we identify the state of the sale. We can select from a listing of states (or provinces) or this field can be automatically selected when a zip code has been entered.

---

**Field: Sale City**

This required dropdown selection, City, is where we select the city for our sale. The list of cities is dependent on the selected sale state or is automatically populated once we enter a sale zip code. If the zip code spans multiple cities then a manual city selection will be required if the correct city is not displayed.

---

**Field: Sale Client Name**

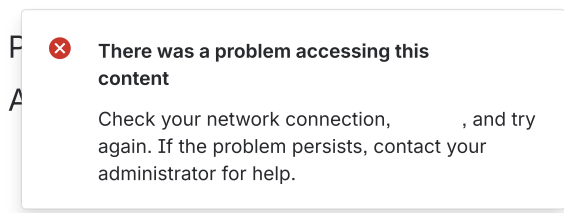
This optional field allows you to provide a client name for the sale. The client name is for record keeping and can be used to search for sales.

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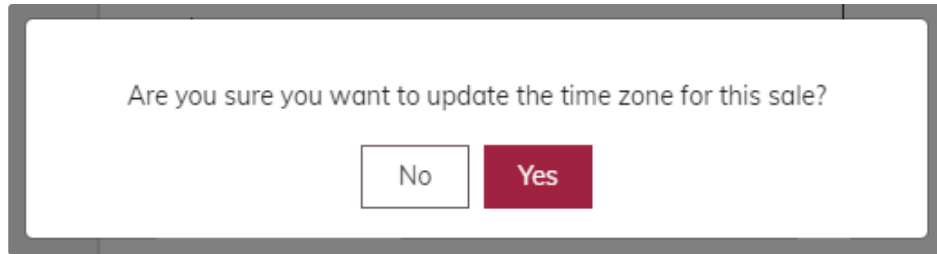
**Field: Sale Time Zone**

The required dropdown selection Time Zone is where we specify the time zone for our sale start and end times. Daylight saving time, if applicable, will be managed by the system.

The default dropdown selection time zone will be set from the location time zone but can be changed using this dropdown selection. In most cases you will not need to change the time zone, however if your sale is across time zone boundaries and you want to represent your sale start and end in the sale location time zone then you can change that using this field.



ifferent from the location setup there will be a popup -  
e zone for this sale?



**i** Note: Users of CTBIDS applications will see times in their time zone as identified by the computer or device they are using. Time zone selections are used to save the time in that time zone. For example, a sale scheduled to start at 1:00pm EDT will show to users in the Mountain time zone of 11:00am MDT and will show to users in Arizona as 10:00am MST.

**Field: Sale Start Time**

The required field Start Time is a pop-up calendar field where we can select the date and the time that we expect our sale to start. The time selected in the pop-up calendar is in the time zone defined in the field above it.

**i** Note: The start date and time of a sale is very important as CTBIDS will display the sale if there is 1 or more items that are in the “ready” state.

**⚠** When entering a sale start date/time consider setting the date out further into the future when you do not yet know the exact start date/time.  
Once a sale start date/time has been achieved, you will no longer be able to edit the start date/time.  
If the start date/time is now in the past and you are unable to edit this, you can still make your sale ‘live’ by moving all items from Pending to Ready and the sale will immediately go live. This may require added planning to be available at the exact start date/time for moving the items.  
This is why we encourage you to extend the sale start date/time to avoid this limitation. You are able to adjust the start date/time if the date/time has not yet been achieved.

**Field: Sale End Time**

The calendar field where we can select the date and the time that we expect our sale to end. The time selected in the pop-up calendar is in the time zone defined in the field above it.

**✖** There was a problem accessing this content  
Check your network connection, and try again. If the problem persists, contact your administrator for help.

**i**

Note: The end date and time of a sale is very important. For sales with auction items, the end time selected is the start of sale closing which is a time period between the sale end date and time and the last item closing based on duration, item closing time, and soft closing behavior.

**Warning:** Do not change the end date and time of an ongoing sale (i.e. a sale has already started) without serious consideration. Active bidding on items whose closing time shifts is not considered good business practice.

**Field: Sale Close Duration**

The required dropdown selection Close Duration allows us to identify the number of minutes AFTER the sale End Time to distribute all sale items to close.

**Example 1:** Sally has a sale that consists of 95 items. Her sale end time is 5:00pm and her Close Duration is 90 minutes. As a result, Sally's items in her sale will have closing times spread out over the duration after the sale has started closing. Sally will have 2 items closing at 5:00, 2 items closing at 5:01, 2 items closing at 5:03, 2 items closing at 5:04, 2 items closing at 5:05, 1 item closing at 5:06, and 1 item closing every minute from 5:07 to 6:29pm.

**Example 2:** John has a sale that consists of 4 items. His sale end time is 4:30pm and his Close Duration is 120 minutes. As a result, John's items in his sale will have closing times spread out over the duration after the sale has started closing. John will have 1 item closing at 4:30, 1 item closing at 4:31, 1 item closing at 4:32, 1 item closing at 4:33, and 1 item closing at 4:34.

1. Your items will now close in the order that you selected for the sale
  - a. Please note that items will close in the same increment of minutes of the 'Close Duration' that you selected when you created your sale. These will go in blocks of the amount of items vs the amount of minutes selected.
    - i. Example: If you have a 90 minute Close Duration set for your sale, they will go in blocks of 90 items/lots.

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Check your network connection, and try again. If the problem persists, contact your administrator for help.

Close Duration for your sale and you have 180 items. These items will go in blocks of 90 items per minute (ex: item 1 and item 91, item 2 and item

- b. The number that you order your items/lots will affect the order that they appear in in your sale based on the block that they are in. For example: If there are 270 items/lots in your sale and you selected a 90 minute Close Duration period then you will have 3 blocks of 90 items. (Items numbered with the order of 1, 91, 181 will appear next to each other in your sale).
2. If you did not save to Sync Items, or the items are not showing in the correct order for your sale, you will need to re-sync the items.
    - a. To re-sync the items, you will need to change one item to zero, and then back to the original number you had it set at. Once that is completed, you will need to click the green Sync Item Closing Time

---

**Field: Sale Tax (%)**


The required sale Tax ( % ) field requires a tax percentage for items sold. If you operate in an area where tax is not collected on sold items, just enter 0 in this field.


3/22/24 Release provide an implied decimal:

**Implied Decimal on Sale, Item, and Buyer Premium sale settings:**

Implied decimal has been added to Sale tax setting, individual item sale tax setting, buyers premium percentage setting

- [seller.com High Value and Premium Domain Names](#) users will now see an implied decimal to help reduce tax percentage and Buyer Premium percentage entry mistakes.

 **Warning:** Make sure you are aware of the tax laws in your area and the area of a sale.


 **Note:** In some areas certain items are not taxed while other items are taxed. To account for this, each item has a checkbox that allows to remove the tax on that item even if you have a tax percentage listed for the sale.

---

**Field: Sale Buyers Premium**

The required field Buyers premium ( % ) allows you to specify the buyers premium for the sale overall.

According to Wikinedia:

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Check your network connection, , and try again. If the problem persists, contact your administrator for help.

In auctions, the **buyer's premium** is a charge in addition to the hammer price (i.e. the winning bid announced) of an auction item, or lot. The winning customer is required to pay both the hammer price and the percentage of that price called for by the **buyer's premium**.

Caring Transitions encourages a buyers premium of 15% for auction centric sales.

The sale Buyer's Premium value is universal to the sale's auction items but can be overridden on an item by item basis using the field "Item Buyers Premium".

**i** Buyer's premium is only applied to auction items. Direct Buy and Onsite items do not compute buyer's premium.

#### Field: Sale Pickup Information

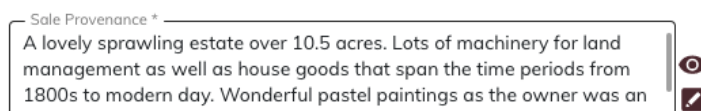
The sale Pickup Information text area is where you can write pick up details to be displayed on customer invoices. This information is not visible on the CTBIDS web site EXCEPT for invoices.

**i** Tip: A well crafted pick up information includes the date, time, and location for pickup. If sale location is difficult to find, provide your customers easy to understand navigation instructions.

#### Field: Sale Provenance

The required, rich text field Sale Provenance is where we provide a description of the sale. This description is provided to users of CTBIDS.

Rich text fields, such as Sale provenance, are not editable directly. You can edit the contents of this field by selecting the pencil-in-a-box icon.

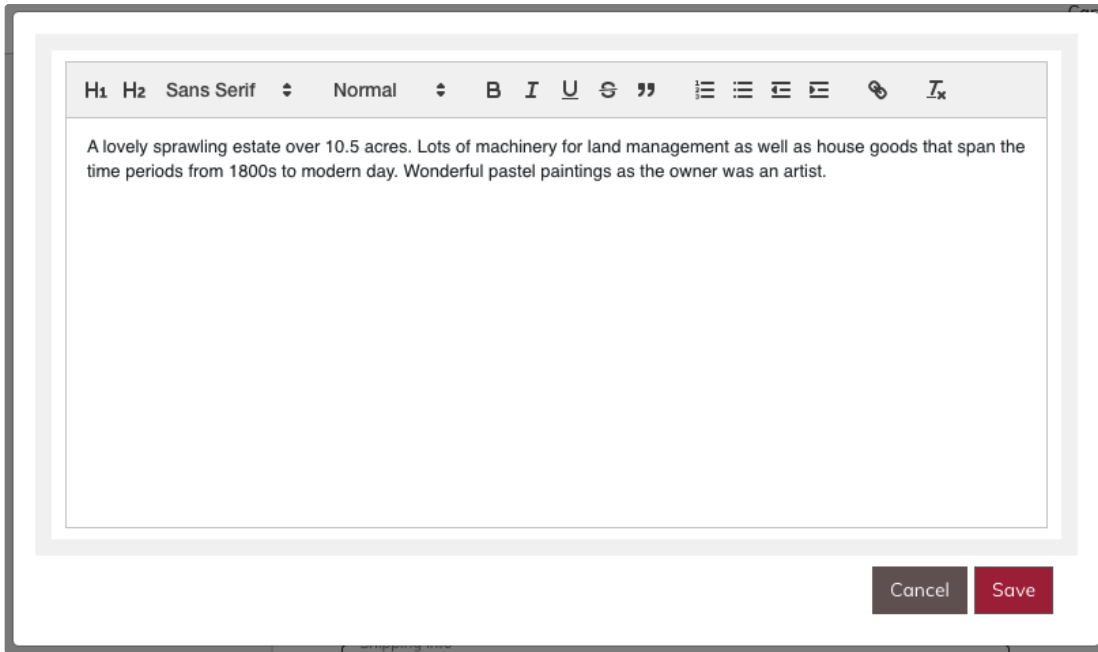


Upon selecting the pencil icon, an editor will pop up allowing you to edit the contents of this field.

Support  
striking  
you

**x** There was a problem accessing this content  
Check your network connection, , and try again. If the problem persists, contact your administrator for help.

size, font styles such as bold, italics, underline, and numbered lists and indent or outdent sections of



When you have created your sale provenance just select the “Save” button to save the text.

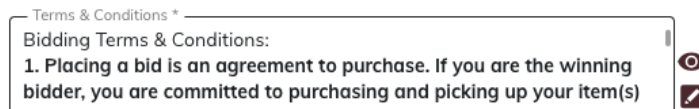
To view the text as it appears in a web page, select the eye icon.

---

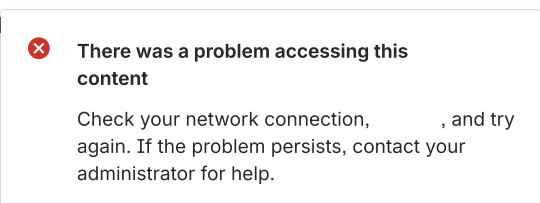
#### Field: Sale Terms & Conditions

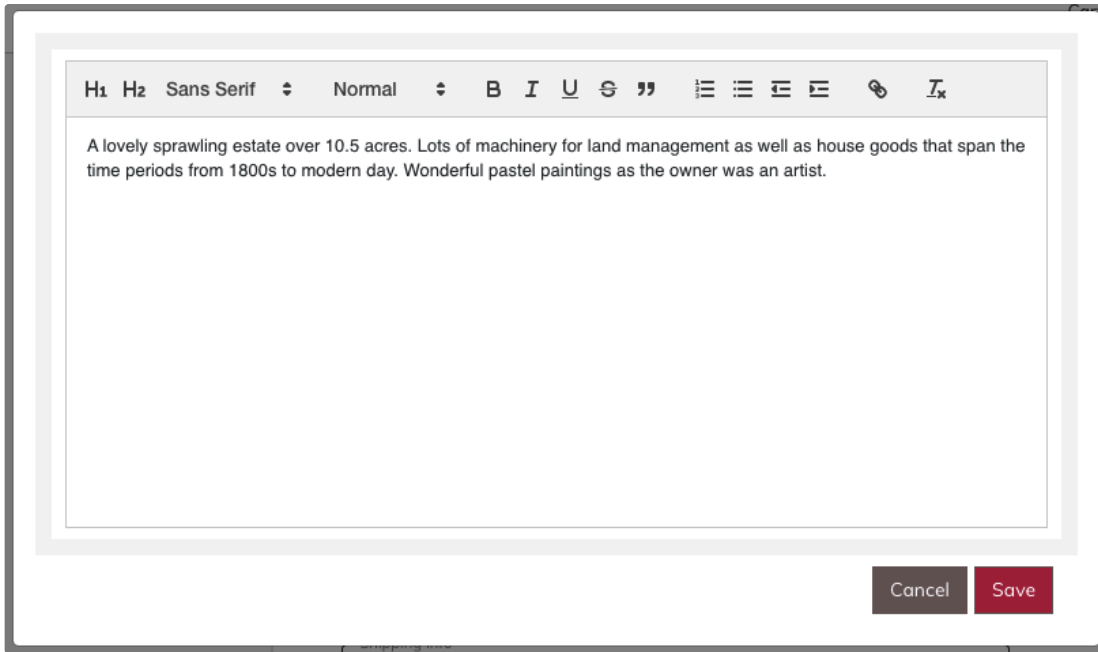
The required, rich text field Terms & Conditions is where we provide the terms and conditions of the sale. The contents of this field are provided to users of CTBIDS.

Rich text fields, such as Terms & Conditions, are not editable directly. You can edit the contents of this field by selecting the pencil-in-a-box icon.



Upon selecting the pencil icon, an editor will pop up allowing you to edit the contents of this field. Supported formatting elements include font size, font styles such as bold, italics, underline, and strikethrough. You can also create bullet and numbered lists and indent or outdent sections of your





When you have created your sale Terms & Conditions just select the “Save” button to save the text.

To view the text as it appears in a web page, select the eye icon.



**There was a problem accessing this content**

Check your network connection, \_\_\_\_\_, and try again. If the problem persists, contact your administrator for help.

## Editable Fields

Please see the chart below for when/what fields are editable for all phases of a Sale.

<b>Field</b>	<a href="http://Seller.CTBids.com">Seller.CTBids.com</a>	<a href="http://Seller.CTBids.com">Seller.CTBids.com</a>	<a href="http://Seller.CTBids.com">Seller.CTBids.com</a>	<a href="http://Seller.CTBids.com">Seller.CTBids.com</a>	<a href="http://Seller.ctbids.com">Seller.ctbids.com</a>
<b>Data Item</b>	<b>Pre Sale Start</b>	<b>Sale Started, Not Closing, No Bids on Item (Ready Status)</b>	<b>Sale Started, Not Closing, Bids on Item (Ready Status)</b>	<b>Sale Started, Closing has Started</b>	<b>Sale has Closed</b>
Buyer's Premium	Y	N	N	N	N
Category	Y	Y	N	N	N
Dimensions and Weight	Y	Y	Y	N	N
Direct Price	Y	Y	N	N	N
Fulfillment Tracking Information	Y	Y	Y	N	N
Handling Fee	Y	Y	N	N	N
House Area	Y	Y	Y	N	N
House Location (e.g. Kitchen)	Y	Y	Y	N	N
Item Closing Date	N/A	N/A	N/A	N	N
Item Closing Time (hms)	N/A	N/A	N/A	N	N
Item Condition	Y	Y	N	N	N

Item Description	Y	Y	Y	N	N
Item Images and Video Edit	Y	Y	Y - Adding images and videos	N	N
			N- Remove images or video unless retract bids	N	N
Item Images Display Order	Y	Y	Y	N	N
Item Information:	Pre Sale Start	Sale Started, Not Closing, No Bids on Item	Sale Started, Not Closing, Bids on Item	N	N
Item is Featured Flag	Y	Y	Y	N	N
Item is NOT Taxed Flag	Y	Y	Y	N	N
Item Revenue Goal	Y	Y	Y	N	N
Item Receipt Method Settings (Item)	Y (dependent on Sale level settings)	Y (dependent on Sale level settings)	N	N	N
Item Receipt Method Settings (Sale)	Y	Y	N	N	N
Item Receipt Method Settings (Location)	Y (Have to have at least one IRM selected)	N (Cannot remove IRM that is in an active sale at this location)	N (Cannot remove IRM that is in an active sale at this location)	N	N

Item Status	Y	Y	N	N	N
Item Tags	Y	Y	Y	N	N
Item Title	Y	Y	Y	N	N
Item Type	Y	Y	N	N	N
Item Valuation \$	Y	Y	Y	N	N
Real-Time CTBIDS Customer Messages	Y	Y	Y - Hide or Unhide only	N	N
Reserve Price	Y	Y	N	N	N
Sale Address	Y	Y	Y	N	N
Sale Front Door Image	Y	Y	Y	N	N
Sale Page Banner Image	Y	Y	Y	N	N
Sale Provenance	Y	Y	Y	N	N
Sale Tax %	Y	Y	Y	N	N
Sale Time Zone	Y	Y	Y	N	N
Sale Title	Y	Y	Y	N	N
Sale Zip Code	Y	Y	Y	N	N
Scheduled Pick Up Date	Y	Y	Y	N	N
Shipping Fee	Y	Y	N	N	N
Staggard Duration	Y	N	N	N	N
Staggard Time	Y	N	N	N	N
Starting Price	N/A	N	N	N	N

	<b>Start Date editable?</b>	<b>End Date Editable?</b>
<b>Sale in Ready and Live -No bids placed</b>	No	Yes
<b>Sale in Ready and Live -Bids placed</b>	No	Yes
<b>Sale in Pending Start Date Not passed</b>	Yes	Yes
<b>Sale in Pending Start Date Passed</b>	No	Yes
<b>Sale in Pending - Start and End Date passed</b>	No	Yes
<b>Sale in Ready - Soft Close in Progress</b>	No	No
<b>Sale was Live - Start and End Date passed</b>	No	No

## Searching for Sales or Items

To see the list of sales at your location, select the Sales tab on the left hand corner, then select your location from the dropdown. You can further refine your results by filling out the other fields, but selecting your Location is mandatory.

CTSeller  
Caring Transitions Owner Dedicated Support line is now 844-OWNER-411 (844-696-3741) Sign Out

Home  
Locations  
**Sales**  
Items  
Payment/Bidder  
Invoice  
Reports  
Messages  
FAQ

Sale Title Client Name Starting Before Starting After  
State City Zip Code Location  
+ Create

CTSeller  
Caring Transitions Owner Dedicated Support line is now 844-OWNER-411 (844-696-3741) Sign Out

Home  
Locations  
Sales  
**Items**  
Payment/Bidder  
Invoice  
Reports  
Messages  
FAQ

Location Category Item Title Description Item SKU Created Date From Created Date To  
CT Test Location - Nothing Realty for Sale All  
+ Create

Display Records Per Page 10 Filter Clear All Search

## Sales at My Location

To see the list of sales at your location, select the Sales tab on the left hand corner, then select your location from the dropdown. You can further refine your results by filling out the other fields, but selecting your Location is mandatory.



## Bulk Item Edits

Sellers now have the ability to edit items in bulk from their Seller Dashboard. Here is a video demonstration as well [Bulk Item Edit Demo](#)

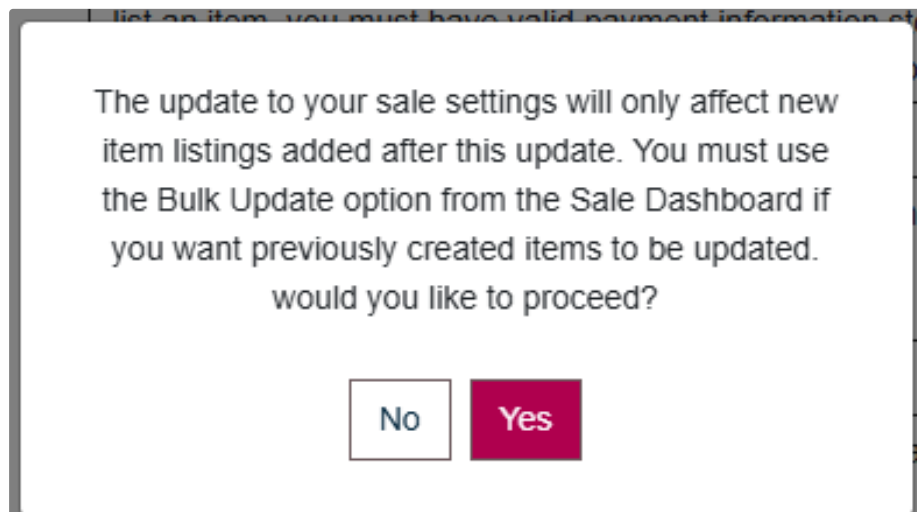
**Please Note:** You will not be able to edit items that have bids placed on them, you will need to retract the bids prior to editing the items.

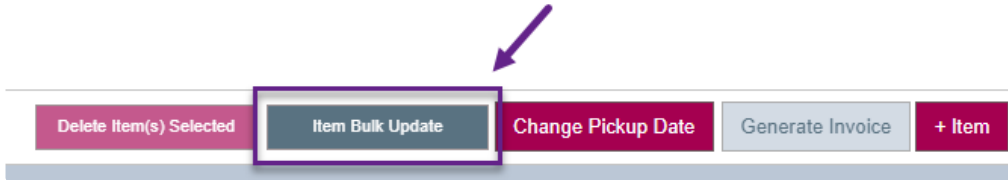
If you 'Select All' this will only change the item settings, it will not change your sale settings.

**⚠ If you edit your sale settings after item creation, this will not apply to any previously created items, it will only apply to new items moving forward. To update the item settings (Tax, Tax %, BP %, IRM, etc.) you will need to use the Item Bulk Update. Please see information below.**

To help with reminding all Seller Site users that changing the Sale Setting after items have already been created for BP, Tax, and IRM and this action will NOT update already created items; you will now see an alert message for those fields when you go to update them on your sale settings.

This is a reminder that to update BP, TAX, or IRMs on items already created and in your sale, you must use the Item Bulk Update feature on your sale dashboard.

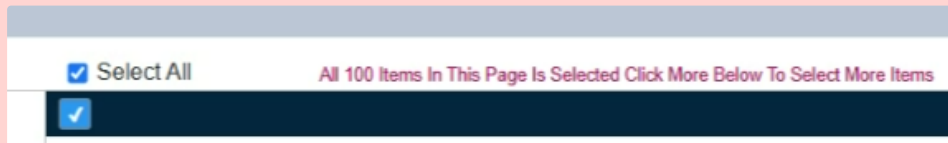




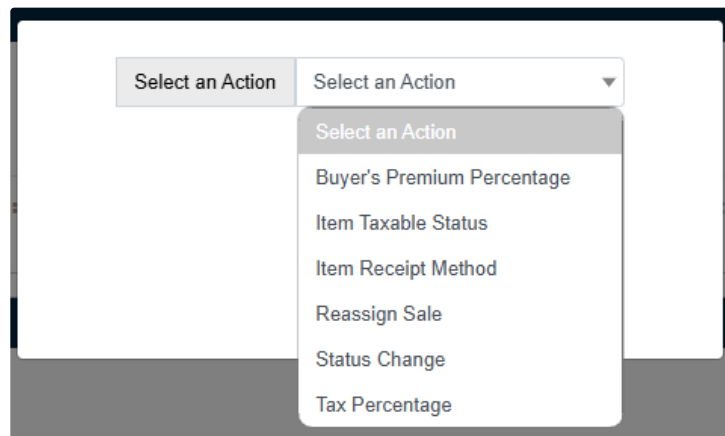
You will have the option to Select All items or you can select each item individually, as many as you want.

**⚠ If you have more than 100 items in your sale you must hit the 'More' option at the bottom of all the items listings so that all items in the sale get selected (depending upon how many items you have, you may need to hit 'More' more than once so that all items are selected).**

If you do not select the 'More' option, only the first 100 items that are displayed on the screen will be selected and you will see a warning message to indicate this as shown here:



Once the items you want to edit have been selected, select the 'Item Bulk Update' button and you will have a pop-up window with multiple options to choose from:



**Buyer's Premium Percentage** - Here you will be able to change the BP % for any items you have selected

---

Select an Action
Buyer's Premium Percentage ▾

Update Buyer's Premium(%)

No
Yes

---

**Item Taxable Status** - Here you can change items from Taxable to Not Taxable

Select an Action
Item Taxable Status ▾

Item taxable     Item not taxable

All selected items will be marked as item is not taxable

No
Yes

Select an Action
Item Taxable Status ▾

Item taxable     Item not taxable

All selected items will be marked as item is taxable

No
Yes

**Item Receipt Method** - Here you can change the IRM for any items selected. If you do not want something to be offered for that item (ie You want to remove shipping on an item that is very fragile or too large to ship) you can unselect the IRM for those items.

Select an Action
Item Receipt Method ▾

Item Receipt Methods

Pickup     Delivery     Shipping

No
Yes

**Reassign Sale** - You will now have the option to reassign/move items from one sale to another. Please note, these items must be in a Pending Status to a different sale. You will have a dropdown menu to select which sale you would like to reassign the selected items to.

Select an Action
Reassign Sale ▾

Select Location

CT Test Location - Nothing Really for Sale
▾

Select Sales \*

Select Sales \*
▾

No
Yes

**Status Change** - This is where you will move items from Pending to Ready and vice versa

Select an Action Status Change

Status Change

Do you want to change all items to  
**Ready Status?**

No Yes

**Tax Percentage** - You will be able to change the selected items tax percentages here when needed

Select an Action Tax Percentage

Update Item Tax(%)

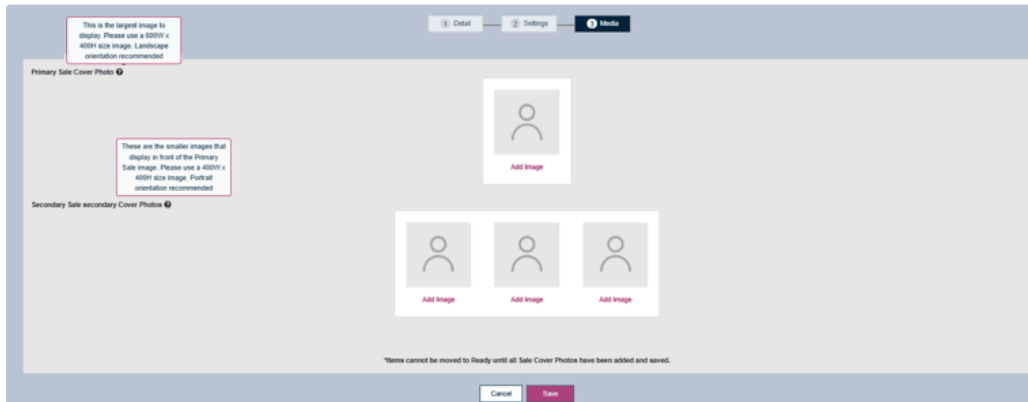
No Yes

## Why isn't my onsite item showing up?

Onsite only items/sales will no longer display on the CTBids site but can still be created and marked for 'onsite'. These items are integrated and will appear on the [EstateSales.org: Find Estate Sales or Shop Online Auctions](#) site.

Why am I getting a warning message that I cannot move items from Pending into Ready due to no sale cover images?

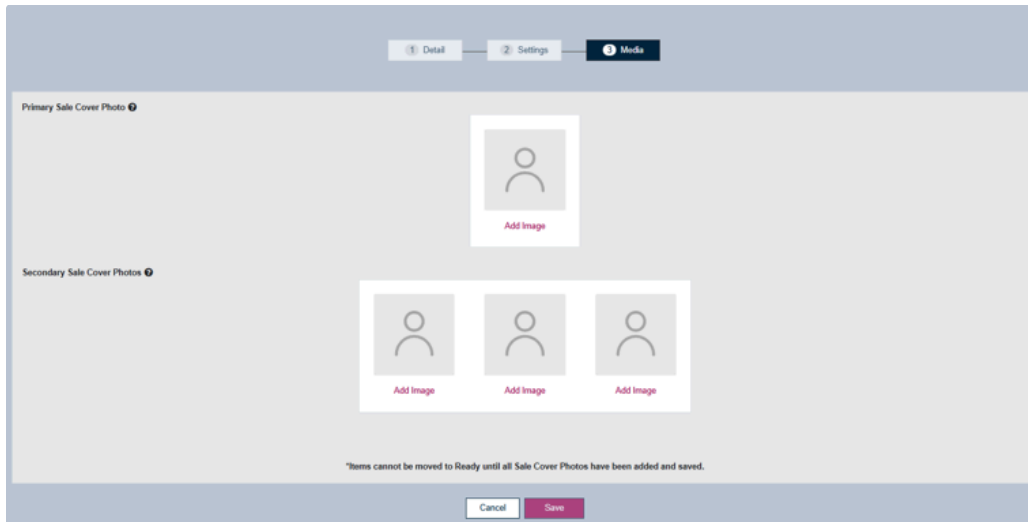
All sales now require photos to be upload to the media tab. You will need to upload photos from four different items. Please go into the sale settings for the sale, select the Media tab and upload the sale Primary and Secondary images that are now required.



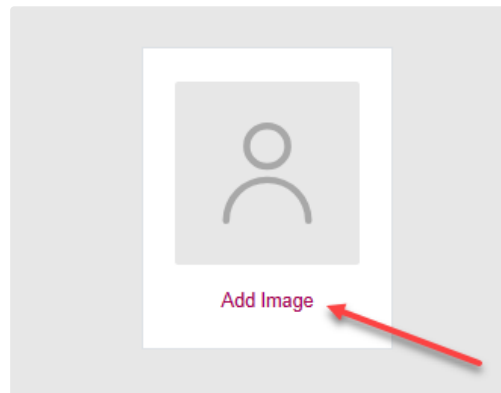
Once the images are added your items can be moved from Pending to Ready.

## How do I upload or change my sale cover image?

Go to the Media tab on your Sale settings.



Select the Add Image link on each template to add or change an image.




The Primary Photo is the largest image to display and works almost like a “background” on your sale display. The recommended size for the Primary Photo is 600W x 400H. The Secondary Photos are the three smaller images that display in the front of the Primary Sale image. The recommended size for the Secondary Photo is 400W x 400H.

Please note that you can still create items and put them in Pending if you do not have any Primary or Secondary images selected yet. **However, you cannot move items from Pending to Ready without these images uploaded to your media tab.**

You can change these images at any time whether or not your sale is live and bids are placed.

- ⓘ Please use images of items in your sale. Do not use premade collages or portraits of yourself, staff, or clients. CT Marketing has the right to go in and edit your sale display if

they choose to.

 You will not find this feature on the Seller app. It is only available on the Seller . com. If you upload a Sale Cover Photo from the Seller app, it will render as the Primary Cover Photo. You will still need to upload three Secondary images.

# Security Tips when Posting Sales on CTBids

## On-Site Security Measures

- **Maintain Exterior Appearance:** Avoid altering the outside appearance of the home. For example, if a doormat or chairs are on the front porch, leave them in place, even if they are part of the sale. This helps avoid signaling that the house is vacant or undergoing a significant change.
- **Lockbox Placement:** If using a lockbox, consider a less conspicuous location than the front door to minimize its visibility.
- **Situational Awareness:** Always be aware of your surroundings, especially when moving items in or out of a home.
- **Advertising Gold and Jewelry:** Our regular buyers know how to find these items on CTBids. Consider not advertising gold and jewelry in the general sale descriptions to avoid drawing unwanted attention.
- **Post-Auction House Visits:** After an online auction sale has gone live, **do not return to the house, especially not alone.**
- **Vary Your Routine:** Try to be a little unpredictable with your arrival and departure times at locations.
- **Suspicious Activity:** If you notice a strange vehicle or person sitting in a vehicle, do not stop, park, or go into the home. Drive around the block, head to a public location, or take other evasive action.
- **Minimize Distractions:** Avoid multi-tasking, such as being on the phone while driving or working on-site, to ensure you are fully aware of your surroundings.

## Managing Location Data (Geotagging) in Photos

We'd like to remind everyone to be mindful of location data (also known as geotagging) that may be embedded in photos taken with smartphones or digital cameras.

**What's the Risk?** Many devices automatically store GPS location information in image files. When these photos are shared, especially on social media or in public listings, they may unintentionally reveal:

- Home or office addresses
- Travel patterns or worksite locations
- Confidential or sensitive environments

This can pose a significant privacy risk and may even compromise business security if shared publicly or with unauthorized parties. CTBids Seller currently removes this information from photo's when posted to the CTBids Site and also when using the Seller Mobile App.

### **How to Protect Yourself and the Client:**

#### **On iPhone:**

1. Go to Settings > Privacy & Security > Location Services
2. Select "Camera," then choose "Never" or "Ask Next Time"

#### **On Android:**

1. Open the Camera app
2. Tap Settings (gear icon)
3. Disable "Location tags" or "Save location"

#### **Best Practices:**

- Always review photos for sensitive details, including location data, before sharing them.
- Be cautious when attaching images to external communications, ensuring they do not contain hidden location information.

### **Enhanced Security Tools & Practices**

- **Portable Sensor Lights:** Strategically aim sensor lights from trees or other elevated positions towards access points.
- **Secure Safe:** If valuable items are present, use a medium to large safe at the location, ensuring it is difficult to move.
- **Reinforce Entry Points:** Consider reinforcing windows and doors with window locks, bars, or door jammer braces.
- **Portable Cameras:** Utilize portable outdoor and indoor cameras for added surveillance.
- **Sturdy Lockboxes:** Use sturdy lockboxes or, if possible, the homeowner's or Realtor's lockboxes.
- **Timed Lighting:** Implement lights on timers. Consider multiple lights at different times and/or using a TV timer to simulate occupancy.
- **Restricted Location Sharing: Do not send the exact location of the property until the morning of the sale or pickup.**

- **Two-Person Rule:** Always ensure there are **two people on-site** during all sale and pickup activities.

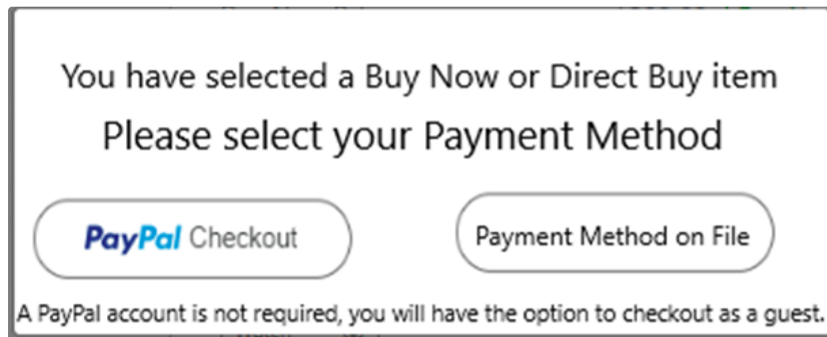
## Buy Now/Direct Buy Only Sale & Buy Now with Reserve Price

- Please note: If you have a sale that only has Direct Buy or Buy Now items (meaning no items that you can bid on) you will not be able to process payments for any **add-on** invoice immediately. You will need to send an email to [Ctbidshelp@caringtansitions.com](mailto:Ctbidshelp@caringtansitions.com) or call **844-OWNER-411 (844-696-3741)**, and advise them of the sale name and invoice number so that we can have this moved by our Development team.

### Buy Now/ Direct Buy Items

Customers will now have the option to choose either using the commerce platform checkout (PayPal guest checkout) OR to use their payment method on file when checking out.

- **\*\*Please note: This will be the ONLY time customers can use guest checkout for payment**



- **⚠** If you create a sale with all Direct Buy items and set the sale closing date out further than normal (example: Sale starts 12/15/23 and the end date is set for 12/15/2024 -1 full year) then any Credit Cards used by a customer cannot expire prior to your END date. You could have customers whose card expires 6/01/2024 and they attempt to purchase on 12/29/23...due to the sale end date extending past their card expiration date, they will not be able to purchase.

It may be wise to not extend sales out too far or you may be missing out on sales.

### Buy It Now feature with Reserve Price

Although we do not encourage this action, sellers have the option to enable the Buy Now feature simultaneously with a Reserve Price on an item. When the Reserve Price has been met and the bidding price is within a 78.25% range of the Buy Now price, the system removes the Buy Now

button. This logic is to encourage bidders to keep bidding on the item instead of opting for the Buy Now option. Ultimately, the item can sell for more than the Buy Now price was asking for.

Example: I create an item with a \$15 Reserve and a Buy It Now price of \$25. Customer A places a bid of \$15. The Reserve label now says "Reserve has been met", but the Buy It Now price is still available because the current bid of \$15 is not within the 78.25% range of the Buyer It Now price. Customer B places a bid of \$21, and the Buy It Now button disappears. This now makes bidding on this item function in a more "auction" fashion to allow for a higher sold price.

If you want an item to keep the Buy It Now logic, do not put a reserve on the item.

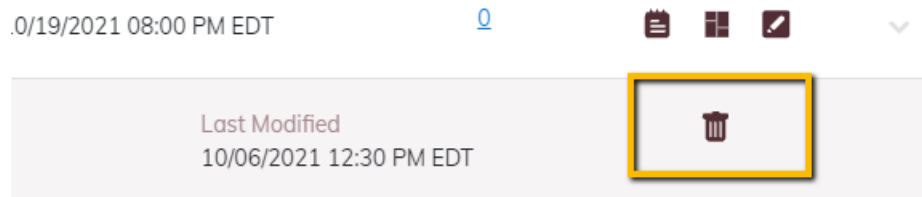
## Delete a Sale

To delete a sale, sign into Seller.

Click on 'Sales' from the left-side menu and search for the sale you wish to delete.

**A sale can only be deleted if there are 0 items in it.** This can be used to help clean up your sales that may have been used for testing purposes or placeholders.

When you see the sale listed, select the arrow drop down on the right side of the row to display the dropdown where you can click on the trash can icon to delete the sale.



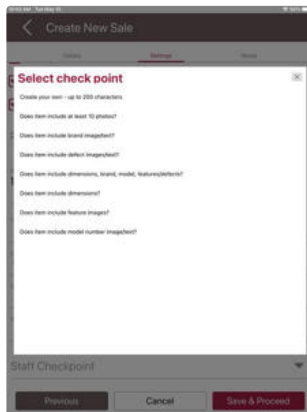
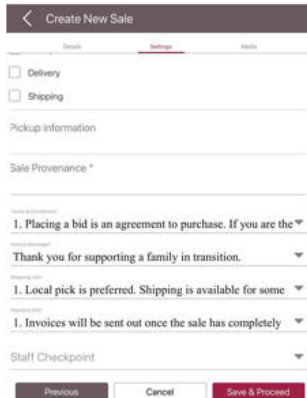
**Please note: If you have any items in Queue still assigned to a sale that has been deleted, they will still Publish to the previous sale, and you will need to go back into the Seller NG App and assign them to the correct sale**

## Staff Checkpoint

As a Seller, you now have the option to add a 'Staff Checkpoint' question to your sale, so that this checkpoint question will appear for any employees (staff) in the field to remind them of certain things to check when creating items.

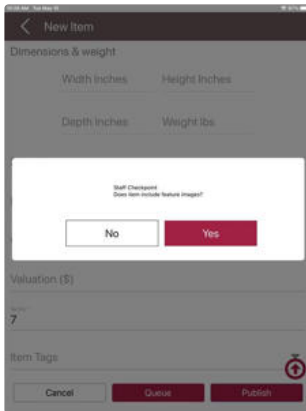
This option is available during the 'Settings' section when creating a new sale

- This option is available on both Seller.ctbids, and the Seller NG App



- **The dropdown from 'Staff Checkpoint' options will include:**
  - **Does item include dimensions?**
  - **Does item include brand image/text?**
  - **Does item include model number image/text?**
  - **Does item include feature images?**
  - **Does item include at least 10 photos?**
  - **Does item include defect images/text?**
  - **Does item include dimensions, brand, model, features/defects?**
  - **Create your own - up to 200 characters -** If selected, empty text box will populate with a save/cancel button

Once completed and Staff Checkpoint question is selected and saved for the sale, anytime an employee/staff creates an item, they will be prompted with the selected question



When the staff/user creating items on the NG app reach the end of the item fields and ready to select either 'Queue' or 'Publish' they will see a popup window with the question the Seller has chosen for this sale and an option to select 'Yes' or 'No' to it. If they select 'Yes' then they will be permitted to select 'Queue' or 'Publish'. If they select 'No', then text will display "Please review your item" and they will return to the previous screen.

## Counterfeit/Fake Items

### **Counterfeit or replica items**

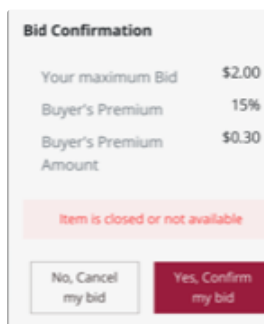
The sale of bootlegs, counterfeits, fakes, and unauthorized or pirated copies of items is illegal and not allowed on CTBIDS, including:

- Counterfeits, fakes, and replicas of brand-name items, including items “inspired” by a brand without permission of the owner
- Bootlegged or unauthorized recordings
- Pirated copies of any copyrighted materials
- Use of a trademark or other implied affiliation with a brand

If a lot or item is found to be a counterfeit or fake, it will be removed from the sale immediately. This includes sales where it is made known the item is a replica, it is strictly forbidden and will be deleted.

## Re-syncing Items/ Item is Closed Error Message

If you have a live sale, and users are not able to successfully place a bid because they are getting an error message when attempting to confirm their bid: "Item is closed or not available", you will need to re-sync your items.



If you have moved an item from a previous sale into a new sale, the item will need to be re-synced to the new sale. **This can be done by putting the item in a 'Pending' status and then changing it back to 'Ready'**. This action can be done in the sale dashboard. If there are multiple items needing to be re-synced you have the option to use Bulk status change, by clicking "Change all item status button" and selecting all the items and move to 'Pending' and the same back to 'Ready'.

This will align the item data to the sale and be available to be bid upon.

## Changing/Editing a Closed Sale

If a sale has closed by accident or incorrect dates were entered in, **Do Not** reopen the sale.

Create a new sale and clone any/all items from the previous (closed) sale to go to the new sale.

## CT Seller NG File Formats


Image Size: 5MB per photo

Image Formats: All Formats

Video Size: 50MB per video

Video Formats: All video formats. We recommend keeping the setting on 'Most Compatible'.

8:56

5G 

 Camera

## Formats

CAMERA CAPTURE

High Efficiency

Most Compatible



To reduce file size, capture photos and videos in the High Efficiency HEIF/HEVC format. Most Compatible will always use JPEG/H.264. 4K at 60 fps, 1080p at 240 fps, and HDR video require High Efficiency.



## Field: Template Editor

The following fields use the Template Editor to edit formatted text within the application:

- **Sales Terms and Conditions** (Location Default and Specific Sale)
- **Sale Invoice Message** (Location Default and Specific Sale)
- **Sale Shipping Message** (Location Default and Specific Sale)
- **Sale Payment Message** (Location Default and Specific Sale)
- **Sale Provenance** (Specific Sale)

The Template Editor provides various editing and formatting tools to help you create that perfect text. Formatting capabilities are:

- **Adjust font sizes** - small, normal, large, and huge
- **Adjust font styling** - bold, italics, underline, strikethrough, and quote (indentation with a grey line to the left of the text)
- **Adjust list items** - numbered list, bullet list, indent, and outdent.

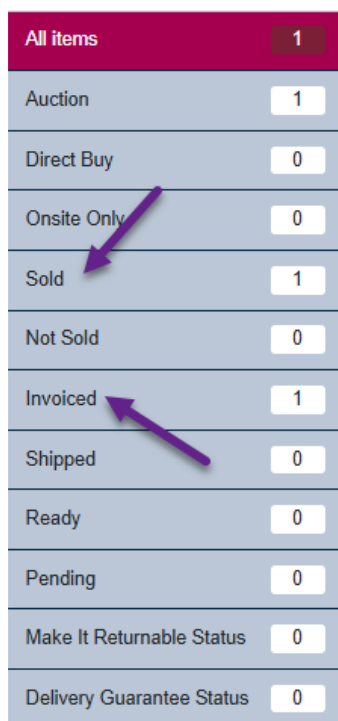
## What to do Post Sale

Application: **Seller CTBIDS**

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After your sale has closed here are the steps to follow:

1. Sign into your Seller account
2. Select 'Sales' from the left-side menu
3. Search for your sale details to populate information
4. Once the sale has appeared, select the 'Dashboard' icon
5. Review 'Sold' items from the left-side menu.
6. If any item(s) need edited, bids retracted, customer changes, etc., click on the 'eye' icon next to the particular item(s).
7. After reviewing sold items, select "Generate Invoices" in the top right corner of your screen.
8. You can view/edit invoices that are generated before sending them to winners by selecting 'Invoiced' from the left-side menu.
9. After reviewing generated invoices and ready to send to winners, select the blue 'Send/Resend Unpaid Invoice to Buyers' button from the 'Sold' tab or blue 'Email Invoices' button from the 'Invoiced' tab. Both are located in the top right screen.

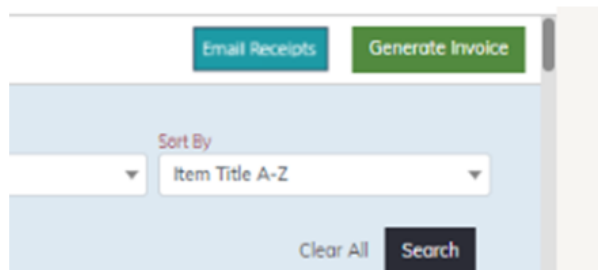


All items	1
Auction	1
Direct Buy	0
Onsite Only	0
Sold	1
Not Sold	0
Invoiced	1
Shipped	0
Ready	0
Pending	0
Make It Returnable Status	0
Delivery Guarantee Status	0



## Processing Invoice with Non Restricted item (System Generated)

1. Login to <http://Seller.ctbids.com>
2. Select 'Sales' from the left side menu
3. Search for the sale, and select the sale Dashboard icon
4. In the upper right-hand corner, select 'Generate Invoices'
  - a. If the 'Generate Invoice' button is greyed out - check to make sure there are not any items that are still live – you cannot generate until the sale is completely closed. If issue persists- then you would send out a slack message to Level 3 (Development Team)



5. Seller will generate Invoices and select Process payment to charge default card on file

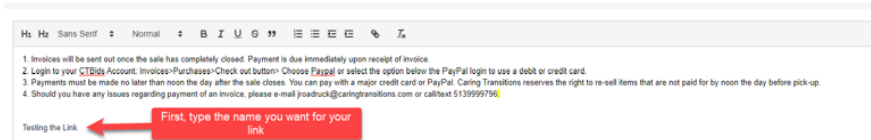
## Approved - New Invoice or Add On Invoice (Owner Created New Invoice)

1. When owners create a new invoice or add on service to an invoice, the customer must approve of the new invoice with the additional services
2. Scenario for Customer Accepting Additional Services/Charges
  - a. Sale Ends
  - b. Owner clicks Generate Invoices
  - c. Owner Processes Payment from Invoice Dashboard for Item
  - d. Owner Adds On Invoices for Shipping/Services
  - e. Owner Sends Invoice to Customer for Approval
  - f. Customer Approval Secured
  - g. Owner Processes Payment from Invoice Dashboard
  - h. Customer Card Charged for Additional Service Cost

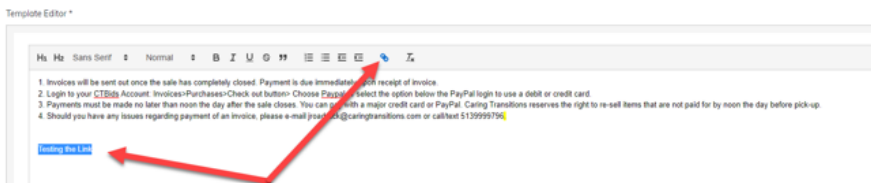
## Adding Link to Invoice

Sellers can add a link into the invoices generated at their location. In order to add a link, please follow the steps below.

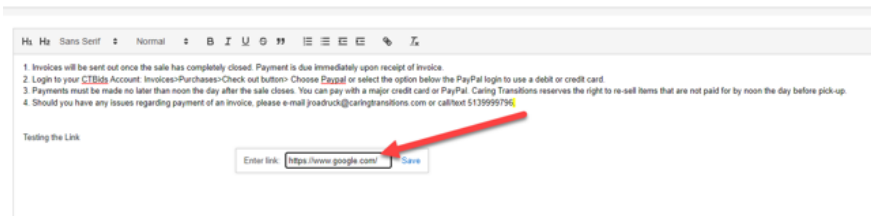
1. Go to your Location template and click the pencil icon on the Invoice Messaging tab
2. Type the name you want the link to be




3. Highlight the text and select the link icon



4. A pop-up will appear and you can copy and paste the URL into the 'Enter link' field and select 'Save' when you are done



- You can directly copy and paste a link into the invoice template. The link must contain www. and/or https: in order to redirect to the correct page. For example: you can directly add <https://www.google.com> or  Google , but not [google.com](http://google.com). **However, we strongly recommend utilizing the hyper-link function.**

## New Invoice - Greater than \$5000 (Owner Created New Invoice) (CPP)

1. Any invoice greater than \$5,000 will automatically charge 10% of that total to the card as a deposit
  - a. If the deposit amount is approved it is up to the seller/customer to choose a method to collect the remaining payment
    - i. Collecting remaining payment method on CTBIDS
      1. Seller will select Process Payments on invoice to collect remaining balance
      2. CTBIDS invoice will be marked as paid and emailed to win
    - ii. If the Seller does not wish to collect the remaining balance through CTBIDS they will have to pick an alternative method, then manually mark the invoice as paid
2. CTBIDS will not send the 10% transactions to the PayPal dashboard for any item purchased at \$5,000 or over.

## Fulfillment Emails (Tracking Number Email Notifications)

- As an owner, you will have 21 days to enter in tracking information to the invoice.
- Currently, the only required items for this are items that were purchased with Make It Returnable (MIR) or Delivery Guarantee (DG) services and the customer selected Shipping as their IRM. Please be aware this can change in the future to include ALL items with Shipping listed as the IRM.
- You will receive emails notifying you that you have invoices that do not have tracking information provided, until all invoices have fulfillment information entered in.
- Emails will be sent out in the following increments for every sale until all invoices have fulfillment information:
  - 1st Reminder: Day 7 after Sale End Date
  - 2nd Reminder: Day 10 after Sale End Date
  - 3rd Reminder: Day 14 after Sale End Date
  - 4th Reminder: Day 20 after Sale End Date
  - Final Reminder: Day 21 after Sale End Date
  - Missed Deadline Notification: Day 22 after Sale End Date

## Editing Invoices when DG/MIR are purchased

<b>Scenario</b>	<b>Parent Invoice Voided?</b>	<b>DG Invoice Voided?</b>	<b>MIR Invoice Voided?</b>	<b>New Parent Invoice Created?</b>	<b>New DG Invoice Created?</b>	<b>New MIR Invoice Created?</b>	<b>Seller Service Still Valid?</b>
Seller increases the dollar amount of an item that had DG/MIR	Yes	Yes	Yes	Yes	No	No	No
Seller decreases the dollar amount of an item that had DG/MIR	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Seller increases the dollar	Yes	Yes	Yes	Yes	Yes	Yes	Yes

amount of an item that did not have DG/MIR purchased, but the item is on the same invoice as another item that does have DG/MIR							
Seller decreases the dollar amount of an item that did not have DG/MIR purchased, but	Yes	Yes	Yes	Yes	Yes	Yes	Yes

the item is on the same invoice as another item that does have DG/MIR							
Seller removes an item with DG and MIR from an invoice	Yes	Yes	Yes	Yes	No	No	No
Seller removes item that did not have DG/MIR purchased, but is on the same invoice	Yes	Yes	Yes	Yes	Yes	Yes	Yes

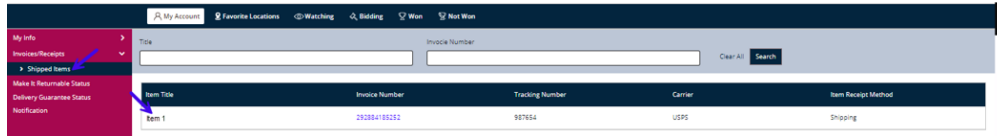
as an item that did have MIR/DG							
Seller adds fee (ex: shipping/handling) to invoice	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Seller changes IRM on item with DG/MIR purchased	Yes	Yes	Yes	Yes	No	No	No
Removing tax on an item without DG/MIR but on the same invoice as an item that did have	Yes	Yes	Yes	Yes	Yes	Yes	Yes

MIR/D G							
Seller remove s the tax on an item that had DG/MI R purchas ed	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Multiple items on an invoice have DG/MI R purchas ed. The seller remove s one/mu ltiple of these items.	Yes	Yes	Yes	Yes	Yes	Yes	Yes

## Tracking Information for a Buyer

If a Buyer has purchased an item and selected Shipping as their Item Receipt Method, they will now be able to view the tracking information from your CTBids account once the owner has entered in the fulfillment information.

Once they have logged in- it will be under the 'Invoices/Receipts' tab on the left nav. They will see 'Shipped Items'



This will display every item and the tracking information associated with it, as well as the Invoice number it is tied to.

## Fulfillment Steps for adding in Tracking Information to Item Invoice

1. Sign on to [Seller.ctbids.com](https://Seller.ctbids.com)
  - a. Make sure to check the box for accepting the Terms & Conditions
    - i. If you have not created your own password, please click 'Forgot Password'



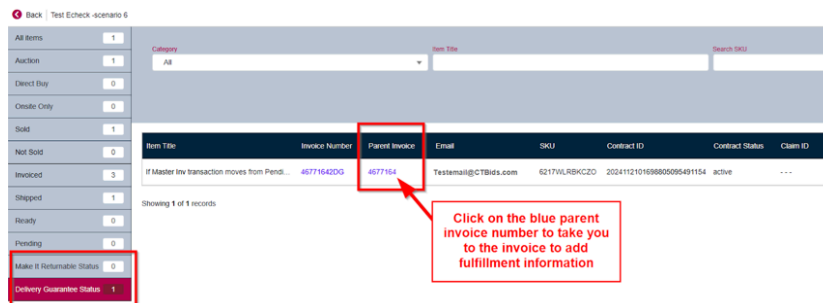
2. On the left nav – select 'Sales'



3. Enter in the name of the Sale and select 'Search'
  - a. Once sale is found, click the 'Dashboard' icon to the left



4. Once in the Sale Dashboard, select 'Invoiced' on the left nav
  - a. You will have multiple ways to Search for an invoice that needs to be updated with tracking
5. You will see a link to Parent invoice from the MIR/DG Tabs to add fulfillment information (12/6/24 update)
  - o You will see on the DG or MIR Tab that there is a link to the parent invoice where you will need to add fulfillment.
    - There will not be an actionable link (not a blue hyperlink) if the Make it Returnable policy is a Pickup item (no need for shipping fulfillment).
    - **\*Reminder\*** If the customer has both an MIR and a DG policy on the same invoice, you will only need to click the parent invoice link once (on either the MIR or DG tab) and entering fulfillment will satisfy the entry for both policies since they are both associated with the same parent invoice.



6. New Fulfillment title and card Icon will appear on the parent invoice when 'Shipping' is selected as an IRM on an item in the invoice (when viewing all invoices on the Invoiced tab).
  - a. Quick click of the card icon will show you if the fulfillment information has been added

- i. Item title will display when fulfillment **has not** been added
- ii. Fulfillment information will show when fulfillment information has been added.

Invoice No- 4677164 Date:- 11/21/2024 08:34 AM EST

**Name :** Customer  
**Phone :** 555-555-5555  
**Email :** Testemail@CTBids.com  
**Address :** Test Address Ln. Test City, State, 55555

Total Amount	Pending	Status	Auto Charge	Email Sent	Transaction History	Fulfillment
\$ 15.00	\$ 0.00	Paid	Completed	Yes		

7. You can also check in the **MIR/DG tabs** and check the last column to see if you have entered fulfillment for this policy under the title **'Shipment Entered'** with a Yes or No:

SKU	Contract ID	Contract Status	Claim ID	Claim Status	Shipment Entered
6217WLRBKCZO	2024112101698805095491154	active	---	---	Yes

**i** If an item has Pickup and/or Delivery as the Item Receipt Method, you do not need to enter any additional information in the fulfillment fields.

- 8. Once you have opened the invoice you want to update – select 'View Invoice'
- 9. Then select 'Fulfillment' at the top

CTBids

**Billing To:** Katie Garcia, 1234 Cincinnati way, Dayton, Ohio, USA, 45402. Email: KGarcia@sammtransitions.com, Phone No: 5133341439

**Pickup Location:** Sara S, 1234 Test Rd., Cincinnati, Ohio, USA, 45201. Email: ctbidessupport@sammtransitions.com, Phone No: (711) 455-8552

**Shipping To:** 1234 Cincinnati way, Dayton, Ohio, USA, 45402

Invoice Details

- 10. Here is where you will select the items, enter the tracking number, carrier info and any notes
- 11. You will select the items included in the tracking information you are about to enter and select 'Apply'
  - a. Please note, if ALL items from the invoice are going in the same box, please 'Select All'
  - b. **If there will be more than one tracking number per invoice, please only select the items included in that tracking. You can enter in as many tracking numbers as needed for the invoice**
- 12. **If the customer won one (1) item/Lot, and that one lot has many items but is a single listing**, and it will require more than one shipping box which will give you more than one tracking number to enter.
  - a. **Please use the 'Notes' field to enter additional tracking number information in this situation.**
- 13. Once the item(s) have been selected, you will then enter in the Tracking Number
- 14. Next you will enter in the Carrier information (USPS, FedEx, UPS, etc.)
- 15. You can enter in any notes
- 16. Once everything has been entered select 'Create'

Item Receipt Method: Shipping

Notes: [Text Area]

Select Item: [Dropdown Menu]

Tracking Number: [Text Field]

Carrier: [Dropdown Menu]

Buttons: Clear, Apply, Create

Footer: Item Title, Tracking Number, Carrier, Item Receipt Method

- 7. Once you have created the fulfillment information it will show up directly below
  - a. **If a customer changes their IRM from shipping to pickup:**

- i. You can edit the IRM BEFORE payments are processed, but if payments are already processed – please enter the word **‘Pickup’ in the Tracking # and Carrier fields, and the pickup date in the Notes field**
  - b. **If a customer does not pay their add-on shipping invoice, what to do with the Fulfillment requirement fields:**
    - i. You have 21 days to work with the customer to receive payment and enter tracking information, this invoice will continue to be included within the email count as needing a tracking number as a reminder.
    - ii. If the customer does not pay, or refuses to pay, to satisfy the fulfillment requirement (so that this invoice is not included in the count for tacking information needed on the reminder email), please enter **‘Did Not Pay Shipping’ into the Tacking number and Carrier fields, and add notes if you would like so that this documented.**
  - c. You can always edit the tracking information if it was entered incorrectly by selecting the ‘Pencil’ icon on the left
8. If the customer won one (1) item/Lot, and that one lot has many items but is a single listing, and it will require more than one shipping box which will give you more than one tracking number to enter.
- a. Please use the ‘Notes’ field to enter additional tracking number information in this situation.

Item Title	Tracking Number	Carrier	Item Receipt Method
Kate Win	121459795	USPS	Shipping

**Update Fulfillment**

Item Receipt Method \*  
Shipping

Item Id \*  
3204829

Tracking Number \*  
123456

Carrier \*  
UPS

Notes

Once Tracking information is added and you view the MIR and DG tabs on the left navigation bar on your Sale Dashboard, you will see the section labeled ‘Contract Status’. All Pending and Active Statuses are sent by Seel via API calls. There may be a delay in a status change due to their own system updates and API call timing

• **Pending:**

◦ **MIR Services**

- If this is an MIR product and the pickup date has not happened yet, then the status will remain as ‘pending’ until that pickup date is satisfied. Once the date is satisfied, then the status will update to ‘Active’.
- If this is MIR product and you are shipping the items, then the item will remain in ‘pending’ until the package is delivered.
  - The package is tracked by Seel. This will auto update via an API call to show that the package was received, then the item will show as ‘Active’.

◦ **DG Service**

- If this is a DG product, the status will stay in ‘Pending’ until the item has Shipped

• **Active:**

◦ **MIR Services**

- For ‘Pickups’, this will happen when the sale pickup date is achieved.
- For Shipped items, this will happen once the package is delivered to the customer.
  - Seel does all of the tracking and sends an API call once the package was received so that this status is updated.

◦ **DG Services**

- Once the item has shipped, the status will change to ‘Active’
  - Seel does all of the tracking and sends an API call once the package was shipped so that this status is updated.

All Items	356	Categories		Item Title		Search SKU	
Auction	356	All					
Direct Buy	0					Clear All Search	
Onsite Only	0						
Sold	309						
Not Sold	46						
Invoked	72						
Shipped	101						
Ready	0						
Pending	1						
Make it Returnable Status	18						
Delivery Guarantee Status	57						

Item Title	Invoice Number	Email	SKU	Contract ID	Contract Status	Claim ID	Claim Status
Test Item Name Title	0000000000DG	Testemail@test	Q11	202409640127490454213244	pending	---	---
Test Item Name Title	0000000000DG	Testemail@test	T1246	2024096401509280454448549	active	---	---
Test Item Name Title	0000000000DG	Testemail@test	T1037	2024096401235030407791676	pending	---	---
Test Item Name Title	0000000000DG	Testemail@test	T1226	2024096401224810454387526	pending	---	---
Test Item Name Title	0000000000DG	Testemail@test	T1142	2024096401761630454611813	active	---	---
Test Item Name Title	0000000000DG	Testemail@test	O09	2024096401045410454187607	pending	---	---
Test Item Name Title	0000000000DG	Testemail@test	T0144	20240964016274704543994617	pending	---	---

## Tax Exemption

### Editing, Approving, or reviewing Tax Exemptions

If you have a customer that uploads a new tax exemption file, you will receive a notification to Approve their Tax Exemption in the 'Approve Tax Exemption' tab which is a subtab under the Buyer/Bidder Tab.

- The search fields within the 'Approve Tax Exemption' tab are to search the list of customers who appear within this tab (if your list is long and you are looking to search for a specific customer).
  - Please note, Tax Exemptions are per location, as Exemptions may vary from state to state, etc. So you will need to make sure your location has reviewed the file and approved/declined the user
1. To search for a customer within the 'Approve Tax Exemption' Tab, use the filter search options if you need to search for a specific customer (if your list is long and filtering is required)

⚠ If you do not see a tax exemption here to approve but the customer insists that they have uploaded one. Please now search this customer on the Buyer/Bidder Tab.

1. Click on the pencil icon to review their profile
  - a. Go to the Bidding Details section and to the far right will be a dropdown menu for you to select your location.
    - i. Once your location is selected, the colored tax button will appear in the center of the Bidding Details box, click this button and review what you do have on file for this customer.
      1. If there is a current active (unexpired) tax exemption, any new files that the customer uploads will not be presented for your review until the current tax exemption is expired.
      2. If you entered the incorrect expiration date and need to force an expiration on a file so that you can review a new file, please read further down on this article on how to do this.

#### 2. Select Review

⚠ Be sure that all documents that are required for your state are uploaded by the customer and visible to you **before you approve the file(s)\***. If the customer needs to add another file to complete what is needed for your state, this must be done prior to Seller approval. If you approve a file and then the customer uploads a new file, that new file will not be displayed for approval until the current file(s) that were already approved have expired.

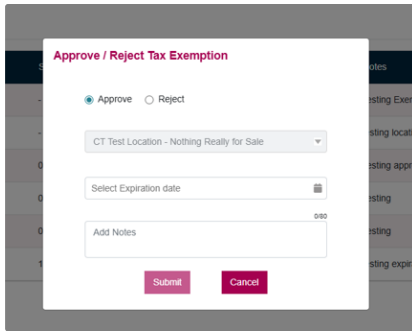
\*If you reject the submission, this action cannot be edited to 'approved'. The customer will have to upload their tax exemption files again for your approval.

Name	Nick Name	Email	Phone	Status	Tax Exemption Submission Date	
Cowley Mindy	hmindy	Vinogencfrederick@gmail.com	2405278285	Active	10/06/2021	<a href="#">Review</a>

#### 3. Review the Tax Exemption file uploaded for that user, and select the 'Approve' button

The screenshot shows the 'Approve Tax Exemption' interface. On the left is a dark sidebar with navigation options: Locations, Sales, Buyer/Bidder, Approve Tax Exemption (156), Invoice, Reports, Messages, and FAQ. The main content area has a dropdown menu for 'CT Test Location - Nothing Realty for Sale'. Below it is a 'Files' section titled 'Exemption List'. The list is divided into 'Approved' and 'Pending' sections. The 'Pending' section contains six items, each with a thumbnail image and a 'View' button. The items are: a gold bird figurine, another gold bird figurine, a gold necklace, a white van, an orange, and a document. A red arrow points to a 'Review' button at the bottom right of the document thumbnail.

#### 4. A pop-up window will appear for you to either select the toggle for 'Approve' or 'Reject'

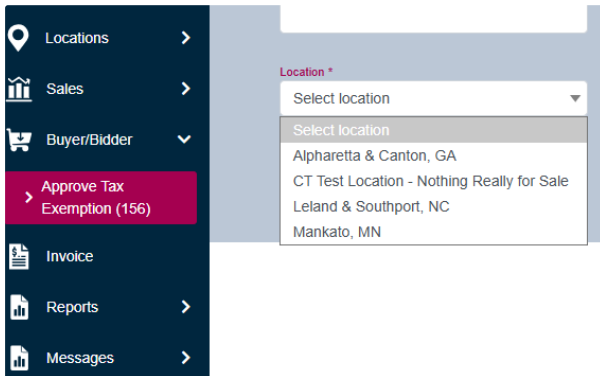


5. If Approved, enter in the expiration date and any notes you may want to add
  - a. The Approval status or location cannot be edited once selection has been made
6. Once finished, select the 'Submit' button
7. **Each user will need to be approved individually**

**⚠ Tax exemption expiration dates can be edited if it is done **prior** to the expiration date.**  
**Example:** If you have entered an incorrect expiration date and it is now on, or past, the expiration date that you entered; the customer will need to upload and submit their tax exemption file again for you to see it, and approve it. Then be sure to enter the correct date.

**ℹ Please note: You will no longer need to add your location to the users Exemption List: You will just approve every user individually and the system will automatically add your location**

1. If you are a vendor or have access to multiple locations, it is important to make sure you are choosing the correct location from the drop-down menu before approving any pending tax exemptions.



**ℹ** If you do not see a tax exemption certificate this would mean there is most likely a placeholder inserted until the customer reuploads a new document

**Tax Exemption Placeholder**

This Customer has a previous approved tax exemption form on file. The original, approved, tax exemption form was lost through a data migration and will require a reload.

Customer Actions Needed: 1.Please upload a replacement form.

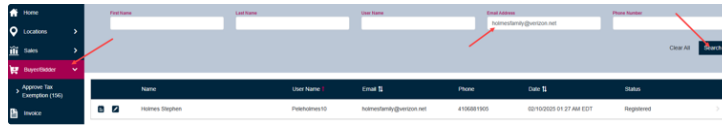
Seller Actions Needed: 1.Reflect Tax Exempt Status on any Invoices generated.

Approve Replacement Form, when uploaded.

**ℹ** It is advised that CTBIDS and Caring Transitions staff do not upload exemption forms on behalf of customers.

**If you need to search for a customer's tax exemption to review the status for your location.**

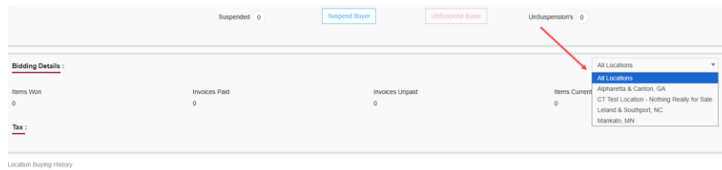
1. **Go to your Buyer/Bidder tab and search for the customer.**



2. Click on the pencil icon to open the customer's profile

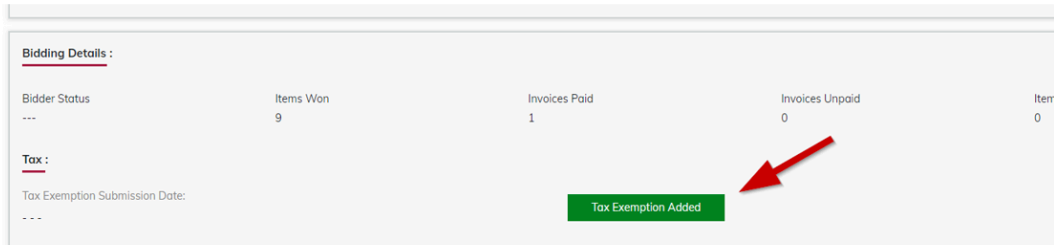


3. Go to the 'Bidding Details' section/segment and to the far right is where the location status is auto-default to 'All Locations', you will need to select your location from the dropdown box (as tax exemption status is location specific).



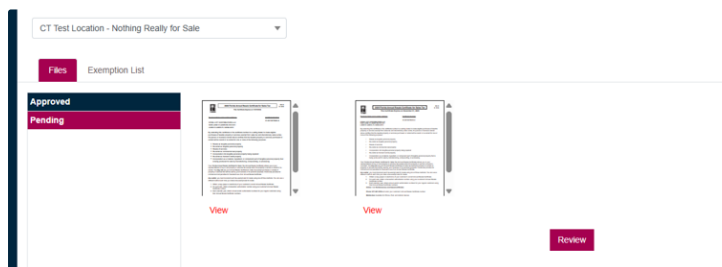
4. Once you select your location, you will see their tax status appears as a button in the middle of this section. This button is color coded, please click on that button no matter what color it is. This will open their tax files and the exemption list for you to review:

- a. Green: Tax Exemption Added
- b. Yellow/Orange: Tax Exemption Expired
- c. Red: Tax Exemption Not Added
- d. No Tax Exemption -In White (tax exemption file was rejected)



5. Again, Please click on the colored button -no matter the color- (shown above) to open the tax exemption details for this customer (shown below is what you will see -Two Tabs)

- a. The Tab you will be placed in is the Files Tab.
  - i. This shows documents that the customer has added to their account.
    - 1. If you see a 'Review' button, then this means that there is an active file that needs to be reviewed.
- b. The other tab is Exemption List
  - i. This shows all actions you/your location have taken on files for this customer.



6. Review uploaded documents or click on the 'Exemption list' tab to review all actions taken for this customer on files.

- a. You may see multiple entries if the customer has added multiple files on different dates.
- b. Review all columns.
  - i. **Tax exempt column:** which shows the current status of the file which is: expired, rejected, or approved for each entry.
    - 1. Approved is an active exemption for your location
    - 2. Rejected means you rejected the file(s) when you reviewed it and the customer for that review was not approved
    - 3. Expired means that file expired and you will see the expiration date noted in the appropriate column
  - ii. **Approved Date:** is the date that your location reviewed the file and took action with that review
  - iii. **Expiration Date:** is the set expiration date your location set for that file.
    - 1. This can be edited but only if it has not expired (you can only edit this date while the file is still active)
  - iv. **Notes:** your location entered this note when reviewing the file
  - v. **Submission Date:** the date the file was sent to your location

Augusta & Lake Oconee

Files Exemption List

Locations	Submission Date	Expiration Date	Notes	Taxexempt	Approved Date
<input checked="" type="checkbox"/> Augusta & Lake Oconee	06/07/2024 04:45 AM EDT	---	Approved for exemption	Expired	Aug-03-2024
<input checked="" type="checkbox"/> Augusta & Lake Oconee	10/10/2025 05:17 AM EDT	---	Not a real tax file	Rejected	Oct-13-2025
<input checked="" type="checkbox"/> Augusta & Lake Oconee	12/01/2025 10:26 AM EDT	Dec-31-2031	Approved for exemption	Approved	Dec-01-2025

Showing 3 of 3 records

Page 1

⚠ If you approve a file and then the customer uploads a new file, that new file will not be displayed for approval until the current file(s) that were already approved have expired.

If you entered an incorrect tax expiration date and need to force-expire the current file, please read further down this article for instructions on how to do this.

### Tax Exempt Customer was Charged Tax

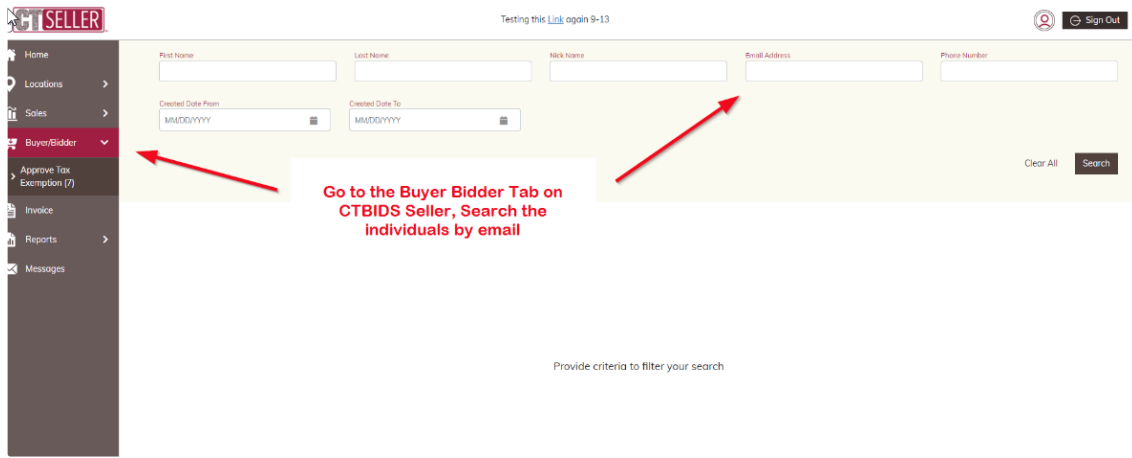
If you have a customer who was charged tax and should have been exempt, this customer's tax exemption file most likely expired and they will need to upload a new file to their account. Once it is upload, you can approve the file for your location and enter the correct expiration date. It is the customer's responsibility to keep track of when their exemption expires. You may also choose to refund the customer the tax amount from your PayPal dashboard.

### Delete an approved Tax Exemption or update/change the Expiration Date:

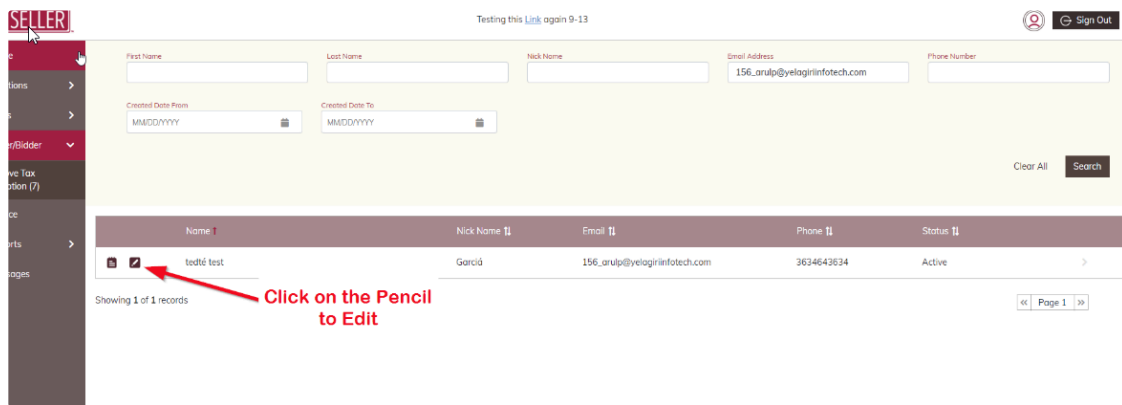
Here is a series of screenshots on how you can edit tax exemption files to change/update their expiration date or change/edit the expiration date to today's date that will expire the file by 12:01AM, effectively removing that tax exempt file.

ⓘ If they ever end up tax exempt again, they would need to upload a new file for your review (be sure to enter the correct expiration date any time you approve a tax exemption).

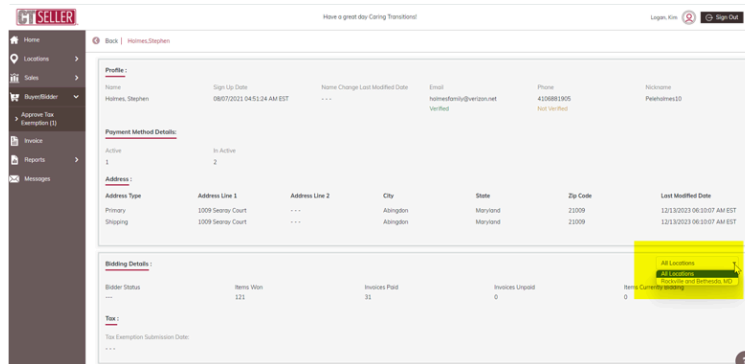
- 1.



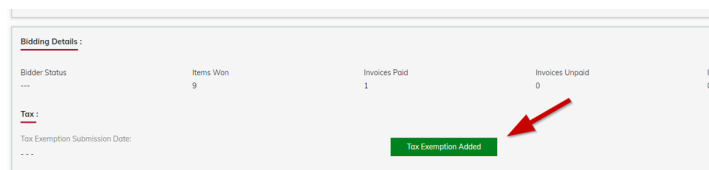
2.



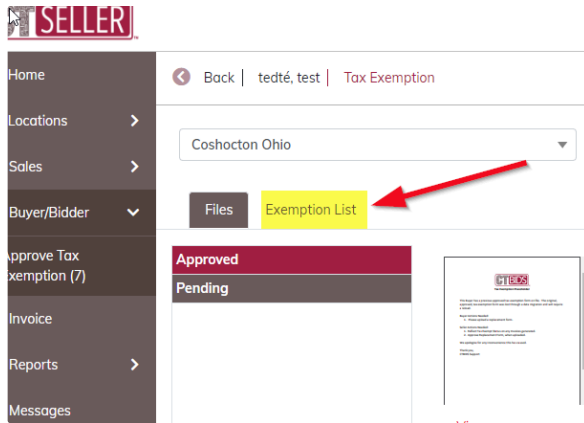
3. Adjust the location to your location (defaults to All locations)



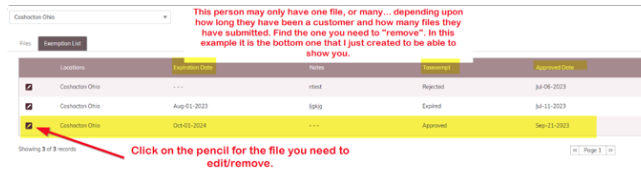
4. Once your location is selected, the tax exemption button will appear in the middle of the 'Bidding Details' section, click on the colored button to open the tax exemption information for that customer



5. Click on Exemption List

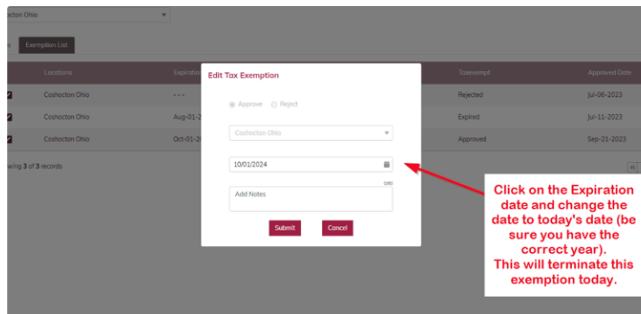


5.

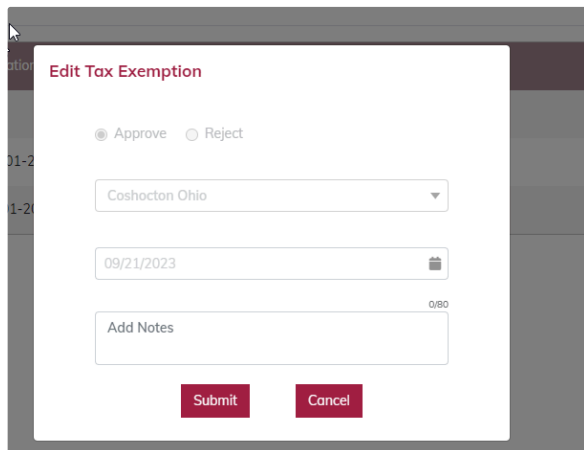


6. For removing an approved tax exemption you will enter Today's date, for editing/updated a tax exemption you will enter the updated/corrected tax exemption expiration date and click submit.

**⚠ Not that the screenshot tells you to enter today's date... this is for an example of removing an approved exemption.**



7. You will see that today's date is now gray (when today's date is entered -if submitting an updated expiration it will not be in gray, it will remain black). Hit submit. Once you submit, since the expiration date is "today", you will no longer be able to edit this field. Again, they will need to upload a whole new file for approval if they provide a new updated one.



8. You can see that it now shows the expiration of today if you are wanting this exemption removed. If you want to simply update the expiration, you will see the new date you entered.

Coshocton Ohio

Files **Exemption List**

Locations	Expiration Date	Notes	Taxexempt	Approved Date
<input checked="" type="checkbox"/> Coshocton Ohio	- - -	ntest	Rejected	Jul-06-2023
<input checked="" type="checkbox"/> Coshocton Ohio	Aug-01-2023	ljgkjg	Expired	Jul-11-2023
<input checked="" type="checkbox"/> Coshocton Ohio	Sep-21-2023	- - -	Approved	Sep-21-2023

Showing 3 of 3 records

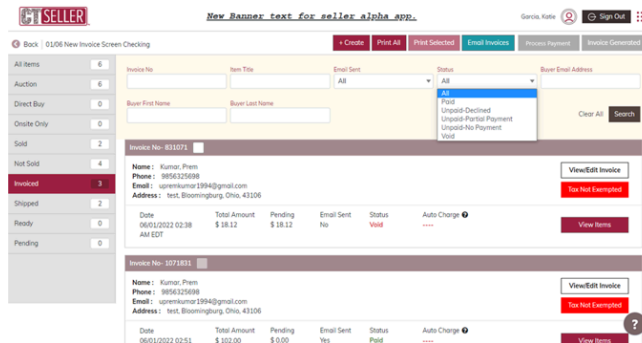
<< Page 1 >>

9. If you entered today's date, by this evening at 12:01AM, this will be marked expired.

Invoices: creating, editing, sending/emailing, pending Status, voiding, printing, restricted items, Add On invoices, & other invoice topics.

### Viewing Invoice Status from Dashboard

1. Sellers have the ability to view invoices by their payment status
2. The dashboard has a drop-down menu labeled Status where they are choose which invoices to view



### Pending Invoice Status

A 'pending' status can happen for a couple of different reasons and was put in place so that attempting to process a payment multiple times does not occur (which could result in charging the customer multiple times and then the need to reimburse if multiple payments clear). Please always review the Response Code under the Transaction History to review what it states.

### Here are two reasons payments can be set pending:

1. **If the customer has a PayPal account vaulted as their form of payment and within their account they have selected to use their bank account for payment, PayPal can issue that payment as an ECheck (or Echeque);** that payment can take days to clear. This is a PayPal account product offered to customers and you do have the ability to block/not accept the use of Echecks -we have this outlined in the Seller Knowledge Base as well on how to block/not accept Echecks within your PayPal dashboard settings.
  - a. You can check the Transaction History and review the response code. You will see that it lists 'Echeck' as the response.
  - b. You can search and monitor the transaction in your PayPal Dashboard to see if/when the Echeck clears. You will see a date listed by PayPal as to when they expect the transaction to fully process.
  - c. You can communicate with the customer to let them know their payment was received via Echeck. The customer can cancel the pending payment if you both do not want to wait for the payment to clear.
    - \*Be aware that since you have not disabled accepting EChecks on your PayPal account in the settings, then your account currently allows payment by Echeck.**
  - d. **It can take anywhere from 4-7 days for an ECheck to process (can be longer if PayPal attempts this process a second time).**
    - i. You can wait for the Echeck to clear and offer to schedule an alternative pickup date (if pickup applies) so that you are sure payment was successful. If 'Shipping' was selected, please wait to ship items until the payment has cleared.
  - e. Please look up how to turn off acceptance of Echecks if you no longer wish to accept them.
2. **If the API call between PayPal and CTBids timed out before a response code for the payment could be given,** then the payment will remain in a 'pending' state to prevent additional payment attempts.
  - a. In most cases, the system will automatically update the invoice once the payment fully processes to reflect the appropriate status (completed/Paid or failed) in due time.
    - i. This automatic update may take four hours or slightly longer to reflect on the invoice.
  - b. **If you notice that after 8+ hours the invoice is still in 'pending':**
    - i. Please first check the Response Code to see if it shows that this is an Echeck. If you see that it is an Echeck, please see the above scenario 1 for more information.
  - c. **If you do not see Echeck as the response code and the invoice has been in 'pending' for 8 hours or longer.**
    - i. Email [CTBidsHelp@caringtransitions.com](mailto:CTBidsHelp@caringtransitions.com) to let us know that you have an invoice payment in 'pending' and it has been more than 8 hours, please include the invoice number, Sale Title, and your location.

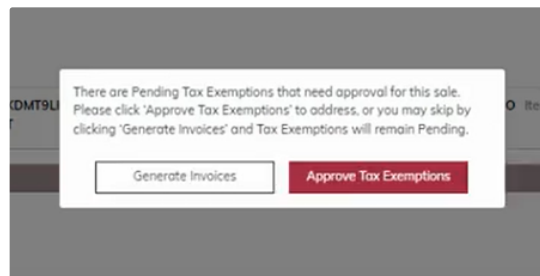
1. The Development Team will be contacted to review the transaction.

**i** The final outcome of the transaction for Echecks will be updated automatically to the CTBids invoice once the API call is received. You may see in your PayPal dashboard that the payment has cleared (or failed) before the invoice itself is updated on the CTBids site (due to the timing of when the the API call is sent and received). Please monitor the payment in your PayPal Account and know that the automated process of updating the invoice to the final outcome will occur in due time.

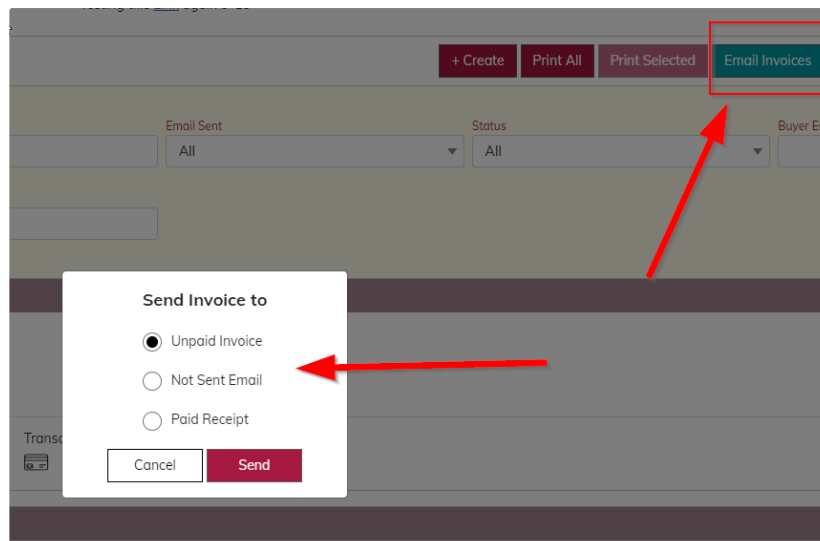
**\*Please do not recharge the customer by creating a new invoice and you will not be able to void the pending invoice. You will need to wait for the invoice to auto-update to 'failed' and unpaid to be able to void.**

#### Sending invoices/receipts globally

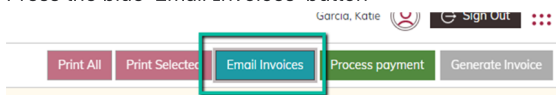
1. After your sale has closed here are the steps to follow:
  - a. Sign into your Seller account
  - b. Search for your sale details to populate information
  - c. Once the sale has appeared, select the 'Dashboard' icon
  - d. Review 'Sold' items from the left-side menu.
  - e. If any item(s) need edited, bids retracted, customer changes, etc., click on the 'View/Edit' button next to the particular item(s).
2. After reviewing sold items, select "Generate Invoices" in the top right corner of your screen.
3. If you have any Pending Tax Exemptions, you will get an alert before being able to generate invoices
  - a. You can skip this step by clicking 'Generate Invoices' and it will generate all invoices as they are
  - b. You can select 'Approve Tax Exemptions' and it will take you to the Approve Tax Exemptions page



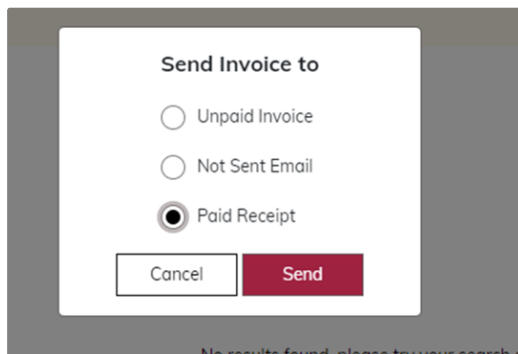
- Please note that by selecting 'Approve Tax Exemptions' you will still need to go back to the sale dashboard and select Generate Invoices.
  - You will need to approve each users Tax Exemption individually
- You can view/edit invoices that are generated before sending them to winners by selecting 'Invoiced' from the left-side menu.
- After reviewing generated invoices and ready to send to winners, select blue 'Email Invoices' button from the 'Invoiced' tab and make the appropriate selection for what you are wanting (to send globally) then click 'send'.



- To email all **Paid receipts** from your sale (globally), go to the Invoiced tab on the Sale Dashboard
- Press the blue 'Email Invoices' button



- A pop-up message will render, giving you options to send the appropriate receipt



- After clicking the correct Receipt option, click the red 'Send' button to generate the emails

**Email - Unpaid Invoices -For ALL Unpaid Invoices on your sale (globally)**

1. Same steps for emailing Paid Invoice- see photo above -

**Email - Not Sent Emails -For ALL Not Sent Emails on your sale (globally)**

1. Same steps for emailing Paid Invoice- see photo above


**If you would like to send ONE invoice/receipt to just one customer, and NOT to all customers, follow these steps:**

1. First click on the view/edit invoice for the one invoice/Receipt you would like to send by email (works for both paid and unpaid status invoices)



2. Once that opens and you are viewing the actual invoice, about midway down -under the Invoice Date- you will see the 'Send Email' button. This will email out JUST this invoice/receipt

← Back
Make Payment
Mark Shipped
Transaction History
Print
Edit Invoice



**Billing To**  
**Kim Logan**  
 555 Main St,  
 Grove City, Ohio  
 USA, 43123  
[kLogan@caringtransitions.com](mailto:kLogan@caringtransitions.com)  
 Phone No: 6144036993

**Pickup Location**  
**Joel Roadruck**  
 1234 Cinci St.,  
 Cincinnati, Ohio  
 USA, 45201  
[ctbidssupport@caringtransitions.com](mailto:ctbidssupport@caringtransitions.com)  
 Phone No: (513) 703-5504

**Shipping To**  
 222 Coin St,  
 Grove City, Ohio  
 USA, 43123

**Invoice Details**




Invoice: 2334164 UNPAID

Invoice Date :- 08/15/2023 04:17 PM EDT  
Send Email

Items	SKU	Amount	Tax	Tax Amount	BP	BP Amount	Gross Amount
Pick-Up Only 2	1245	\$ 1.00	2 %	---	5 %	\$ 0.05	\$ 1.05
Shippable	124578	\$ 1.00	2 %	---	5 %	\$ 0.05	\$ 1.05
		<b>\$ 2.00</b>		<b>\$ 0.00</b>		<b>\$ 0.10</b>	<b>\$ 2.10</b>

Visibility into Sent emails with the 'Email Sent' icon on each invoice on the 'invoiced' tab on your sale dashboard:

- Once emails have been sent you will see an Email card icon to click on to review the current email Status. This feature is to add more visibility into whether a customer received the system sent email of their invoice/receipt.
  - This feature is a 'moving forward' feature. Any emails sent after 12/7/24 will contain the log details, where past emails sent will not (this is not retroactive).

Invoice No- 4677164 Date:- 11/21/2024 08:34 AM EST						
<b>Name :</b> Customer						
<b>Phone :</b> 555-555-5555						
<b>Email :</b> Testemail@CTBids.com						
<b>Address :</b> Test Address Ln, Test City, State, 55555						
Total Amount	Pending	Status	Auto Charge	Email Sent	Transaction History	Fulfillment
\$ 15.00	\$ 0.00	Paid	Completed	Yes 		

#### • Delivered Emails

##### ◦ Title: Email Delivery Status

- **Sent:** Email sent to destination email server (successfully sent from the CTBids platform).
- **Delivered:** Email delivered to destination email server
- **Open:** The user has opened the email in their inbox
- **Click:** The user has clicked on the supplied link within that email that redirects them to their account to view the invoice/receipt. \*If the customer does not click on the link within the email, you will not see an updated status of 'click'. A customer can view their receipt through the attachment in the email without clicking the link or within their My Account.

##### ◦ Title: Reason

- You will see the link to the customer's account (this is the link they clicked on within their email to view their invoice/receipt -**you will not have access to open that link**, it is displayed here for proof of action done by the user).

#### • Bounced or Failed emails

##### ◦ Title: Email Delivery Status

- **Sent:** Email sent to destination email server (successfully sent from the CTBids platform).
- **Bounce:** The email that was successfully sent from the CTBids platform could not be delivered (issues with the destination email server or the customer's email account).
- **Title: Bounce Type**
  - Generic reason for the email not reaching the recipient
- **Title: Reason**
  - This is backend information for why the user's email was not delivered or 'bounced'. There is an issue on the users end with their destination email server, email address, or account inbox that prevents the delivery of the email. Any posted URLs in this column will not render a result when searched where you can take action with -this is strictly backend information that you are seeing for the bounce/failure
    - You can attempt to send the email again -which will render another line item for 'Sent'- to see if the customer has resolved their email issues.
      - If you receive another 'bounce' response, you may need to reach the customer by other means (phone number).
- Example email for Sent, Delivered, Opened, and the person 'Clicked' on the link within the email:

Email Sent Date	Source Email Address	Destination Email Address	Email Delivery Status	Bounce Type	Reason
2024-11-27	noreply@ctbids.com	Testemail@ctbids.com	Sent	---	Email sent to destination email server
2024-11-27	noreply@ctbids.com	Testemail@ctbids.com	Delivered	---	Email delivered to destination email server
2024-12-02	noreply@ctbids.com	Testemail@ctbids.com	Open	---	65.185.153.221
2024-12-02	noreplyuat@ctbids.com	Testemail@ctbids.com	Click	---	<a href="https://buyersuat.ctbids.com/my-account/invoice/7457/view">https://buyersuat.ctbids.com/my-account/invoice/7457/view</a>

- Example email for an email that 'Bounced'. It was sent from CTBids successfully but was not able to be delivered:

Email Sent Date	Source Email Address	Destination Email Address	Email Delivery Status	Bounce Type	Reason
2024-12-02	noreply@ctbids.com	TaxPayer_1@gmail.com	Sent	---	Email sent to destination email server
2024-12-02	noreply@ctbids.com	TaxPayer_1@gmail.com	Bounce	General	smtp; 550-5.1.1 The email account that you tried to reach does not exist. Please try 550-5.1.1 double-checking the recipient's email address for typos or 550-5.1.1 unnecessary spaces. For more information, go to 550 5.1.1 <a href="https://support.google.com/mail/?p=NoSuchUser">https://support.google.com/mail/?p=NoSuchUser</a> 98e57ed59e1d1-2eee2ae64e1s1136880a91.150 - gsmtp

### Editing Invoices BEFORE Processing Payments

1. Owner can edit invoices to reduce taxes or buyer's premium
2. To edit an unpaid invoice do the following:
  - a. Sign In to Seller CTBIDS
  - b. Select the left-side menu item "Invoices"
  - c. Apply search criteria to limit the list of invoices. You can list invoices by sale, customer, invoice number, and date range. For a full listing of sale invoices, use the sale filter.
  - d. When you have your invoice, or list of invoices, you will notice that depending on status (paid or unpaid) there are button options.
    - i. View/Edit Invoice button can be selected to edit an unpaid invoice
      1. The button will simply show as 'View Invoice' if the invoice has been paid and edits are not longer an option.
  - e. Once the invoice opens, click the Edit Invoice option on the top right side.
  - f. When you have made all the edits necessary, select the "Submit" button in the upper right of the invoice to save changes.
  - g. The previous invoice will be voided out and a new invoice will be generated
  - h. You will need to send the new invoice to the customer by clicking the 'Email Invoices' button in the top right corner or by clicking to view the invoice and selecting Send Email under the date/time stamp.
    - i. **If the new invoice amount increased the amount of the invoice with your edit**, the customer will need to approve the charges prior to you being able to process the payment.
      1. Emailing the invoice must be done so that the customer can receive and approve it. Emailing also makes this invoice visible to the customer in their CTBids My Account.

⚠ Users cannot **edit** an invoice once it has been Paid –information on this is within this article

Shipped Tab on Your Sale Dashboard

CTSeller

Back

- All items 6
- Auction 6
- Direct Buy 0
- Onsite Only 0
- Sold 2
- Not Sold 4
- Invoiced 4
- Shipped 2**
- Ready 0
- Pending 0
- Make It Returnable Status 0
- Delivery Guarantee Status 0

The 'Shipped' tab will contain invoices where you have successfully added fulfillment/tracking information on a shipping IRM invoice. This will show you how many invoices you have successfully added tracking information to and selecting the tab will show you specific information: Item Title, Invoice Number, Customer Email, Tracking Number, Carrier, and IRM.

If a customer calls/emails you and would like to know their tracking information, this would be a great tab to use to find that information.

Printing Invoices

When printing invoices, your printer settings are going to be important so that your invoices print correctly without information missing or getting cut off.

- 1. Be sure to pick the correct paper size (When testing I purposefully selected the incorrect paper size and printed...it did not end well)
- 2. **Set the Scale to 'Fit to printable area' -this is a must!**

Vintage Posters	LL3042	\$1.00	\$8.81	%	\$0.09	18%	\$0.18	\$0.00	\$1.27
Handyman Specials	LL3044	\$1.00	\$8.81	%	\$0.09	18%	\$0.18	\$0.00	\$1.27
Small Appliances For Liquids	LL3043	\$1.00	\$8.81	%	\$0.09	18%	\$0.18	\$0.00	\$1.27
World Book	GB5015	\$1.00	\$8.81	%	\$0.09	18%	\$0.18	\$0.00	\$1.27
Various Paperback Books	GB5013	\$1.00	\$8.81	%	\$0.09	18%	\$0.18	\$0.00	\$1.27
Various Books	GB5012	\$1.00	\$8.81	%	\$0.09	18%	\$0.18	\$0.00	\$1.27
Eclectic Decor #5	LL3053	\$1.00	\$8.81	%	\$0.09	18%	\$0.18	\$0.00	\$1.27
A Little Light Reading	SL3051	\$2.00	\$8.81	%	\$0.18	18%	\$0.36	\$0.00	\$2.54
Table Lamp	LL3058	\$1.00	\$8.81	%	\$0.09	18%	\$0.18	\$0.00	\$1.27
Assorted Bath Towels And Bed Sheets	MH7015	\$5.00	\$8.81	%	\$0.44	18%	\$0.90	\$0.00	\$6.34
Bathroom Essent	MH7016	\$1.00	\$8.81	%	\$0.09	18%	\$0.18	\$0.00	\$1.27

Total Amount 861.62

Thank you for supporting a family in transition. Payment is secured immediately upon sale closure. We use Shipping Smart to manage the shipping and pickup process. You will receive text and/or email communications informing you of the status.

PICKUP ADDRESS: 1970 Glencoe St Denver CO 80220

PICKUP TIME: Friday, July 14 From 9 AM-1PM

Questions? mhine@carportransitions.com

Please bring necessary tools and help for picking up large items. Loading assistance is not available. Some items may be located in the basement. Please bring boxes or totes for smaller items to carry away.

Print settings: 2 sheets of paper

Destination: Canon TR8600 series

Pages: All

Copies: 1

Color: Black and white

More settings:

Paper size: Letter 8.5"x11" 22x28cm

Pages per sheet: 1

Scale: Fit to printable area

Two-sided:  Print on both sides

Print using system dialog... (Ctrl+Shift+P)

Print Cancel

**⚠ Setting the print Scale to 'Default' will NOT format the page correctly...especially if/when you print a multi-page invoice, items could get cut off or will be missing.**

See illustration below

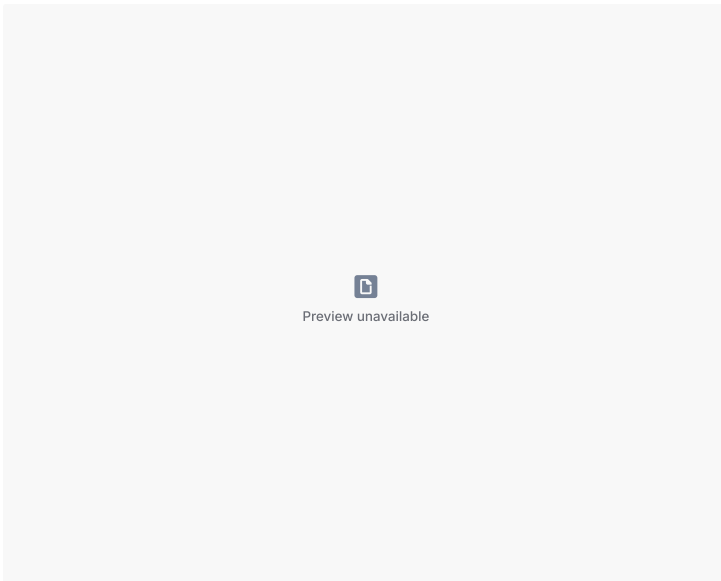
Items	SKU	Amount	Tax %	Net Amount	BP %	Net Net Amount	Net Net Amount
Hitting All The Rig In Notes	SL1008	\$1.00	8.81%	\$0.09	18%	\$0.18	\$0.00
Hugs n' Wifs	LL3011	\$1.00	8.81%	\$0.09	18%	\$0.18	\$0.00
Shot And A Beer	SL1018	\$1.00	8.81%	\$0.09	18%	\$0.18	\$0.00
Howlin' At The Moon	SL1048	\$1.00	8.81%	\$0.09	18%	\$0.18	\$0.00
Small Rug	LW9011	\$10.00	8.81%	\$0.88	18%	\$1.80	\$0.00
'A Child's Garden' Painting By Cheryl Hill	LW9020	\$1.00	8.81%	\$0.09	18%	\$0.18	\$0.00
Vintage Posters	LL3042	\$1.00	8.81%	\$0.09	18%	\$0.18	\$0.00
Handyman Spruce	LL3044	\$1.00	8.81%	\$0.09	18%	\$0.18	\$0.00
Small Appliances For Liquids	LL3043	\$1.00	8.81%	\$0.09	18%	\$0.18	\$0.00
World Book	GB8015	\$1.00	8.81%	\$0.09	18%	\$0.18	\$0.00
Various Paperback Books	GB8013	\$1.00	8.81%	\$0.09	18%	\$0.18	\$0.00
Various Books	GB8012	\$1.00	8.81%	\$0.09	18%	\$0.18	\$0.00
Eclectic Decor #5	LL3053	\$1.00	8.81%	\$0.09	18%	\$0.18	\$0.00
A Little Light Reading	SL1051	\$2.00	8.81%	\$0.18	18%	\$0.36	\$0.00
Table Lamp	LL3058	\$1.00	8.81%	\$0.09	18%	\$0.18	\$0.00
Advanced Book Two	WW7015	\$5.00	8.81%	\$0.44	18%	\$0.90	\$0.00
<b>Total</b>		<b>\$61.62</b>					

PICKUP ADDRESS: 1970 Glencoe St Denver CO 80220  
PICKUP TIME: Friday, July, 14 from 9 AM- 1PM

### Creating a New Invoice (Owner Created New Invoice)

1. Owners have ability to create new invoices for CTBIDS
  - a. Ex: reselling unsold items from a previous sale
  - b. Second highest customer example
2. Owner will select '+ Create' button to make a brand new invoice

3. The owner will be redirected to a screen where they will input the sale title the item/items are associated with
4. After a sale titled is entered, the owner can complete the necessary steps to create a new invoice



5. **Reminder to email this new invoice to the customer so that the customer can 'approve' the new invoice charges.**
  - a. They can do this in their 'My Account', invoices/receipts tab, then select 'view' on the new invoice where they will see an 'Approve' or 'Decline' option. They can also click from within the email which will redirect them into their account to do this action.
    - i. Once the customer approves the new invoice, the 'Process Payment' button on the invoice will now be actionable.
      1. If the customer 'Declines' the new invoice charges or fails to do any action on the invoice (approving or declining), then the 'process payment' option will remain grayed-out (not actionable) on your dashboard.
6. If a customer wants to surrender an item they won, and the seller creates an invoice for another customer who also bid on an item, the IRM option the customer choose when they placed the bid is what will render on their newly created invoice.

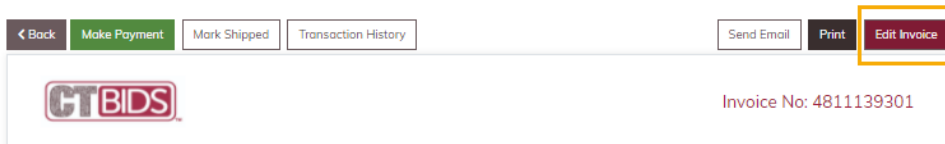
#### How to Void an Invoice

Sellers will now have the ability to void an invoice with a button. Please follow the steps below, or [Click Here](#) to watch a video.

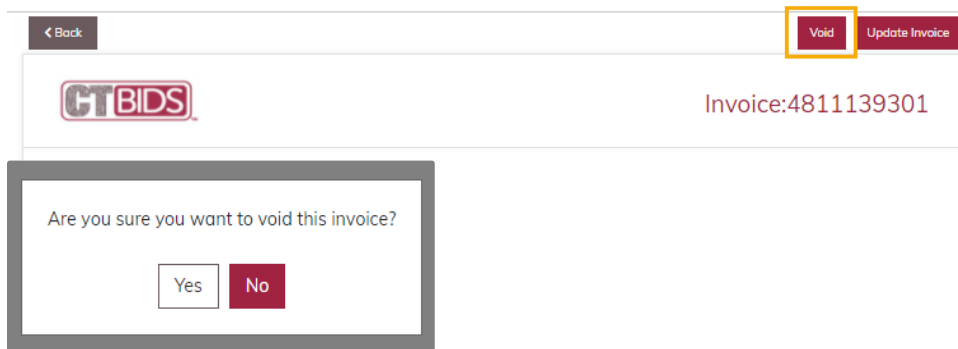
1. Login to [Sellers.ctbids.com](https://Sellers.ctbids.com)
2. Locate invoice from Sale Dashboard, or search for invoice directly from the Invoice tab on the left-hand side
  - a. Please note sellers cannot void an invoice that has been paid
3. Click View/Edit Invoice button



4. Select Edit Invoice in the upper right-hand corner



5. Select Void
  - a. Once selected, a pop-up window will ask "Are you sure you want to void this invoice"



6. When you go back to dashboard, the invoice will now say Status Void

Invoice No- 34017305				
Name :				<a href="#">View Invoice</a>
Phone :				<a href="#">Tax Exemptions</a>
Email :				
Address :				
Date	Total Amount	Pending	Email Sent	Status
11/04/2021, 22:11	\$ 3.09	\$ 0.00	Yes	Void
				<a href="#">View Items</a>

**1** Sellers CANNOT void a paid invoice. They will have to initiate a refund through PayPal, then create a new invoice through the CTBIDS invoice dashboard.

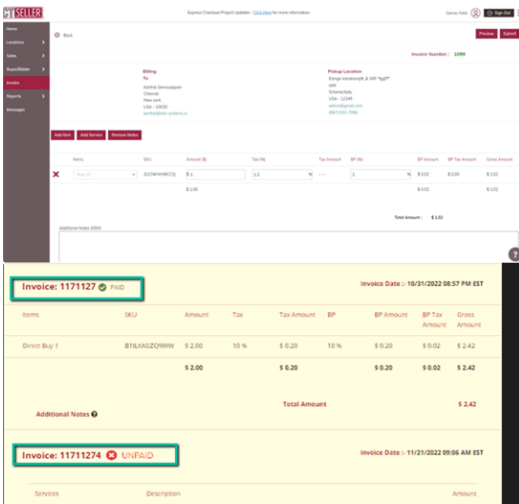
**Checking Invoice Status**

To verify the status of invoices do the following:

1. Sign In to Seller CTBIDS
2. Select the left-side menu item 'Invoices'
3. Search for invoice, if necessary. Status column will show invoices as 'Unpaid', 'Paid', or 'Void'.
4. Select the 'View Invoice' button to view invoice
  - a. Paid invoices are not able to be edited.
  - b. Unpaid invoices can be edited; **edits will void the current invoice and generate a new invoice.**
5. **\*\*If an invoice is still showing unpaid, please check your PayPal Dashboard and/or CTBIDS to ensure payment had initiated and is pending before marking a customer as Non-Payment\*\***

**Add On Invoice (Owner Created New Invoice)**

1. Seller can add on additional services or shipping charges
2. New invoice number will be generated after changes have been made, creating a "child" invoice



3. Owner Emails Invoice to Customer for Approval
4. Customer Approves Invoice
5. Owner processes Payment from Invoice Dashboard
6. System processes Payment Successfully in full
7. If a seller edits an invoice to REDUCE services or charges, there will not be additional approval needed from the customer

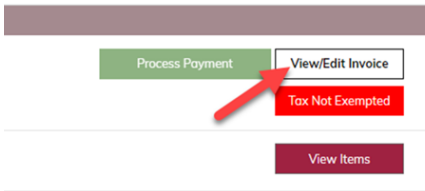
**Editing an Invoice vs Adding Additional Services**

1. Owners should only edit invoices for actions such as reducing tax percentages and customer's premium
2. Using the additional services option is appropriate for changing amounts for shipping, handling, and any other price change the owner wishes to apply to the invoice

**Editing the Item Receipt Method on an Invoice**

1. As long as the invoice is still Unpaid, you can change the item receipt method

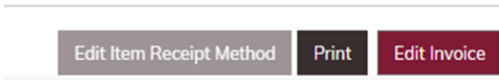
2. Navigate to the invoice on your Sale dashboard and select View/Edit Invoice



3. Select the Edit Item Receipt Method button in the upper right corner

4. Select the new IRM you want saved to the invoice and then select the Confirm button

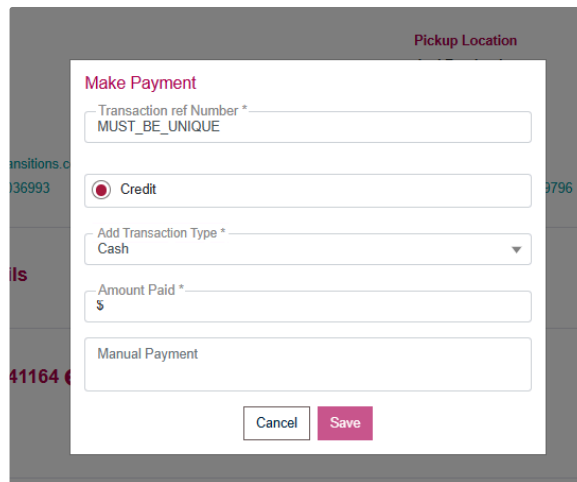
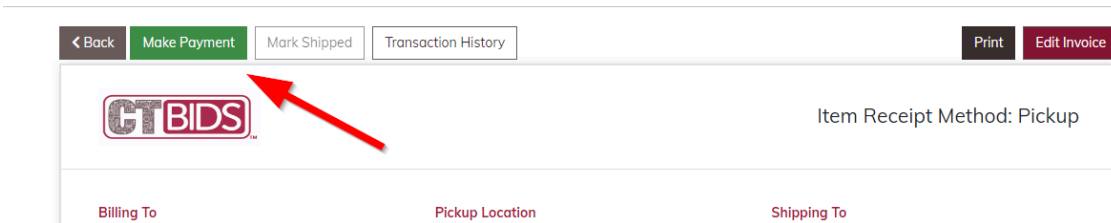
5. The Edit Item Receipt Method button will be disabled if you only have one IRM selected for the entire sale. The gray color indicates the button is not actionable.



### Marking an Invoice as Paid when Accepting Payments Outside of CTBIDS

1. View invoice that requires payment outside of CTBIDS

2. Click Make Payment button



3. Manually enter the transaction number

a. This number/reference is manually created (it has to be unique -most use the invoice number -so you may want to copy to have that ready) and not autogenerated, this can be whatever you want and what makes sense for your business but it has to be something that has never been used before.

4. The Credit radio button will be auto selected as you are crediting a payment to the invoice.

5. Select the appropriate transaction type (Cash, Card, check, other)

6. Enter the amount being paid

7. Add additional notes in the bottom field box if you would like (can add things like "Venmo" or "CashApp").

8. Click the Save button to document the payment you received outside of the system.

**To apply a partial payment to an invoice**

1. Sellers need to find the unpaid invoice in question by selecting 'Invoices' from left-side menu and using the search to find the invoice
2. Click 'View/Edit' button to view
3. Click green button that says 'Make Payment'
4. Pop up will display to enter cash information. Enter transaction ref number, should not matter if credit or debit is selected, transaction type as cash, amount paid, and description. *The transaction ref number should be restriquee each time*
5. Click 'Save'
6. Invoice will show new amount due as 'Pending Amount'

The screenshot shows the 'Invoices' section of a web application. A search filter is applied to the 'Sale Title' column with the value 'test'. The table below shows one invoice with the following details:

Invoice ID	Sale Title	Buyer	Buyer Email	Date	Status	Amount	Pending Amount
418525146921	test - not for sale 3/4	Garcia, Kaitlyn	krglavas@gmail.com	03/04/2022 03:50 AM EST	Unpaid	\$5.10	\$5.10

The 'Make Payment' modal form contains the following fields and options:

- Transaction ref Number: 418525146921
- Radio buttons:  Credit,  Debit
- Add Transaction Type: Cash
- Amount Paid: \$2.00
- Partial Payment Testing: [Text Field]
- Buttons: Cancel, Save

The screenshot shows the same invoice management interface as above, but after a partial payment of \$2.00 has been applied. The 'Pending Amount' for the invoice is now \$3.10.

Invoice ID	Sale Title	Buyer	Buyer Email	Date	Status	Amount	Pending Amount
418525146921	test - not for sale 3/4	Garcia, Kaitlyn	krglavas@gmail.com	03/04/2022 03:50 AM EST	Unpaid	\$5.10	\$3.10

**Restricted Item invoice**

1. Sale Ends
2. Owner processes payments globally
3. PayPal Restricted invoices will not process and will be listed as 'Unpaid' and 'PayPal Restricted'
4. Owner secures payment outside of CTBIDS
5. Owner Reconciles by manually entering in payment via 'Make a Payment' button within Invoice

**Invoice with BOTH Restricted and Non Restricted items on the same invoice (System Generated -split)**

1. PayPal does not allow transaction of restricted items (guns, gun parts, ammo)
2. If the customer won multiple items from a sale, with some items being restricted and some not, the system will split the items into separate invoices-non-restricted items being all on one invoice and restricted being all on one other invoice
  - a. When separate invoices are generated from the same sale, the invoice containing the restricted items will have a "child" or "inherited" invoice number- meaning it will be different from the restricted item invoice

Invoice: 1171127 <span>PAID</span>		Invoice Date: 10/31/2022 08:57 PM EST							
Items	SKU	Amount	Tax	Tax Amount	BP	BP Amount	BP Tax Amount	Gross Amount	
Direct Buy 1	B1LKAGZQWW	\$ 2.00	10 %	\$ 0.20	10 %	\$ 0.20	\$ 0.02	\$ 2.42	
		\$ 2.00		\$ 0.20		\$ 0.20	\$ 0.02	\$ 2.42	
<b>Additional Notes</b>								<b>Total Amount</b>	<b>\$ 2.42</b>

Invoice: 11711274 <span>UNPAID</span>		Invoice Date: 11/21/2022 09:06 AM EST					
Services	Description	Amount					

3. Sale Ends

4. Owner clicks Generate Invoices

1. System splits Invoices (Invoice 1 is non-restricted Items, Invoice 2 is restricted Items)

- Owner Processes Payments
- System processes Payment Successfully in full for the non-restricted items invoice

7. Restricted Item:

- Process Payment from Invoice Dashboard for the restricted invoice will not occur, invoice will show as unpaid and list it as 'PayPal Restricted'.
- **Owner secures payment outside of CTBIDS**
- **Owner Reconciles by manually entering in payment via 'Make a Payment' button within Invoice**

Why was the Invoice Voided?

Anytime a change is made to an invoice, referred to as a "Parent Invoice", it voids that invoice and generates a new invoice which is referred to as the "Child Invoice". The new or "Child" invoice will have the same invoice number as the "Parent" with one additional number added to the end.

Invoice greater than \$5000 (System Generated)

1. Sale Ends
2. Owner clicks Generate Invoices
3. Owner Processes Payment from Invoice Dashboard
4. System takes 10%
5. Owner can Process Remaining Balance from Invoice Dashboard
  - a. Customer Card Charged Entire Remaining Balance
6. OR owner can collect the remaining balance outside of CTBids and enter a manual payment for the remaining balance on the invoice.

Items	SKU	Amount	Tax	Tax Amount	BP	BP Amount	Gross Amount
Painting by Dot tie Stimmel	TC188	\$1,200.00	---	---	15%	\$180.00	\$1,380.00
		\$1,200.00		\$0.00		\$180.00	\$1,380.00

<b>Additional Notes</b>	<b>Handling Fee</b> \$10.00
CT Handling Fee - Shipping	<b>Additional Amount</b> ---
	<b>Payments Received</b> \$138.00
	<b>Remaining Amount Due</b> \$1,252.00

Thank you for bidding! We appreciate your business and helping our clients downsize.  
 Pick-up: Friday, July 8th from 3:00 pm to 6:00 pm @ :541 Wilmington Ave. (Dayton, OH 45220)

Collecting Remaining Balance from Partial Payments

1. Owner processes remaining balance from Invoice Dashboard
2. If successful customer card charged entire remaining balance
3. If unsuccessful, owner needs to reach out to customer to secure the payment

**Partial Payment – Manual Adjustment Entered First (Specific Example Amount)**

1. Sale Ends
2. Owner Creates Invoice for \$10,000
3. Owner Opens Invoice and clicks 'Make a Payment'
4. Owner enters in 'Amount Paid' (manually)
5. Owner enters a Partial Payment amount of \$500.00
6. Owner selects 'Save'
7. System takes the manually entered partial payment amount of \$500.00 off of invoice total
8. System does not charge the card at this point
9. Owner selects 'Process Balance Amount' from Invoice Dashboard
10. Remaining Balance = \$9,500
11. Customer Card Charged Entire Remaining Balance

**Partial Payment – Manual Adjustment Entered AFTER System Processed Payment (Specific Example Amount)**

1. Sale Ends
2. Owner Creates Invoice for \$10,000
3. Owner Processes Payment from Invoice Dashboard
4. System takes 10%
5. Owner Opens Invoice and clicks 'Make a Payment'
6. Owner enters in 'Amount Paid' (manually)
7. Owner enters a Partial Payment amount of \$500.00
8. Owner selects 'Save'
9. System takes the manually entered partial payment amount of \$500.00 off of invoice total
10. System does not charge the card at this point
11. Owner selects 'Process Balance Amount' from Invoice Dashboard
12. Remaining Balance = \$8,500
13. Customer Card Charged Entire Remaining Balance

**New Invoice – Less than \$5000 is processed as normal.**

1. Sale Ends
2. Owner Processes Payment from Invoice Dashboard
3. Customer Card Charged Entire Balance

**Invoice Fulfillment (Shipped)**

After a seller ships the items to the winning customer, it is required that within 21 days to go into the invoice and include the tracking information. To do so, please continue with the following steps:

1. Go to the invoice that contains the shipped items
2. In the header select the “Fulfillment” button

[Back](#) [Fulfillment](#) [Transaction History](#) [Create Add On Invoice](#) [Print](#)

**CTBids**  
Caroling Transitions

Billing To	Pickup Location	Shipping To
<b>Katie Garcia</b> 1234 cincinnati way, Dayton, Ohio USA, 45430 KGarcia@caringtransitions.com Phone No: 5133341436	<b>Sara S</b> 1234 Test Rd., Cincinnati, Ohio USA, 45201 ctbidssupport@caringtransitions.com Phone No: (111) 458-0852	1234 cincinnati way, Dayton, Ohio USA, 45430

**Invoice Details**

3. A new window will appear with multiple fields that you will select the items from the invoice
  - a. You will now select the items to be included for this tracking number.
  - b. Enter in the Tracking Number
  - c. Enter in Carrier (FedEx, USPS, UPS, etc)
  - d. You can also enter in notes if desired
  - e. Select 'Create

Main Package Method:

Notes:

Select Items: 

- Select All
- Retention Test 2

Tracking Number:

Carrier:

#### Customer Declined - New Invoice or Add On Invoice

1. Scenario for Customer Declining Additional Services/Charges
  - a. Sale Ends
  - b. Owner clicks Generate Invoices
  - c. Owner Processes Payment from Invoice Dashboard for Item
  - d. Owner Adds On Invoices for Shipping/Services
  - e. Owner Sends Invoice to Customer for Approval
  - f. Customer Declines Additional Services
  - g. Owner Discretion on next steps
  - h. Customer Card Not Charged any additional charges
    - i. **If the customer accidentally declines an Add On invoice, you will need to void the invoice and create a new one to send out for them to approve.**

**Hi "Sellers Name",**

This notification is to inform you that "Buyer Name" has **DECLINED** the invoiced amount for Additional Services provided in "**Invoice Number**".

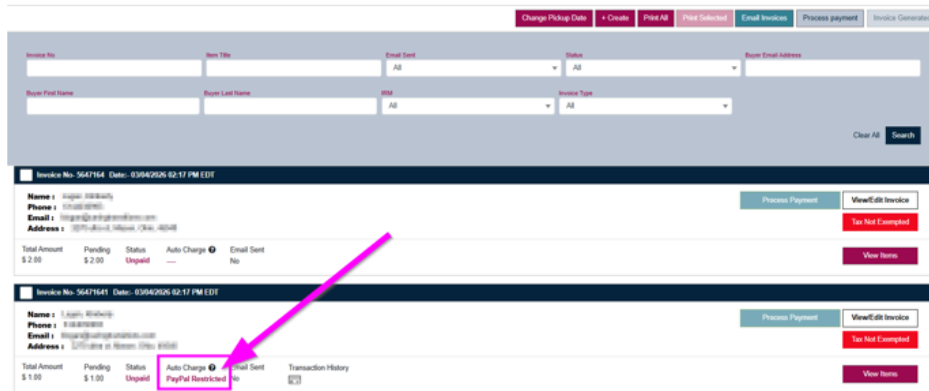
Some suggested next steps:

1. Void the current invoice if Buyer is no longer interested in the items
2. If Void is needed, reach out to next Buyers in line for the item if they are interested

Please reach out to the Help Desk at [CTBIDSHelp@caringtransitions.com](mailto:CTBIDSHelp@caringtransitions.com) with any questions.

## Processing Invoice with PayPal restricted items

1. PayPal does not allow transaction of restricted items (guns, gun parts, ammo, tobacco)
2. Customer and Seller will have to come to an agreement of a payment method outside of PayPal
  - a. Sale Ends
  - b. Owner clicks Generate Invoices
    - i. Any invoices with restricted category items will show as 'PayPal Restricted' on the Invoiced tab.



- c. Owner is unable to Process Payment from Invoice Dashboard for these invoices (that ability to process is blocked by the system)
- d. Owner secures payment outside of CTBIDS
- e. Owner Reconciles by manually entering in payment via 'Make a Payment' button within Invoice

Item categories in CTBids that will block payment processing are:

- Firearms
- Gun Parts
- Ammo

Making sure that items are placed into the correct categories is important so that payment processing through the site with PayPal is blocked.

- i If restricted items are processed through PayPal processing, this can result in fines, account limitations, or account termination. Please be sure to add items into the correct categories so that you do not process using PayPal.

How can I tell if the customer purchased Make It Returnable or Delivery Guarantee and what happens if it fails?

Payment for Make it Returnable and/or Delivery Guarantee **must** be completed through CTBids and will happen when you initially process payments for your sale. This payment sends the API call with the necessary information to the third-party vendor for the purchase details of the product(s).

1. **Do not accept payment for these product services outside of CTBids even if the payment failed.**
2. **If the initial item invoice is successful but the MIR or DG invoice payment(s) failed after initially processing invoices, you will not have the option to process that failed MIR and/or DG invoice(s) again. The customer is no longer eligible for the product service(s) when the payment failed for MIR and/or DG.**
3. **If the initial item invoice fails (parent invoice) and you process payment again (for the parent invoice) and it is successful, the MIR and/or DG invoice will also try to process through for product payment.**
4. **Again, please do not accept payment for any failed MIR or DG invoices outside of CTBids.**
  - a. **If you do accept payment outside of CTBids, you will need to refund the customer since the product service is no longer available.**

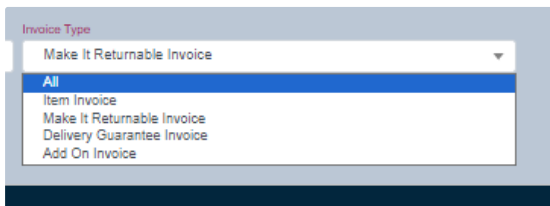
❗ If the item invoice fails and the customer pays for the item invoice outside of CTBids, the MIR and/or DG policy will no longer be available for purchase. You do not have the ability to process MIR and/or DG invoices separately, they must process with the item invoice with system processing.

Please do not accept payment outside of CTBids for the MIR/DG invoice amounts if you are accepting payment for the item invoice outside of CTBids. The customer will need to be informed that the policy(cies) are no longer available for purchase.

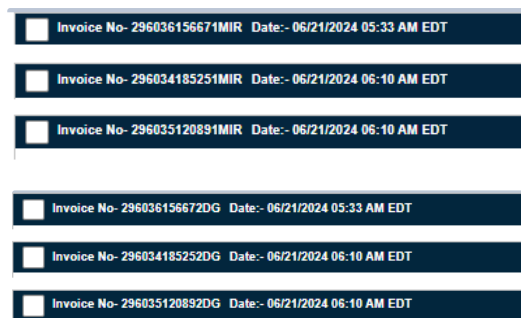
\*This limitation was set by Seel for offering their policy products on our site.

Once you have closed your sale, generated invoices and have processed payments, there are a few ways you can check to see if your customers have purchased Make It Returnable (MIR) or Delivery Guarantee (DG).

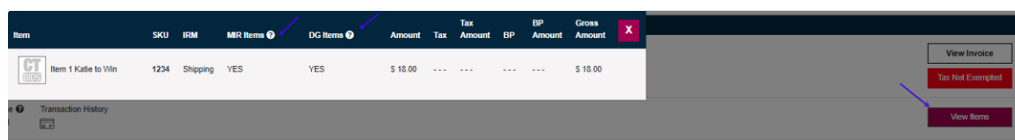
- The customer will have a separate invoice strictly for MIR or DG, you can also search for it by 'Invoice Type' from the Invoice Dashboard



- If they do have an invoice with MIR or DG – it will display on the invoice number with MIR or DG



- You can select the 'View Items' button from the invoice dashboard (this you will have to do on every invoice to check)



- You can also view all items that were sold with either MIR or DG from the Sale Dashboard. When you select either tab, it will show you any items that were purchased with this service, and show you the invoice number for it as well.

- You will see a blue Parent invoice link that you can use when you are ready to add shipping fulfillment information. For full instructions on adding fulfillment please see the article: **Fulfillment Steps for adding in Tracking Information to Item Invoice**

Back | Test Echeck - scenario 6

All Items: 1  
 Auction: 1  
 Direct Buy: 0  
 Create Only: 0  
 Sold: 1  
 Not Sold: 0  
 Invoiced: 3  
 Shipped: 1  
 Ready: 0  
 Pending: 0  
 Make it Refundable Status: 0  
 Delivery Guaranteed Status: 1

Item Title	Invoice Number	Parent Invoice	Email	SKU	Contract ID	Contract Status	Claim ID
If Master Inv transaction moves from Pend...	#5776420G	#577633	Testemail@CTBids.com	6217WLRBKCZO	2024112101698805095491154	active	---

Showing 1 of 1 records

- You can also check in the MIR/DG tabs on the last column to see if you have entered fulfillment for this policy under the title **'Shipment Entered'** with a Yes or No:

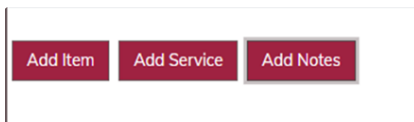
SKU	Contract ID	Contract Status	Claim ID	Claim Status	Shipment Entered
6217WLRBKCZO	2024112101698805095491154	active	---	---	Yes



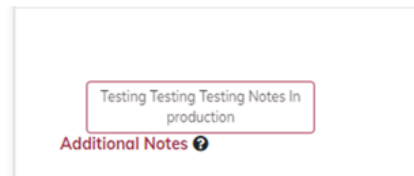
Preview unavailable

## Additional Notes in an Invoice

1. Sellers can add notes to an unpaid invoice
2. To do so, navigate to the invoice you want to add notes to
3. Click the “View/Edit Invoice” button
4. Click the red Edit Invoice button
5. Click the Add Notes button



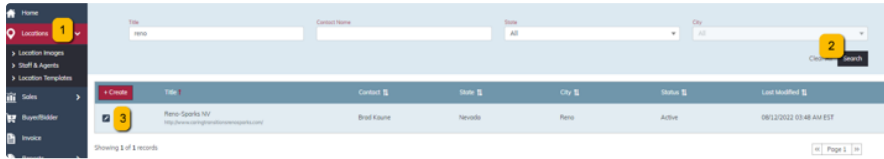
6. Add your notes to the Additional Notes text box
7. Hit the Submit button in the top right corner
8. If you go back to view the invoice, an Additional Notes header with a question mark will appear
9. Hover over the question mark to see your Additional Notes message



10. When printing invoices, the Additional Notes message will be displayed in its own text box for the customer to also view

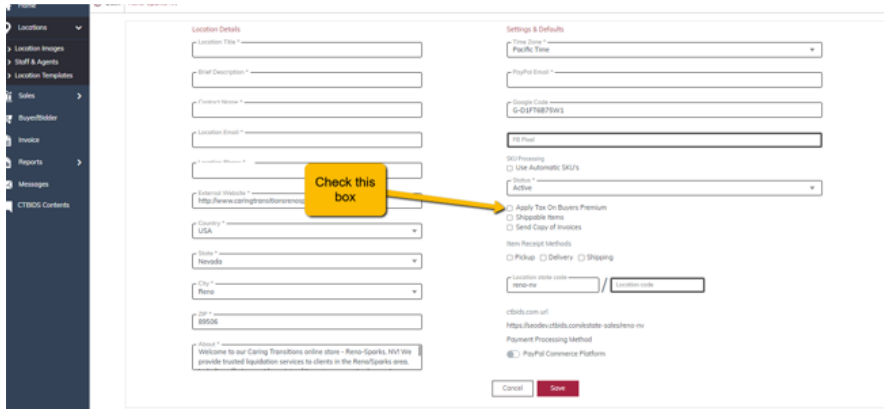
# Tax on Buyer's Premium

1. If you always want tax to show on BP you should have your location details setup to have that option checked. Click locations and then click search and then you will see you can edit your details.

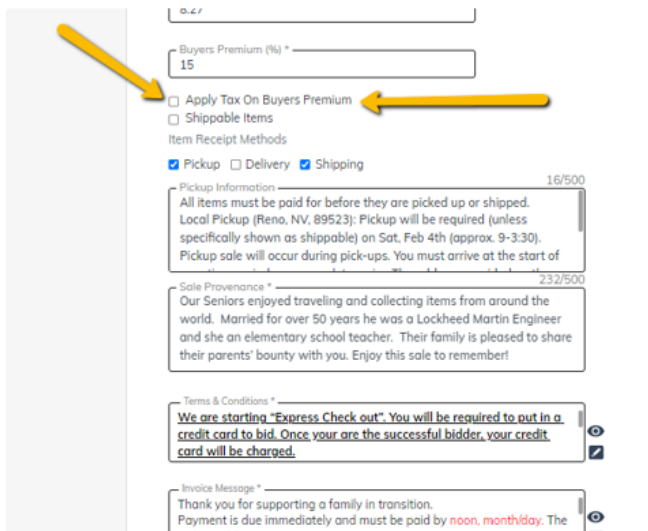


2. You can then check the box so that when you create sales this will already be checked (you could do the same for item receipt method with pickup and shipping too).

3. When you make these choices at the location level, those options will already be checked when you create a new sale so you have a lower chance of forgetting to select them each time you create a sale.

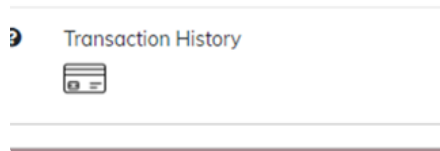


4. Make sure the Apply Tax On customers Premium is selected at the individual sale level as well

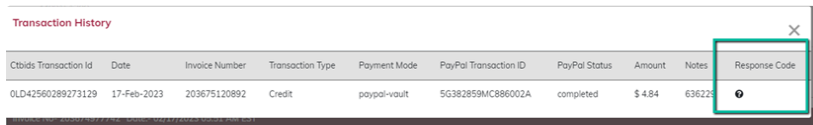


## Viewing Response Codes from Transaction History

1. After payments have been processed, Sellers will be able to view the PayPal response code from the Transaction History dashboard
2. To view the response code go to the Invoiced tab in the sale
3. Navigate to the invoice you want to view and click the card icon under the Transaction History header

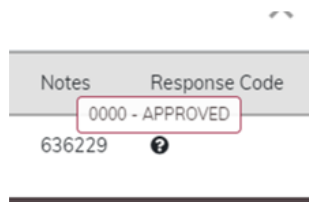


4. The Transaction History pop-up will render with the Response Code header to the right

The image shows a 'Transaction History' pop-up window. It contains a table with the following columns: 'Ct bids Transaction Id', 'Date', 'Invoice Number', 'Transaction Type', 'Payment Mode', 'PayPal Transaction ID', 'PayPal Status', 'Amount', 'Notes', and 'Response Code'. A green box highlights the 'Response Code' column header and the first row's value, '636229'.

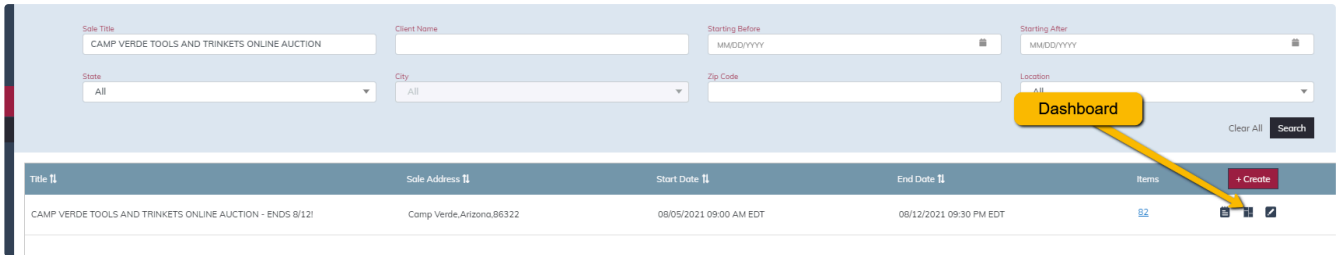
Ct bids Transaction Id	Date	Invoice Number	Transaction Type	Payment Mode	PayPal Transaction ID	PayPal Status	Amount	Notes	Response Code
0LD42560289273129	17-Feb-2023	203675120892	Credit	paypal-vault	5G382859MC886002A	completed	\$ 4.84	636229	0

5. Hover your mouse over the question mark to view the response code

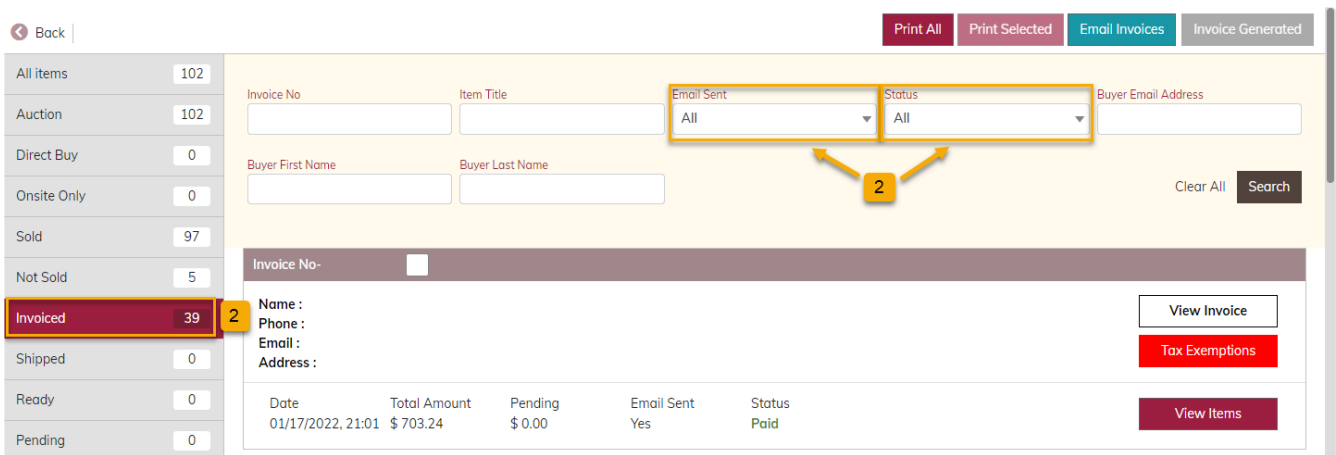


# How to Print All or Specific Invoices

1. Search for your sale title under Sales and then click the Sale dashboard icon:



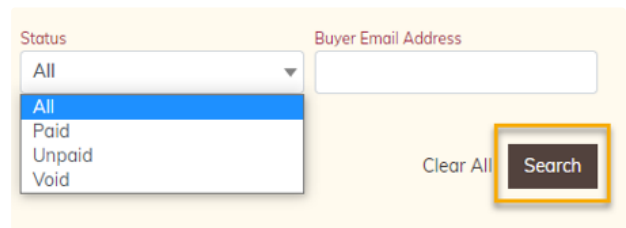
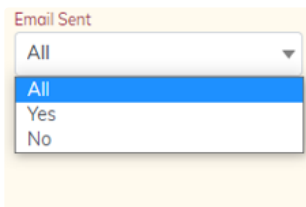
2. Click invoiced - Then click the drop down for Email Sent and Status



3. Select options from Email Sent and Status and click Search button:

Email Sent Options: All, Yes, No

Status Options: All, Paid, Unpaid, Void



4. Once invoices are generated, please make sure to scroll to the bottom of the page and select 'More' button until entire results are displayed. Use the arrow to scroll back up to top of page if needed.

Invoice No-

Name :  
Phone :  
Email :  
Address :

[View Invoice](#)  
[Tax Exemptions](#)

Date	Total Amount	Pending	Email Sent	Status
01/17/2022, 21:01	\$ 54.67	\$ 0.00	Yes	Paid

[View Items](#)

[More](#) 4



5. Click Print All Button to print all invoices generated. You may also chose 'Print Selected' and you can click on which invoices you would like to print from the batch.

Back | [Print All](#) [Print Selected](#) [Email Invoices](#) Invoice Generated

5

All items 102  
Auction 102  
Direct Buy 0  
Onsite Only 0  
Sold 97  
Not Sold 5  
Invoiced 39  
Shipped 0  
Ready 0  
Pending 0

Invoice No-  Item Title  Email Sent  Status  Buyer Email Address

Buyer First Name  Buyer Last Name  [Clear All](#) [Search](#)

Invoice No-

Name :  
Phone :  
Email :  
Address :

[View Invoice](#)  
[Tax Exemptions](#)

Date	Total Amount	Pending	Email Sent	Status
01/17/2022, 21:01	\$ 703.24	\$ 0.00	Yes	Paid

[View Items](#)

[Print All](#) [Print Selected](#) [Email Invoices](#) Invoice Generated

Invoice No-  Item Title  Email Sent  Status  Buyer Email Address

Buyer First Name  Buyer Last Name  [Clear All](#) [Search](#)

Invoice No-

Name :  
Phone :  
Email :  
Address :

[View Invoice](#)  
[Tax Exemptions](#)

Date	Total Amount	Pending	Email Sent	Status
01/17/2022, 21:01	\$ 703.24	\$ 0.00	Yes	Paid

[View Items](#)

Invoice No-

Name :  
Phone :  
Email :  
Address :

[View Invoice](#)  
[Tax Exemptions](#)

Date	Total Amount	Pending	Email Sent	Status
01/17/2022, 21:01	\$ 116.03	\$ 0.00	Yes	Paid

[View Items](#)

Invoice No-

Name :  
Phone :  
Email :  
Address :

[View Invoice](#)  
[Tax Exemptions](#)

Date	Total Amount	Pending	Email Sent	Status
01/17/2022, 21:01	\$ 13.37	\$ 0.00	Yes	Paid

[View Items](#)

6. Select Print All to print out all invoices generated

[← Back](#)

[Print All](#)



Invoice No:

✓ PAID

## Full Payment – Manual Adjustment Entered

- Due to laws in certain states, it is mandatory for auctioneers to have the option to accept cash payments
- Cash payments are recommended for exception scenarios and is not recognized as a best practice
- Owners have the ability to accept payments, including cash, outside of CTBIDS for purchases

## Prohibited Items for CTBIDS, PayPal Processing, and Twilio Text Content

### **Prohibited Items Policy:**

#### **Alcohol, drugs & tobacco**

Alcohol, drugs, tobacco, and related products are often subject to regulatory restrictions and are illegal for sale in some cases. Because we can't enforce these laws and regulations, we don't allow these items for sale, including:

- Alcohol
- Prescription drugs
- Drugs, narcotics, or controlled substances (even those that are legal in some states)
- Items marketed for the purpose of intoxication
- Drug paraphernalia such as bongs, vaporizers, and pipes
- Tobacco and related products, including e-cigarettes, e-juice, vaporizers, mods, hookahs, and hookah accessories

#### **Adult & mature content**

Items intended for adult use or that contain explicit sexual content are not allowed on CTBIDS, such as:

- Explicit sexual content
- Pornography - Although pornography can be difficult to define, an item generally qualifies as pornography when it contains extreme or explicit version of sexual content.
- Adult toys

#### **Animal Products and Human Remains**

Certain animal products are highly regulated and prohibited on CTBIDS due to the risk of harm to live, companion, or endangered animals.

#### **More Details:**

The following are examples of animal products that may not be sold on CTBIDS:

1. Live animals.
2. Items created using any endangered or threatened animal species. We define these as animal species designated as threatened or endangered by the

[US Endangered Species Act](#) or listed in [Appendix I](#) of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES). [Click here](#) for more details about which animals we prohibit.

1. Items made from cat and dog parts or pelts as defined by

[US Federal Law](#).

1. Ivory according to

[Federal Law](#)

1. Items made from human remains or products from the human body.

### **Counterfeit or replica items**

The sale of bootlegs, counterfeits, fakes, and unauthorized or pirated copies of items is illegal and not allowed on CTBIDS, including:

- Counterfeits, fakes, and replicas of brand-name items, including items “inspired” by a brand without permission of the owner
- Bootlegged or unauthorized recordings
- Pirated copies of any copyrighted materials
- Use of a trademark or other implied affiliation with a brand

### **Dangerous Items and Recalled Items**

For safety and legal reasons, we prohibit certain dangerous items from CTBIDS.

[Recalled Items](#) or **Items that Present Unreasonable Risk of Harm**

Items that have been recalled by governments or manufacturers are prohibited from being sold on CTBIDS. A few examples of items that have been recalled are certain vintage Corning Ware percolators, lawn darts, and drop side cribs.

Items that present an unreasonable risk of harm are prohibited, even if they have not been the subject of a recall. This would include, for example, items that present a choking hazard. We generally rely on information from various government agencies to identify these items.

**Firearms can be sold but only if state a Federal law is followed and the proper background check is conducted.**

## **Hate Items: Items that Promote, Support, or Glorify Hatred**

We want CTBIDS to be a community where people of all backgrounds, nationalities, religions, political affiliations, and even different types of artistic taste and humor feel welcome. Art is incredibly subjective, and what is offensive to one is not necessarily offensive to others.

### **More Details:**

Caring Transitions does not allow items or listings that promote, support or glorify hatred toward people or otherwise demean people based upon: race, ethnicity, national origin, religion, gender, gender identity, disability, or sexual orientation (collectively, “protected groups”). We also prohibit items or content that promote organizations or people with such views.

The following items are not allowed on CTBIDS:

1. Items that support or commemorate current or historical hate groups, including propaganda or collectibles. Examples of hate groups include Nazi or Neo-Nazi groups, Ku Klux Klan (KKK) groups, white supremacist groups, misogynist groups, or groups that advocate anti-gay, anti-immigrant, or Holocaust denial agendas.
2. Items that contain racial slurs or derogatory terms in reference to protected groups.

### **Examples of What is Allowed:**

Religious symbols, including swastikas when used in peaceful or religious context (often in Hinduism, Buddhism, and Jainism)

Items that use idiomatic expressions that include the word “nazi,” such as “grammar nazi” or “soup nazi”

## **Illegal items or encouraging illegal activity**

Any item that is illegal or that encourages illegal activity is not allowed, including items such as:

- Items with sensitive information such as IDs, passports, and social security cards
- Fake or forged documents (such as licenses, IDs, diplomas, and government-issued documents)
- Police badges or security uniforms, as these can be used to impersonate an officer or gain access to secure areas

- Locked phones or devices, for example blacklisted, activation, iCloud or similar locks
- Current vehicle license plates or plates that were valid in the last 5 years
- TV streaming devices
- Cars without titles
- Canisters or cylinders of pressurized gas (such as CO2 or nitrous oxide)
- Stolen or found goods
- Rideshare signs

### **Medical & healthcare items**

Due to health and safety, privacy, and regulatory concerns, certain medical and healthcare items are not allowed for sale on CTBIDS, including but not limited to:

- Devices (i.e. CPAP), drugs, and medications that require a prescription from a licensed medical practitioner (such as a dentist, doctor, optometrist, or veterinarian)
- Pills, vitamins, and supplements
- Contact lenses
- Used cosmetics
- Used makeup sponges and applicators
- Needles and items containing needles (such as syringes or tattoo equipment)

### **Non-compliance**

Posts that violate any of our guidelines, policies, or terms may be removed at our discretion.

### **PayPal Restricted Items**

You cannot process payments through any PayPal platform products for any PayPal restricted items.

Examples of those items are:

- Guns
- Ammo
- Gun parts/accessories
- Certain weapons or knives regulated under applicable law

Please refer to the Acceptable Use PayPal Policy for all items listed as restricted:

[Acceptable Use Policy](#)

⚠️ If you process payments using PayPal on any Restricted items, PayPal can and will take action against you and your account.

### Twilio Text Messaging Forbidden Wording

Twilio is our third-party vendor who handles all outgoing text message notifications from CTBids. This includes all bidding text notifications and the One-Time-Passcode for verifying customer phone numbers.

⚠️ Twilio does NOT allow outbound texting that contains prohibited item naming conventions in the subject or body of the text messages. **Including forbidden wording in the subject or body can result in account suspension for the entire CTBids website which means that ALL customers will not receive text notifications until the situation is resolved.**

Examples are:

- Cannabis
- CBD
- Vape/E-Cigs
- Alcohol
- Firearms
- Tobacco

**Please refer to the Forbidden Message Categories for the full listings that Twilio has outlined:**

[🔗 Twilio Help Center](#)

Here is an example of a forbidden text sent to one of our customers as an outbid notification. Twilio flagged this message and this could result in a suspension of the account sitewide:

Examples of messages violating this policy include:

- Dear CTBids Customer You have been outbid - Glenfield Model 60 22LR Marlin Firearms Company & Current price is \$37.00 }. Click to bid - <https://ctbids.com/estate->

## Duplicate Payments / Payment not associated with Invoice

If the seller ever receives duplicated payments for the same invoice, or if they receive a payment and it is not attached to the invoice, get the following information:

- PayPal confirmation emails of payments
- Invoices affected
- How did the customer make the payment through PayPal?
- Did the customer checkout as a guest or with their PayPal account?
- **\*\*If an invoice is still showing unpaid, please check your PayPal Dashboard and/or CTBIDS to ensure payment had initiated and is pending before marking a customer as Non-Payment\*\***

# Processing Payments- Payment Initiated

## 1. Owner clicks on process payment

### Processing Payments

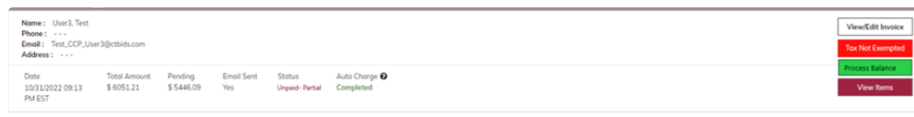
1. Payments will now be processed in CTBIDS
2. After invoices are generated, seller will need to click the global Process Payment button at the top of the Sale Dashboard



## 2. Auto-charge status will equal “Initiated”



## 3. When payment is successful, Auto-Charge status will equal “Completed”



## Payments Failed because PayPal has an outage or disruption in service that will impact vaulting a payment method for customers and/or processing payments for Owners

- We have developed a way to communicate with the Sellers and the Buyers when PayPal has a disruption in service.
  - When a customer is attempting to vault a card and PayPal service is unavailable at that time, the customer will receive a message:
    - “CBCD008: PayPal Payment Gateway currently unavailable: This Payment could not be processed at this time. Please Try again later.
  - When a Seller processes payments and PayPal service is unavailable at that time, the payment will fail and when the Seller checks the response codes, there are two that they may see
    - “Uh oh, looks like we encountered a server problem”
    - “CBCD008: PayPal Payment Gateway currently unavailable: This payment could not be processed at this time. Please try again later.”
  - When PayPal service is disrupted and a customer is attempting to do a Direct Buy purchase
    - The Direct Buy button will not be actionable (grayed out). There will not be a user facing message for the customer. The button will become actionable again once service is reestablished.

PayPal Issues with Customers & Info; Disputes, limitations, Holds of funds, 2-step verification, Refunding a customer, and more...

PayPal Account Hold of funds or need to request a monthly limit increase

**Please read carefully, it is important that you follow this pathway to release a hold of funds and/or to request a monthly limit increase. This pathway gets the request into the correct department to assist you faster!**

Most holds of funds are due to reaching or exceeding your monthly limit. If you notice that you are close to reaching your monthly limit and it has been over 30 days since you last requested a limit increase, you can get ahead of the processes by requesting a limit increase. This request can be done every 30 days. Your account will go under review with this request and it does not guarantee that your limit increase will be granted as this review is based solely on YOUR account history.

If you have funds already on hold and needs assistance, **you must follow the steps below** so that your account can go under review with the appropriate Team at PayPal. If you use a different pathway, this review will take longer as it will take longer to get to the appropriate team to assist you.

#### **Steps to Request a Holds release/Limit Increase**

- Log in to your PayPal account.
- Go to the Resolution Center or your account dashboard.
- Look for an option related to monthly limits or payment release schedules.
- Request an increase in your hold/release limit; **this can typically be done once every 30 days.**
- If you don't see an online option, use the "Contact Us" or "Message Center" feature to reach PayPal support and request a manual review.
- Provide any documents or additional information as requested, such as identity verification or transaction details.

#### **Additional Tips**

- Ensure your account is fully verified and free from any ongoing disputes or recent buyer complaints, as these can impact your eligibility for a limit increase.
- If approved, the new limit will typically take effect on the first day of the next month following approval.

Review your account status and make sure you have met PayPal's seller criteria, such as having no recent disputes and maintaining a positive selling record, before applying for a holds limit increase

If after **5 Business Days** (does not include weekends or Holidays) and you have not had a response from PayPal to your submission (check your dashboard and your emails), you can contact CTBids Help requesting an additional escalation of the situation. Please let us know the date that you made this submission.

#### **Hold on funds due to a limitation placed on your account.**

\*The directions below are for the website version of PayPal and not the app.

Please go to your PayPal Profile settings.

Click on Settings to open.

You should be placed in the Account Access tab within the settings.

Click on "View" where you see the Limits option.

Scroll to read the information provided.

- You will see an option to 'lift limits'.
  - Select this and follow prompts.
    - You may be asked to provide information about your business, your bank account, or other business related things to get this limitation resolved.

**After** the above actions have been completed; you can reach out to [CTBidsHelp@xaringtransitions.com](mailto:CTBidsHelp@xaringtransitions.com) to let us know that you have selected this option and funds are being held. Please let us know if you have provided all or as much information as you can that they have requested.

If you feel there is information you are struggling to provide, please outline what you are struggling to provide in your email.

The CTBids Tech Team can reach out to PayPal Rep to alert his team that you have taken action on this and we can see if they can offer more assistance with this. The resolution is not instantaneous and will require time to review your account even after contacting our PayPal

team/Rep.

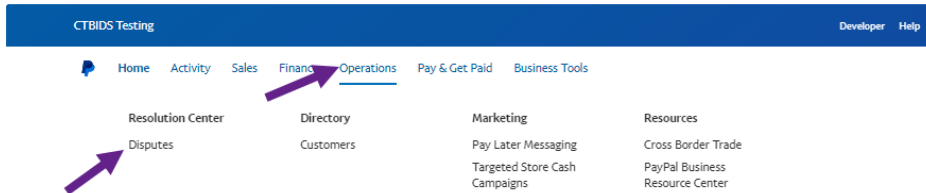
Please keep an eye on your emails and your PayPal dashboard notifications and messages to see if you receive anything from PayPal.

### Disputes/Claims

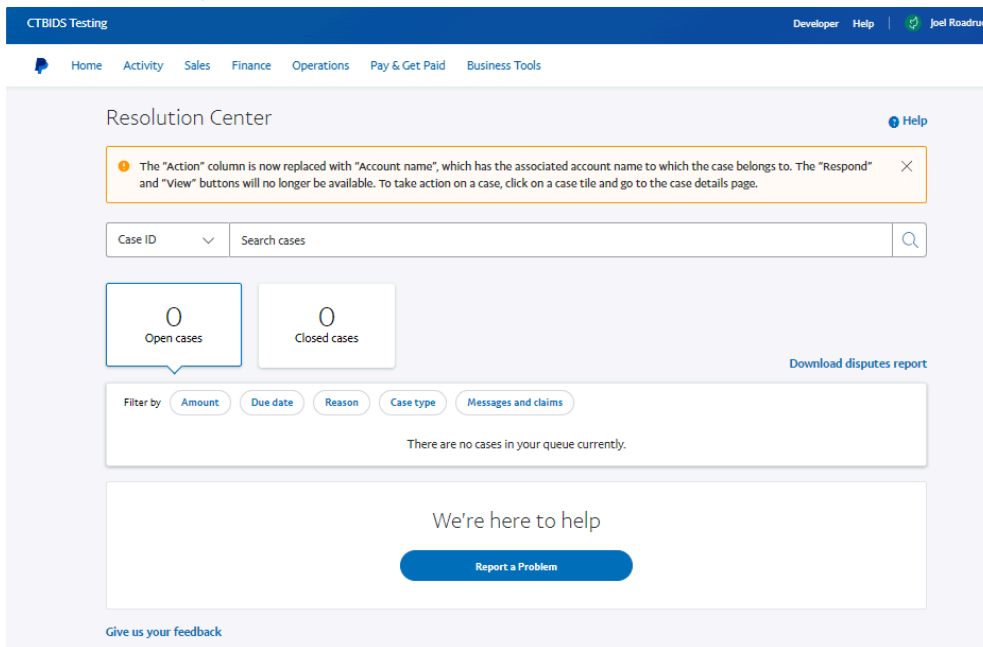
If you have any open cases (Disputes) – please follow these steps:

- To view the Resolution Center and/or see any Disputes:

1. Login to your PayPal account
2. Click on Operations and then select 'Disputes'

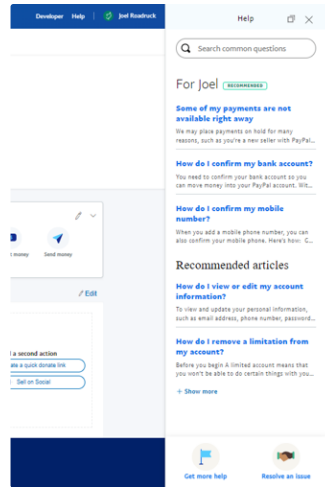


3. Here you will find the Resolution Center with any information needed about any open cases and what the next steps would be.
4. If you are responding to a dispute, please make sure to send all documentation and answer all questions **WITHIN or BEFORE** 10 days from the start date of the open case.
5. If there is nothing in the Resolution Center or you have not received anything from PayPal directly, please reach out to [CTBIDShelp@caringtransitions.com](mailto:CTBIDShelp@caringtransitions.com) and ask for assistance.



- Please note: You can always select the 'Help' icon in the top left corner for commonly asked questions, or to search for anything you are looking for help with.

There is also a 'Help' section in the Resolution Center to assist with additional questions you might have there as well.



**i** If you have a suspicious PayPal email, that you might suspect is fraudulent - please forward the entire email to: [phishing@paypal.com](mailto:phishing@paypal.com)

**Having issues with a customer and need to report this or talk to PayPal about a situation:**

**i** If you need to report a fraudulent buyer - PayPal would like you to contact customer service by using either of these methods.

1. Message us:

You can message us anytime. Log in to your PayPal account on the PayPal app or depending on your location, you may also be able to message us on social media.

2. Call us:

a. On the PayPal app, tap Contact Support at the bottom of the screen.

b. On a web Browser, go to our Contact Us page

i. Select the issue that most closely matches your reason for contacting us

ii. If the information you're shown does not answer your question, scroll down. Depending on the issue, you'll see an option to message us, call us, or ask the community.

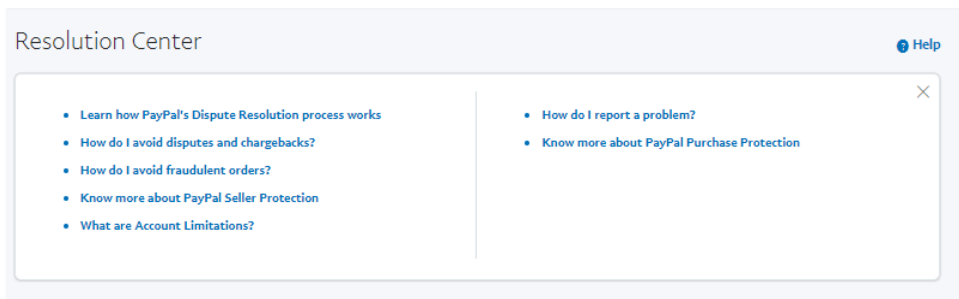
Link for more information about 'Buyer Abuse' with false claims: [How do I report buyer abuse? | PayPal US](#)

**Respond to a dispute or Claim:**

**Here is a good link that outlines how to respond to a dispute, claim, or chargeback (please note that there are three tabs for your review within this link):**

[PayPal Security | Protect Your Financial Data | PayPal US](#)

To respond to a dispute or claim, go to your Resolution Center:



### Information about Claims

Customers can file a dispute/claim with their credit card company if they paid using a vaulted credit card or they can file a claim with PayPal if they used a vaulted PayPal account.

#### Scenario: **Customer paid using a vaulted Credit Card and filed a dispute/claim with their Credit Card Company or Bank**

- If a customer paid using a vaulted credit card and filed a claim with the credit card financial issuer, this is an External Chargeback and this claim was NOT filed with PayPal. What does this mean?
  - External chargebacks have a higher authority when filed outside PayPal with a financial provider. When it comes to consumer protection laws, that review process with a financial provider does not get disclosed to PayPal.
  - PayPal always tries to win every dispute outside with an external chargeback. We want to keep your funds inside PayPal and in your account. But, in the end, that is determined by their bank or card issuer. The entire review/investigation and the final decision is made by the customers bank or card issuer, not PayPal.
- Can you file an appeal to this decision?
  - The option to file an appeal with PayPal is not available (the investigation and decision was not handled by PayPal). The only way to appeal this, or try and resolve, would be to work with the buyer/client and their financial card issuer. As for how to get in touch with their card issuer, that would have to be disclosed by the client/buyer.

#### Scenario: **Customer Paid using a vaulted PayPal account and filed a dispute/claim with PayPal**

- If a customer paid using a vaulted PayPal account and filed a claim with PayPal, this is an internal PayPal Chargeback, and this claim review/investigation and decision will be with PayPal.

### PayPal Charge Back

Owners/sellers are encouraged to get a Bill of Lading from the delivery service they use. A BoL can be useful if a customer files a claim against an owner over missing merchandise. There is no guarantee the owner will win but it is helpful to have as much proof of shipping and delivery as possible.

#### **The best practices to reduce the probability of getting chargebacks and losing claims are:**

1. Be sure what you show as your business name on a customer's credit card statement is CTBIDS. The number one reason sellers get chargebacks is that their name on a customer's credit card statement refers to their LLC name so the customer does not recognize the purchase as being legitimate.
2. **Any charge back must be responded to within 10 calendar days. Responding after 10 days will cause an automatic loss.**
3. Always get a tracking number for every shipment. Require insurance for the value of the item. Require signature for items over \$750.
4. Provide exceptional customer service so that customers have no need or inclination to file a claim to begin with. Do your best to work out any discrepancy directly with an unsatisfied customer so that a claim is not filed to begin with.
5. Communicate and respond to customer inquiries quickly.

### **PayPal Chargebacks at a Glance**

Before diving into a discussion of [PayPal chargeback](#) time limits, we should clarify this: a PayPal *chargeback* is different from a PayPal *claim*. Both are distinct from a PayPal *dispute*. Keeping this terminology straight can be confusing, but it's very important.

Disputes and claims both apply to PayPal peer-to-peer transactions (i.e., the buyer and seller are both using PayPal to send and receive money). In contrast, a chargeback means the buyer skipped both the merchant *and* PayPal, and went straight to the bank instead. When the cardholder files a chargeback, the merchant loses the funds from their account and will be [charged a PayPal chargeback fee](#).

The transaction must fit a specific list of criteria to qualify for seller protection, though. Also, being enrolled in PayPal Seller Protection is no guarantee against chargebacks, but it can help in certain circumstances.

#### PayPal **Chargeback** Time Limit

As described above, a PayPal chargeback occurs when a customer side-steps PayPal and the merchant altogether and approaches their bank to receive a refund. This means the case will be handled by the cardholder's issuing bank rather than PayPal.

What can you do if the customer filed an 'External' Chargeback (The customer filed the chargeback with their card issuer and not PayPal). PayPal is the third-party processor only in these cases. The card issuer will be handling the case and will make the final decision. You will submit all of your proof through your PayPal Dashboard Resolution Center, which gets passed through to the card issuer who is handling the case.

**⚠** If you lose the chargeback case, there is no appeal process for this external chargeback through PayPal (had the customer filed a dispute or claim with PayPal and not their card issuer, you would have the opportunity to appeal within your Resolution Center -but this is not available on External Chargebacks). PayPal staff, including our CSM, only has access to requesting a status update for your External Chargeback cases.

What can you do now?

You can call your local authorities to enquire about what your options are if you feel you are dealing with a fraudulent customer. You can also look into filing with Small Claims Court (Please refer to your state and local laws on the conditions for filing with Small Claims Court).

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#### **In most cases, cardholders have 120 days to file a chargeback.**

However, the exact PayPal chargeback time frame varies depending on the card brand (Visa, Mastercard, etc.), as well as the reason code assigned to the chargeback.

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#### **Once a chargeback has been filed, the merchant has ten days to respond.**

Otherwise, the chargeback will be finalized.

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During the review process, a temporary hold will automatically be placed on the transaction funds. This hold will stay in place until the chargeback is resolved with the debit/credit card issuer. The funds will be released back to the merchant if the chargeback is settled in their favor.

#### PayPal **Dispute** Time Limit

PayPal dispute rules are different from a conventional credit card payment. Because PayPal is facilitating the payment on both ends, they have an interest in ensuring that both the the buyer and seller are satisfied.

**Buyers have 180 days from the transaction date to initiate a transaction dispute** in the PayPal Resolution Center. PayPal will allow a dispute if one of the following is true:

##### "Items Not Received" Claims

The buyer claims to have paid for an item, but never received what was promised.

##### "Item Significantly Not as Described" Claims

The buyer claims the item they received is significantly different from what was promised, based on the seller's description.

In either case, the process starts when the buyer initiates a dispute through the PayPal Resolution Center. The buyer and the seller then have 20 days to work together for a solution (e.g., initiate a refund, reship item).

The buyer can escalate the dispute to a claim at any time during this period. If the dispute is **not** escalated or resolved after 20 days, PayPal will automatically close the dispute.

#### PayPal Claim Time Limit

If the buyer escalates the dispute to a claim, **the seller generally has 10 days to respond**. If PayPal doesn't receive a response to the claim in 10 days, they will rule in favor of the buyer and withdraw the funds from the merchant's account.

Specific PayPal claim time limits will vary according to the reason provided:

#### "Items Not Received" Claims

If the seller responds to the escalated claim, buyers should respond to the seller within three days.

If the exchange of responses doesn't resolve the claim, PayPal will decide the outcome of the dispute, usually within 5 to 10 days.

#### "Item Significantly Not as Described" Claims

If the seller's responses don't resolve the claim, PayPal will review the case, obtain additional information from the buyer and seller as needed, and decide the outcome, usually within 5 days.

To receive a refund, buyers are generally asked to return the item within 10 days. PayPal then verifies the return within 5 days and enforces the outcome of the claim.

#### Setting up a 2 Factor Verification:

##### What is 2-step verification and how do I turn it on or off?

PayPal's 2-step verification (two-factor authentication) gives you an extra layer of security when accessing your account. This process can only be done through your web browser and not through the PayPal App. You can set up 2-step verification using an authenticator app (like Google authenticator and Microsoft authenticator.)

Here's how to set up for 2- step verification for your mobile phone:

1. Click the [Settings](#) icon next to "Log out."
2. Click **Security** near the top of the page.
3. Click **Set Up** to the right of "2-step verification."
4. Choose how you'll get your code by selecting "Use an authenticator app."
5. Click **Set it Up** and follow the steps on the screen.

**This process can only be done through your web browser and not through the PayPal App.**

To turn off 2-step verification:

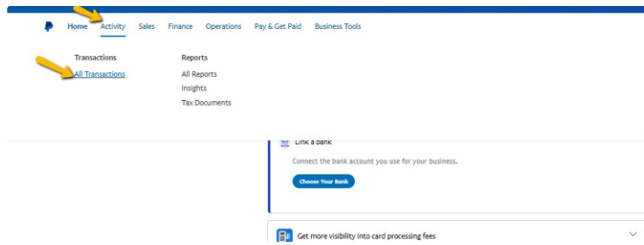
1. Go to [Profile](#).
2. Click **Update** next to "2-step verification."
3. Click **Turn off** next to 2-step verification, then click the **Turn Off** button.

**Please note:** Customers who currently have 2-step verification via text turned on will not be able to enable 2-step verification text again if they decide to turn off.

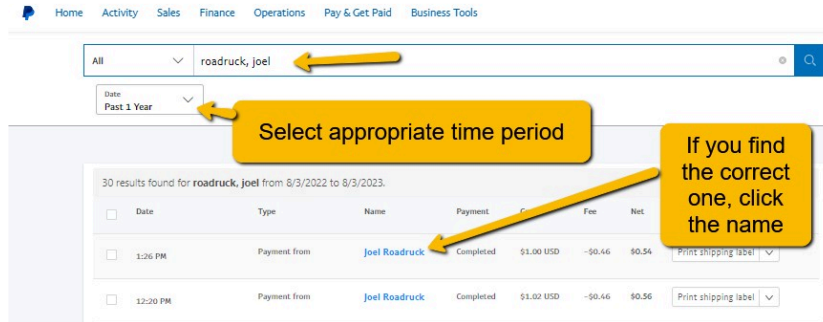
You can opt to skip 2-step verification on a device you trust. Simply log in to PayPal on the device and complete 2-step verification. You'll see the option to "trust this device."

#### How to Refund a Customer through PayPal

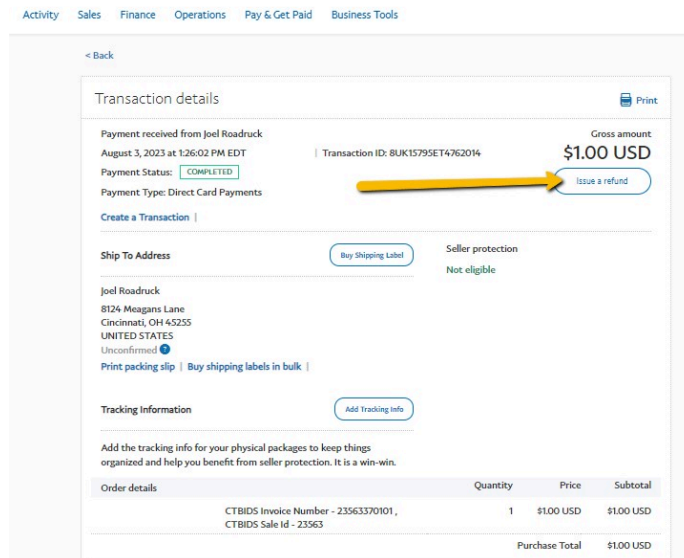
Login to PayPal and then click Activity/All Transactions:



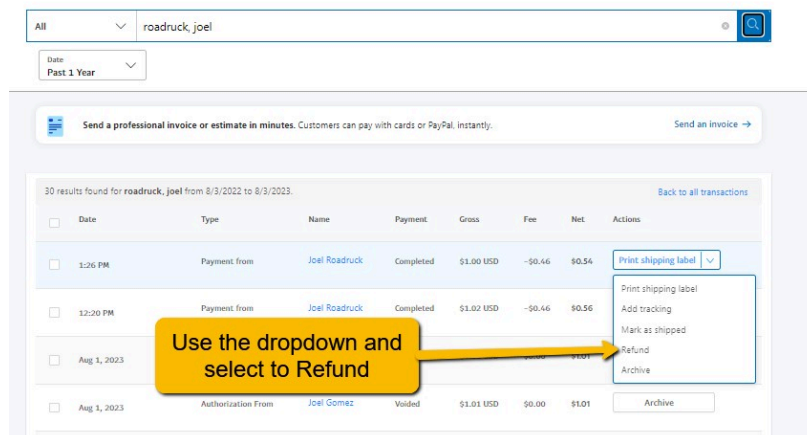
You could then search by the customer's last name or last name alone or last name, first name to limit the search:



And from the Invoice, you can see the invoice details you will see an option to Refund:



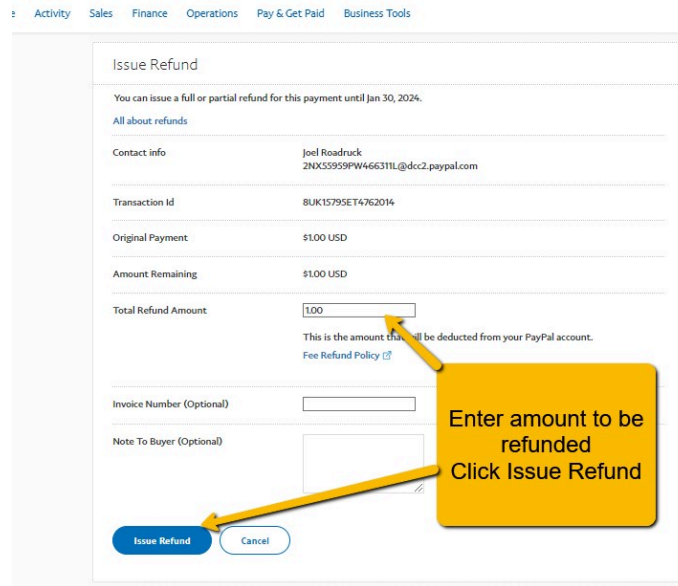
But there is also an option to use the dropdown and select Refund:



In either case you can select the amount you wish to refund – partial or full.

If a search by last name does not yield desired results you can do an exact search by using other search criteria.

Select amount, and issue refund:



#### Refunding a customer through your PayPal Dashboard -when will the customer receive the refund?

The timing for refunds depends upon what type of method of payment was used and is now being refunded back to. PayPal has outlined this in this article: [Where is My Refund? Track Status | PayPal US](#)

Here is what is in this article:

Customer asks: Where is my refund?

PayPal Answers:

We send all refunds back to your original payment method. The time it takes to receive your money varies by payment method. In some cases, refunds go to your balance account in case we are unable to credit your original payment method or when you choose balance as the destination.

Within the [Activity](#) log, you will find the **Refund Tracker**. The **Refund Tracker** is a three-step tracker for your complete checkout transaction refunds funded by banks or cards (full-amount refunds that are not split between payment methods). The tracker consists of three steps, and each step has a specific meaning.

#### First Step:

- [Refund Initiated](#) - PayPal has initiated the refund process.

#### Second Step:

- [Refund Processing](#) - PayPal is processing the refund back to your original card or bank payment method.
- [Refund Sent](#) - PayPal has completed the processing and has sent the refund ahead to your card issuer or bank. Note: that the refund has not yet been completed as your card issuer or bank may also take time to process the refund.

#### Third Step:

- [Refund Pending](#): The refund is now pending with your card issuer or bank for further processing if you have paid originally using a debit or credit card or bank.
- [Refund Completed](#): This is typically the last step of the refund journey. It means that you should have received the funds in your card or bank account. **Note:** If you have not received the refund yet, please reach out to your card issuer or bank to check the progress of the refund using the bank reference ID or by referring to the original transaction.

#### Refund Processing Timeframes

##### Credit card (including PayPal Credit)

When you pay with a credit card, a refund usually takes between 1 and 2 billing cycles, depending on the card issuer.

We'll still send a refund to a canceled or prepaid card. Contact your card issuing company to access this money. For checkout transactions, you may use the bank reference ID shown under [Activity](#) for tracking refunds with your card issuer.

**Debit Card**

When you pay with your debit card, it will generally take up to 5 business days for your refund to be completed, however, depending on your card company, some refunds may take up to 30 days. For checkout transactions, you may use the bank reference ID shown under [Activity](#) for tracking refunds with your bank.

If we are unable to apply the refund to your debit card, we will add it to your PayPal balance.

**Bank account**

When you pay with your bank account, we'll automatically transfer the refund to your bank account. Once issued, refunds usually take up to 5 business days to complete.

Some refunds may take up to thirty days, depending on the status of the payment at the time the refund was issued.

**PayPal balance**

When you pay with your balance, the refund will go to your PayPal Balance on the same day.

**PayPal balance plus credit card**

When you pay with your balance and credit card, the refund will go to your PayPal balance and credit card. Once issued, the refund will go to your balance on the same day. The refund to the card can take between 1-2 invoices, depending on the card issuer.

## PayPal Contact info and How to open a PayPal Merchant Technical Ticket

Having an issue with your PayPal account or need more information about a transaction?

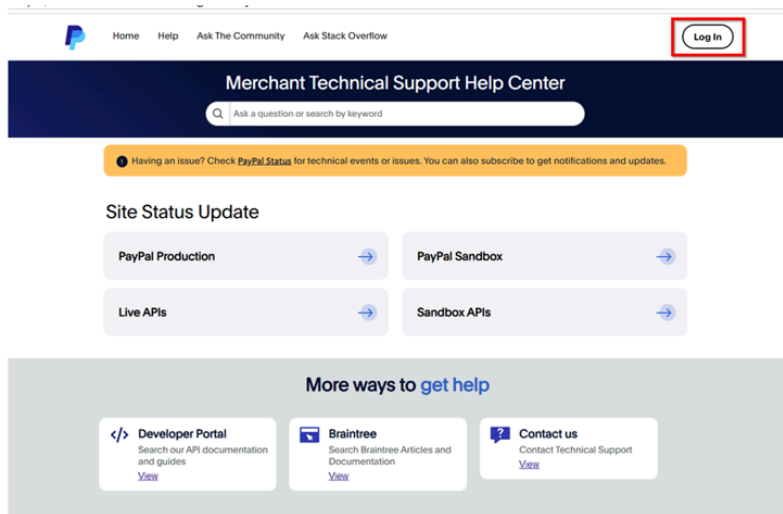
You can either call their Business support line: **888-215-5506**

Or

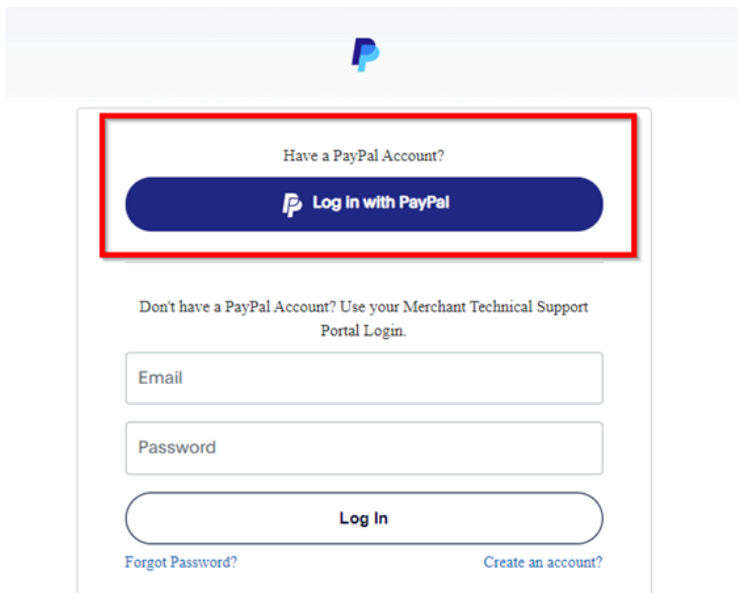
You can create and open a PayPal Merchant Technical Ticket, here are instructions:

- Finding this on your dashboard without the link and instructions can be difficult.
- Step 1, use the link and click to log into PayPal

LINK: [https://www.paypal-support.com/s/?language=en\\_US](https://www.paypal-support.com/s/?language=en_US)



- Step 2, login with your business PayPal account information




- Step 3, select Contact Us, (Contact Technical Support)

Account Overview


MY CASES MY CONTACT DETAILS

Subject	Case Number	Status	Date Created
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More ways to get help




**Developer Portal**  
Search our API documentation and guides



**Partner Portal**  
Connect with a PayPal Partner



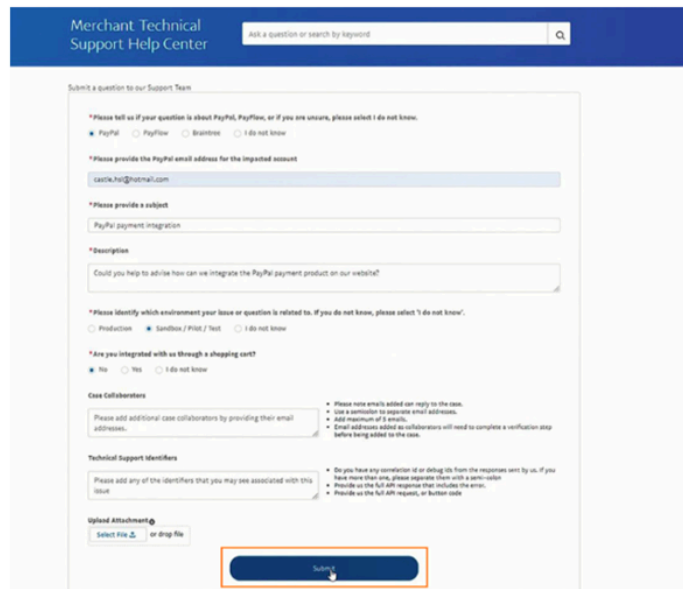
**Braintree**  
Search Braintree Articles and Documentation



**Contact us**  
Contact Technical Support

- This next page is where you will need to fill in the fields for the issue you are having.

You'll be redirected to PayPal's Merchant Technical Support Help Center, where you can submit a ticket to PayPal support.



Merchant Technical Support Help Center

Ask a question or search by keyword

Submit a question to our Support Team

\*Please tell us if your question is about PayPal, PayPal Flow, or if you are unsure, please select 'I do not know'.

PayPal  PayPal Flow  Braintree  I do not know

\*Please provide the PayPal email address for the impacted account

castle.hoi@gmail.com

\*Please provide a subject

PayPal payment integration

\*Description

Could you help to advise how can we integrate the PayPal payment product on our website?

\*Please identify which environment your issue or question is related to. If you do not know, please select 'I do not know'.

Production  Sandbox / Pilot / Test  I do not know

\*Are you integrated with us through a shipping cart?

No  Yes  I do not know

Case Collaborators

Please add additional case collaborators by providing their email addresses.

- Please note emails added can reply to the case.
- Use a semicolon to separate email addresses.
- Add maximum of 5 emails.
- Email addresses added as collaborators will need to complete a verification step before being added to the case.

Technical Support Identifiers

Please add any of the identifiers that you may see associated with this issue.

- Do you have any screenshots or debug logs from the responses sent by us, if you have more than one, please separate them with a semi-colon
- Provide us the full API response that includes the error.
- Provide us the full API request, or button code

Upload Attachment

Select file or drag file

Submit

- You can add any documentation, transaction ID's, and any information to describe the issue that they are having or need an answer to.

## PayPal Response Codes

<b>Value</b>	<b>Description</b>
PayPal Payment Gateway currently unavailable.	PayPal Payment Gateway currently unavailable: This payment could not be processed at this time. Please try again later. -Issue or maintenance at PayPal that prevented the transaction from processing. Please try again later.
Echeck Payment Denied	Payment has been issued as an echeck issued out by PayPal  This response code is issued by PayPal or the card issuer when they deny to process a transaction.
1000	PARTIAL_AUTHORIZATION.
1300	INVALID_DATA_FORMAT.
1310	INVALID_AMOUNT.
1312	INVALID_TRANSACTION_CARD_ISSUER_ACQUIRER.
1317	INVALID_CAPTURE_DATE.
1320	INVALID_CURRENCY_CODE.
1330	INVALID_ACCOUNT.
1335	INVALID_ACCOUNT_RECURRING.
1340	INVALID_TERMINAL.
1350	INVALID_MERCHANT.
1352	RESTRICTED_OR_INACTIVE_ACCOUNT.
1360	BAD_PROCESSING_CODE.
1370	INVALID_MCC.
1380	INVALID_EXPIRATION.
1382	INVALID_CARD_VERIFICATION_VALUE.
1384	INVALID_LIFE_CYCLE_OF_TRANSACTION.

1390	INVALID_ORDER.
1393	TRANSACTION_CANNOT_BE_COMPLETED.
5100	GENERIC_DECLINE.
5110	CVV2_FAILURE.
5120	INSUFFICIENT_FUNDS.
5130	INVALID_PIN.
5135	DECLINED_PIN_TRY_EXCEEDED.
5140	CARD_CLOSED.
5150	PICKUP_CARD_SPECIAL_CONDITIONS. Try using another card. Do not retry the same card.
5160	UNAUTHORIZED_USER.
5170	AVS_FAILURE.
5180	INVALID_OR_RESTRICTED_CARD. Try using another card. Do not retry the same card.
5190	SOFT_AVS.
5200	DUPLICATE_TRANSACTION.
5210	INVALID_TRANSACTION.
5400	EXPIRED_CARD.
5500	INCORRECT_PIN_REENTER.
5650	DECLINED_SCA_REQUIRED.
5700	TRANSACTION_NOT_PERMITTED. Outside of scope of accepted business.
5710	TX_ATTEMPTS_EXCEED_LIMIT.
5800	REVERSAL_REJECTED.
5900	INVALID_ISSUE.
5910	ISSUER_NOT_AVAILABLE_NOT_RETRIABLE.

5920	ISSUER_NOT_AVAILABLE_RETRIABLE.
5930	CARD_NOT_ACTIVATED.
5950	DECLINED_DUE_TO_UPDATED_ACCOUNT. External decline as an updated card has been issued.
6300	ACCOUNT_NOT_ON_FILE.
7600	APPROVED_NON_CAPTURE.
7700	ERROR_3DS.
7710	AUTHENTICATION_FAILED.
7800	BIN_ERROR.
7900	PIN_ERROR.
8000	PROCESSOR_SYSTEM_ERROR.
8010	HOST_KEY_ERROR.
8020	CONFIGURATION_ERROR.
8030	UNSUPPORTED_OPERATION.
8100	FATAL_COMMUNICATION_ERROR.
8110	RETRIABLE_COMMUNICATION_ERROR.
8220	SYSTEM_UNAVAILABLE.
9100	DECLINED_PLEASE_RETRY. Retry.
9500	SUSPECTED_FRAUD. Try using another card. Do not retry the same card.
9510	SECURITY_VIOLATION.
9520	LOST_OR_STOLEN. Try using another card. Do not retry the same card.
9530	HOLD_CALL_CENTER. The merchant must call the number on the back of the card. POS scenario.
9540	REFUSED_CARD.

9600	UNRECOGNIZED_RESPONSE_CODE.
0000	APPROVED.
00N7	CVV2_FAILURE_POSSIBLE_RETRY_WITH_CVV.
0100	REFERRAL.
0390	ACCOUNT_NOT_FOUND.
0500	DO_NOT_HONOR.
0580	UNAUTHORIZED_TRANSACTION.
0800	BAD_RESPONSE_REVERSAL_REQUIRED.
0880	CRYPTOGRAPHIC_FAILURE.
0890	UNACCEPTABLE_PIN.
0960	SYSTEM_MALFUNCTION.
0R00	CANCELLED_PAYMENT.
10BR	ISSUER_REJECTED.
Instrument Declined	INSTRUMENT_DECLINED The instrument presented was either declined by the processor or bank or it can't be used for this payment.
PCNR	CONTINGENCIES_NOT_RESOLVED.
PCVV	CVV_FAILURE.
PP06	ACCOUNT_CLOSED. A previously open account is now closed
PPRN	REATTEMPT_NOT_PERMITTED.
PPAD	BILLING_ADDRESS.
PPAB	ACCOUNT_BLOCKED_BY_ISSUER.
PPAE	AMEX_DISABLED.
PPAG	ADULT_GAMING_UNSUPPORTED.
PPAI	AMOUNT_INCOMPATIBLE.

PPAR	AUTH_RESULT.
PPAU	MCC_CODE.
PPAV	ARC_AVS.
PPAX	AMOUNT_EXCEEDED.
PPBG	BAD_GAMING.
PPC2	ARC_CVV.
PPCE	CE_REGISTRATION_INCOMPLETE.
PPCO	COUNTRY.
PPCR	CREDIT_ERROR.
PPCT	CARD_TYPE_UNSUPPORTED.
PPCU	CURRENCY_USED_INVALID.
PPD3	SECURE_ERROR_3DS.
PPDC	DCC_UNSUPPORTED.
PPDI	DINERS_REJECT.
PPDV	AUTH_MESSAGE.
PPDT	DECLINE_THRESHOLD_BREACH.
PPEF	EXPIRED_FUNDING_INSTRUMENT.
PPEL	EXCEEDS_FREQUENCY_LIMIT.
PPER	INTERNAL_SYSTEM_ERROR.
PPEX	EXPIRY_DATE.
PPFE	FUNDING_SOURCE_ALREADY_EXISTS.
PPFI	INVALID_FUNDING_INSTRUMENT.
PPFR	RESTRICTED_FUNDING_INSTRUMENT.
PPFV	FIELD_VALIDATION_FAILED.
PPGR	GAMING_REFUND_ERROR.

PPH1	H1_ERROR.
PPIF	IDEMPOTENCY_FAILURE.
PPII	INVALID_INPUT_FAILURE.
PPIM	ID_MISMATCH.
PPIT	INVALID_TRACE_ID.
PPLR	LATE_REVERSAL.
PPLS	LARGE_STATUS_CODE.
PPMB	MISSING_BUSINESS_RULE_OR_DATA.
PPMC	BLOCKED_Mastercard.
PPMD	PPMD.
PPNC	NOT_SUPPORTED_NRC.
PPNL	EXCEEDS_NETWORK_FREQUENCY_LIMIT.
PPNM	NO_MID_FOUND.
PPNT	NETWORK_ERROR.
PPPH	NO_PHONE_FOR_DCC_TRANSACTION.
PPPI	INVALID_PRODUCT.
PPPM	INVALID_PAYMENT_METHOD.
PPQC	QUASI_CASH_UNSUPPORTED.
PPRE	UNSUPPORT_REFUND_ON_PENDING_BC.
PPRF	INVALID_PARENT_TRANSACTION_STATUS.
PPRR	MERCHANT_NOT_REGISTERED.
PPS0	BANKAUTH_ROW_MISMATCH.
PPS1	BANKAUTH_ROW_SETTLED.
PPS2	BANKAUTH_ROW_VOIDED.
PPS3	BANKAUTH_EXPIRED.

PPS4	CURRENCY_MISMATCH.
PPS5	CREDITCARD_MISMATCH.
PPS6	AMOUNT_MISMATCH.
PPSC	ARC_SCORE.
PPSD	STATUS_DESCRIPTION.
PPSE	AMEX_DENIED.
PPTE	VERIFICATION_TOKEN_EXPIRED.
PPTF	INVALID_TRACE_REFERENCE.
PPTI	INVALID_TRANSACTION_ID.
PPTR	VERIFICATION_TOKEN_REVOKED.
PPTT	TRANSACTION_TYPE_UNSUPPORTED.
PPTV	INVALID_VERIFICATION_TOKEN.
PPUA	USER_NOT_AUTHORIZED.
PPUC	CURRENCY_CODE_UNSUPPORTED.
PPUE	UNSUPPORT_ENTITY.
PPUI	UNSUPPORT_INSTALLMENT.
PPUP	UNSUPPORT_POS_FLAG.
PPUR	UNSUPPORTED_REVERSAL.
PPVC	VALIDATE_CURRENCY.
PPVE	VALIDATION_ERROR.
PPVT	VIRTUAL_TERMINAL_UNSUPPORTED.

## PayPal Seller Account Issues, Echeck, & other Info

### 2-Step Verification Process

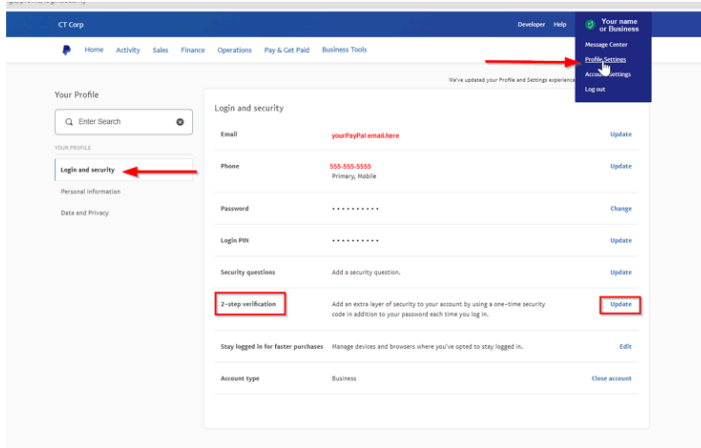
To protect your PayPal account from unauthorized access/login to your Business Account.

You can turn on 2-step verification within your PayPal account to protect your account.

Every time you sign into PayPal, it will require two methods of authentication. That is, if you have set up two-factor authentication (2FA) for your PayPal account.

But what if you just sign in using your password without taking additional steps? It means that you haven't set up 2FA for your PayPal account yet. You're missing out on an additional security feature which provides a second line of defense against cybercriminals.

1. Login to your Business PayPal account
2. Click on your name in the top right side, and click on profile settings



3. Be sure you are on the Login and Security tab
4. Find the 2-Step verification line in the middle section and click on Set Up (or 'Update' if you need to double check these settings).

If you would like to receive a code via text, select the 'Text me a code' option and follow the prompts for proper setup.

## Where should we send your one-time code?

Let's set up the mobile number where you'll receive your codes for 2-step verification.

Country/Region NG +234	Mobile Number [REDACTED]
---------------------------	-----------------------------

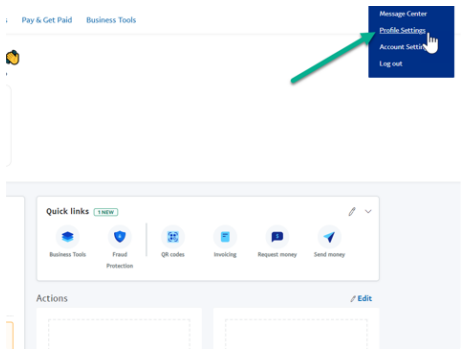
Next

By continuing, you confirm that you are authorized to use this phone number and agree to receive text messages. Carrier fees may apply.

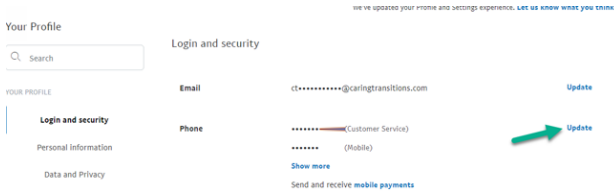
**i** Every time you go to login into your PayPal account, you will have to go through the verification process and enter the code for access.

### Adding a Customer Service Phone Number in PayPal (AMEX)

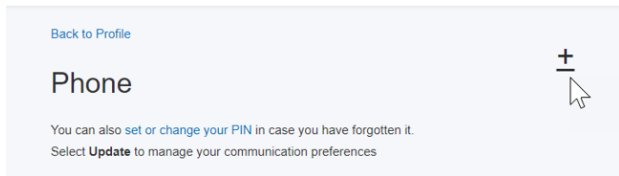
1. Go to your name at the top right corner of the dashboard in PayPal and click Profile Settings



2. Under the Phone section, select the Update button

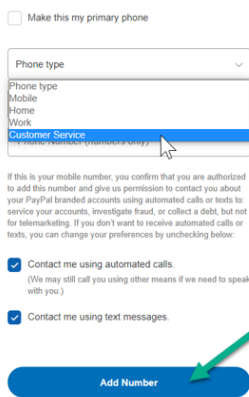


3. Select the Plus icon to the right of the Phone header



4. From there, a window should pop up for you to add a number. On the Phone Type drop-down, select Customer Service. When you are all done, select Add Number.

#### Add a phone number



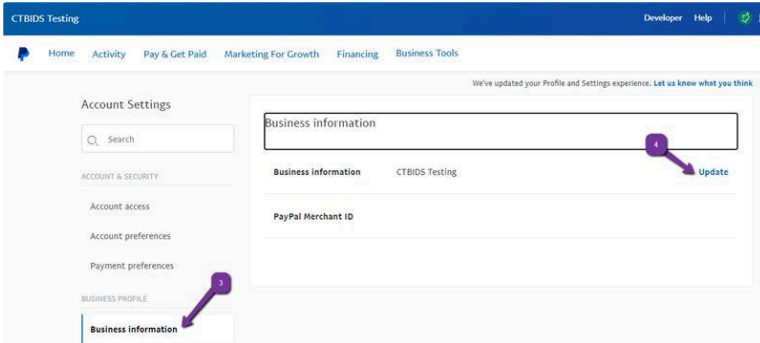
#### PayPal Settings & Account Name (Credit Card Statement Name)

It is highly recommended to have your CTBids Name in for your account name in PayPal instead of your LLC. Please follow the steps below to change your name in PayPal.

1. Log in to PayPal and select your account name in the right hand corner
2. Select Account Settings from the drop-down menu

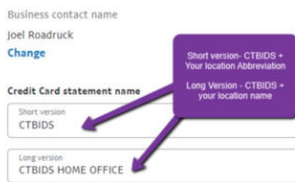


3. Click Business Information from the left-hand pane
4. Click Update



5. Click Edit in the Business Information field
6. Here is where you can edit your credit card statement name
  - a. Short version - use your shortened CTBIDS name (CTBIDS + Your Location Abbreviation)
  - b. Long version - use your full CTBIDS name (CTBIDS + Your Location name)

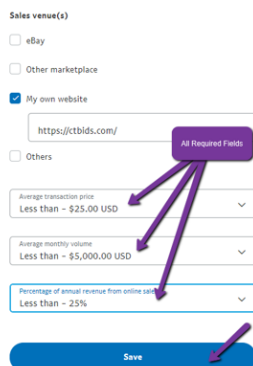
**Edit your business information**



7. Select the Sales Venue - **this is a required field**
  - a. We recommend using your vanity URL - do not insert a www. before the vanity URL



8. Select from the three drop-downs - **these are required fields**
  - a. Average transaction price
  - b. Average monthly volume
  - c. Percentage of annual revenue from online sales



9. Click Save

### eCheck or eCheque -disable accepting eCheque/eCheck in your PayPal Dashboard Settings

PayPal offers this option to customers. A customer's payment can be funded by an eCheck, this only indicates that the payment request itself was performed. The funding is dependent on the bank clearing the check and it can take 4-7 days to clear. PayPal will attempt to clear the funds 3 times, after which the payment will fail.

This payment will show as 'pending' on CTBids on your sale dashboards invoice tab, and will be listed as 'echeck' for the response code. You can monitor the transaction in your PayPal account by looking up the transaction.

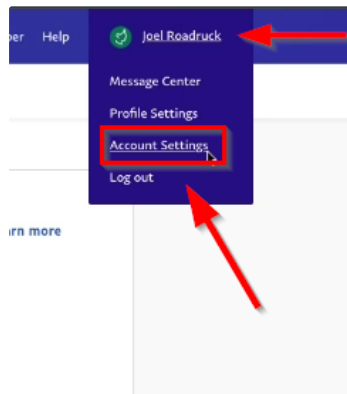
If an eCheck does not clear you may receive an email from PayPal letting you know that funds have not processed yet and not to ship the item. Some Owners have already had the auction pickup where this customer now has possession of the item(s) and their funds still have not cleared. You may need to offer an alternative pickup date if the ECheck has not cleared yet.

### Good news! You can turn off the acceptance of eChecks on your PayPal dashboard!

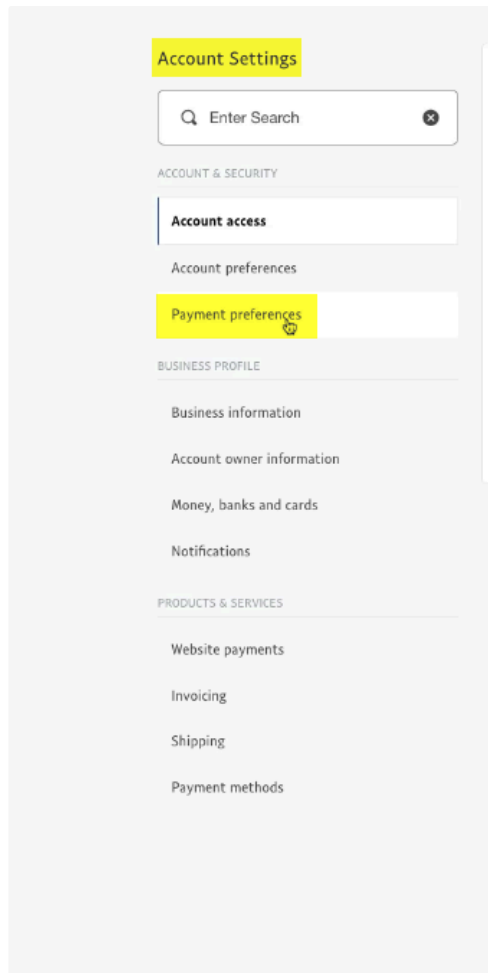
1. Go to your account by clicking on your name on your dashboard, top right side:



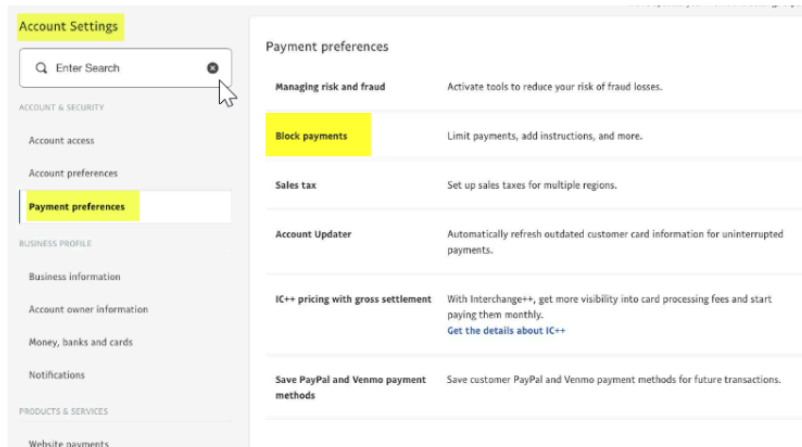
2. Click on Account Settings



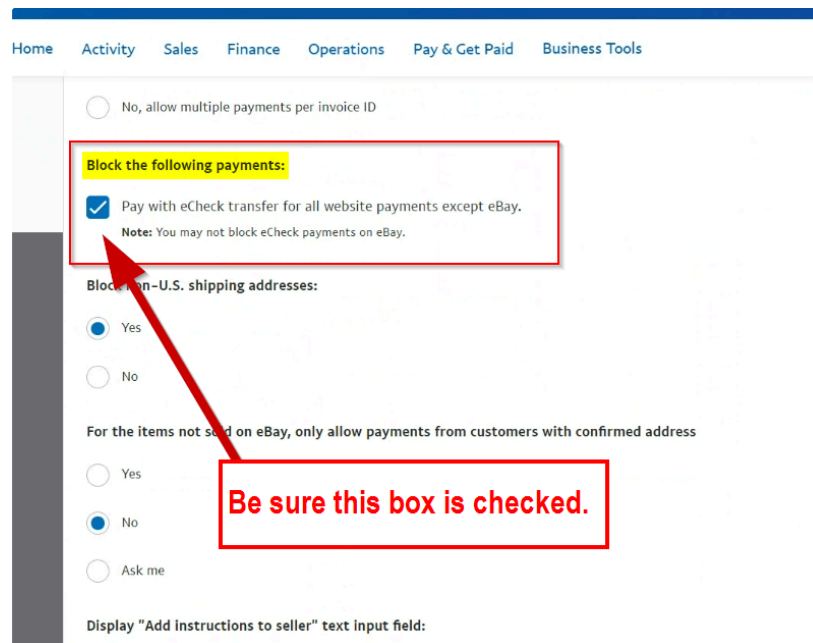
3. Click on Payment Preferences



4. Click on Block Payments



5. Find the section about eChecks/eCheques and select the box to not allow payment by this method.



### PayPal Processing Fees

The Payment Method that a customer uses (has vaulted and marked as default on their account and is used when the payment processes) will process with different processing fees.

- If a customer has a **Credit Card** vaulted and that is the payment method that was used when you processed payments; the fees for that transaction:
  - 2.44% plus \$0.44 (if opted in for Chargeback Protection)
  - 2.04% plus \$0.44 (if opted out on Chargeback Protection)
- If a customer has a **PayPal ID** vaulted and that is the payment method that was used when you processed payments; the fees for that transaction:
  - 3.49% plus \$0.49 for PayPal transactions

**i** You can always refer back to your Merchant Agreement.

### PayPal Log Purchase Details

When reviewing transaction details on your PayPal dashboard, you will see details about the transaction.

- Item ID: Item SKU number
- Item name: Item Title
- Price
  - Includes BP amount
- Sales Tax
  - Sales Tax and Tax on BP will be combined in this total

Test example:

Item ID	Item name	Quantity	Price	Subtotal
Item # SS-001	Item 1 SS in app Direct Buy	1	\$1.38 USD	\$1.38 USD
Purchase Total				\$1.38 USD

**Amount details**

Item	Subtotal
Purchase Total	\$1.38 USD
Sales Tax	\$0.09 USD
Shipping Amount	\$0.00 USD
Handling Amount	\$0.00 USD
Insurance Amount	\$0.00 USD
Gross Amount	\$1.47 USD
PayPal Fee	-\$0.47 USD
Net Amount	\$1.00 USD

For add-on invoices for shipping

- There will be no Item ID (no SKU)
- Item name: will include the invoice number and sale ID
- Price: amount charged for the additional invoice
  - If 'shipping' was selected it will also itemize this in the Amount Details section

Test Example:

**Order details**

Item ID	Item name	Quantity	Price	Subtotal
-	CTBIDS Invoice Number - 290275120892 , CTBIDS Sale Id - 29027	1	\$1.00 USD	\$1.00 USD
Purchase Total				\$1.00 USD

**Amount details**

Item	Subtotal
Purchase Total	\$1.00 USD
Sales Tax	\$0.00 USD
Shipping Amount	\$1.00 USD
Handling Amount	\$0.00 USD
Insurance Amount	\$0.00 USD
Gross Amount	\$1.00 USD
Insurance Amount	\$0.00 USD
Gross Amount	\$1.00 USD
PayPal Fee	-\$0.46 USD
Net Amount	\$0.54 USD



Card and the Processor Response Details  
 Card Type: VISA  
 Address Verification Service (AVS): N

**Customer details**

Paid by  
Customer's Name  
 The sender of this payment is Unregistered

**Need help?** Go to the [Resolution Center](#) for help with this transaction, to settle a dispute or to open a claim.

**Memo**

CTBIDS Invoice Number - 290275120892 , CTBIDS Sale Id - 29027

## PayPal Seller Protection

Here are links to PayPal's Seller Protection Policy along with helpful information listed below.

### We feel this first link has the best information:

[PayPal's Seller Protection Program](#)

### Other links for you to read about Seller Protection:

[What is PayPal Seller Protection? | PayPal US](#)

[PayPal's Seller Protection Program](#)

#### What is PayPal Seller Protection?

Our Seller Protection helps guard you from losing money to claims, chargebacks and reversals. You're covered for the full purchase amount on all eligible transactions.

#### Our Seller Protection applies to 2 types of complaints:

- Item not received
- Unauthorized transaction

If a transaction is eligible for Seller Protection, it will be marked as eligible or partially eligible on the Transaction Details page. If it's marked as partially eligible, you're only protected for items a buyer didn't receive.

#### Requirements for Seller Protection:

##### For physical items:

- Ship the item to the address on the Transaction Details page.
- Respond to our requests for documentation and other information within the required timeframe.
- Provide us with valid proof of shipment or delivery.

##### For intangible goods:

- Meet integration requirements
- Provide evidence that the intangible item was delivered or provided as described, or that the service was completed as described.
- Paid transaction [fees](#) on the sale.

## ✓ What are the requirements for Seller Protection?

### Basic Requirements

- Your permanent address (listed in your PayPal account) must be in the United States.
- The item must be a physical, tangible good that can be shipped, except for items subject to the Intangible Goods Additional Requirements below.
- Ship to the address on the Transaction Details page.
- If we request documentation or other relevant information, we ask that you respond promptly (typically within ten business days).

The detailed Seller protection **basic requirements** can be found in the Seller Protection section of our [User Agreement](#)

### Additional Requirements

For "Item Not Received" cases:

- The payment must be marked "eligible" or "partially eligible" on the Transaction Details page.
- You must provide proof of delivery for the item

For "Unauthorized Payment" cases:

- The payment must be marked "eligible" on the Transaction Details page.
- You must provide **Proof of Delivery or Proof of Shipment** as described in [User Agreement](#).

For Intangible Goods:

- Met integration requirements
- Paid Standard Transaction Fees on the sale.
- Delivered the item and provide Proof of shipment or delivery for Intangible Goods.
- Provide signature confirmation when the full amount of the payment (including shipping and taxes) exceeds the amount listed in the signature confirmation threshold table (based on the currency of the payment).

The detailed **Seller Protection Intangible Goods Additional Requirements** can be found in the Seller Protection section of our [User Agreement](#)

Payments for the following aren't covered by our PayPal Protection:

- Real estate, including residential property
- Businesses
- Vehicles, including motor vehicles, motorcycles, caravans, aircraft and boats
- Significantly Not As Described claims on custom-made items
- Items prohibited by the PayPal Acceptable Use Policy
- Industrial machinery used in manufacturing
- Items equivalent to cash, including prepaid or gift cards
- PayPal Direct Payments
- Virtual Terminal Payments
- Personal Payments

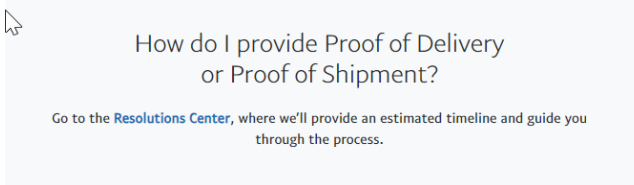
## What isn't covered by Seller Protection?

Most PayPal transactions are covered as long as they follow these requirements. However, there are instances where Seller Protection doesn't apply:

- Claims, chargebacks, or reversals filed because the item is significantly different from how it was described (e.g. you described an item as "new," but sent a used one).
- It involves an item that PayPal determines, in its sole discretion, is a counterfeit item.
- It involves an item that you deliver in person, including in connection with a payment made in your physical store, unless the buyer paid for the transaction in person by using a PayPal goods and services QR code.
- It involves sales that are not processed either through a buyer's PayPal account or a PayPal guest checkout transaction.
- It involves items equivalent to cash including gift cards.
- It involves a donation.
- It relates to the purchase of a financial product or investment of any kind.
- It involves a payment sent using PayPal's friends and family functionality.
- It involves a payment made using PayPal Payouts and Mass Pay.
- The item is a vehicle, including, but not limited to a motor vehicle, motorcycle, recreational vehicle, aircraft or boat.
- Payments made in respect of gold (whether in physical form or in exchange-traded form).

These eligibility requirements for coverage can also be found in the [Seller Protection section](#) of our [User Agreement](#)

How do you provide Proof of Delivery with PayPal:



How do I provide Proof of Delivery or Proof of Shipment?

Go to the [Resolutions Center](#), where we'll provide an estimated timeline and guide you through the process.

## What is Proof of Delivery?

For physical goods:

- Date of delivery and 'delivered' status
- An address for the recipient that matches the shipping address on the Transaction Details page
- An address for the recipient showing at least the city/state, city/country, or zip/postal code (or international equivalent).
- Signature confirmation when the full amount of the payment (including shipping and taxes) exceeds the amount (based on the currency of the payment) listed in the [signature confirmation threshold table](#) Signature confirmation is online documentation, viewable at the shipping company's website, indicating that the item was signed for.

For Intangible goods:

For intangible or digital goods, proof of shipment or delivery means compelling evidence to show the item was delivered or the purchase order was fulfilled. Compelling evidence could include a system of record showing the date the item was sent and that it was either:

Electronically sent to the recipient, including the recipient's address (email, IP, etc.), where applicable; or  
Received or accessed by the recipient.

For QR Code Transactions:

For QR code transactions, you may be required to provide us with alternative evidence of delivery or such additional documentation or information relating to the transaction.

## What is Proof of Shipment?

For physical goods:

- Date of shipment
- An address for the recipient that matches the shipping address on the Transaction Details page
- An address for the recipient showing at least the city/state, city/country, or zip/postal code (or international equivalent).

What you can do ahead of time to be covered by Seller Protection:

## What can you do ahead of time to be covered by Seller Protection?

Before you ship your customer's order, check to see if your transaction is eligible for Seller Protection.

- If it's eligible, great. You don't need to do anything to register beforehand for coverage.
- The date the item was shipped.
- The recipient's address, showing at least the city and state, or city and country, or zip/postal code (or international equivalent). The address information on your shipping receipt must match the address on the Transaction Details page.
- If your transaction isn't eligible or is only partially eligible, please note that you bear responsibility for any problems or losses. So exercise caution, and review your orders carefully for any indication of fraud.

## Tips for secure sales with PayPal

- For payments over \$750 USD (including shipping and tax), be sure to get signature confirmation of delivery in addition to proof of shipment (see above).
- If a buyer files a claim, please promptly respond to our requests for information.
- Ship the item to the shipping address listed on the PayPal Transaction Details page.

Customer files a claim, what to do on your PayPal dashboard?

## What can Seller Protection do for you if a customer files a claim?

**First, log in to your account to see if the transaction was eligible or partially eligible. Even if we can't cover you for the transaction, responding in the Resolutions Center makes it easier for us to help you through the claim.**

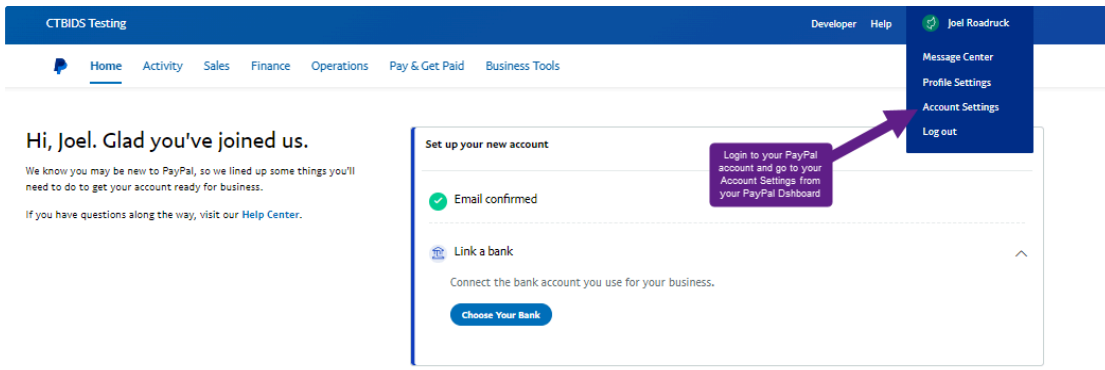
To learn more about PayPal Protection, simply click Legal at the bottom of any PayPal page, then click [PayPal Account User Agreement](#).

### PayPal Account Transaction Limitations

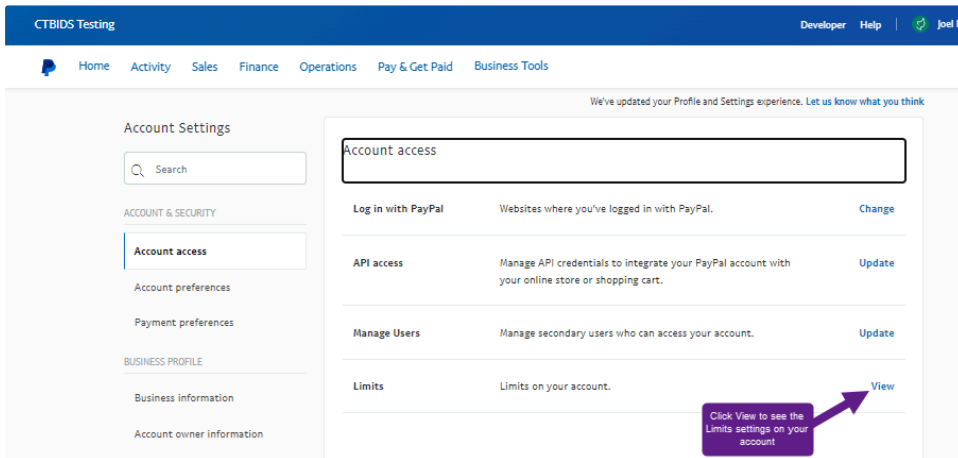
If you are needing to check on your PayPal for your limits on your transactions for Daily or Monthly etc., please follow these steps:

• **To view your limits and/or request an increase:**

1. Login to your PayPal Account
2. Hover over your account name (Top Left Hand Corner)
3. Select Account Settings

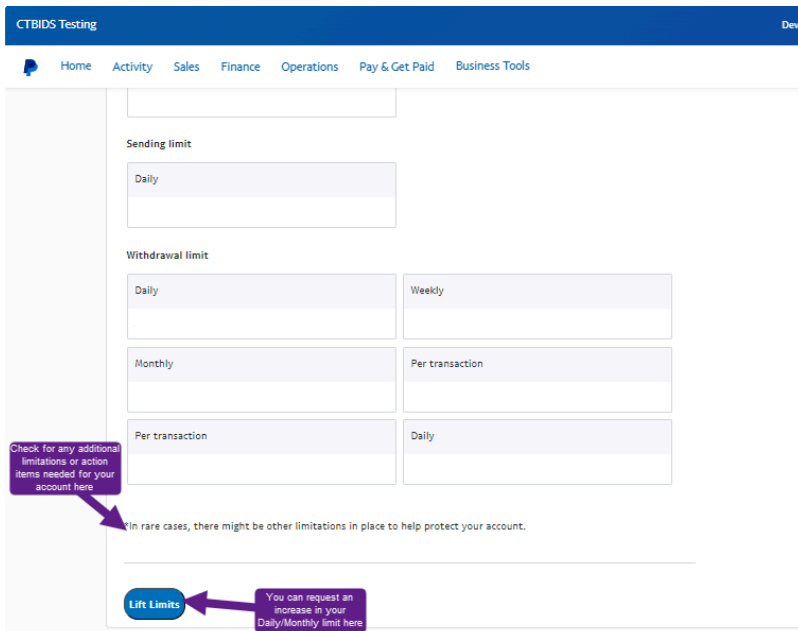


4. Select View next to 'Limits on your account'



5. Scroll down to see your account limitations for transactions.

6. If you are requesting to Raise your limitation amounts, please select 'Lift Limits'



7. If you are looking to see if any other limitations are on your account, they might also be placed here, but please always check your Resolution Center for additional limits placed

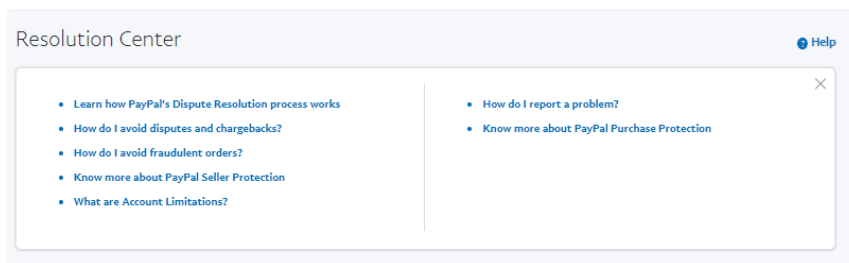
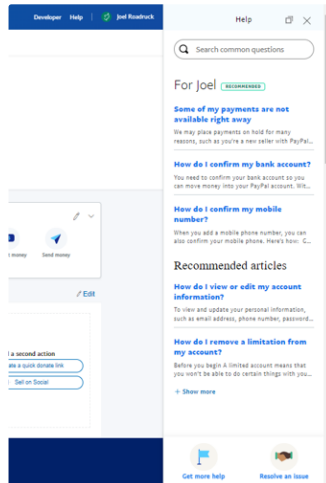
8. Please follow all steps provided here and follow the directions given.

9. If there is nothing in the Resolution Center or you have not received anything from PayPal directly, please reach out to [CTBIDShelp@caringtransitions.com](mailto:CTBIDShelp@caringtransitions.com) and ask for assistance.

**i** Please note: You can always select the 'Help' icon in the top left corner for commonly asked questions, or to search for anything you are looking for help with.

There is also a 'Help' section in the Resolution Center to assist with additional questions you might have there as well.

- 1 If you have a suspicious PayPal email, that you might suspect is fraudulent - please forward the entire email to: [phishing@paypal.com](mailto:phishing@paypal.com)
- 1 If you need to report a fraudulent buyer - please send the information (Include any communications, documentation, proof of why you suspect them to be fraudulent) to: [bc-info@paypal.com](mailto:bc-info@paypal.com)



### PayPal Account Compromised

If you ever feel that your PayPal Account has been hacked or compromised, please make sure to call their customer service line Immediately at **888-221-1161**.

We also Strongly Recommend setting up a Two-Factor Verification in your PayPal Account to avoid this.

### What is 2-step verification and how do I turn it on or off?

PayPal's 2-step verification (two-factor authentication) gives you an extra layer of security when accessing your account. This process can only be done through your web browser and not through the PayPal App. You can set up 2-step verification using an authenticator app (like Google authenticator and Microsoft authenticator.)

Here's how to set up for 2- step verification for your mobile phone:

1. Click the [Settings](#) icon next to "Log out."
2. Click **Security** near the top of the page.
3. Click **Set Up** to the right of "2-step verification."
4. Choose how you'll get your code by selecting "Use an authenticator app."
5. Click **Set it Up** and follow the steps on the screen.

**This process can only be done through your web browser and not through the PayPal App.**

To turn off 2-step verification:

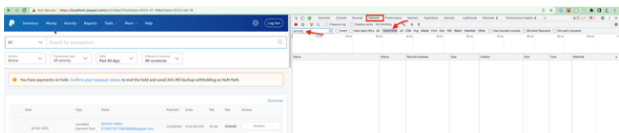
1. Go to [Settings](#).
2. Click **Security**.
3. Click **Update** next to "2-step verification."
4. Click **Turn Off** next to 2-step verification, then click the **Turn It Off** button.

**Please note:** Customers who currently have 2-step verification via text turned on will not be able to enable 2-step verification text again if they decide to turn off.

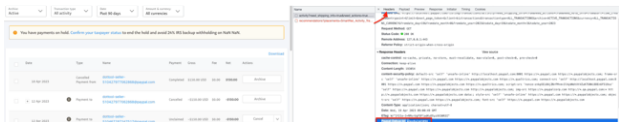
You can opt to skip 2-step verification on a device you trust. Simply log in to PayPal on the device and complete 2-step verification. You'll see the option to "trust this device."

#### PayPal Transaction Repeating in Activity Dashboard

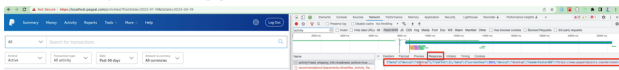
1. Log in [Pay, Send and Save Money with PayPal | PayPal US](#)
2. From "Home" go to "Activity" > "All transactions"
3. Open the "inspect" (by clicking right-button and select "inspect")
4. Select "network" tab, click "Fetch/XHR and filter by activity."



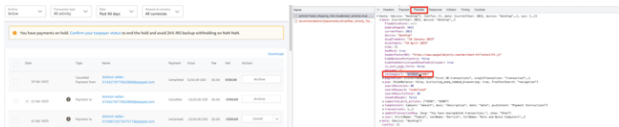
5. Reload the page, or reproduce the mentioned issue
6. A service called "activity?need\_shipping\_info..." will be displayed
7. Click "Header" and look for "PayPal-Debug-ID", **save this information**



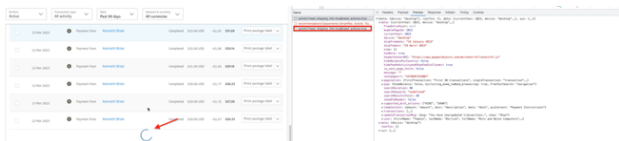
8. Go to "Response" **copy and save all information.**



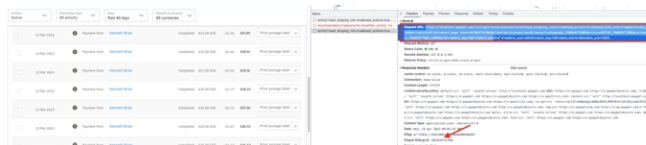
9. Go to "Preview" **copy and save the information on "Nextpageurl"**



10. Scroll down until the page starts load new transaction, a new service called "activity?need\_shipping\_info..." will be displayed



11. **Copy and save "Request URL and PayPal-Debug-ID"**

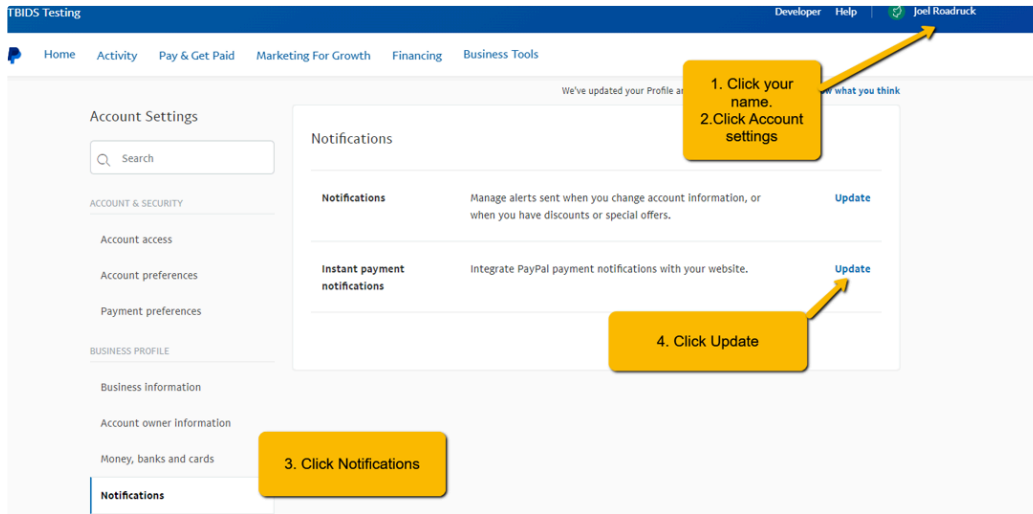


#### PayPal Instant Payment Notification (IPN) Warning

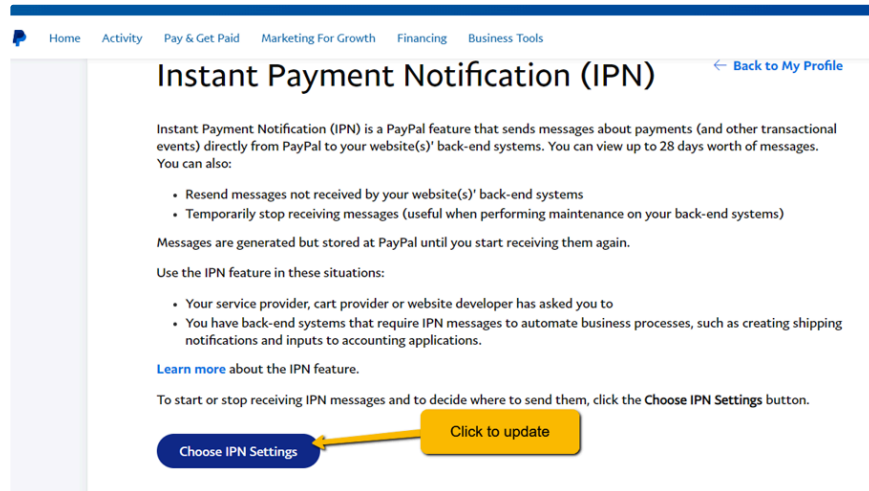
The Instant Payment Notification Warning is an account setting you can change. Instant Payment is no longer needed. It was used on the old Legacy CTBIDS.

If you receive an email regarding a payment notification warning from PayPal, please follow the steps below to disable it:

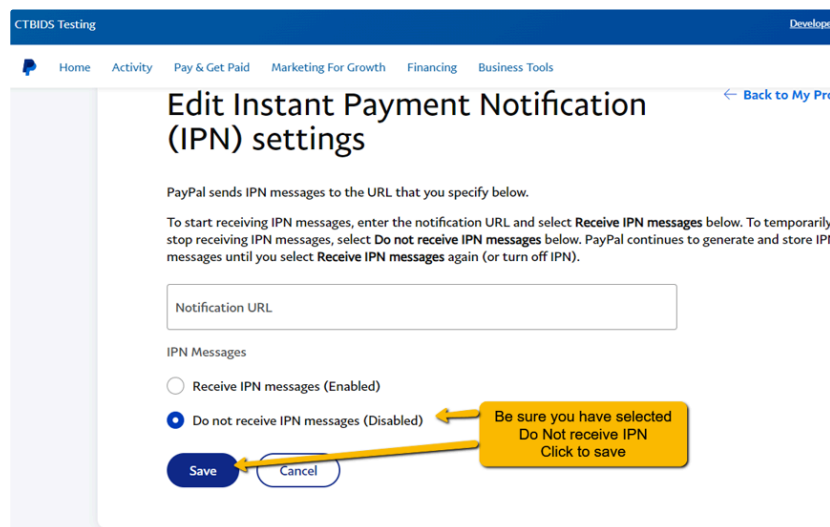
**Sign in to your PayPal account – click your name/Account settings/Notifications/Update/Edit IPN/Do not receive/Save**



Next screen yours may say update IPN setting



Make sure you switch to: Do not receive IPN messages

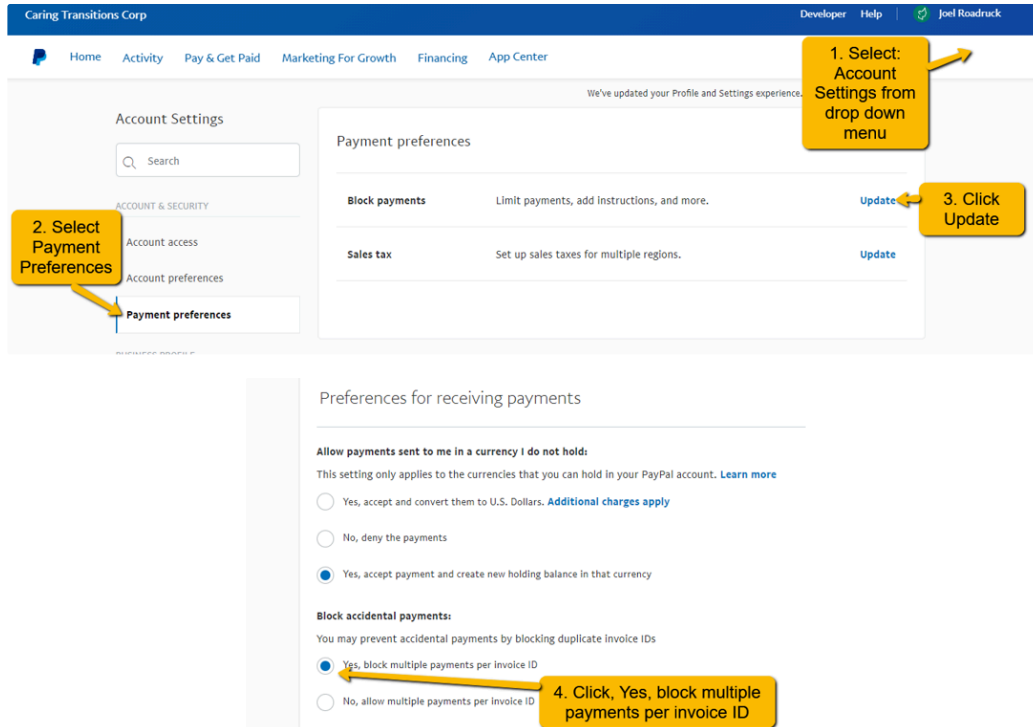


**PayPal -Blocking Double Payments**

You can avoid receiving duplicate payments through PayPal by [blocking payments](#) using the same invoice ID number:

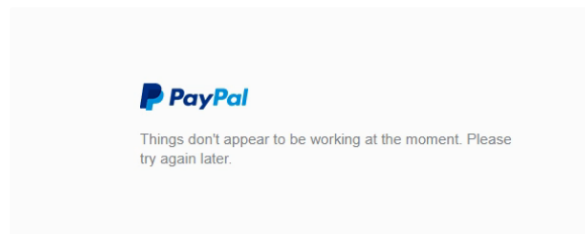
1. Click the [Settings](#) icon next to "Log out".
2. Click **Payment preferences** on the left.
3. Click **Update** to the right of "Block payments".
4. Select **Yes, block multiple payments per invoice ID** under "Block accidental payments".
5. Your changes are automatically saved.

Screen shots with alternative path to update duplicate invoice blocking



**PayPal Checkout Error Message**

If you are receiving this error message when trying to checkout using PayPal, please follow directions indicated below

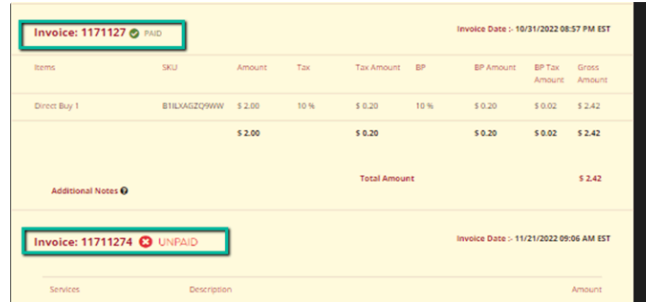


**Error on PayPal Checkout Page: Things don't appear to be working at the moment. Please try again later.**

1. Log in to your PayPal account.
2. Go to the Website Payment Preferences of your PayPal profile.
3. Scroll/swipe down to the Encrypted Website Payments section.
4. Set Block Non-encrypted Website Payment to Off.

**Invoice with BOTH Restricted and Non Restricted (System Generated)**

1. **PayPal does not allow transaction of restricted items (guns, gun parts, ammo)**
2. If the customer won multiple items from a sale, with some items being restricted and some not, the system will split the items into separate invoices-restricted items being all on one invoice and unrestricted being all on one other invoice
  - a. When separate invoices are generated from the same sale, the invoice containing the restricted items will have a “child” or “inherited” invoice number- meaning it will be different from the unrestricted item invoice



3. Sale Ends

4. Owner clicks Generate Invoices

1. System splits Invoices (Invoice 1 is Unrestricted Items/Invoice 2 is Restricted Items)

2. Unrestricted Item

- Owner Processes Payment from Invoice Dashboard for Unrestricted Items
- System processes Payment Successfully in full

7. Restricted Item:

- Owner is unable to Process Payment from Invoice Dashboard for Restricted Items
- Owner secures payment outside of CTBIDS
- Owner Reconciles by manually entering in payment via 'Make a Payment' button within Invoice

**PayPal Business Verification Processes: KYC & KYB**

Some owners may have to go through one of these verifications processes, **or both**, at PayPal's request. Please consider having these items together and ready to go to help speed up the process.

**KYC -Know Your Customer Verification**

- Driver's license
- Proof of home address
  - If this is on the driver's license, then that will be acceptable
  - If not, we will need a utility bill, bank statement or credit card statement
- Proof of SSN
  - SS card or a tax document within the last 12 months
- Beneficial Owner Information
  - <https://www.paypal.com/policydashboard/process/compliance/cip>
  - <https://www.paypal.com/policy/flow/fincenbo>

**KYB -Know Your Business Verification**

- Proof of Business Identity
  - A copy of the IRS letter assigning the EIN number
- Proof of Business Address
  - A utility bill, insurance document, tax statement, business license, bank statement or credit card statement
- Proof of Business Existence

- Business license or Certificate of Good Standing from the Secretary of State

### **File a complaint to PayPal**

If you need to file a complaint about PayPal, here are the instructions from PayPal on how to do this:

How can I make a formal complaint to PayPal?

We aim to offer you excellent customer service, but we may not get it right every time. So, if you're dissatisfied with PayPal, please let us know, and we'll do our best to find a solution quickly and fairly.

We'll send you an acknowledgment of the filed complaint within 10 days of receipt. We'll do our best to provide you with an answer or resolution to your complaint within 15 days for payment-related complaints. In exceptional circumstances, the timeframe may be extended to 35 days to allow for our investigation. If we need to extend this timeframe, we'll notify you after 15 days and outline the research to date. For all other complaints, we will respond within one month.

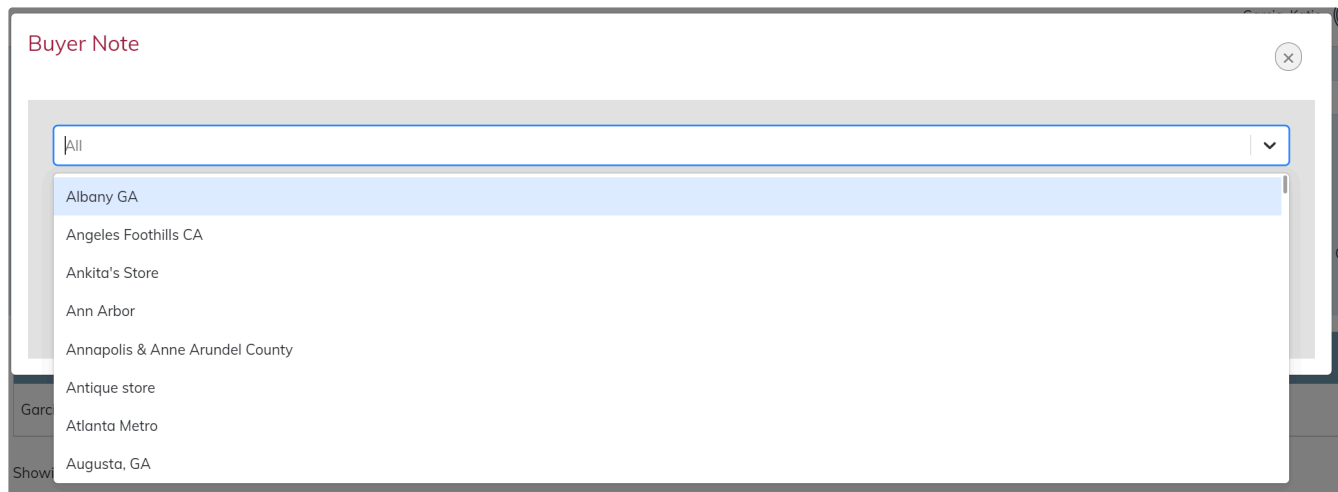
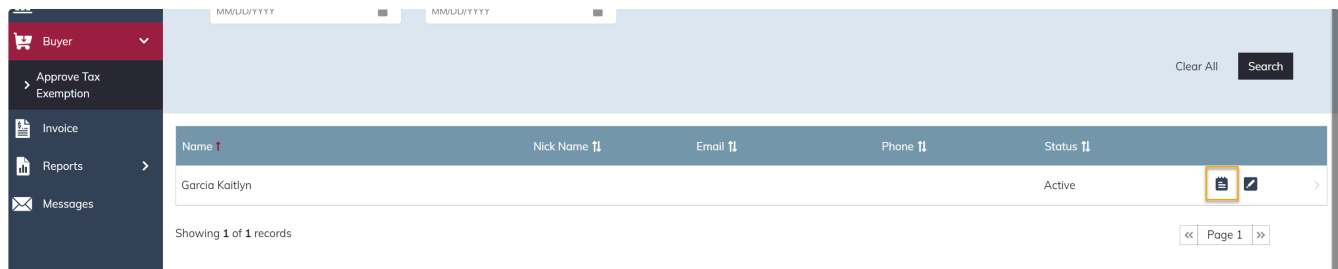
Here's how to submit your complaint from a web browser:

1. Go to 'Complaints' on the PayPal website.
2. Click Submit a complaint about PayPal.
3. Select a reason for the complaint.
4. Provide details about the complaint.
5. Click Submit Complaint.

## Add Customer Notes

To add a note to a customer, do the following:

1. Sign in to Seller CTBIDS
2. Select 'Buyer' from the left-side menu
3. Use the search fields to locate the customer whom you want to add a note to
4. When the customer appears, select the 'Notepad' icon to edit note
5. Pop up window will appear, you can select All or a specific location



6. After selecting All, your location, or any other location enter in your note and hit Save
  - a. You should see a green Success box above the note after completion

Buyer Note



All



500/500

Type in the body of your note here...

Save

Admin Test

01/26/2022 10:45 AM EST

Buyer Note

success



All



500/500

Type in the body of your note here...

Save

Admin Test

01/26/2022 10:45 AM EST

7. All notes marked for All are visible to admin and other sellers.

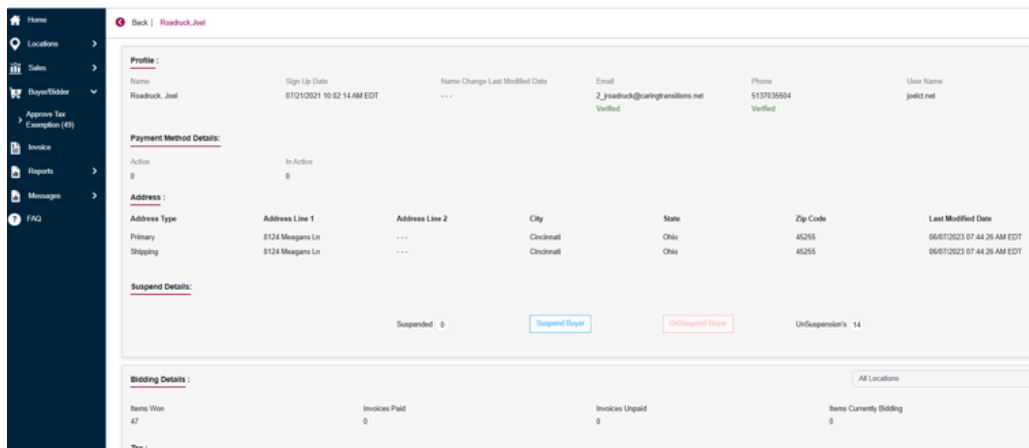
a. Please note that notes can only be added at this time, edits and deletes are not available at this time

## Customer Search & Information Details

You can now look up ALL customers and get more detailed information on them even if the customer has not bid or won at your location.

1. Login to <http://Seller.ctbids.com>
2. Click customer/Bidder tab on the left hand side and enter search criteria for customer
3. Click the 'pencil' icon on the left-hand side
4. You will see the following information on the customer you selected:
  - Profile:
    - Name
    - Sign Up Date: This will be the date the user completed their account verification of email and phone number (if the customer signed up prior to 09/2021 and has legacy information, their phone number and email address may appear as not verified since their information was imported from the legacy platform)
    - Name Change Last Modified Date: if the customer modified their name, a date/time stamp will be shown here for that action.
      - A customer cannot change their name on their own, they must call into CTBIDS Help to request a name change and must first verify information on their account. This can only be done through the Admin site.
    - Email: (if the customer signed up prior to 09/2021 and has legacy information, their phone number and email address may appear as not verified since their information was imported from the legacy platform)
    - Phone number: (if the customer signed up prior to 09/2021 and has legacy information, their phone number and email address may appear as not verified since their information was imported from the legacy platform)
    - Nickname: User nickname
  - Payment Method Details:
    - Active' (how many Payment Methods in total that are vaulted)
    - Inactive (number of payment methods that are currently inactive -of the total vaulted).
  - Address:
    - Primary: Their Primary Profile Address
    - Shipping: Their default shipping Address

- Last Modified Date: if the customer made changes to their Primary address (a date/time stamp will be shown as to when the address was last edited)
- Bidding Details: This information will be specific to YOUR location. You will only see information entered here if the customer has won item, paid invoices, or unpaid invoices for your location only
  - If you have access to more than one location, you can select the location you wish to view this customer under by using the dropdown box.
- Items Won: The total number of items won at your location
- Invoices Paid: The total amount of invoices the user has paid at your location
- Invoices Unpaid: The total amount of invoices the user has not yet paid at your location
- Items Currently Bidding: The total amount of items the user is currently bidding on at your location



**Please Note:**

- You will only be able to see invoices that are from your location
- You will not be able to search information on other items they have purchased that were **not** from your location
- You will not be able to see invoices from other locations

**i** Suspensions: Suspensions are currently being enhanced for sitewide view and will be available in one of our upcoming releases to include more enhancements for suspensions.

## Retract a Bid/Customer/All Bids

Application: **Seller CTBIDS**

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### **To retract a bid do the following:**

1. Sign In to Seller CTBIDS
2. Select the left-side menu item 'Sales'
3. Search for the sale and select the sale 'Dashboard' icon in the list of the selected sale
4. Locate the item in question from the sale and select the 'eye' icon to view it
5. When the item details appear, the list of bid history is displayed and a button to retract the bids from the item is shown on the right.

**Bidding History**

Bidders: 3      Current: \$21      Goal: \$0.00[\$21]      Value: \$0.00[\$21]

**Item Details**

Retract a Bidder      Retract All

Date & Time	Bidder	Bid Amount	Proxy Max Bid
09/29/2022 06:33:47 PM EDT	Suter	21	37

Retract

6. By selecting a retract option, a pop up window will appear to list a reason for retraction. **This comment will be sent to all customers via email to notify of a retraction on the item.**

Please provide the reason for the retraction and keep in mind this message will be sent to all user who bid on this item.

This will retract the current bid. would you like to proceed?

Cancel      Confirm

Select 'Confirm' to remove the current bid. This function will remove each bid one by one.

**⚠ Please Note:** You will not be able to retract a bid when the item has less than 1 minute left on the clock for bidding. This action will be blocked with messaging presented.

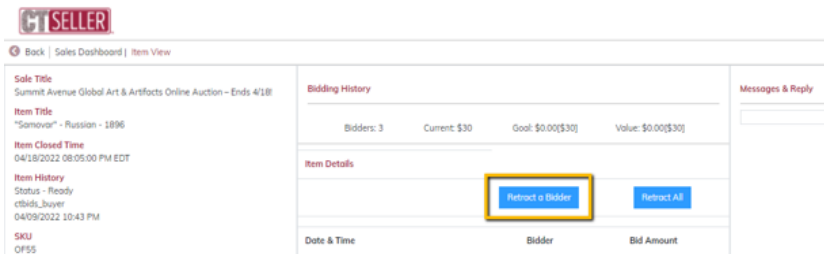
This will retract the current bid, would you like to proceed?

Item is about to close, cannot allow this action

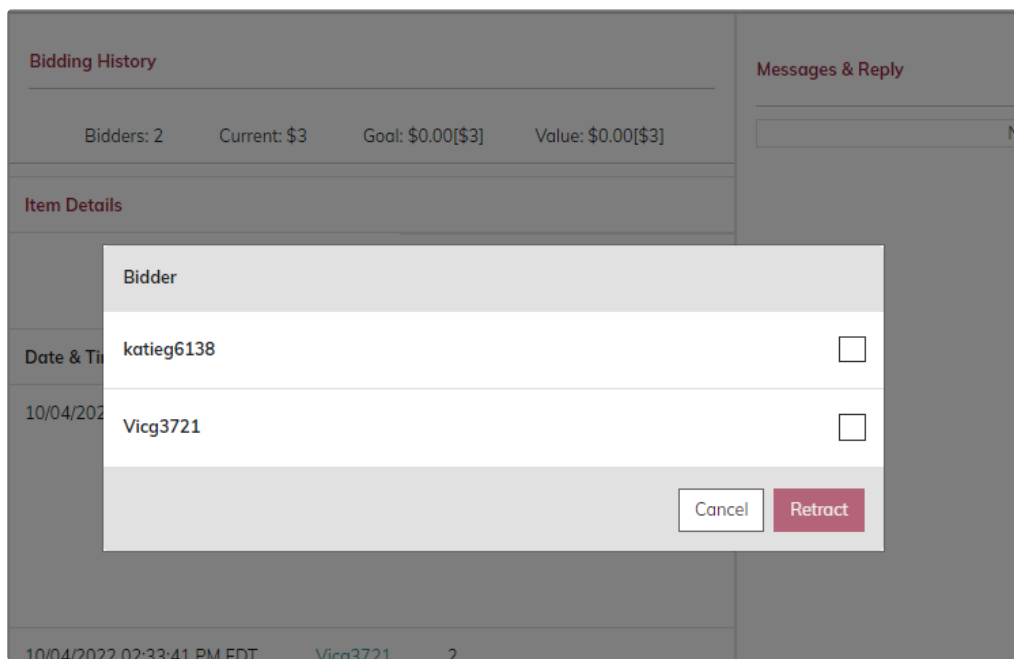
Cancel Confirm

## To Retract a customer:

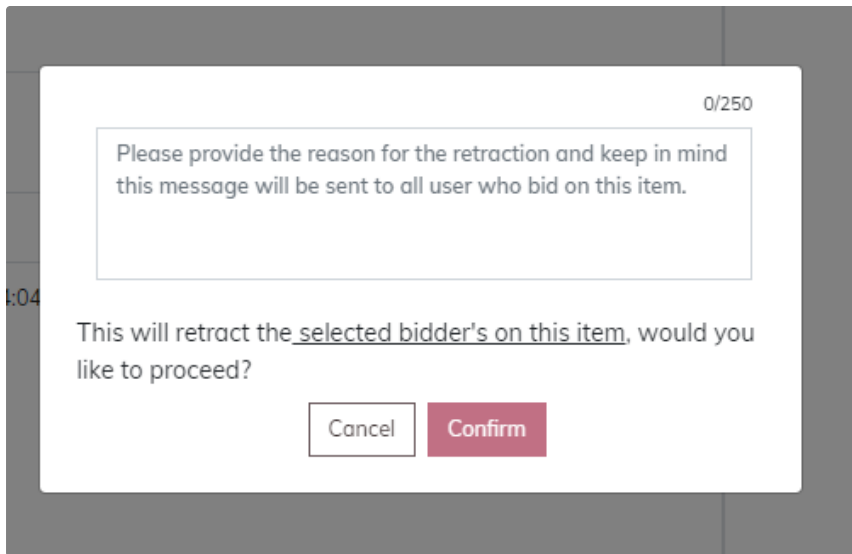
1. You can follow the same steps from above for retracting a bid
2. To Retract a customer, it will remove all bids from the selected customer.
  - a. Select the Retract a Bidder button



- b. Select the user who's bids you are retracting
  - i. This will retract **all** of the bids from this user

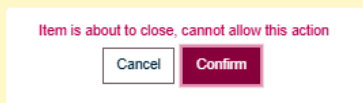


3. By selecting a retract option, a pop up window will appear to list a reason for retraction. **This comment will be sent to all bidders via email to notify of a retraction on the item.**



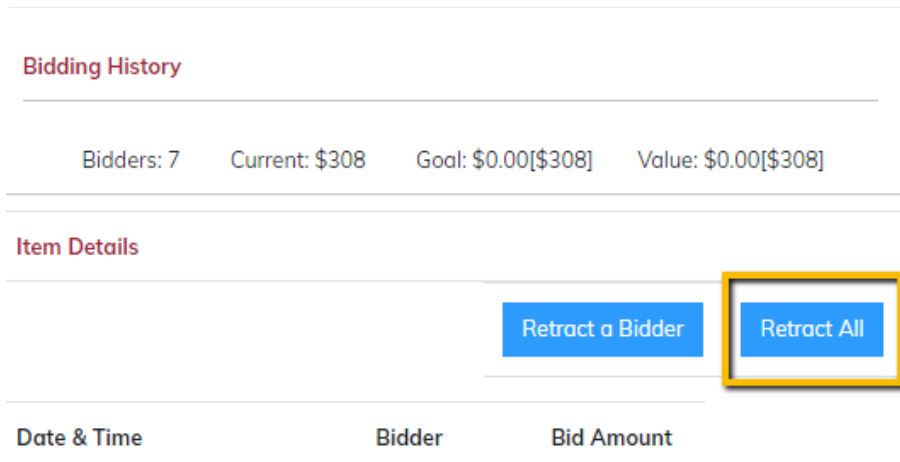
4. Select 'Confirm' to remove the current bid. This function will remove each bid one by one.

**⚠ Please Note:** You will not be able to retract a bid when the item has less than 1 minute left on the clock for bidding. This action will be blocked with messaging presented.

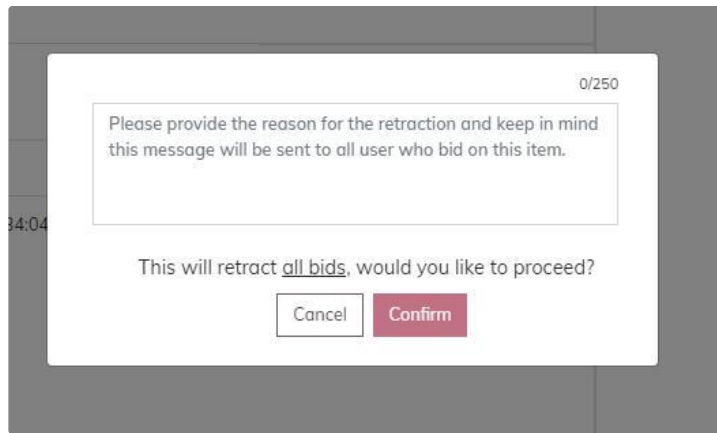


### **Retract All Bids:**

1. To retract all bids from an item, select the Retract All button

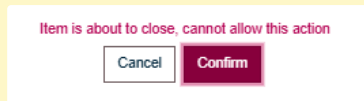


2. By selecting a retract option, a pop up window will appear to list a reason for retraction. **This comment will be sent to all customers via email to notify of a retraction on the item.**



**Please Note- when you retract a bid, every user/customer that has placed a bid on this item will be notified of a bid retraction, and will see the message you enter in**

**⚠ Please Note:** You will not be able to retract a bid when the item has less than 1 minute left on the clock for bidding. This action will be blocked with messaging presented.



**Once a bid has been retracted, there is no way to reverse this action**

# Suspending a Customer & Invoice Management after Suspension

Application: **Seller CTBIDS**

## Suspending a Customer

Released on 3/22/24 - The Seller's ability to make suspensions and unsuspend for their own location.

- **Suspending a Customer**

- **Suspend Details**

- Active Sales Reports will now include a column for Suspension Status
  - You can run an Active Sales Report to check for any suspended customers on your active sales (a new column has been added for this)
    - You can look up the suspended customer using the Buyer/Bidder tab
      - You can then click on the red flag for a quick view into their suspension status.
        - If you feel that the suspension status details will require you to take action, you can now suspend for your location yourself if you feel you need to

- **The ability to suspend or unsuspend for your location is available to you for your location**

- When you click on 'Suspend Buyer' you will be presented with four options to select your reason for suspension.
  - Fraudulent Behavior
  - Non Payment - Item
  - Non Payment - Shipping
  - Inappropriate Behavior

- **You will see a static message about suspending network wide.**

- The decision to suspend network wide should be based upon whether you feel the customer is a threat to the entire network.
  - Your action will be to call into the Help Desk to request a network wide suspension if the request is urgent \*reminder that emails into CTBids Help have a 24 hour response time and should not be used for Urgent suspension requests.

- **When you do request a Sitewide Suspension the suspension request will be sent to the appropriate department for a review of the request.**

- **If you report that this IS URGENT** (which should be done by phone and not email)
  - You can and should proceed with suspending for your own location first.

- Then the agent helping you will suspend the user sitewide when the reason is Urgent: Suspected Fraud, Threatening/Aggressive Behavior
- This sitewide suspension will still be reviewed and may be changed/updated to a location specific suspension based on the review findings but your location specific suspension will remain intact.
- **If your sitewide suspension request is NOT URGENT**
  - You can and should proceed with suspending for your own location.
  - You can make the request via email to [CTBidsHelp@caringtransitions.com](mailto:CTBidsHelp@caringtransitions.com) or by phone call into Maximum **844-696-3741**
  - Your sitewide suspension request will be reviewed by the appropriate department and a decision made whether to suspend sitewide or to maintain the suspension at the location level.

### **Other Suspension information:**

- Keep in mind, suspending the bidder from your location will now 'Flag' the customer for the entire Owner network to see.
  - They will appear as 'suspended' on Active Sales Reports
  - When an owner searches for the customer in the system the red flag will be visible and can be selected to review the suspension(s) quickly.
    - A box will open to show you the 'Why, Where, and When'.
- **This Flag system is designed to help reduce the need for Network Wide suspensions:** through this increased visibility. You no longer have to suspend sitewide as a way to protect other locations since this feature provides instant visibility.
  - Suspending for your site as you attempt to work through the issue with the customer will still be visible to all, but may not require a full network suspension at that time.
- You will have the ability to add notes to your suspensions which will be seen publicly by all Franchise Owners and anyone with Admin/Seller Access.
- There are two areas on Seller CTBIDS .com where suspension details can be reviewed
  - The first way that a Seller site user can review the suspension details is by going to the Buyer/Bidder tab and entering the customer's name.
    - Here the customer will be shown in a list format below the search criteria.
      - If the customer has been suspended, even if it is only from one location, a red flag will appear to the left of their name
        - You can click on the flag to quickly review where, why, & when the customer has been suspended from. The information that will be displayed is:

- The location name(s) where the customer is suspended from
  - The reason selected for the suspension
  - Added notes written at the time of the suspension(s)
  - Who the person was that suspended
- The second way to view a customer's suspension is after you have searched for the customer
    - click on the pencil icon to open up the customer's full information.
    - Under the label of 'Suspend Details' you will see the word 'suspended' with a number next to it.
      - That number represents the number of locations that the customer is suspended from.
      - You can click on that number to open a box to review where, why, & when the customer has been suspended from. The information that will show is:
        - The location names where the customer is suspended from
        - The reason selected for the suspension
        - All notes written at the time of the suspension(s)
        - Who the person was that suspended
- **Unsuspending a customer**
    - Unsuspension Details
      - You have the ability to unsuspend a customer from your location
        - First click on the Buyer/Bidder tab and search for the customer
        - Click on the pencil icon to open the customer's profile
        - Look for the 'Suspend Details' section
        - If you wish to unsuspend from your location; these are the parameters:
          - If you suspended a customer from your location only, you can unsuspend them for your location only
          - If you disagree with a sitewide suspension made by another location, you can unsuspend a customer from your location only so that they can bid on sales at your location
          - If you made a sitewide suspension and now the issue has been resolved, you will need to call into the Help Line to request a lift of the sitewide (network wide) suspension.
            - A static message will be visible as a reminder of this action.

- When you click on unsuspend you will be presented with a box to select why you are unsuspending. Those options are:
  - Customer Paid Unpaid Invoice
  - Customer Paid Unpaid Shipping Invoice
  - Resolved issues with Customer
  - Other -See Notes
- You will also leave brief notes about the unsuspending that will be publicly visible to the entire Network
  - If you suspend this customer again from your location, your unsuspending entry will be removed and the new suspension entry will now be shown. This is real-time updates as they happen.
- If you require the lift of a sitewide suspension you will need to email or call CTBids Help for this action.
  - This action can only be performed by an ADMIN site user who has the correct permissions.
    - Please list your reasons for lifting the sitewide suspension so that it can be documented.
- Unsuspension View
  - To view any unsuspending details
    - You will click on the Buyer/Bidder Tab
    - Enter the customer's information to search
    - Click on the Edit Icon to review the customer's profile
    - Under the label of 'Suspend Details' you will see the word 'Unsuspending's' with a number next to it.
      - That number represents the number of locations that the customer is unsuspending from.
      - You can click on that number to open a box to review where, why, & when the customer has been unsuspending. The information that is shown will be:
        - The location names where the customer is unsuspending from
        - The reason selected for the unsuspending
        - All notes written at the time of the unsuspending(s)
        - Who the person was that unsuspending
      - If a customer was suspended sitewide and then unsuspending sitewide, the unsuspending's number will be large (the total number of locations).

- Don't be alarmed by this
- This is why unsuspension's also have details about why and when, along with notes, so that you can review this status.

### **Suspension Best Practices:**


- Up until now, most suspensions have been placed as Sitewide suspensions. We understand that this was done as a way to protect and warn all other locations the only way that was available to you at the time. Please reevaluate when you feel you need to suspend sitewide now that you have these additional tools to help with full network visibility.
- Best Practice examples:
  - If you have a customer with 1 unpaid invoice, you can suspend for only your location while you make an attempt to reach them about the failed or unpaid invoice.
    - Suspending for your location flags them for visibility into the issue for ALL Owners to see.
    - Suspending for your location will produce a result on any Active Sales Reports run where the customer is winning items.
    - If you feel you have given adequate time for a response and you now feel that this person is a threat to the entire system due to other suspensions seen or many unpaid invoices seen on their account, you can call request a sitewide suspension.
      - Keep in mind that the entire network can already see that you have suspended this person and why.
  - If you have a customer who was rude to you and/or your staff at an auction pickup. Yes, you definitely will want everyone to know, and you can do this by suspending for just your location and outline what happened.
    - Again, the user is flagged for the entire network to see and the reason is stated.
      - Does their action warrant a sitewide suspension request or is full visibility into the situation with your suspension enough?
  - If someone declined additional services for shipping/packing.
    - Suspending for your location will alert the entire network to this situation.
      - Are there other suspensions for the same reason?
        - If this seems to be a habitual issue, does this now warrant a sitewide suspension request?
      - Is this customer a frequent customer of CTBIDS and is otherwise in good standing?
        - Could this have been just a one-off because the shipping cost was just higher than the customer expected? Please review the customer's profile.

- You will want to look closely at each situation before making your decision on a sitewide suspension.
- Keep in mind that the entire reason for the flag feature is to alert the entire network
  - A sitewide suspension prevents the customer from bidding at ALL locations on the site.
    - We have had many occurrences where a customer was suspended sitewide and then other locations have written in to unsuspend for just their locations because this customer has been a great customer for them. This is why sitewide suspensions go under review.
  - Let the flag do the work for you for your location specific suspension. Allow each Owner to make the suspension decision for themselves in certain situations.
    - Obviously this does NOT refer to Fraudulent activity. If you feel the customer is suspected of fraud, please call in with the urgent suspension request.
    - If a customer has threatened you or your staff, please call in with an urgent request for sitewide suspension.
- Again, one suspension is all it takes to flag a customer for ALL to read. This follows the customer onto your Active Sales Reports to easily see that a suspended customer is bidding and winning on your auction.
  - You can then look up the customer and review the suspension status/flag and decide for yourself what your next action should be.

## Invoice Management after Suspension

**Process:** If you decide to suspend a customer for non-payment or late payment you may wish to sell the unpaid item to other customers.

**Option 1:** Sell the unpaid item to the next highest Bidder. Check the Bid History and verify who the next highest bidder is. Communicate with, and offer, the item to that Bidder/customer at their highest bid. If they accept, you will need to create a new invoice and process that payment.

 If you need to know how to create a new invoice, please scroll down for steps to: 'Adding the Item to New Invoice'.

**Option 2:** Sell the unpaid item(s) by other means such as during pickup or taking credit card over the phone or sending an invoice from PayPal. In this case, any new price would have to be manually updated to your copy of the Sale History report. There is not an option to update the true selling price into CTBIDS. With this option you should make an edit to the original unpaid invoice by removing items, or removing prices. Any edit will void the original invoice sent to the

unpaying suspended customer so that a late payment would not be possible. There is no need to send the newly created invoice to the unpaying customer.

⚠ The action to change the winning customer of an item is no longer available through the “Change Bidder” button. In order to assign an item to a different customer after the sale has ended, please follow the steps below.

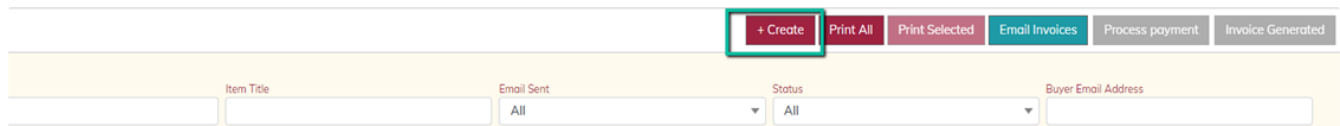
⚠ You can only edit an invoice before payments are processed

### Assigning the Item to Existing Invoice

1. Remove the item you want to reassign or completely void the invoice if the customer surrenders the item/items
2. Confirm the invoice was voided
3. Navigate to the invoice of the customer you wish to assign this item to
4. Click “Edit Invoice”
5. Click “Add Item”
  - a. The system automatically adds the next available item
  - b. **If multiple unsold items are available, choose the appropriate item from the drop-down**
6. Add appropriate prices/amounts to ‘Amount’, ‘Tax’, and ‘BP’ fields
7. Click the Submit button at the top of the page when all edits are complete and satisfactory
8. This will automatically void the customer’s **original** invoice and create a new one
9. The customer will have to accept this new invoice BEFORE seller can process payments

### Adding the Item to New Invoice

1. Click the ‘Create’ button at the top of the Seller dashboard



The screenshot shows a navigation bar with buttons: '+ Create', 'Print All', 'Print Selected', 'Email Invoices', 'Process payment', and 'Invoice Generated'. Below this is a form with four fields: 'Item Title', 'Email Sent' (dropdown menu with 'All' selected), 'Status' (dropdown menu with 'All' selected), and 'Buyer Email Address'.

2. Select “Create New Invoice”
3. Select the new winning customer in the Billing To field
4. Click “Add Item”

- a. The system automatically adds the next available item
  - b. **If multiple unsold items are available, choose the appropriate item from the drop-down**
5. Add appropriate prices/amounts to 'Amount', 'Tax', and 'BP' fields
  6. Click the Submit button at the top of the page when all edits are complete and satisfactory
  7. The customer will have to accept this new invoice BEFORE seller can process payments

## Customers - How to Bid

To place a bid on an item you must first register for an account and you must be signed in to place a bid. You will see a bid box appear on each auction item listing. Place your bid in the box and click the “Yes, Confirm My Bid” button. A dialog will appear confirming your bid.

× **Confirm your Bid details**

Please find below the details of the pricing and payment structure

Your Maximum Bid	<b>\$18.00</b>
Buyer's Premium	<b>9.8%</b>
Buyer's Premium Amount	<b>\$1.76</b>

You may confirm or cancel your bid at this point but if you want to place this bid select the “Yes, Confirm my bid” button. Our site uses proxy bidding so that you can enter your highest maximum bid and we will place bids for you automatically based on the bid increment amount shown. Only you will know your Maximum bid and it will require another customer to bid against you to increase the price. There is no need to enter commas if your bid amount exceeds \$999. Just enter the numerals. The earliest customer wins when two customers place the exact same maximum bid. It is always a good idea to add a few extra pennies to your bid to avoid a tie.

Example:

An item is currently at \$1 with no other bids and you place your maximum bid of \$22. The bid increment is \$1 and there is no reserve. You will become the winning customer at \$1. Later, another customer places a maximum bid of \$10 and you will immediately become the winning customer at \$11. The other customer increases his bid to \$15. You become the winning customer again at \$16. The new customer now places a maximum bid of \$22 which matches your original bid of \$22. You will remain the winning customer at \$22 since you placed your \$22 bid first. When there is a tie, the earlier bid wins. Now the new customer places a new bid at \$25. He now becomes the winning customer at \$23.


Another scenario: It can be advantageous to add a few odd cents to your bid. Let's say you placed your first bid for a maximum of \$25.01. Another customer places a maximum bid of \$10, you become the winner at \$11. Now the other customer places a bid of \$25, you would become

the winner at \$25.01 if no additional bids were entered. It will appear in the Bid History that you won the bid by less than the required increment of \$2, but, in fact, when you placed your initial bid, it did exceed the bid increment requirement at the time the bid was made. A proxy bid can never exceed your maximum amount.

Caring Transitions/CTBids.com will bid incrementally\* for you up to your maximum bid. Your maximum bid is kept a secret from other users. \*The exception to this rule is when your maximum bid is placed on an item with a reserve and your bid is less than the reserve. In that case, your maximum bid amount will be shown.

Extra time will be added when bids are placed near the time that the sale begins to close to allow all customers the same chance to win the item.

<b>If the bid amount is greater than:</b>	<b>The bid increment will be:</b>
\$ 1	\$ 1
\$ 25	\$ 2
\$ 100	\$ 5
\$ 500	\$ 10
\$ 1000	\$ 25
\$ 2500	\$ 50
\$ 5000	\$ 100

 You can now view all of your Proxy Bids on your 'Active Bids' Tab in your account. The Max Proxy Bid will be below the current bid amount for any item you are actively bidding on.

## Two Customers Placed the Same Amount

When two customers place the same bid amount, the winning item will go to the customer who placed the bid first.

## Delivery Guarantee FAQ

### **What is Delivery Guarantee Shipping Protection?**

Seel Delivery Guarantee, also known as Shipping Protection, allows buyers to receive a full or partial refund if a product purchased by the buyer is damaged, stolen, or lost in connection with the shipment of the product. Auction items eligible for Delivery Guarantee will be clearly indicated on the items bid page. Not all CTBids auction items qualify for Delivery Guarantee. Pickup and Delivery items are not eligible.

### **How to purchase Delivery Guarantee?**

You add Delivery Guarantee while you are bidding on an eligible item for an extra charge. Pickup and Delivery items are not eligible. If you have opted to purchase, Delivery Guarantee and have won the eligible auction item, you will receive an email from Seel confirming your Delivery Guarantee order with a coverage ID. All eligible item returns are handled only by Seel, which is an independently owned and operated vendor, at [Returns@Seel.com](mailto>Returns@Seel.com)

### **How to purchase Delivery Guarantee if using Proxy Bidding?**

1. Set your proxy bid—the maximum amount you're willing to pay for the item.
2. If the item qualifies for Delivery Guarantee, you'll have the option to add this service for an additional fee.
3. Pickup and Delivery items are not eligible for Delivery Guarantee.
4. The cost of Delivery Guarantee will be calculated based on your maximum proxy bid.
5. If you win the item at the maximum proxy bid, the final Delivery Guarantee fee equals the initial quote.
6. If you win the item for less than the maximum proxy bid, the Delivery Guarantee fee automatically adjusts lower to match the coverage price of the winning bid.

If you have opted to purchase, Delivery Guarantee and have won the eligible auction item, you will receive an email from Seel confirming your Delivery Guarantee order with a coverage ID. All eligible item returns are handled only by Seel, which is an independently owned and operated vendor, at [Returns@Seel.com](mailto>Returns@Seel.com)

### **How do I submit a Delivery Guarantee claim?**

Visit <https://resolve.seel.com> to start a claim or check your item return status.

For all item Delivery Guarantee questions, please email Seel at [Returns@Seel.com](mailto>Returns@Seel.com), not CTBids.

### **What are the steps for returning a Delivery Guarantee claim with Seel?**

If you have opted to purchase Delivery Guarantee and own the eligible auction item, you will work directly with Seel, not CTBids, to submit a Delivery Guarantee claim.

1. You will receive an email from Seel confirming your Delivery Guarantee order with a coverage ID.

1. Your Delivery Guarantee claim must be made with Seel within:

- a. 7-days after expected delivery date for theft claim,
- b. 7 days from date of delivery for damage claim,
- c. 30 days from shipping date for non-delivered lost package claim.

1. To start a claim, you will need to visit:

<https://resolve.seel.com/>

1. Follow all instructions provided by Seel.

1. CTBids auction items picked up by the buyer are not available for Delivery Guarantee.

1. For Delivery Guarantee claim questions please email Seel at [Returns@Seel.com](mailto>Returns@Seel.com)

### **Who do I contact with general questions about Delivery Guarantee?**

For all Delivery Guarantee questions please email Seel at [Returns@Seel.com](mailto>Returns@Seel.com)

For general [CTBids.com](http://CTBids.com) questions please email: [CTBIDSHelp@CaringTransitions.com](mailto:CTBIDSHelp@CaringTransitions.com)

### **How long do I have to make a Delivery Guarantee claim with Seel?**

Delivery Guarantee item claim(s) must be submitted to Seel within: 7-days after expected delivery date for theft claim,

7 days from date of delivery for damage claim; 30 days from shipping date for non-delivered lost package claim. Visit <https://resolve.seel.com> to start or check your item claim status. For item return questions, please email Seel at [Returns@Seel.com](mailto>Returns@Seel.com).

### **What is covered by Delivery Guarantee Delivery Guarantee?**

Seel Delivery Guarantee allows buyers to receive a full or partial refund if a product purchased by the buyer is damaged, stolen, or lost in connection with the shipment of the product. Eligible items are between \$15 and \$1,000 in value. Pickup and Delivery items are not eligible.

### **What kind of claims are not covered under Delivery Guarantee?**

CTBids Auction items eligible for Delivery Guarantee will be clearly indicated on the items bid page. Not all items listed on [CTBids.com](http://CTBids.com) qualify. Pickup items are not eligible. Items valued less than \$15 and greater than \$1,000 are not eligible. Delivery Guarantee does not cover returns due to errors made by the CTBids Auctions such as sending you the wrong item, a defective item,

the wrong size, or the wrong color. In this case, please contact the CTBids Auctioneer directly for assistance.

### **How will I know if and when my Delivery Guarantee claim will be approved?**

You will be contacted through email from Seel who is in control of, and responsible for, all Delivery Guarantee claims, not CTBids.

### **What happens if my Delivery Guarantee claim is not accepted by Seel?**

Seel is the final arbiter and responsible for all Delivery Guarantee claims, not CTBids. For all Delivery Guarantee questions please email our Seel at [Returns@Seel.com](mailto>Returns@Seel.com).

### **When and How will I receive my Delivery Guarantee reimbursement from Seel?**

Once your claim has been received, inspected, and approved by Seel, you will receive an email confirming the status of your claim request and your account updated at <https://resolve.seel.com>. Seel reimbursements are generally made via Venmo, Paypal, direct deposit, or virtual credit card through email if your request is eligible.

### **How do I check the status of my Delivery Guarantee claim?**

Visit <https://resolve.seel.com> to check your claim status. For all Delivery Guarantee questions please email Seel at [Returns@Seel.com](mailto>Returns@Seel.com).

### **How much does Delivery Guarantee cost?**

You may independently purchase Delivery Guarantee for a specific eligible item. Pickup items are not eligible. The Delivery Guarantee fee varies by auction item and is non-refundable due to the nature of this service provided by Seel.

### **Is Delivery Guarantee Refundable?**

You have the option to buy Delivery Guarantee for an eligible auction item. Delivery Guarantee is non-refundable and is an insurance service contract between you and Seel, not CTBids. You will have a 24 hour cancellation period.

### **About Seel Delivery Guarantee Delivery Guarantee - Summary**

Seel provides optional Delivery Guarantee (Shipping Protection) services for eligible CTBids items. Seel services can be purchased during bidding. The purchase or use of Seel services constitutes a contract directly between the buyer and Seel, and not with CTBids, CTBids Seller, or any Caring Transition franchise owner. Not all items auctioned on CTBids are eligible for Seel services. The original CTBids buyer premium, shipping fees, and return shipping costs to Seel for items are not covered or eligible for reimbursement. Seel is the final authority and is solely responsible for handling all claims. Additional Seel terms apply ([Terms of Service | Seel](#)). Visit

<https://resolve.seel.com> to start or check your item return or claim status. For item return questions, please email Seel at [Returns@Seel.com](mailto>Returns@Seel.com).

## Make It Returnable FAQ

### What is Make It Returnable?

- Make It Returnable provided by Seel, also known at times as Return Assurance on CTBids, gives you the ability to return an eligible item you have won at auction on CTBids to Seel, a third-party vendor. Auction items eligible for Make It Returnable will be clearly indicated on the items bid page. Not all CTBids auction items qualify for Make It Returnable.

### How to purchase Make It Returnable?

- You add Make It Returnable while you are bidding on an eligible item for an extra charge. If you have opted to purchase, Make It Returnable and have won the eligible auction item, you will receive an email from Seel confirming your Make It Returnable order with a coverage ID. All eligible item returns are handled only by Seel, which is an independently owned and operated vendor. You can contact Seel at [Returns@Seel.com](mailto>Returns@Seel.com).

### How to purchase Make It Returnable if using Proxy Bidding?

1. Set your proxy bid—the maximum amount you're willing to pay for the item.
  2. If the item qualifies for Make It Returnable, you'll have the option to add this service for an additional fee.
  3. The cost of Make It Returnable will be calculated based on your maximum proxy bid.
  4. If you win the item at the maximum proxy bid, the final Make It Returnable fee remains unchanged from the initial quote.
  5. If you win the item for less than the maximum proxy bid, the Make It Returnable fee automatically adjusts lower to match the coverage price of the winning bid.
- If you have opted to purchase, Make It Returnable and have won the eligible auction item, you will receive an email from Seel confirming your Make It Returnable order with a coverage ID. All eligible item returns are handled only by Seel, which is an independently owned and operated vendor, at [Returns@Seel.com](mailto>Returns@Seel.com)

### What is the item return policy with Seel?

- All CTBids sales are considered final. However, if you purchase Seel's Make It Returnable, you have the option to return eligible items within 7 days of pickup, or delivery date if shipped. If an order includes both eligible and ineligible items, only the eligible items may be returned through Make It Returnable. These types of returns are handled solely by Seel via the Seel Resolution Center (<https://resolve.seel.com/>), with an additional return item shipping charge to Seel.

## **How do I return an eligible CTBids Make It Returnable item?**

- You will work directly with Seel, not CTBids, to return your item per Seel's return policy.
- If you have opted to purchase Make It Returnable and won the eligible auction item:
  1. You will receive an email from Seel confirming your Make It Returnable order with a coverage ID.
  2. Report your return within 7 days of pickup, or delivery date if shipped through the Seel Resolution Center (<https://resolve.seel.com>)
  3. Log in with your email and order number or coverage ID from your confirmation email.
  4. Select the item(s) you wish to return.
  5. Choose your preferred refund method and return shipping option.
  6. Follow the instructions Seel provides to ship your return within 7 days of claim initiation to Seel.
  7. Cost of shipping your item(s) to Seel is an additional expense not covered by Make It Returnable.
  8. Once received and inspected for eligibility, your refund will be processed.
  9. For all Make It Returnable questions, please email Seel at [Returns@Seel.com](mailto>Returns@Seel.com), not CTBids.

## **Who do I contact with general questions about Make It Returnable?**

- For all Make It Returnable questions please email Seel at [Returns@Seel.com](mailto>Returns@Seel.com).
- For general [CTBids.com](http://CTBids.com) questions please email: [CTBIDSHelp@CaringTransitions.com](mailto:CTBIDSHelp@CaringTransitions.com).

## **How long do I have to ship my item(s) back?**

- Your request to return an item must be made to Seel within seven (7) days of your receiving the eligible CTBids auction item from pickup date, or from delivery date if shipped. You will have 7 days to ship your item(s) back to Seel from the day you initiate a return (file a claim)

## **Do all 'lot' items (bundles of items) have to be returned?**

- If you've won a 'lot' on [CTBids.com](http://CTBids.com) that contains multiple items and you wish to return one, several or all the items using the Make It Returnable option, it's essential that all items within the lot are included and in their original condition as they were at the time of purchase. This is necessary to qualify for a refund through Make It Returnable. If items are found to be missing from the returned order, your refund request may be at risk of being rejected.

## **What happens if my item is damaged after I receive it – Can I still return it?**

- Items must be in their original condition to be eligible for a Make It Returnable refund. If your item is damaged or altered after you receive the item, you may not be eligible for a refund under Seel's return policy. For all Make It Returnable questions, including specific item claims, please email our Seel at [Returns@Seel.com](mailto>Returns@Seel.com).

### **What kinds of returns are covered with Make It Returnable?**

- Make It Returnable is currently only offered on orders shipping to addresses in the United States or being picked up at addresses in the United States. Eligible items are between \$15 and \$1,000 in value. Auction items that are eligible for Make It Returnable will be clearly indicated on the items bid page.

### **What kind of returns are not covered under Make It Returnable?**

- CTBids Auction items eligible for Make It Returnable will be clearly indicated on the items bid page. Not all items listed on [CTBids.com](http://CTBids.com) qualify. Items valued less than \$15 and greater than \$1,000 are not eligible. Make It Returnable does not cover returns due to errors made by the CTBids Seller such as sending you the wrong item, a defective item, the wrong size, or the wrong color. In this case, please contact the CTBids Seller directly for assistance.

### **Are the original auction fees and shipping costs covered under Make It Returnable?**

- The original CTBids buyer premium, shipping fees, and return shipping costs to Seel for items are not covered or eligible for reimbursement with Make It Returnable.

### **How will I know if and when my return will be approved?**

- You will be contacted through email from Seel who is in control of, and responsible for, all Make It Returnable claims, not CTBids. You can check the status of your return request at <https://resolve.seel.com>. CTBids is not in control of or responsible for the return or Seel's response to Make it Returnable claims.

### **What happens if my return is not accepted by Seel?**

- Seel is the final arbiter and responsible for all Make It Returnable claims, not CTBids.
- For all Make It Returnable questions please email Seel at [Returns@Seel.com](mailto>Returns@Seel.com).

### **When and How will I receive my refund from Seel?**

- Once your item has been received, inspected, and approved by Seel, you will receive an email confirming the status of your return request and your account updated at <https://resolve.seel.com>. Seel reimbursements are generally made via Venmo, Paypal, direct deposit, or virtual credit card through email if your request is eligible.

### **How do I check the status of my return?**

- To check the status of your item return, simply visit <https://resolve.seel.com>. If you've chosen to purchase Make It Returnable and have won an eligible auction item, you'll receive an email from Seel confirming your Make It Returnable order along with a unique coverage ID. To track your return status, you will need either your order ID or the coverage ID provided by Seel. For inquiries or questions regarding Make It Returnable contact Seel at [Returns@Seel.com](mailto>Returns@Seel.com).

### **How much does Make It Returnable cost?**

- You may independently purchase Make It Returnable for a specific eligible item. The Make It Returnable fee varies by auction item and is non-refundable due to the nature of this service provided by Seel.

### **Is Make It Returnable Refundable?**

- Make It Returnable is a non-refundable service contract between you and Seel. CTBids is not a party to the contract. You will have a 24 hour cancellation period.

### **Why do I see multiple transactions on my account from the same invoice/sale?**

- On your bank or credit card statements, you might notice multiple individual transactions for the purchase of Make It Returnable coverage offered by Seel. Each purchase of this service will appear as a separate transaction. However, the total of these transactions will equal the order total on your invoice; they will simply be itemized according to the specific service(s) you've purchased or opted in for.

### **About Seel, Make It Returnable - Summary**

- Seel provides optional Make It Returnable (Return Assurance) services for eligible CTBids items. Seel services can be purchased during bidding. The purchase or use of Seel services constitutes a contract directly between the buyer and Seel, and not with CTBids, CTBids Seller, or any Caring Transition franchise owner. Not all items auctioned on CTBids are eligible for Seel services. The original CTBids buyer premium, shipping fees, and return shipping costs to Seel for items are not covered or eligible for reimbursement. Seel is the final authority and is solely responsible for handling all claims. Additional Seel terms apply ( [Terms of Service | Seel](#) ). Visit <https://resolve.seel.com> to start or check your item return or claim status. For item return questions, please email Seel at [Returns@Seel.com](mailto>Returns@Seel.com).

## Delivery Guarantee

### What is Seel's Delivery Guarantee?

Seel Delivery Guarantee is a customer protection against loss, damage or theft during delivery of your order. Additionally, Delivery Guarantee includes carbon offsets for the emissions resulting from your order's delivery and transit. Delivery Guarantee is a 3rd party service, offered and administered by CTBids partner, Seel.

### What does Seel Delivery Guarantee cover?

Seel Delivery Guarantee covers package loss, damage, and theft that meet the following criteria.

**Loss:** Domestic packages not delivered before the 30th day following order fulfillment (i.e., the date when the order is shipped by the merchant) or international packages not delivered before the 60th day following order fulfillment are considered lost. The compensation for lost packages is the value paid for the purchased item(s).

**Theft:** Packages marked "delivered" yet not received are considered a "theft", though this may be due to some mishaps that are not criminal in nature. To qualify as a case of theft, supporting documents, such as a police report, may be required. (See "What Supporting Docs are Required for a Claim of Theft?") The compensation for a verified case of theft is the value paid for the purchased item(s).

**Damage:** Shipping Protection covers item damages to the point that the item(s) are unusable, clearly fractured, shattered, bent (if not bendable), crushed, etc., but does not cover cosmetic damage (scratches, dents, etc.), manufacturing damages, packaging errors, or unsealed items. The compensation for damaged items is up to the value paid for the purchased item(s).

**Seel Delivery Guarantee also includes carbon-neutral shipment within the recipient's country.**

Note: Total compensation for one Shipping Protection cover is up to the value actually paid for the item(s).

How does Seel Delivery Guarantee resolve the shipping issues of my order?

The customer experience of Seel Delivery Guarantee is as follows:

- Add Seel Delivery Guarantee at checkout for a modest fee to protect the order against loss, damage, and theft.
- If your order is eligible for Seel Delivery Guarantee, you'll be receiving a confirmation email from Seel with all the coverage details, as well as instructions on how to report your package

issue.

- If your protected package suffers loss, theft, or damage, you can report the issue via the Seel Resolution Center ([resolve.seel.com](https://resolve.seel.com)).
- Seel will assess the issue to determine if the reported order issue qualifies for a payout.
- If the reported issue does qualify, a refund will be automatically sent to you.

To qualify for the payout, you need to follow the issue reporting requirements:

- Issues of loss, where the package is not delivered as per the carrier's information, must not be reported sooner than 30 days after the order fulfillment date for domestic shipments and 60 days for international shipments.
- Issues of damage and theft, where the package is shown "delivered", must be reported within 7 days from the time the carrier's information is updated to "delivered".
- All issues must be reported within 90 days of the order date.

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Customers will now see when items are eligible for MIR at the item level once bids have been placed to meet the MIR criteria:

- Item price must be between \$15-\$1000
- Must have Shipping selected as the Item Receipt Method
- Item's assigned category must be Seel approved (categories are listed in Knowledge Base)
- Cannot be a PayPal Restricted Item. These include
  - Firearms
  - Gun Parts
  - Ammo

Make It Returnable Eligible ⓘ

Delivery Guarantee Eligible ⓘ

<b>Current Bid</b>	76.00
Minimum	\$78.00
Increment	\$2.00


Bid Amount  Bid

The customer will be able to see how much it will cost for DG and have the option to toggle it on or keep it off. When they toggle it on, they are opting in for the DG service

**Bid Confirmation**


Your Maximum Bid	\$15.00
Buyer's Premium	2.3%
Buyer's Premium Amount	\$0.34

**Bid with Confidence** Provided By **seel**



**Make It Returnable™** ⓘ

For \$1.75, you can add this option to return these item(s) for any reason within 7 days of pickup or shipping.




**Delivery Guarantee™** ⓘ

Protect against loss, damage, theft & offset emissions for \$0.98.


\*Not available for pickup and delivery item(s)

No, Cancel My Bid
Yes, Confirm My Bid

When selecting the information icon ⓘ they will see a new display explaining more about how the Delivery Guarantee Program


PROVIDED BY  **seel** ✕

1 - Click Protect Against




- ✔ Loss
- ✔ Damage
- ✔ Theft

Instant Resolution



Instantly resolve your shipment issues and get a refund or replacement with a few clicks.

Protect Our Planet



Part of your Delivery Guarantee fee will fund green project to offset emissions from shipping.

Delivery Guarantee offers peace of mind against package loss, damage, and theft, while offsetting carbon emissions from shipping for a greener planet. Should any covered incidents occur, use the [Seel Resolution Center](#) to resolve your package issue and get compensation up to the full value of your order!

\*Delivery Guarantee is not available for pickup and delivery item(s).

## Make It Returnable

- Make It Returnable (MIR) is a service provided by Seel that allows CTBIDS customers to return eligible items due to any approved reasons and receive a refund for the item at no cost to the franchise owner.

Customers will now see when items are eligible for MIR at the item level once bids have been placed to meet the MIR criteria:

- Item price must be between \$15-\$1000
- Must have Pickup or Shipping selected as the Item Receipt Method
- Item's assigned category must be Seel approved (categories are listed in Knowledge Base)
- Cannot be a PayPal Restricted Item. These include
  - Firearms
  - Gun Parts
  - Ammo

This item is shippable  
North Augusta, South Carolina

**Make it Returnable Eligible** ⓘ

<b>Current Bid</b>	52.00
Minimum	\$54.00
Increment	\$2.00

Bid Amount


The customer will be able to see how much it will cost for MIR and have the option to toggle it on or keep it off. When they toggle it on, they are opting in for the MIR service


**Bid Confirmation**




Your maximum Bid	\$25.00
Buyer's Premium	18%
Buyer's Premium Amount	\$4.50

**Bid with Confidence** PROVIDED BY **seel**

**Make it Returnable™** ⓘ  
For \$1.45, you can add this option to return these item(s) for any reason within 7 days of pickup or shipping.

When selecting the information icon  they will see a new display explaining more about how the Make it Returnable Program

PROVIDED BY  **see1** ✕

Return For Any Reason	Instant Resolution	Easy Resolution
 <ul style="list-style-type: none"><li>● No longer needed</li><li>● Dissatisfied with items</li></ul>	 <p>Bid with confidence. Make a return within 7 days of Pickup or Shipping.</p>	 <p>Resolve your return request and get refunded with a few clicks.</p>

See1's Make It Returnable (Return Assurance) are for eligible items from \$15 to \$1,000. Fees vary. When applicable, sales tax will be included in the price of Make it Returnable. Fees vary.

[Privacy Policy](#)      [Terms of Service](#)

## Make It Returnable & Delivery Guarantee Categories

Listed below are the categories and sub categories for Eligible Items for Make It Returnable & Delivery Guarantee. If the category or sub-category is in red, it is not eligible for Make It Returnable.

Make it Returnable Not Eligible	
Category	Subcategory
Antiques	Antiques Other
	Decorative Art
	Furniture
	Silver
Art	Art Other
	Artful Pottery
	Asian Art
	Folk Art
	Handcrafted Art
	Mexican Art
	Native American Art
	Paintings
	Photography
	Prints
	Sculpture
Watercolor	
Books & Periodicals	Audio
	Children's

	Hardback
	Magazines & Newspapers
	Paperback
	Vintage Books
Cameras & Photo Equipment	Antique
	Camera Other
	Digital
	Film
	Video
	Vintage
Clothing & Accessories	Accessories
	Clothing Other
	Handbags & Wallets
	Luxury & Designer Items
	Men's
	Shoes
	Sunglasses & Glasses
	Vintage
	Women's
Coins	
Collectibles	Advertising
	Animals
	Animation Art & Characters
	Bar ware & Breweriana
	Bottles & Insulators

	China Sets
	Clocks
	Coins
	Collectibles Other
	Comics
	Decorative Collectibles
	Figures & Figurines
	Games & Toys
	Historical
	Holiday & Seasonal
	Kitchen & Home
	Knives, Swords, Blades
	Mid-Century
	Militaria
	Model Cars
	Movie Memorabilia
	Retro
	Rocks, Fossils, Minerals
	Sports Memorabilia
	Stamps
	Trading Cards
	Vintage
Craft & Hobby	
Electronics	Computers/Laptops
	Electronics Other

	Home Audio
	Home Video
	Mobile Devices
	TVs
	Video Games
Farm Equipment	Farm Equipment Other
	Heavy Equipment
	Parts & Attachments
	Tractors
Furniture	Bedroom
	Cabinets
	Chairs
	Chest of Drawers
	Desks
	Dressers
	Furniture Other
	Nightstands
	Patio Furniture
	Sofas
	Storage & Organization
	Tables
Household Goods	Appliances
	Baby
	Bath
	Bedroom Goods

	Crystal
	Décor
	Dining Room
	DVDs
	Floor Coverings
	Glassware
	Grilling & BBQ
	Household Goods Other
	Kitchen & Home
	Lawn & Landscape
	Lighting
	Linens
	Luggage
	Medical Equipment
	Mirrors
	Office
	Paint & Painting Supplies
	Patio & Deck
	Pet Supplies
	Seasonal & Holiday
	Shelving
	Sterling Silver
	Storage
Jewelry	Antique & Vintage
	Bracelets

	Costume Jewelry
	Earrings
	Fine Jewelry
	Jewelry Other
	Men's Jewelry
	Necklaces
	Rings
	Watches
Motor Vehicles	Boats
	Cars
	Motor Vehicles Other
	Motorcycles
	Parts & Accessories
	Trailers
	Trucks
Music	Instruments
	Keyboards & Pianos
	Music Other
	Records & CDs
Mystery Lots	
Railroad/Transportation	
Sports & Hobbies	Ammo
	Camping
	Crafts & Hobbies
	Cycling

	Firearms
	Fishing
	Fitness
	Golf
	Gun Parts
	Hunting
	Sailing
	Sporting Goods Other
Tools & Home Improvement	Building Materials
	Hand Tools
	Ladders
	Power Tools
	Tools Storage
	Tools Other
Toys	Dolls
	Games
	Toys Other
	Trains
	Video Games
	Vintage & Antique Toys

## EstateSales.org information

A customer has requested that they be removed from the email list for any sale marketing emails you have sent from [EstateSales.org: Find Estate Sales or Shop Online Auctions](#) :

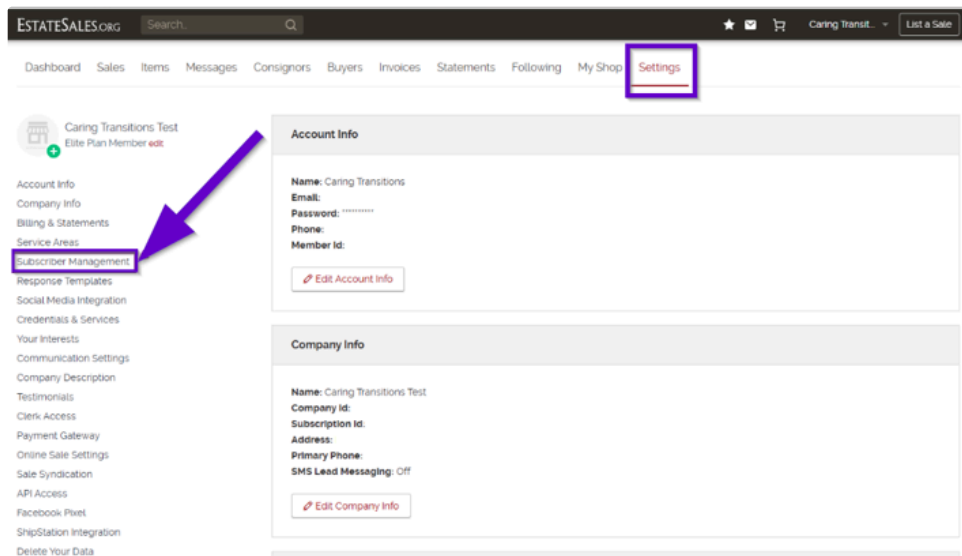
The Caring Transitions Operations Team, CTBids Help Desk, and CTBids IT Tech Team does not have access to your [EstateSales.org: Find Estate Sales or Shop Online Auctions](#) account.

If a customer requests that they be removed from this email list, you will need to do this in your account settings within [EstateSales.org](#) or the customer will need to select the unsubscribe option located at the bottom of the email.

### 1. Go to your Account Settings

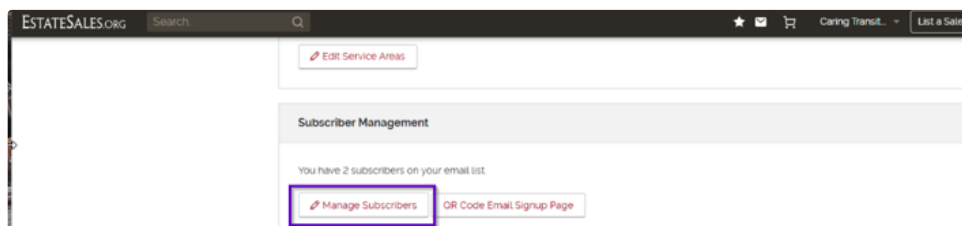
#### a. Choose 'Subscriber Management'

b.



### 2. Select 'Manage Subscribers'

a.



### 3. Use the filters to search for the customer

#### a. Select Delete to remove them from their subscription

b.

ESTATESALES.ORG Search

Manage Your Email List Subscribers

Manage Subscribers Upload Subscriber List

Download List + Add Subscriber

Search for the customer

Search Subscribers

Email Name Phone Search Clear

Showing 1 to 100 of 2 total subscribers Order by: Descending

Date Added	Email	Name	Phone	Opens	Clicks	
Jan 25th 2025	mike-20250125C@mikejudkins.com			0	0	Edit   Delete
Jan 25th 2025	mike-20250125B@mikejudkins.com			0	0	Edit   Delete

Cancel

The customer also has the option to unsubscribe or edit their subscription themselves which is located at the bottom of the email they received.

1.

Share this!

f t p

You're receiving this because you signed up to receive sales notifications from our company page on [estatesales.org](https://estatesales.org), our website, or at one of our estate sales. [Click here](#) to edit your subscription, or you can click [here](#) to unsubscribe.

Caring Transitions (Your CT location name appears here)

Email powered by [Estatesales.org](https://Estatesales.org)

## Publishing a Sale in EstateSales.org

Please refer to the steps below for publishing a sale from CTBids into [EstateSales.org](https://estate-sales.org).

1. **List a Sale:** Once logged in, click the "**List a Sale**" button in the top-right corner of the page.
2. **Import Tool Setup:**
3. The tool will display the company ID pre-filled. This value is saved after the first time a user enters it, but it can be updated if needed.
4. **Fetch Sales:**
5. Click the "**Fetch Sales**" button to retrieve a list of sales for the location ID from the API
6. Select a sale from the list and click "**Import Selected Sale**".
7. The import process runs in the background, so you can navigate to other pages on the site while it completes
8. Video link:

<https://caringtransitions.franconnect.net/fc/fimWebPage.jsp?p5=aoon-abmz-&p3=q-z-q-ran-bq-n-n-&p4=mq-mrz-z-b-vr&urlId=59997>

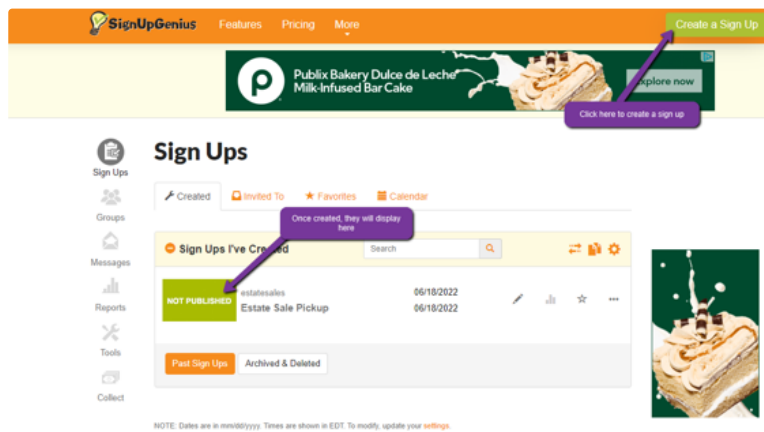
# SignUp Genius

Sellers have the option to create slots for customers to attend at time of pickup, one suggested website is [SignUp Genius](https://www.signupgenius.com). You have the option to choose a Free or Charged plan, and it is completely optional to help optimize timeliness for your Pick up date.

**Please Note: This is not sponsored nor does CTBids support this website as their own**

You are required to create an account to start (free to sign up and pick the free/basic plan).

You can then use this account to create a sign up for your sale, with features including email and text reminders



**Please make sure that the link works before the sale closes, as you will not be able to edit invoice messaging after the sale without Voiding every invoice and having to resend them.**

## Changing Name in PayPal Account

Here is what you will need to change the name on the account:

- Photo ID
- Copy of SSN card, or a paystub that can verify the SSN
- Document with your business letterhead that includes the following:
  - Primary email address currently on file
  - Current name on file
  - Current address on file
  - Current phone number on file
  - New name to be on the file
  - New home address
  - New phone number
  - Reason for the change

## Fran Connect Support Information

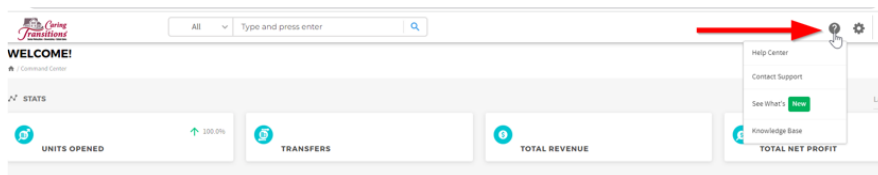
⚠ Fran Connect software **is not** developed or maintained by the CTBIDS IT Department. Fran Connect has their own IT Development Team and Support Department. If you find yourself in need of Fran Connect assistance, please review the additional help below.

### Fran Connect Knowledge Base

The Fran Connect Knowledge Base is similar to the CTBIDS Knowledge Base. You can search, using key words, to find articles and instructions to read and learn how to do certain things within Fran Connect.

Once you are logged into Fran Connect.

From your Command Center, click on the gray question mark on the top right side of your screen

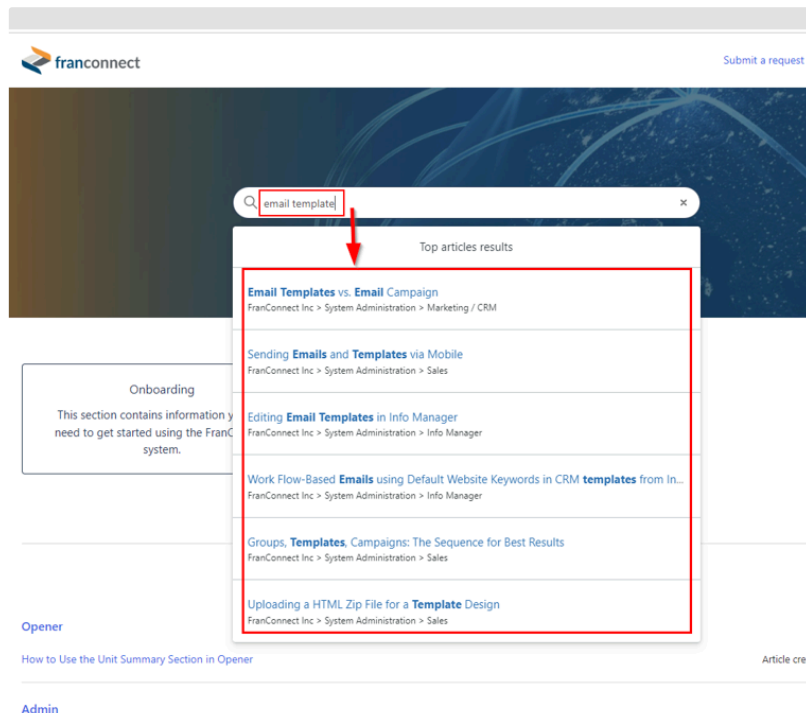


You will see four options for FC help:

- Help Center
- Contact Support
- See what's New
- Knowledge Base

You can start off in the Knowledge Base and enter what it is that you may need instructions or help with doing.

Example: I typed in 'email template' and results begin to show:



You can scroll and read the articles to see if any contain what you require help with.

**Fran Connect Help Desk Email:** [helpdesk@franconnect.com](mailto:helpdesk@franconnect.com)

If you have searched and are unable to find the assistance that you need, you can always email Fran Connect to get more assistance. Someone from Fran Connect will get back with you to help answer your questions or assist you further.

Again, that email is: [HelpDesk@FranConnect.com](mailto:HelpDesk@FranConnect.com)

## Premier Membership FAQs

### **I am creating a sale that will show in Auction Sneak Peek, what do I need to know?**

The logic for which sales render on the Auction Sneak Peek tab are as follows:

1. Plus or minus 7 days from the current date.
  - a. The sales will be based off the scheduled start date.
  - b. From the current date the only sales that will be displayed will be from 7 days behind (past) the current date AND 7 days ahead (future) of the current date
  - c. Ex: If today's date is 7/20/2024, all auctions that start 7/13/2024 thru 7/27/2024 will appear
2. Any sale that has an item in a Pending or Ready Status
  - a. The item must have at least one picture uploaded in order to be visible
    - i. If you have 10 items in your sale and only 2 items have pictures uploaded, then only those two items will be visible for the Auction Sneak Peek
3. Items in the Auction Sneak Peek that are not live will not be available for bidding until the sale start date/time is met
4. The order of sales appear based on the Tentative Start Date (Sale start date), with the auctions furthest ahead being displayed on the top of the list
5. CTBids encourages Premier customers to wait until a sale goes live before reaching out to owners with questions about any items

Here are some tips for best practices If you are in the process of creating a sale that has a start date that falls within the + 7 day range (your sale will be visible even if you are not done editing it)

1. **Leave any client identifiers out** of the Sale/item titles. This includes
  - a. A clients name
  - b. A client's phone number
  - c. A client address
  - d. Anything personal a client would not want CTBids customers to see

### **Can I see if a customer at my location is a Premier member?**

We currently do not have any method on the Seller side that allows owners and staff to pull a report/data for their location if they have Premier members shopping at their location. If you select the "View" icon on an individual item and there is bidding history or messages on the item, you will see a shield icon next to any Premier member's nickname. If you search for a

customer through your Buyer/Bidder tab and the results render a shield next to their name, the customer is a Premier Member.

### **What happens if a Premier member places a bid at my location?**

When a Premier member places a bid at any auction they will automatically be opted in for DG if the item is eligible, at no additional cost to them or the owner. This will cause more MIR and DG invoices to be generated after payments are processed. Owners will need to be sure that they are entering fulfillment information for any invoice that has a MIR or DG item on it. There are no other changes in the bidding processes for customers.

### **What happens if I suspend a Premier member?**

There are two options for suspending a customer: sitewide and location specific. If you suspend a customer from your location, they will not be able to bid at your location but will have access to bidding at all other locations on CTBids. If you call into Maximum and suspend a customer sitewide, they will not have access to any of their benefits and will be banned from bidding at any location. It is recommended to take sitewide suspensions seriously, and we encourage sellers to try and contact customers to resolve any outstanding issues before suspending from their location or sitewide.

### **Where do I refer customers to with questions?**

Customers with questions that are specific to their Premier account should be redirected Member Service and/or Premier Account tabs in their account. From there, they can find the appropriate email and phone number to contact Premier Services and get questions answered.

## Google Analytics Code

If you are interested in having access to this data, you will need to either set up a Google email account (gmail) **OR** convert a current email account into a Google account. (Steps to do so can be found [here](#)).

After doing so, please reach out to the Marketing Team ([marketing@caringtransitions.com](mailto:marketing@caringtransitions.com)) with that email address so they can add it onto your location settings access to view the data directly from Google. Please note: no action is needed on editing or using the Google Code that is found on your location settings in seller.ctbids.

After your Google account email has been added to your location settings in Google Analytics, you will receive a notification via email that you can access data by following the link provided in the email (this will come from a no reply email address directly from Google). Simply click on the link in the email and you will have to sign into your Google account (if not already signed in). You will be shown a dashboard view of data, shown below. *We recommend saving that page to your Favorites tab on your browser for quick reference in the future.* You can use the navigation pane on the left to explore the different data reports, a guide can be found [here](#) ).

## Using Reports

Application: **Seller CTBIDS**

---

There are 6 different reports that can be run, see below or watching the [video](#):

**You will now need to enter in the sale name in the “Type to Filter” text box to pull up the sale you need, and then select the sale from the drop down below [Watch this video](#)**



The screenshot shows the Seller CTBIDS application interface. On the left is a dark sidebar menu with options: Home, Locations, Sales, Buyer/Bidder, Invoice, and Reports. The Reports menu is expanded, showing: Sale History Report (highlighted), Bidder Report, Pickup Report, Active Sales Report, Sign Off Report, and Admin Report. The main content area is a light blue form with the following fields: Location (Please select location), Sale Title (Select Sale), Category (All), Sale End Date From (MM/DD/YYYY), Sale End Date To (MM/DD/YYYY), Item Date (All), Priority, and Payment (All). There are 'Clear All' and 'Search' buttons at the bottom right of the form.

1. **Sale History Report** - Run this report for a complete look at post-sale data.
2. **Bidder Report** - Run this report to view customer data and is helpful for items like Tax exemption Status or general bidder information.
  - a. If you are wanting to run a report of a live sale, please select the Location and enter your sale name to search
    - i. Selecting date, sale name, and other criteria will help render the reports faster and with more precise results
  - b. Users cannot download a report with 10,000  $\leq$  results
  - c. This report should only be pulled before a sale closing starts or after a sale completely closed (not while a sale is actively closing).
3. **Pickup Report** - Run this report for your Staff to use during pickup.
  - a. This will also show what item receipt method users selected during checkout
4. **Active Sales Report** - Run this report to view data during an active sale. *This report is useful if you suspend a customer and need to see other items they may be winning in your sale.*
5. **Sign off Report** - Run this report for your Staff to use during pickup to record a Winner's signature and date upon receiving their items.
6. **Admin Report**- Run this report to have a quick glance for the overview of business (sales, items, percentage of items sold, prices, etc) for desired date ranges

All reports can be exported to a CSV file in Excel.

- To change the Invoice number direction, or if you are getting an error on invoice numbers - Make sure to change the settings from General to Number and remove the decimal points

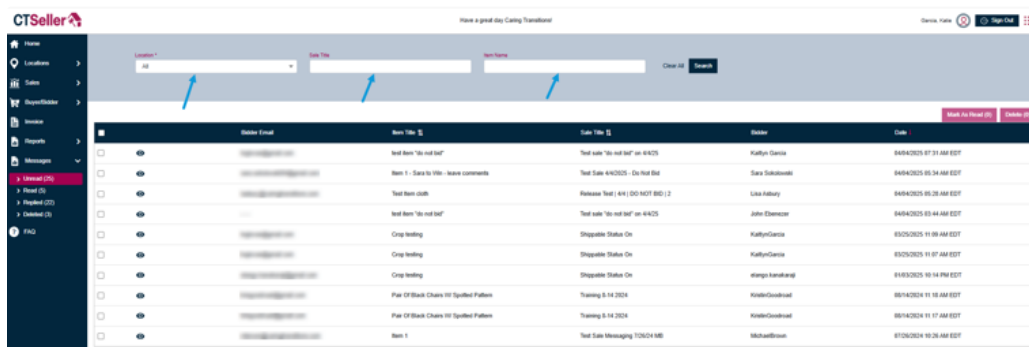
The screenshot shows the Microsoft Excel interface with the following annotations:

- Change setting from 'General' to 'Number':** A callout points to the 'Number' format option in the ribbon.
- Move decimals to decrease so there are none showing:** A callout points to the decimal places settings in the ribbon.
- Errors shown displaying numbers incorrectly:** A callout points to cells in the 'Invoice Number' column that display scientific notation (e.g., 3.51E+10, 3.701E+10).

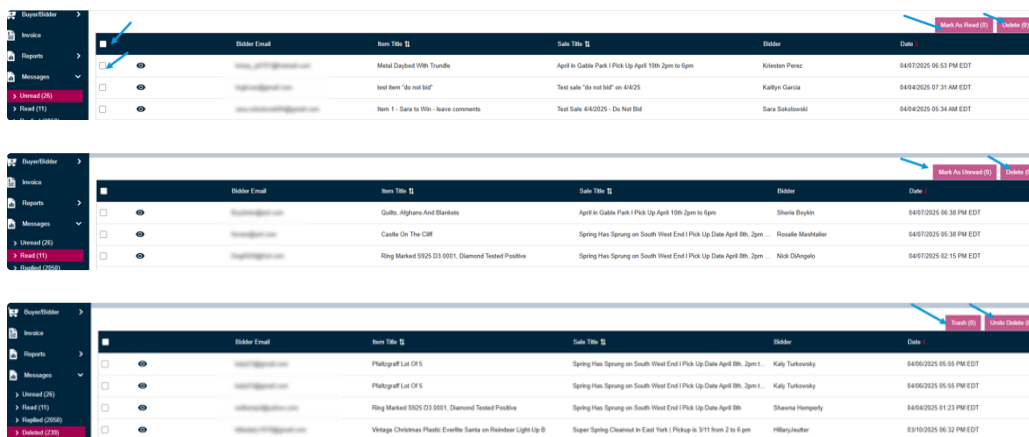
Winner Us	Winner Err	Phone	Address	Winner Cit	State / Pro	Winner Co	Zip / Posta	Invoice Nu	Buyers	Pre Tax	Buyers Status	Sale Title	Sale Start	Sale End	D Item	Close	Reserve	Pr	Number of	Sale Price	Tax	AB	Num
											0	0 Pending	THIS IS A TI	12/15/2020	05/28/2021	---		0	0	0	0	0	
											0	0 Pending	THIS IS A TI	12/15/2020	05/28/2021	---		0	0	0	0	0	
											0	0 Pending	TEST IN FEI	06/18/2021	06/25/2021	---		0	0	0	0	0	
											0	0 Pending	Dec 27 Tes	12/27/2021	12/31/2021	---		0	0	0	0	0	
											0	0 Pending	Test- Not F	02/11/2022	02/25/2022	---		0	21	0	0	0	
											0	0 Pending	Test- Not F	02/11/2022	02/25/2022	---		0	16	0	0	0	
											0	0 Pending	January 20	01/01/2022	01/15/2022	---		0	0	0	0	0	
kaytee89	ktonk93@	9.376E+09	100 Cedar	Springborc	Ohio	USA	45066	3.51E+10	0.05	0	0 Sold	123 Sale Te	03/02/2022	03/02/2022	03/02/2022	---		0	2	1	0.05		
											0	0 Pending	Test edit a	01/24/2022	01/24/2022	---		0	2	0	0	0	
											0	0 Pending	Test edit a	01/24/2022	01/24/2022	---		0	2	0	0	0	
											0	0 Pending	Test Sale J	01/07/2022	01/31/2022	---		0	11	0	0	0	
											0	0 Pending	Test Sale J	01/07/2022	01/31/2022	---		0	2	0	0	0	
											0	0 Pending	TO QA En	12/06/2021	12/08/2021	---		0	0	0	0	0	
											0	0 Pending	test app	08/13/2021	08/13/2021	---		0	2	0	0	0	
Joel	joelroadru	9.997E+09	8124 Meag	Cincinnati	Ohio	USA	45255	5113886	0.05	0	0 Sold	Test PayPa	01/21/2022	01/24/2022	01/24/2022	---		0	3	1	0.05		
											0	0 Pending	Test Sale J	01/07/2022	01/31/2022	---		0	2	0	0	0	
											0	0 Pending	January 20	01/01/2022	01/15/2022	---		0	1	0	0	0	
JoelYahoo	joelroadru	5.14E+09	8124 Meag	Cincinnati	Ohio	USA	45255	3.701E+10	0.01	0	0 Sold	Test edit a	01/24/2022	01/24/2022	01/24/2022	---		0	4	1	0	0	
											0	0 Pending	Test Sale J	01/07/2022	01/31/2022	---		0	4	0	0	0	
											0	0 Pending	Test Sale J	01/07/2022	01/31/2022	---		0	2	0	0	0	
											0	0 Pending	Test edit a	01/24/2022	01/24/2022	---		0	1	0	0	0	
											0	0 Pending	January 20	01/01/2022	01/15/2022	---		0	0	0	0	0	
											0	0 Pending	January 20	01/01/2022	01/15/2022	---		0	0	0	0	0	
											0	0 Pending	January 20	01/01/2022	01/15/2022	---		0	0	0	0	0	
											0	0 Pending	Test PayPa	01/21/2022	01/24/2022	---		0	0	0	0	0	
											0	0 Pending	Test Sale J	01/07/2022	01/31/2022	---		0	0	0	0	0	
											0	0 Pending	Test- Not F	02/11/2022	02/25/2022	---		0	6	0	0	0	

# Seller Messages

- Your messages will now display in one of four different tabs.
  - Unread** - Any unread messages that have come in to your location from a customer
  - Read** - These are messages that have been read from your location
  - Replied** - These are messages that you have responded back to the customer
  - Deleted** - These are the messages that you have deleted
- You now have the option to now search through your messages, by Location, Sale Name and Item Name



- You can now make bulk edits to your messages. You can select one, many, or select all by clicking the top left box.
  - You can mark Unread messages as Read
  - You can mark Read messages as Unread
  - You can delete messages from any tab
  - You can Trash your deleted messages
  - You can Undelete your messages



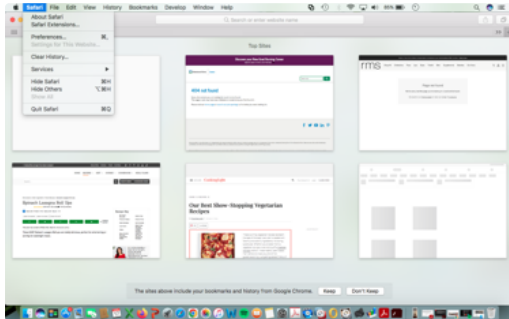


## How to clear Cache and browser data in Safari

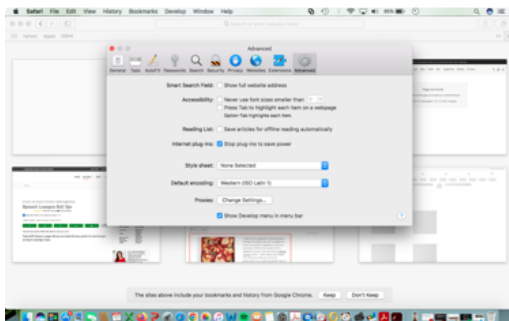
If you are not able to view, or are having difficulties with the site, please make sure to clear your Cache and website history/data. Follow these steps below:

### Desktop Version:

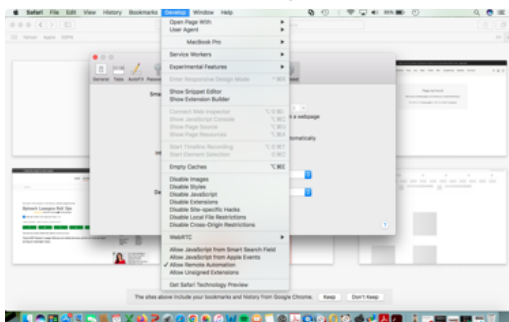
1. Click on the Safari tab at the top left of your screen and choose Preferences from the dropdown menu.



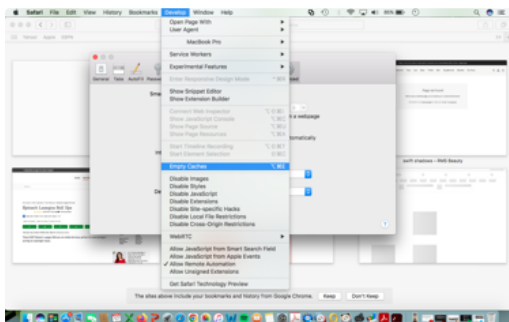
2. Click the Advanced tab of the menu that pops up.



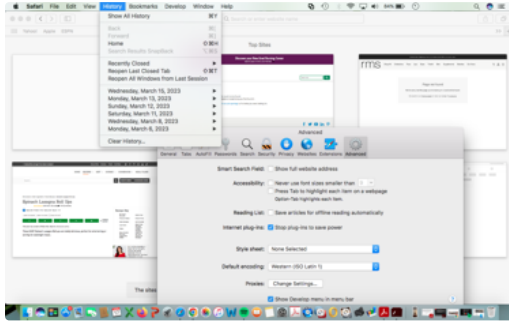
3. Select 'Show Develop menu' in the menu bar and close the Preferences menu.



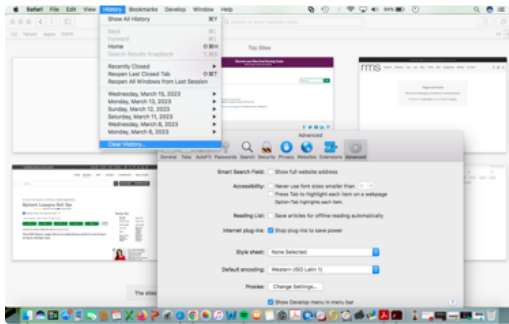
4. Click the Develop tab from the Safari menu at the top of the page.



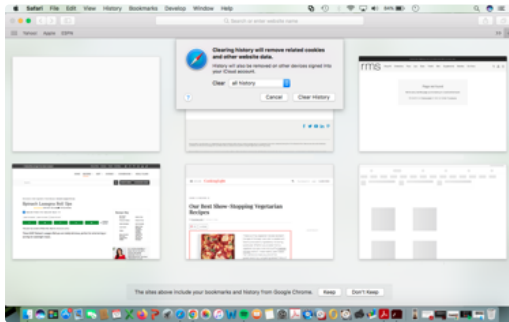
5. Click 'Empty Caches' from the dropdown menu.
6. Choose the History tab at the top of the screen.



7. Select 'Clear History' at the bottom of the dropdown menu

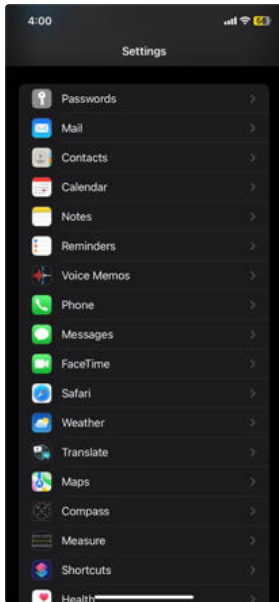


8. A box pops up with a choice to clear the last hour, today, today and yesterday, or all history. Choose your time frame and click the 'Clear History' button.

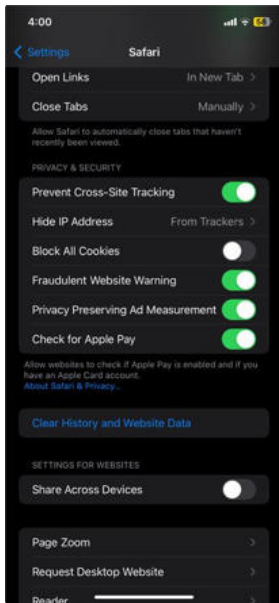


### Mobile Version:

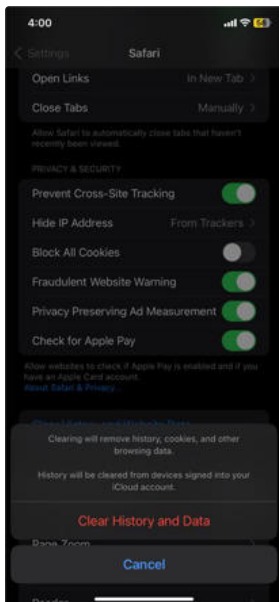
1. Open the Settings app.
2. Tap Safari.



3. Tap Clear History and Website Data.



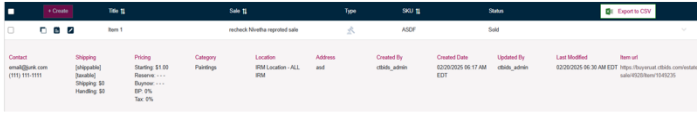
4. On the screen that pops up, choose Clear History and Data.



## Items Tab Information

As a Seller, you now have the option to view item information from the Dashboard. You can now view features by clicking on the item to include:

- Created By
- Created Date
- Updated By
- Last Modified



You also have the 'Export to CSV' button next to the 'Create' button, that will allow you to export all the item data into an Excel report for any sort selection you input; able to see all, pending, ready, sold, not sold status items. Fields on report to follow:

- Item
- Sale
- Type
- SKU
- Status
- Contact
- Shipping
- Pricing
- Category
- Location
- Address
- Created By
- Created Date
- Updated By
- Last Modified
- Taxable
- Description
- Featured
- Item URL

Item	Sale	Type	SKU	Status	Contact	Shipping	Pricing	Category	Location	Address	Created By	Created Date	Updated By	Last Modified	Taxable	Description	Featured	Item URL
Chinese O Summit Av Auction	FPR60	Ready	mgates@c	Yes		0	Antiques	CTwin Cite: Pick-up Ad Mark & Shawn	03/31/2022 01:07	ctbids_buye	04/10/2022 01:07	Yes	Description	No	https://ctbids.c			
Antique Bi Summit Av Auction	FPR 05	Ready	mgates@c	Yes		0	Antiques	CTwin Cite: Pick-up Ad Mark & Shawn	03/30/2022 10:07	Mark & Shav	04/10/2022 01:07	Yes	Description	No	https://ctbids.c			
"Samovar" Summit Av Auction	OF56	Ready	mgates@c	Yes		0	Antiques	CTwin Cite: Pick-up Ad Mark & Shawn	03/30/2022 07:07	ctbids_buye	04/09/2022 11:07	Yes	Description	No	https://ctbids.c			
"Samovar" Summit Av Auction	OF55	Ready	mgates@c	Yes		0	Antiques	CTwin Cite: Pick-up Ad Mark & Shawn	03/30/2022 07:07	ctbids_buye	04/09/2022 11:07	Yes	Description	MN - dual No	https://ctbids.c			

When you select the dropdown for Display Records Per Page, you now have the additional options of 10, 25, 50, 100, 200, 400, and 600; and allow a download of whatever amount of records I select to a CSV file

Location \*  Category  Item Title  Description  Item SKU  Created Date From  Created Date To

Created By  Status  State  City  Zip Code

Display Records Per Page

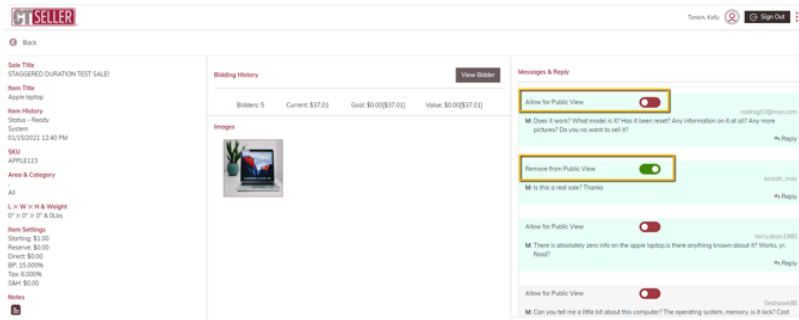
- recheck Nivetha reprinted sale

Item 1	Title	Sale	Type	SKU	Status
recheck Nivetha reprinted sale				ASDF	Sold

Contact	Shipping	Pricing	Category	Location	Address	Created By	Created Date	Updated By	Last Modified	Item url
email@junk.com (111) 111-1111	[shippable] [taxable] Shipping: \$0 Handling: \$0	Starting: \$1.00 Reserve: --- Buynow: --- BP: 0% Tax: 0%	Paintings	IRM Location - ALL IRM	asd	ctbids_admin	02/20/2025 06:17 AM EDT	ctbids_admin	02/20/2025 06:30 AM EDT	https://buyenuat.ctbids.com/estate-sale/4928/item/1049235

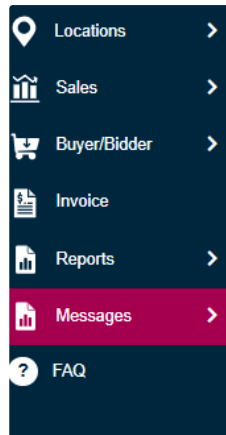
# Hide or Delete Item Messages on CTBIDS

Messages you receive from customers on items can now be shown or hidden from the public view on CTBIDS. This can be found by going to Sales, searching for the sale, navigating to the sale dashboard and then finding the item and clicking on the 'eye' icon to view the item history.

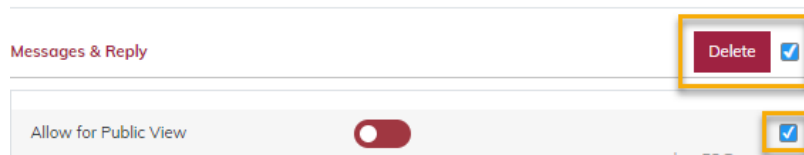


Use the toggles to allow for public view or remove from public view. Red will mean it is hidden from CTBIDS and Green is shown on CTBIDS. This can be used if a customer asks an inappropriate question or personal information is mistakenly provided. Even if you have selected to “Remove from Public View” you may still respond so that your message would be seen by the customer only.

To delete messages - go to the Messages tab on Seller Site



From there you will be able to delete any messages by checking the box and clicking the red 'Delete' button.



Please note - You will not be able to delete messages from the Sale Dashboard, you will only be able to Hide from Public View or Reply

Messages & Reply

Remove from Public View	<input checked="" type="checkbox"/>	KayTonik
M: test message delete this		
R: test reply delete this		↩ Reply
Remove from Public View	<input checked="" type="checkbox"/>	KayTonik
M: test #2		↩ Reply

Seller Reports and Advanced Search option for clients to review closed sale items.

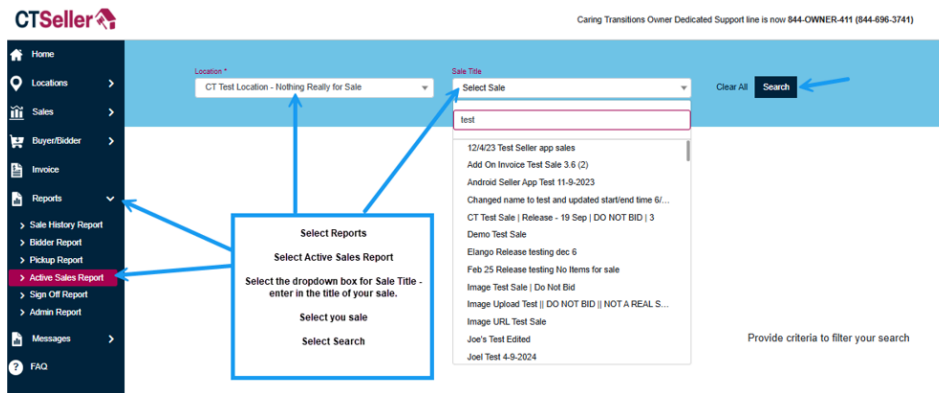
Application: **Seller CTBIDS**

### Active Sales Report

Active Sales Reports can be run to view the current bids (Sale Price column) to check at a glance how your sale is doing. If you run an Active Sales Report while items are closing on your sale, any items that have already closed will cause the report to also populate the BP, and Tax columns. Any items that are still live and have not closed, will show zero (0) on those BP & Tax columns. As more and more items close on a sale, the BP and Tax will populate on that Active Sales Report, all the way up until the last item is about to close. As soon as the last item closes, the Active Sales Report will no longer be available and you will need to now run a Sales History Report.

#### How to run an Active Sales Report:

1. Select Reports
2. Select Active Sales Reports
3. Select your location
4. Click on the dropdown arrow and begin typing in the sale title name you want the report for, it should auto populate below to click on
5. Then click Search



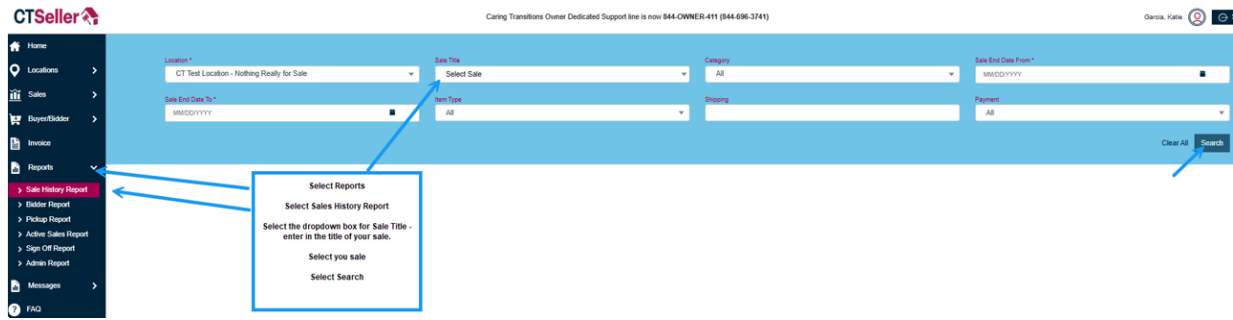
5. Click Export to CSV
6. Check your Download Folder for the Excel spreadsheet

### Sales History Report

You can run a Sales History Report to view closing information and stats from your sale.

**i** The Sales History Report will be importing the Buyers name from their generated invoice. Their name and default shipping address is what will be reflected on the report.

1. Select Reports
2. Select Sales History Reports
3. Select your Location
4. Click on the dropdown arrow and begin typing in the sale title name you want the report for, it should auto populate below to click on
5. Then click Search



5. Click Export to CSV
6. Check your Download Folder for the Excel spreadsheet

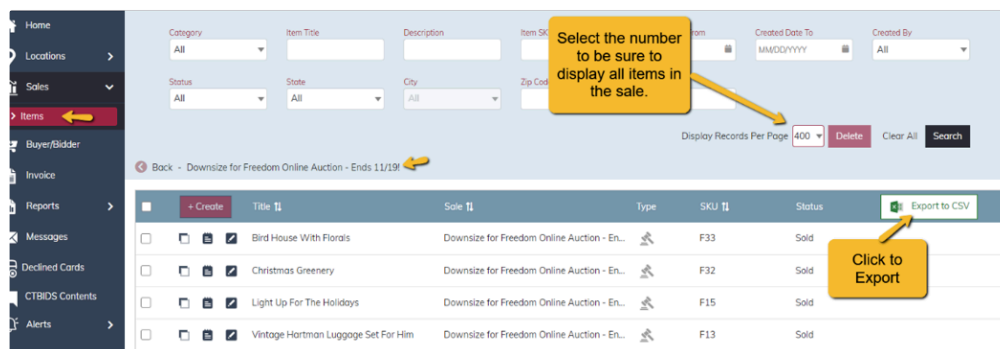
**⚠** On a Sales History Report, some information for Bidders that were part of the 'legacy data' (Before August of 2021) will not appear on the Sales history report. Also, if an invoice was never generated for an item that sold, there will not be an invoice number or Bidder profile address information listed on the Sales History Report.

**i** You can also run a Sales History report to gather individual item URL's for your clients to review. See below for the Advanced Search Feature to help clients with closed sales as well.

### Item 'Report'

If you would like to search and compile a report on a certain item grouping to see, for example: if these items sold, what the price was, and obtain the individual item URL, along with who created and modified the item last:

1. Go to Sales
2. click on items
3. Select your location
4. Select the filters that you see fit (example: you can choose a specific category, item title, date range, and status to narrow the search to exactly what you need). You can also leave the search/filter bars blank and just click 'Search' to populate all data.
5. be sure to adjust the display records number so that all items appear on the report
6. click search
7. Export to CSV

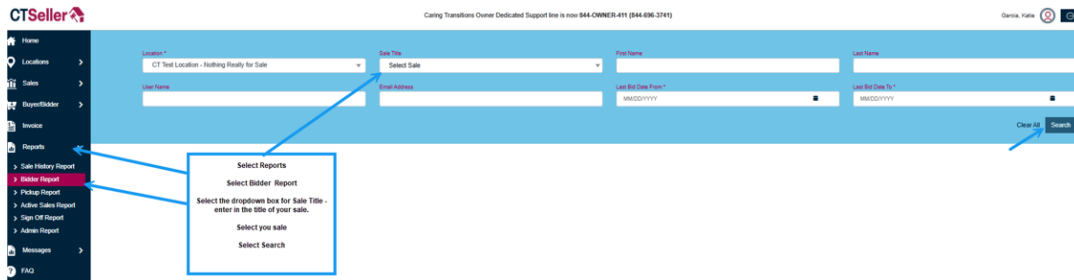


8. When data has populated, you can further refine the results by using the toggles in the headings bar to reorder information.
9. An Item Report also provides a report for a sale in progress that has items in Pending or for when an inventory is being performed for a client.

## Bidder Report

You can run a Bidder Report to obtain some information on buyers who have won on your sale. You can see their email, phone number, tax exemption status and if you have approved that exemption.

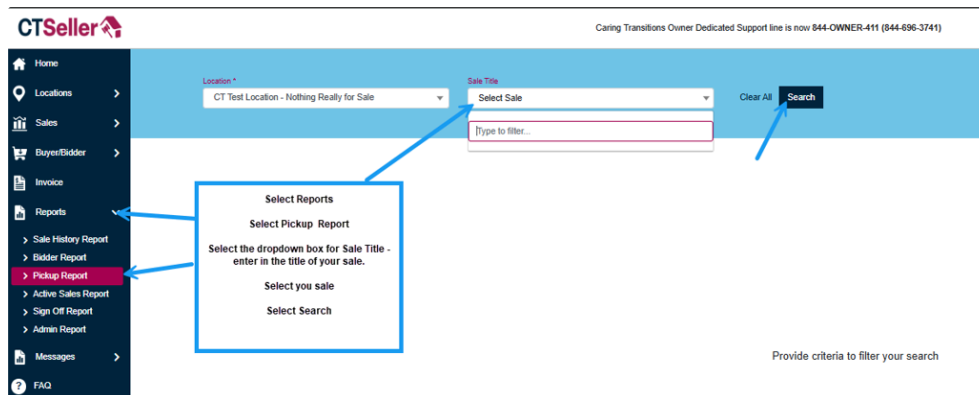
1. Click on the Reports tab
2. click on bidder report
3. filter using the search bars (sale title... or simply search for one bidder by name, email, or nickname).
4. click search
5. Export to CSV



## Pickup Report

You can run a Pickup Report to confirm the Item Receipt Methods selected

1. Click on Reports
2. click on Pickup Report
3. Select your location (if you have more than one location you will need to select the location first)
4. Start to type in the sale title to choose the correct sale
5. click search
6. export to CSV

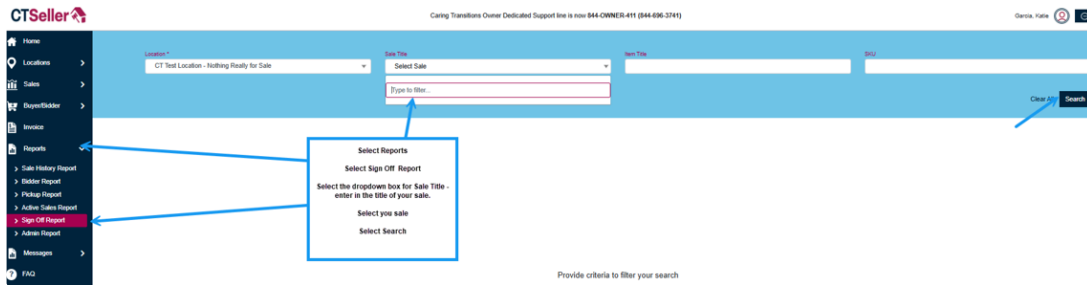


## Sign Off Report

This report is to be used by staff during pickup to record a winners signature and date upon receiving their item.

1. Click on Reports
2. click on Sign Off Report
3. Select the location
4. Select the sale by starting to type in the sale name and then selecting the appropriate sale
5. filter further with the other filter search bars if needed
6. select search
7. Export to CSV

8. expand the columns/rows of the excel spreadsheet as needed to allow for the signature and date, and print

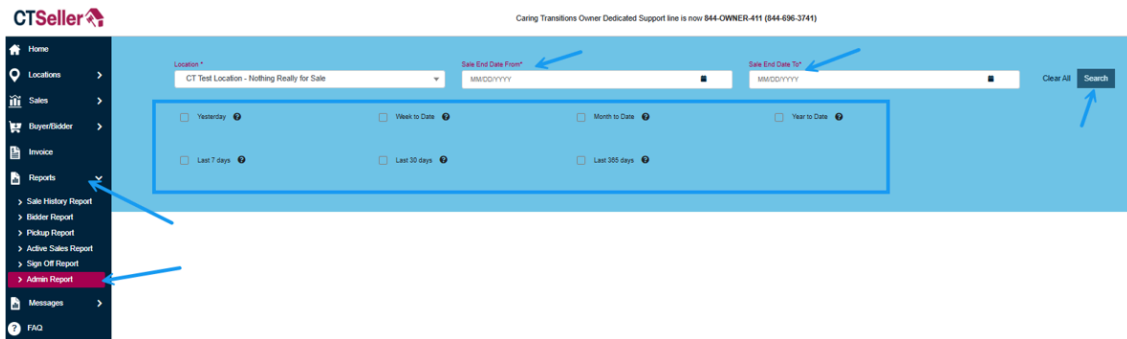


## Admin Report

Run this report to have a quick glance for the overview of business (sales, items sold, prices etc.) for desired date ranges.

1. Click on Reports
2. click on Admin Report
3. select your location
4. select the date range or check the box for a supplied range that you would like to review (the question marks will tell you what this range covers)
5. click search

**Note** there will not be an Export option for a spreadsheet version



## Explore Search Feature to allow clients a way to review closed sale items from their auction

Unfortunately, the option to send a link for a completed sale is no longer an option. Having the super long unique URLs exposed us to a security risk and this had to be eliminated.

You would have to give a client instructions on how to use the Explore. You could use the instructions below and just supply the dates they should use for their sale.

Find your next treasure...

Select options to browse a selection of items.

Location  
 All Locations **2.**

Zip code State Within the radius of  
 Enter Zip code All State Select Distance

Category Subcategory  
 All Category All Sub Category

Keywords  
 Search all of these words

Price Range  
 \$ min - \$ max

Date From  
 Start Date (MM/DD/YYYY) End Date (MM/DD/YYYY)

Option  
 Auction  Direct Buy  Buy Now  
 Shippable  Pick up Only  
 Completed (Location or Category selection is required) **5.**

Reset Find Items **6.**

**i** To get an inventory to include the description you must use the Items Tab. You can start from the Sales tab by selecting the number of items as shown here:

Sales **1**

State: All City: All Zip Code: Roswell and Buckhead Georgia

+ Create	Title	Sale Address	Start Date	End Date	Items
	Beauty Goes to DC Pt. 2 Online Auction - Ends 12/...	Marietta, Georgia, 30067	12/04/2023 06:00 AM EST	12/11/2023 08:00 PM EST	0
	Beauty Goes to DC Online Auction - Ends 12/9/...	Marietta, Georgia, 30067	12/01/2023 06:00 AM EST	12/09/2023 08:00 PM EST	152
	Cabins, Offices, and High Dollar Homes Online Auc...	Marietta, Georgia, 30062	11/19/2023 06:00 AM EST	11/27/2023 08:00 PM EST	130
	Downsize for Freedom Online Auction - Ends 11/19/...	Roswell, Georgia, 30075	11/12/2023 06:00 AM EST	11/19/2023 08:00 PM EST	<b>206</b>
	Elegance in Brookhaven Online Auction - Ends 11/...	Brookhaven, Georgia, 30319	11/09/2023 06:00 AM EST	11/16/2023 08:00 PM EST	43

Category: All Item Title: Description: Item SK: Item Form: Created Date To: M/M/DD/YYYY Created By: All

Status: All State: All City: All Zip Code: All

Select the number to be sure to display all items in the sale.

Display Records Per Page: **400** Delete Clear All Search

Back - Downsize for Freedom Online Auction - Ends 11/19/...

+ Create	Title	Sale	Type	SKU	Status	Export to CSV
<input type="checkbox"/>	Bird House With Florals	Downsize for Freedom Online Auction - En...		F33	Sold	Click to Export
<input type="checkbox"/>	Christmas Greenery	Downsize for Freedom Online Auction - En...		F32	Sold	
<input type="checkbox"/>	Light Up For The Holidays	Downsize for Freedom Online Auction - En...		F15	Sold	
<input type="checkbox"/>	Vintage Hartman Luggage Set For Him	Downsize for Freedom Online Auction - En...		F13	Sold	

## Finding a Closed Auction

In order to find an auction that is no longer active, please follow the steps below.

- Please note- As a part of PCI compliance, the process of providing a URL for older, closed sales has been disabled. If you are wanting to share this information with a client, please send them these steps:
  1. Go to [CTBIDS.com](https://www.ctbids.com) and click on the Explore search tab
  2. Select your location as the location
  3. Enter the dates to be one day before the sale started and one day after the sale ended
  4. Select Completed
  5. Select Find Items

## Advanced Search URL for Closed Items or Auctions

You can capture the URL from Advanced Search Results to help market an item:

- Please note - As a part of PCI compliance, the process of providing a URL for older, closed sales has been disabled. If you are wanting to share a specific item, please follow these steps:

Show an example of the current sale – use advanced search by location, category and sale zip

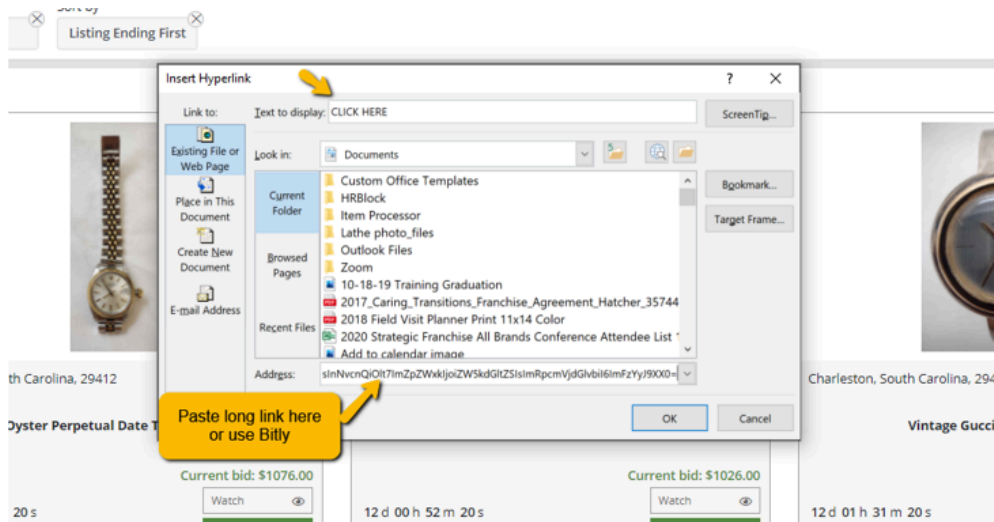
The screenshot shows a search interface titled "Find your next treasure..." with a close button (X) in the top right corner. Below the title is the instruction "Select options to browse a selection of Items." The form is organized into several sections:

- Location:** A dropdown menu set to "All Locations" with a red arrow pointing to it.
- Zip code:** A text input field labeled "Enter Zip code".
- State:** A dropdown menu set to "All State".
- Within the radius of:** A dropdown menu labeled "Select Distance".
- Category:** A dropdown menu set to "All Category" with a red arrow pointing to it.
- Subcategory:** A dropdown menu set to "All Sub Category".
- Keywords:** A text input field labeled "Search all of these words".
- Price Range:** Two text input fields labeled "\$ min" and "\$ max" separated by a hyphen.
- Date From:** Two date input fields labeled "Start Date (MM/DD/YYYY)" and "End Date (MM/DD/YYYY)", both with red arrows pointing to them.
- Option:** A group of checkboxes:
  - Auction
  - Direct Buy
  - Buy Now
  - Shippable
  - Pick up Only
  - Completed (Location or Category selection is required) with a red arrow pointing to it.

At the bottom of the form are two buttons: "Reset" and "Find Items".

Click on the item you want to showcase





[CLICK HERE](#) to see jewelry items in our sale ending on 2/27!

## How can I report an issue?

- The pop-up '?' widget has been removed from [Seller.ctbids.com](https://Seller.ctbids.com).
- Support Options Moving forward:
  - Use the FAQ tab within your Seller Dashboard for common questions or searches
  - To submit a support ticket please email in to [CTBIDSHelp@CaringTransitions.com](mailto:CTBIDSHelp@CaringTransitions.com) or by calling in to the Franchise Owner Help line at 1-844-OWNER411
  - If you have suggestions or requests for improvements - please email [CTBIDSPanel@caringtransitions.com](mailto:CTBIDSPanel@caringtransitions.com)

## CTBIDS Location/Sale Search

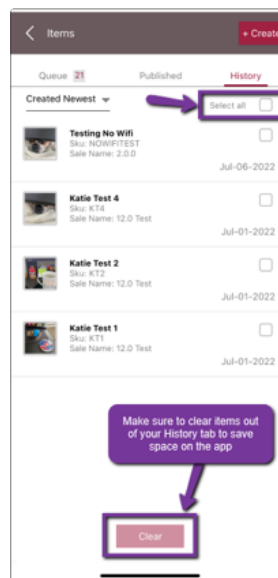
From the [CTBids.com](http://CTBids.com) website, users have the option to search for locations and search for sales by zip code and location name.

- Estate Sales tab- zip code search is the radius of the Estate Sale Location
- Locations tab - zip code search is the radius radius of the CT Business Location
- Location search is the name of the Location

## CT Seller App NG Troubleshooting and Updating

If you have recently updated the app and are having issues or experience the app crashing when trying to take or upload pictures- Please try the following steps:

- Each person should have their own login information and there should be no more than one person logging into a sale with that login (there should not be sharing of login information and multiple people using that login at the same time -this is known to cause issues).
- Turn off Live photos on iOS
- Make sure camera settings are set to Most Compatible for Android and iOS
  - If possible, just publish the items and you can edit them afterwards
- Make sure there is nothing in the Queue, or else everything will be lost
  - If possible, just publish the items and you can edit them afterwards
- Shut down and restart device
- Delete the app
  - Do not delete the app with items in Queue - they will be lost
- Redownload the app
- Sign in
- Accept permissions for camera ,mic, photo access
- Make sure to clear out your History Tab on the Seller NG App periodically to help save space and storage



- We recommend that all app users get a free app called Meteor that will display Upload speed. You need at least 2 Mbps to have timely Publishing results. Don't try to Publish when you have


a weak or very slow upload speed.

**“The video or image upload failed please try again” message when adding media to an item**

If you see this error message you may be using a media format that is not supported.


- Best practice is to use JPEG format for images
- Best practice for video is MP4
  - Other supported video formats are:
    - MOV
    - 3GP
    - AVI
    - WEBM

If you have media that uses a format that is not listed above, try to convert the media to one of the correct formats and then attempt to add to the item again.

 The HEVC video file format may upload just fine through the Seller App, but the issue with HEVC is that not all web browsers support this format which will result in the video not being visible to the customer (all black) and they will not be able to play the video (in some browsers).  
Best practice is to use the MP4 video format so that all customers can view the video (or one of the supported formats listed above).

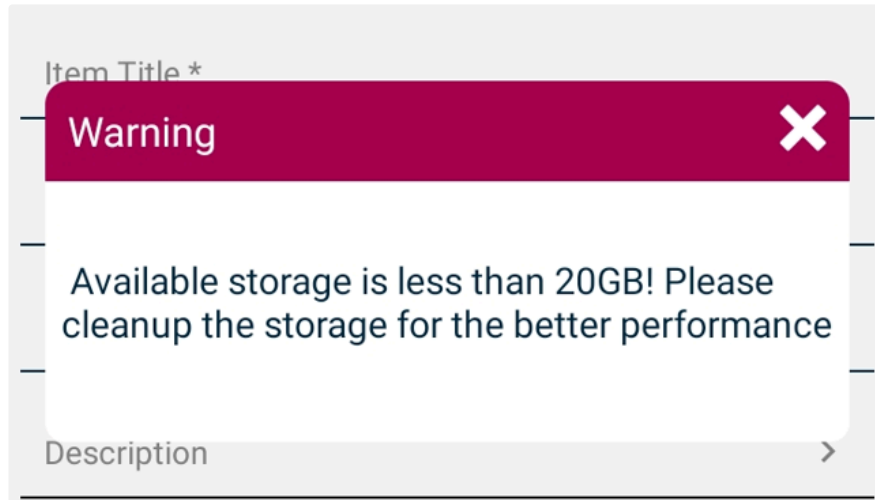
**‘Unauthorized: Invalid or Expired Token’ error message while using the Seller App**

If you have seen this error message, this means that your session has expired, please logout and log back into the seller app to refresh your session.

 If you are repeatedly receiving this message:  
Be sure that your History tab in the app (under the items tab) is cleared and that your device has enough available storage.  
A full history tab uses up internal app space for processing and may be causing this glitch and low available device storage can cause processing issues which can cause odd glitches or app freezing.  
You can uninstall (delete) and reinstall the app once all items are published out of the queue to see if this helps as well.

### Low Available Storage Warning

If you receive the Warning on the Seller App telling you that your 'Available storage is less than 20GB! Please cleanup the storage for better performance' as shown here:



- Please check the amount of available storage that you have on your device (not cloud storage). If your device is low on available storage you may run into processing issues with the app. As you continue to create items with large image files your device storage will continue to decrease. This warning is to ensure you know that you are getting low on available storage and there is now a need to free up more space.
  - To free up more space on your device for processing:
    - Delete unused apps
    - Delete old messages
    - Delete old media (video and photos)
- Also check to be sure that the in-app History tab is cleared out regularly.
  - Too many items in your history tab will use in-app available storage and may prompt this message as well.
    - Deleting the History items will not remove them from your published tab and will not remove them from your sale.

### Having issues signing into the Seller App but are successful at signing into the Seller Site?

Please also check your available storage on your device to see if you are low.

For the same reasons listed above, low storage can cause processing issues with the app (all apps for that matter) and having too low of available device storage can prevent you from being able to sign in.

If you find that you are low on storage, please delete unused apps, old messages, and media that is no longer needed.

Device health is very important when it is used daily for working onsite creating items and uploading/processing large image and media files.

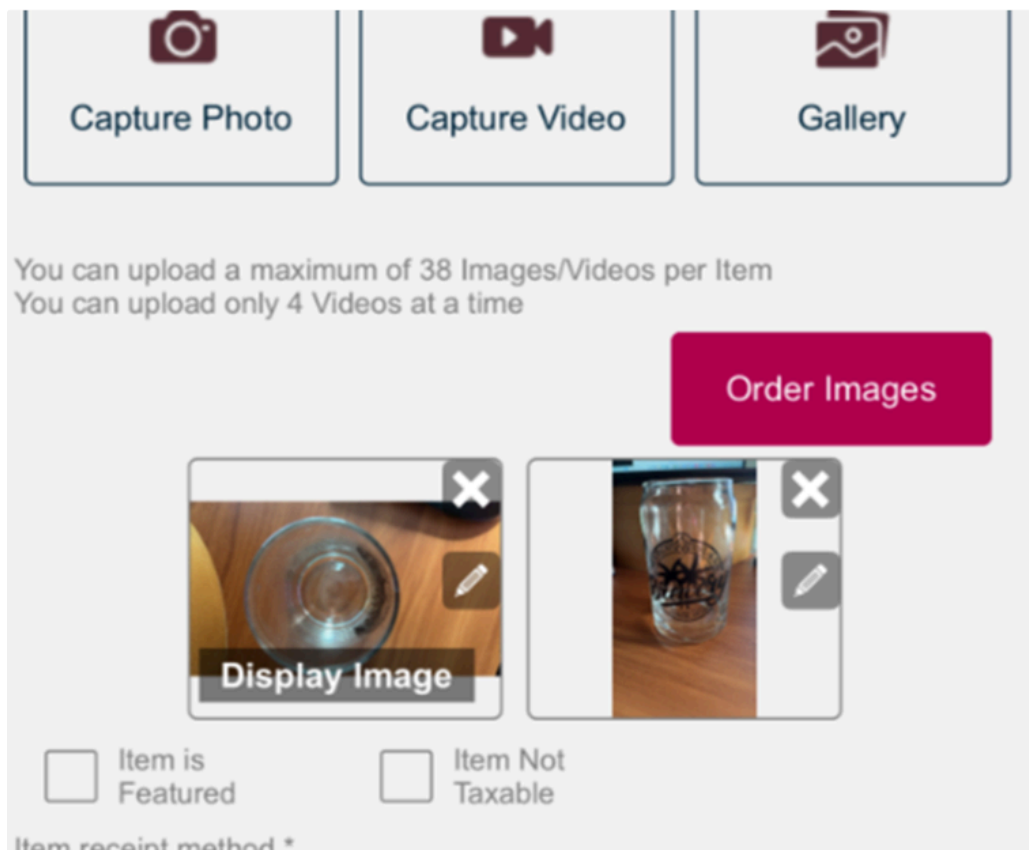
Please be sure the History subtab under the items tab is also cleared out regularly. This will not affect published items in your sales. This is a type of cached storage that can use in-app available space and should be cleared regularly.

**When using the in-app camera to take images, once taken the image rotates and/or flips issue.**

When you are using the in-app camera and your device is pointed downward at an item the device will not sense orientation and can result in flipped and/or rotated images.

As shown here in this example.

- The first of the two images is where my phone was in normal portrait orientation angled down at the item.
  - It flipped it and rotated it to landscape position in the display.
- The second image is my phone also in portrait position, but I held my phone so it faced directly at the item and not downward
  - Image holds the correct orientation.



Be sure to face your camera directly at the item and not overtop and downward at an item. If you need this downward view, then you may need to edit and rotate the image.


### Order of Item Images

You can reorder your item images. Please be sure to follow these steps and take note of the info box.

- When you are creating a new item, once you take all images of the item and select the “use photo” option, you can then select the “Order Images” button option.
- Long press on the image you wish to move to a new location and slide that image into the new spot. Repeat until you have the order you would like.
- Select the Apply button
- Then save the item to Queue or publish the item

**⚠ If you wish to EDIT the item order AFTER you have already saved the item to Queue please first publish the item and then edit the item order from the published tab or from the Seller .com site.**

### How to turn off HEIC/HEIF on mobile device

Have you received this icon  on your photo when uploading or taking photos on the Seller App?



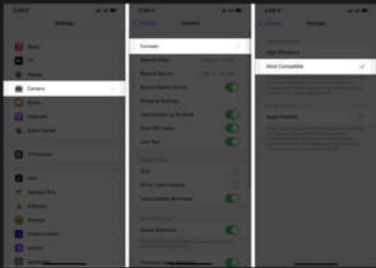
The issue may be the HEIC/HEIF setting on your mobile device.

We are recommending for users to turn on the most compatible mode for images when uploading to the Seller NG App.

## Apple iOS Devices:

**How to turn off HEIC on my iPhone and save photos in JPEG**

1. Launch **Settings** on your iOS device.
2. Now, tap **Camera**.
3. Next, tap **Formats**.
4. Next up, select **Most Compatible**.



Now, your iPhone will shoot pics in JPEG format and videos in H.264 format.

How to turn off Live photos in iOS:

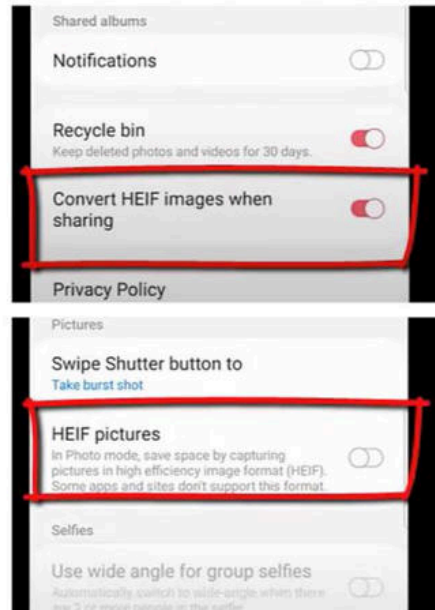
1. Navigate to the Settings app.
2. Tap Camera > Preserve Settings.
3. Switch the toggle next to Live Photos off. (Green means on. Gray means off.)

## Android Devices:

#### How to turn off HEIF on Android

1. Launch Settings on your Android device
2. Select Apps
3. Select Camera
4. Picture Formats
5. High Efficiency Off
6. Turn OFF HEIF
7. Restart your phone

**\*\*Please note, not all android devices are the exact same, you might have varied steps to turn off High Efficiency Settings\*\***



- **For Samsung S24**, the setting is located in a different location on your device. This YouTube video will show you exactly where to go to change the setting and explains why. Start the video at the timestamp 8:50 and begin watching from here. At the timestamp of 9:16, this is where he digs into the High Efficiency picture settings.

- Link to YouTube Video: [📺 Galaxy S24 Ultra - Change These Settings Immediately](#)
  - grab the time slide and take it to 8 minutes and 50 seconds and begin watching here for High Efficiency pictures and the settings that will need changed.

#### **Things to remember when uploading media (photos and videos) using the app**

1. You can now select how you want to upload your images:
  - a. You can capture a photo directly from the app - it will allow multiple shots, and you will have the option to edit your photos before saving, you can take 20 images at a time
  - b. Upload images and videos directly from your device. To change the display image, click and drag the image you want to be the display to where it says 'Display Image'.
    - i. **Limit on uploading photos from a mobile device gallery using the NG app is 20 images**
    - ii. **Limit of one video per item of 15 seconds or less**

iii. Limit on images/videos per item is a total of 40

**< New Item**

Condition \_\_\_\_\_

Description \_\_\_\_\_

Item Type  
**Auction**

Capture Photo   Capture Video   Gallery

You can upload a maximum of 40 images/videos per item.

Item is Shippable    Item is Featured    Item Not Taxable

Starting Price (\$) \_\_\_\_\_  
1

Reserve Price (\$) \_\_\_\_\_

Cancel   Queue   Publish

2. Fill out all necessary information

**< New Item**

Dimensions & weight

Width Inches   Height Inches

Depth Inches   Weight lbs

Shipping \_\_\_\_\_

Handling (\$) \_\_\_\_\_

Goal (\$) \_\_\_\_\_

Valuation (\$) \_\_\_\_\_

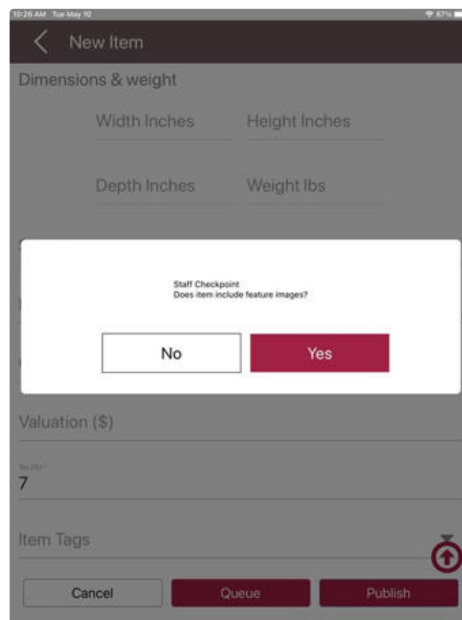
Tax (%) \*  
7

Item Tags \_\_\_\_\_

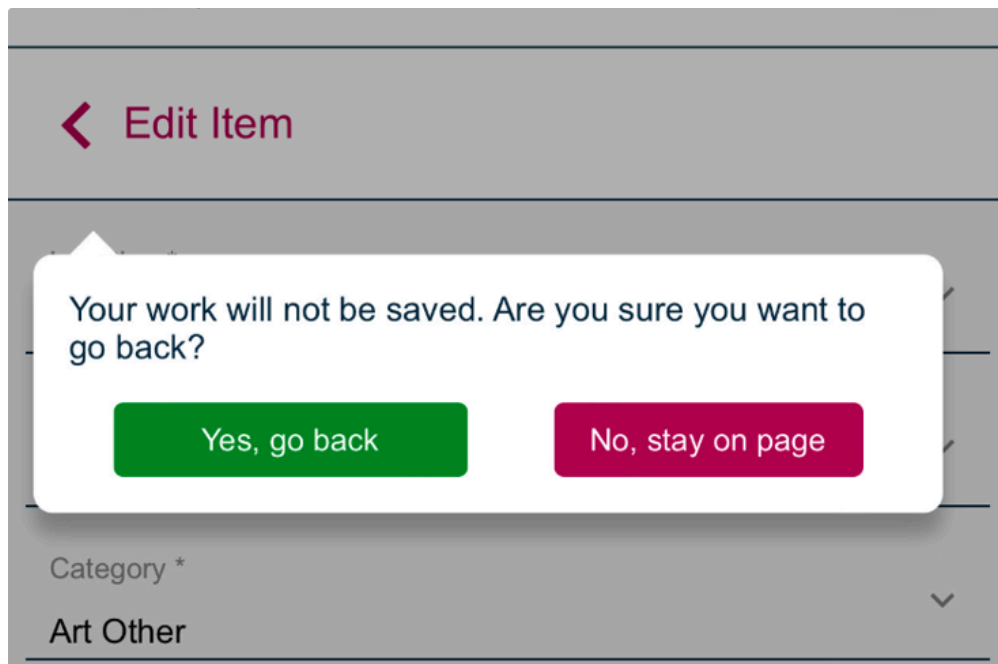
Cancel   Queue   Publish

3. After all information is entered you will have 3 options to proceed:
- a. Cancel - to exit
  - b. Queue - to send the item to the queue

- i. **We recommend no more than 40 items be left in queue at any given time**
- c. Publish - to publish/upload the item
  - i. **You can not select more than 5 items at a time to publish**
  - ii. **If the item has a video, we recommend that you publish that by itself**
  - iii. Please note that by selecting Publish - it will not make the items go live or Ready - they will still be in Pending status until you move them over to Ready status on the desktop
  - iv. After selecting 'Publish' you can select the Publish or History tab so that the successful publish could be verified.
- 4. If the sale has a Staff Checkpoint Selected - when the employee is adding the item to Queue or Publish, they will be prompted with a Staff Checkpoint Question - In order to proceed they must select Yes, if they select No - they will be brought back to the previous continue working or fix what is needed.



- 5. You will not be able to swipe off of the current screen without saving the item information by selecting 'queue' or 'publish'. If you select the back arrow accidentally and had not saved entered information to 'queue' or 'publish', you will receive a popup warning reminding you to save by one of those two options:



#### Photos are Missing After Upload

- Please review the following if you are having issues with images being lost
  - While the Seller App allows for offline uploads to the queue, we strongly recommend publishing directly to the sale items using WiFi and/or data (publishing items automatically puts them in Pending status) to avoid losing data
  - If possible, do not edit items while they are in the queue. We recommend publishing them and editing them after

#### Images or Media Did Not Publish from the Seller App but are Still Visible In-App.

- If you are experiencing that some of the images for your lot were not published (do not appear on the Seller site), but are still appearing in the Published tab, please click on each item individually to see if the sync icon is there. If you see two arrows that form a circle on the individual item, please select this icon as it acts as syncing function to recover and publish images that may not have made it on the initial upload.



**⚠ What happens when you push items to publish and not all of the media is uploaded?**  
When you push image files from a device over a WIFI connection, issues can occur. If you notice that not all images are on the item in the Seller site.

Go back to device that created the item(s), check your published tab and look for the item to see if the sync icon is present. The sync icon shows you that not all media made it on the initial upload. Go back into the item and click the sync icon to try and upload the remaining media items.

Depending upon how large the media files are, along with how good/poor your connection is, you may have to hit the sync button more than once if your media still has not uploaded.

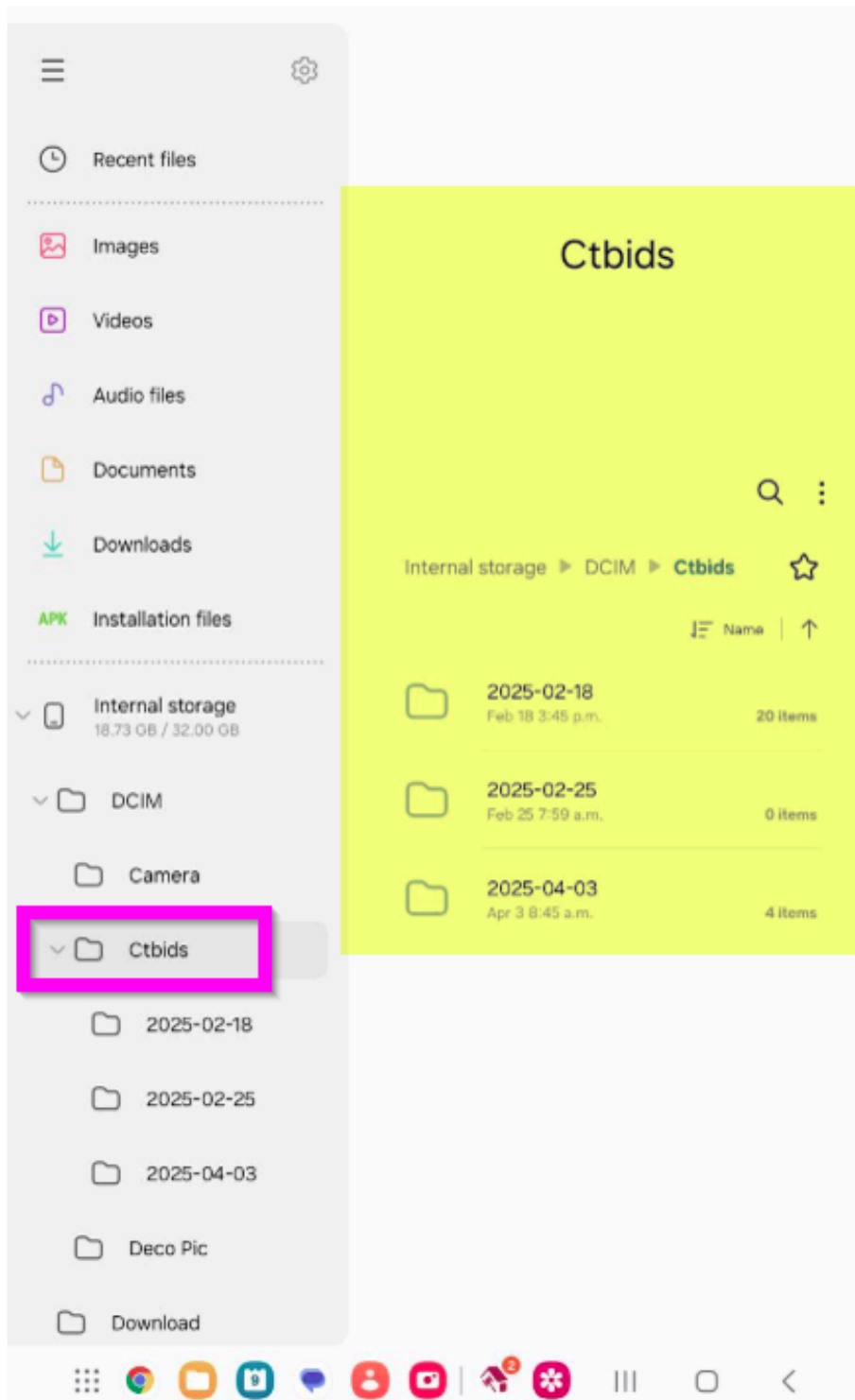
Are you an Android user and having trouble finding the photos in your gallery that you took using the CT Seller NG app?

If you are having trouble finding photos on your device after you have taken them with the in-app camera and are now not seeing them in your device gallery.

Some Android devices are now storing those images in a folder instead of in your gallery.

**Please check in your folders, under Internal Storage, DCIM, and then Ctbids.**

Here is an image to help:




### Seller NG App Update Settings

iOS and Android devices using the CT Seller NG app will have periodic updates to the application. The Technical Communications sent via email and posted on FranConnect will always provide the most current version devices need to be on to ensure efficiency.

iOS and Android users can turn on/enable automatic downloads in their device settings for the App Store (iOS) or Play Store (Android) so their apps are updated when a new version becomes available automatically. (There are also settings on if this is updated over cellular data or Wifi only, user preference).

If automatic updates are turned off/disabled the user will need to manually select to update their apps. Search for the app name in the App Store (iOS) or Play Store (Android) and there will be a button to select that says 'Update'. Clicking it will start the latest version download.

 Users may have to refresh the app page or press and hold down on the app name to force a refresh that shows an update is available.

**To prepare for a new app version, please do the following:**

- Publish items in your queue prior to updating to a new app version.
- Uninstall current Seller NG app.
- Install new version of Seller NG app.
- Upon app update/install, restart your device.
- Please note: You must give the app permission to your device photos; you'll be prompted for this within the app. Or you can go into your device settings and grant permission.
- Please note: All Location Employees should be using their own login; shared logins are discouraged.

**The guidance for optimized usage of the Seller App, as well as supported devices is as follows:**

- A total of 20 images uploaded at a time for in-app camera.
- A total of 20 images uploaded at a time from your device gallery (not the cloud/photo stream).
- A max of 40 images total for each item.
- A max of 10 seconds per video.
- There will be an imposed maximum of 5 items to publish at a time.
- Items can be edited from Published tab.
- Best practice is to edit Sale Setup from [Seller.ctbids.com](https://seller.ctbids.com).
- Sale updates from app would require a log out from app to see reflected changes.

## WebP images on CTBids

Images are now being stored in the WebP format on CTBids, which is the new industry standard for web-based images.

WebP offers faster load times, better compression, and improved performance across modern browsers. This helps improve the user experience by reducing upload and rendering times, while also saving storage space and increasing overall site efficiency.

We understand this may be a change from what you're used to, especially when downloading images for edits. Most modern image editing tools now support WebP, but if needed, there are free online tools available to convert WebP files to JPEG or PNG formats.

Additionally, we always recommend that locations store a copy of their original images separately — ideally in a shared Google Drive, cloud storage service, or team-accessible device. This ensures that images are not only backed up, but also not dependent on a single person's device, where they could be accidentally deleted or lost.

 **Good news is that you can upload WebP formatted images onto the Seller Site.**

If you download an image from the site it will download as WebP format. The Seller site allows for that WebP formatted image to be uploaded.

# Buyer App Support

## Sign In/Sign Up

- To sign in, select the red Sign In button
  - Enter the email address associated with your CTBIDS account as well as the password
  - You can sign if you have an Apple or Google Account with CTBIDS
- To sign up for a CTBIDS account, select the black Sign Up button
  - Enter the appropriate information into all fields
  - Select the red Sign Up button at the bottom of the page
  - You will not be able to sign up for an account with a username that already exists

## Forget/Reset Password

1. If you have forgotten or need to reset your password, please click the 'Forgot/Reset Password?' link on the bottom right corner of the Sign In screen
2. You will receive a link via email to reset your password-this may take a few minutes to send

## CTBIDS LOGO

1. Tapping on the CTBIDS logo at the top of the screen will always take the user back to the homepage

## Anchored Icons

The anchored icons are the five icons or "symbols" on the bottom of the app.

1. The first icon to the left the **Profile/Personal Info icon**
  - a. Customers can
    - i. Edit their profile information
    - ii. Change their shipping address
    - iii. Change their payment methods
    - iv. View their favorited Items, Locations, and Categories
    - v. View their invoices
    - vi. View items they are actively bidding, won, or lost
    - vii. Change their password
    - viii. Edit their preferences
2. The second icon to the left is the **Categories icon**

- a. Customer can navigate to all product categories
3. The middle icon in the **Active Sales icon**
  - a. Customers can see all active sales throughout the country
  - b. They can search for sale by state, city or zip code
  - c. By tapping on a pin, they are redirected to the sale
4. The second icon to the right is the **Current Bids/Auctions tab**
  - a. Customers can view
    - i. Items they are currently bidding on in the left tab
    - ii. All current auctions on the right tab
5. The heart icon on the very right is the **Favorites icon**
  - a. Customers can view their favorited
    - i. Items
    - ii. Locations
    - iii. Categories
  - b. Favorited Items will automatically render on this page
  - c. To view favorited locations and categories select the filter icon at the top right corner of the page
  - d. To “favorite” a location
    - i. Tap the red Add Favorite Location button in the top right corner
    - ii. Search for the location you want to “favorite”
      1. Scroll through the list
      2. Refine your search by using the State filter
    - iii. Tap the heart on the location you want to save
  - e. To remove any favorited items, locations, and categories tap on the red heart

### **Featured Estate Sales**

- This is the first segment that renders on the Homepage
- Tapping the image will render all estate sales on CTBIDS in chronological order, with the sale closing the soonest listed first

### **Product Categories**

- Every product category contains items across all sales on CTBIDS assigned to that category
- Some categories have subcategories which are listed after you tap into a main product category

- If you notice a subcategory shows up on the .com but it does not render on the app, that is because no items were assigned to that subcategory
- Filter
  - Every product category has a filter at the top right corner
  - You can refine your search by
    - Keywords
    - Price Range
    - Specific Item Settings (Auction, Direct Buy, Etc.)
    - Time of Listings Ending
    - Newest/Oldest Listing
    - Alphabetical Order
- Favoriting a product category
  - Navigate to the anchored Heart icon at the bottom of the app
  - Tap the filter at the top right corner of the page
  - Go to the “Favorite Categories” page through the filter and tap on any of the categories listed
  - To remove a category, tap on the red heart icon

### **Estate Sales Closing today**

- This segment on the Homepage displays all sales closing in chronological order, with the sales closing the soonest showing first

### **Discover Unique Treasures**

- Any item that is marked as “Featured” in sale will render, at random, in this segment

### **Browse By Room**

- Customers can now browse by room across different estate sales
- Every “room” has a filter at the top right corner of the page
- Filter Options
  - Categories
  - Keywords
  - Price Range
  - Specific Item Settings (Auction, Direct Buy, Etc.)
  - Time of Listings Ending
  - Newest/Oldest Listing
  - Alphabetical Order

## Contact a Seller

- Navigate to a sale
- Select the Information icon (looks like an “I” with a circle around it)
- The seller’s email address and phone number will render
- You can directly call or email the seller by clicking on their contact information

## Hamburger Menu

- My Account
  - This is another way to view your account information besides using a gavel icon
  - Personal Info
  - Payment Methods
    - Adding a Payment Method
      - Tap “Add Payment Method” button in the top right corner
      - Tap the payment method you wish to vault
        - PayPal
          - Enter your PayPal account information
        - Credit/Debit card
          - Enter your credit or debt information accordingly
          - Click that you accept the Terms and Conditions
          - Tap Save
    - To change your default payment method tap the radio button on the left corner of your preferred method
    - To delete a payment method tap the red trash can on the right corner of payment method
    - You cannot delete all payment methods if you have unpaid invoices or have active bids
  - Favorites
    - This segment contains your favorite Items, Locations, and Categories
    - The same logic mentioned above applies here
  - Tax Exemptions
    - All of a customer’s tax exemption files will be listed here
    - To upload a new tax exemption file
      - Select the Browse button
      - Upload the appropriate file
      - Select Add
    - To view all submitted tax exemptions, click on the Exemption List tab

- Invoices
  - View all invoices here
  - The status of the invoice is to the right of the invoice number
- The Transaction History displays
  - Transaction ID
  - The date the invoice was processed
  - The transaction type
  - Payment mode
  - Response code
  - Any extra notes the seller adds to the invoice
- Bidding
  - This segment displays all items a customer has bid on
  - This tab is organized into three categories
    - Active
      - All items a customer is currently bidding
    - Won
      - All items a customer has won (paid or unpaid)
      - Any items that were on a voided invoice will disappear
    - Not Won
      - All items a customer bid on but did not win
- Change Password
  - Customer can change their password here
  - The new password will be sent to whichever email is on file
- FAQ
  - This segment contains a list of popular questions asked by our customers on CTBIDS
- Sell with Us
  - This segment provides customers or franchise owners how wish to sell on CTBIDS
- Contact Us
  - Email: [ctbidshelp@caringtransitions.com](mailto:ctbidshelp@caringtransitions.com)
  - Phone: 844-4245-3434

## **App Troubleshooting**

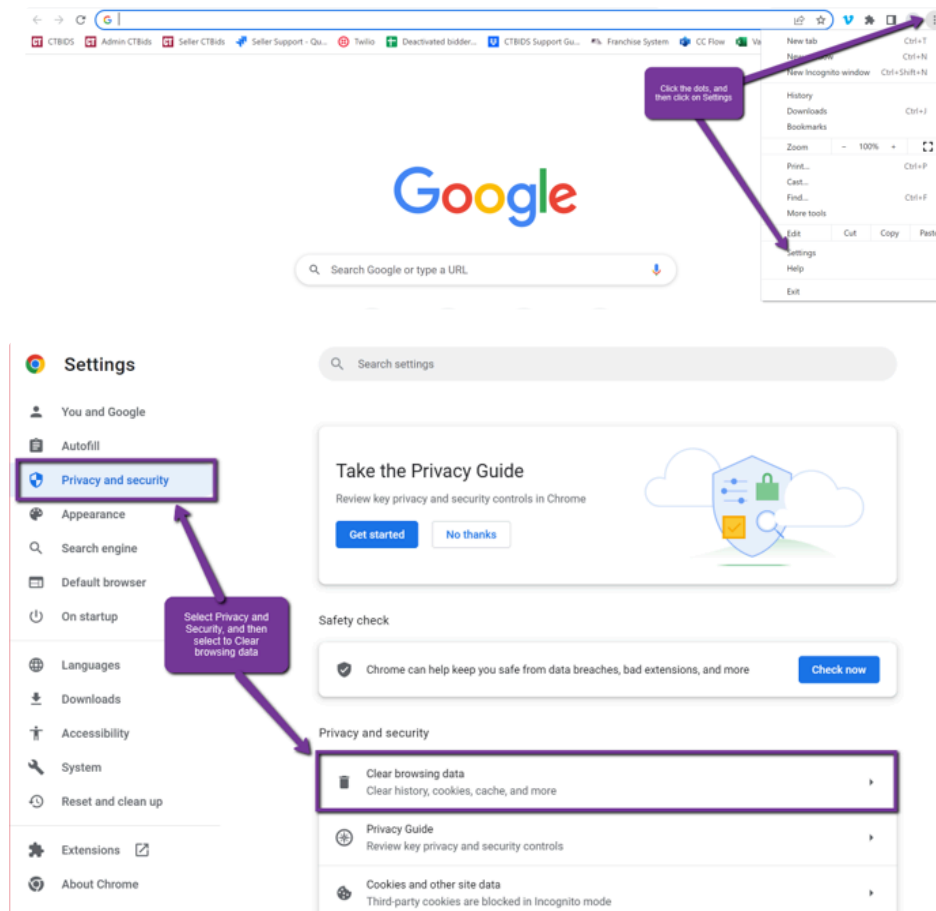
- If you find the app is running unusually slow or is unresponsive, please try the following
  - Check that you're running the latest version.

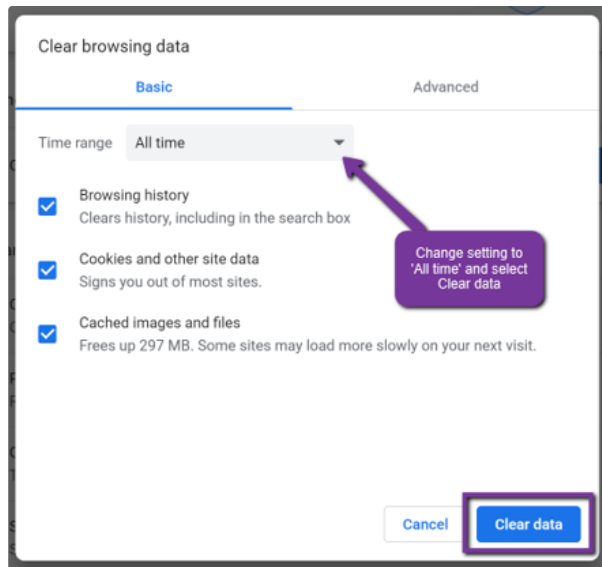
- Delete the app and reinstall it.
- Fully restart your device
- If the problem persists, reach out to CTBIDS Help

# How to Clear Cache for Chrome

If you are not able to view, or are having difficulties with the site, please make sure to clear your Cache and website history/data. Follow these steps below:

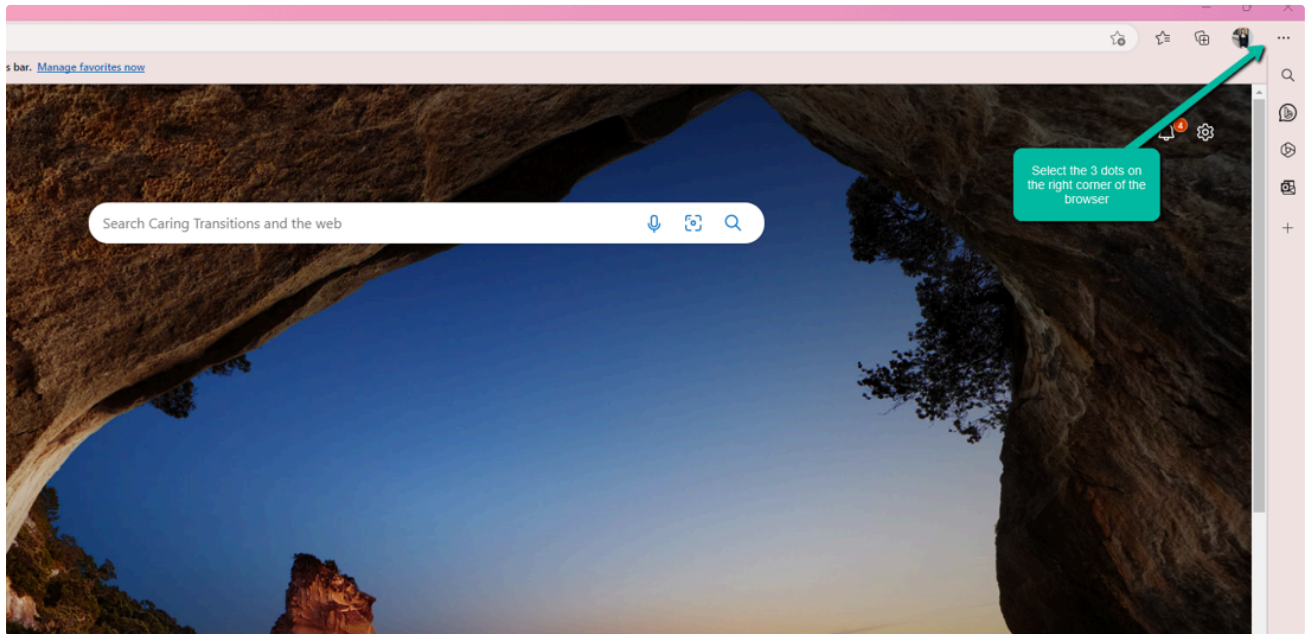
1. Click on the Customization/Control setting at the top right corner of the screen
2. Select Settings
3. Select Privacy and Security
4. Select Clear browsing data
5. Change setting to 'All time' for time range
6. Make sure that all options are selected for Browsing History, Cookies and other site data, Cached images and files
7. Select Clear Data
8. **Make sure to close your browser FIRST after clearing your data**



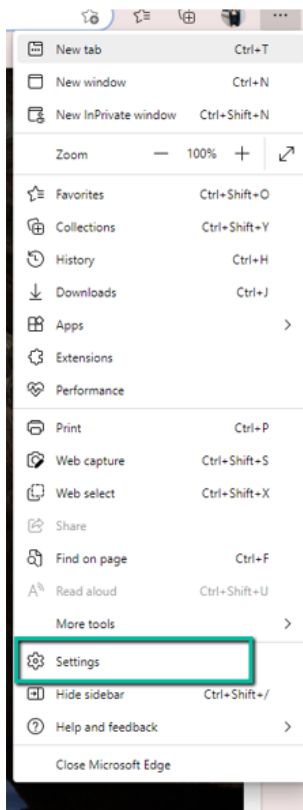


# How to Clear Cache in Microsoft Edge

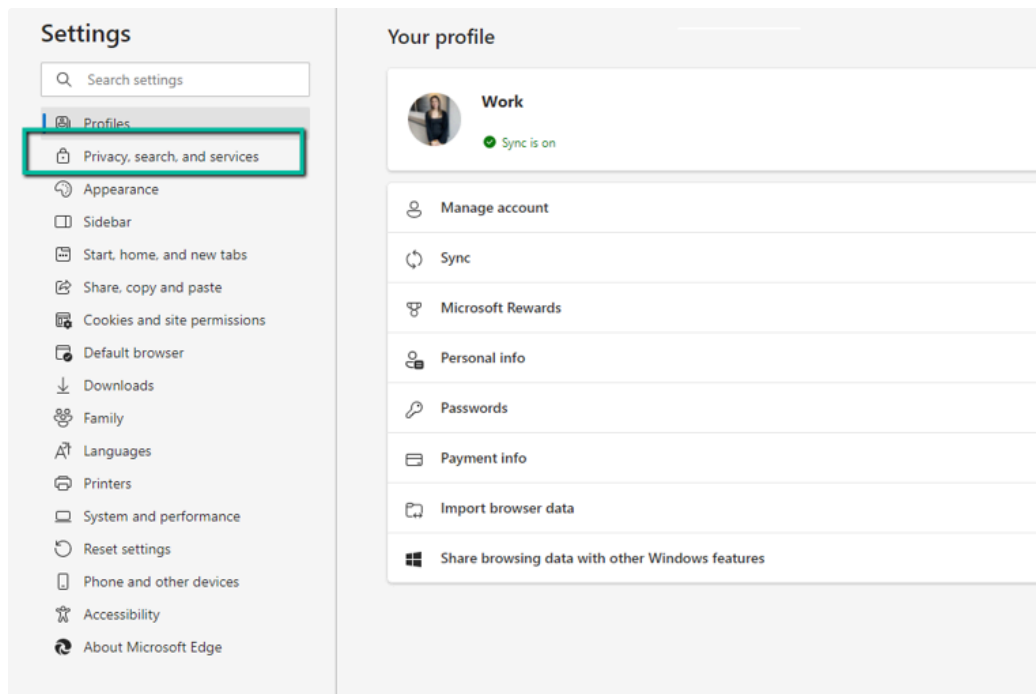
1. Open Microsoft Edge Browser
2. Select Settings and more (the icon that looks like 3 dots)



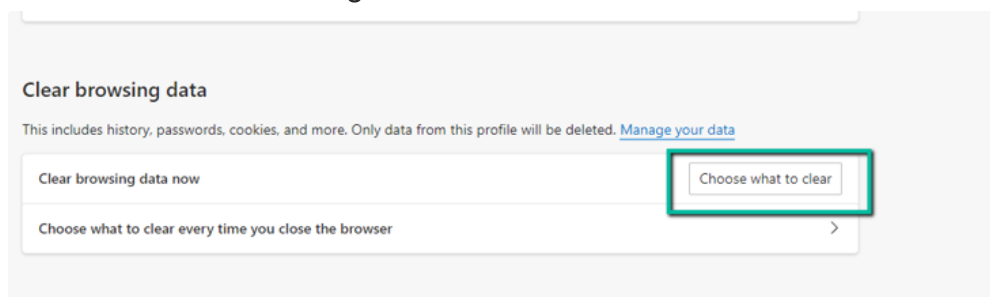
3. Select Settings from the drop-down menu



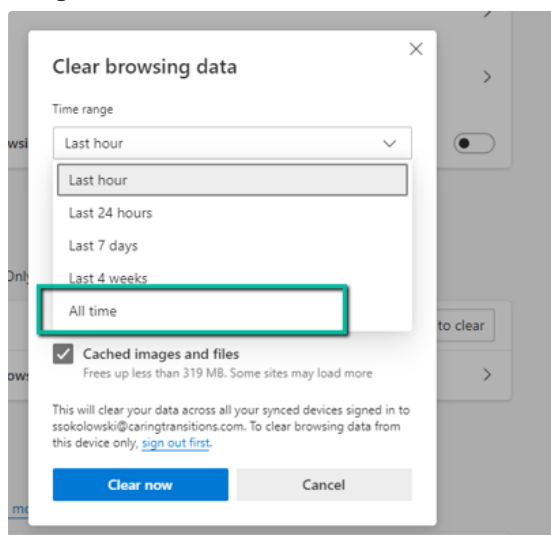
4. Navigate to Privacy, search, and services



5. Under the Clear Browsing data header select Choose What to Clear



6. On the Clear Browsing Data pop-up, it is recommended to select **All Time** under the time range

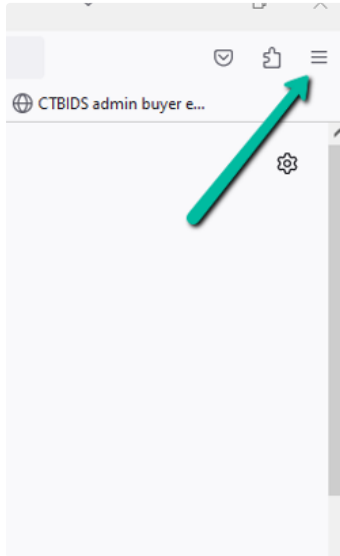


7. Click the **Clear now** button

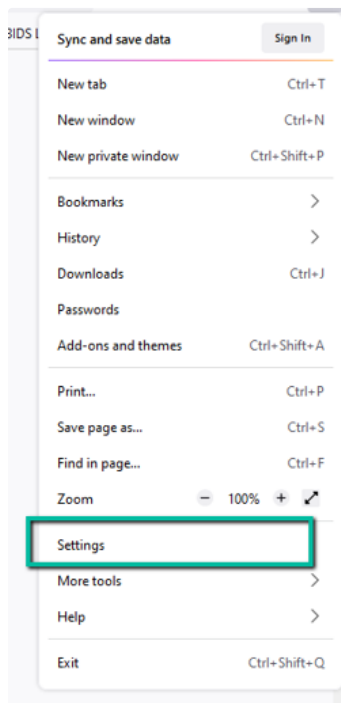
8. **Make sure to close your browser FIRST** after clearing your data

## How to Clear Cache in FireFox

1. Open FireFox Browser
2. Click the “3 Line” icon on the top right of the browser



3. Navigate to Setting

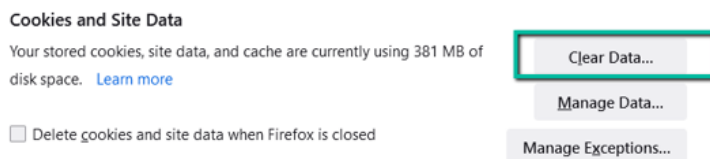


4. Click Privacy and Settings on the left side of the menu

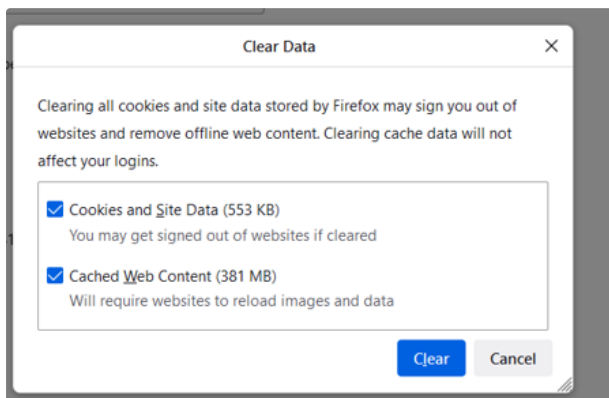


5. Scroll down to the **Cookies and Site Data** header

6. Select the **Clear Data** button




7. Check the boxes on the Clear Data pop-up window, then select the Clear button



8. **Make sure to close your browser after clearing, then reopen the browser to continue working**

## Website URL Info

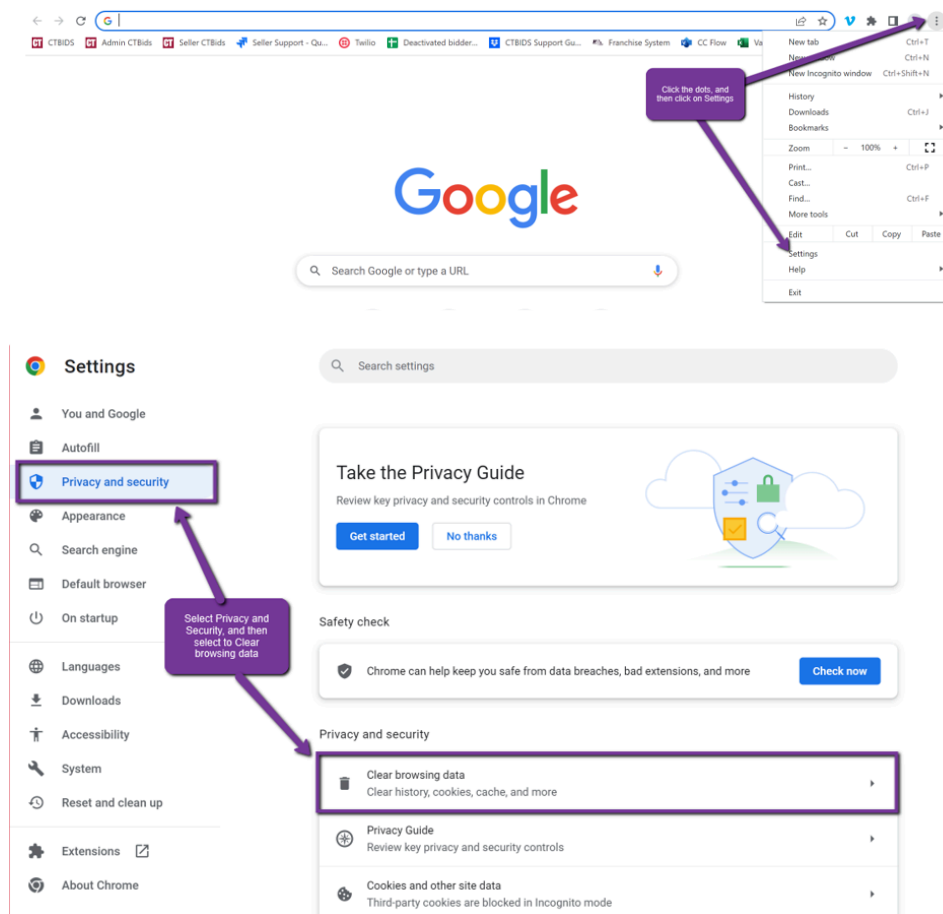
1. Every location has a Vanity URL
2. The Vanity URL will redirect to the Location's CTBIDS page
3. Once the Location page is optimized, you will no longer see the location numbers in the URL.
  - a. <https://ctbids.com/locations/128/sales/> is an example of a Location URL
  - b. <https://ctbids.com/estate-sales/akron-oh> is the corresponding Optimized URL
  - c. <cle-akron.ctbids.com> is the corresponding Vanity URL to the ones mentioned above

 Please only use the Vanity URL for marketing and advertising purposes

## URL/Website Not Working?

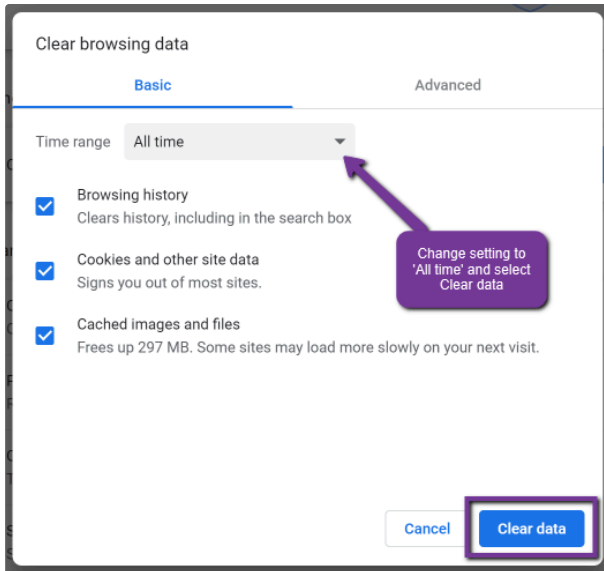
If you are not able to view, or are having difficulties with the site, please make sure to clear your Cache and website history/data. Follow these steps below:

1. Refresh the webpage
2. Click on the Customization/Control setting at the top right corner of the screen
3. Select Settings
4. Select Privacy and Security
5. Select Clear browsing data
6. Change setting to 'All time' for time range
7. Select Clear Data



✘ **There was a problem accessing this content** ✕

Check your network connection, [refresh](#), and try again. If the problem persists, contact your administrator for help.



**There was a problem accessing this content**

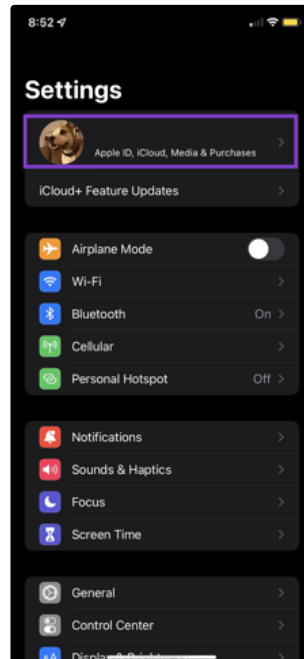
Check your network connection, \_\_\_\_\_, and try again. If the problem persists, contact your administrator for help.

## Apple ID Settings

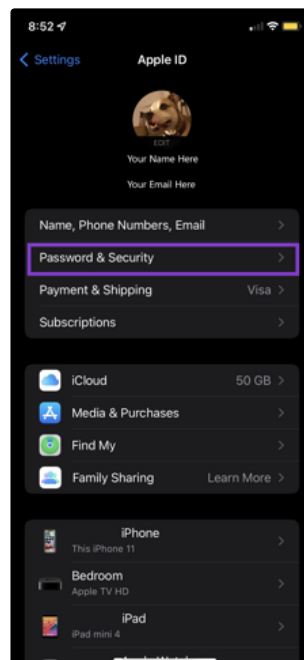
If a user has registered using their Apple ID and are having issues logging back in or deleted their previous account, they will need to 'Stop Using Apple ID' from their account, and re-register or sign in.

To Remove Apple ID from your Apple Device:

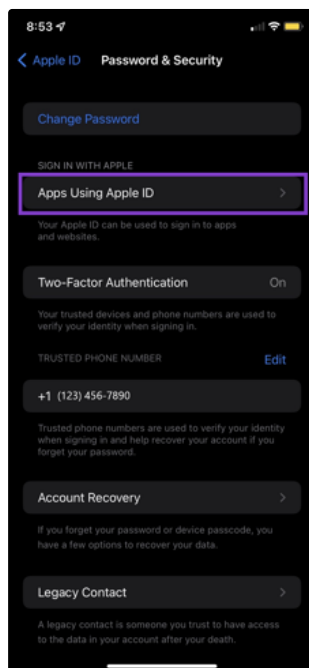
1. Go to Settings on your phone, and select where it has your name and Apple ID



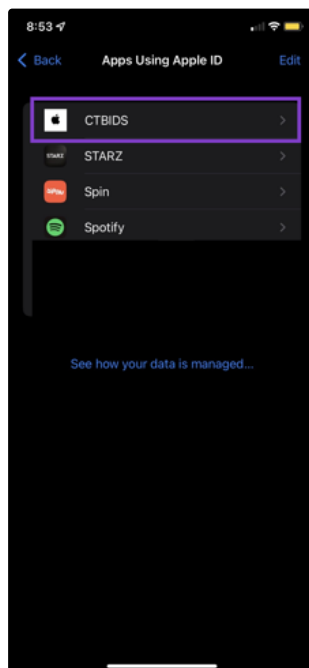
2. Go to your Password & Security setting



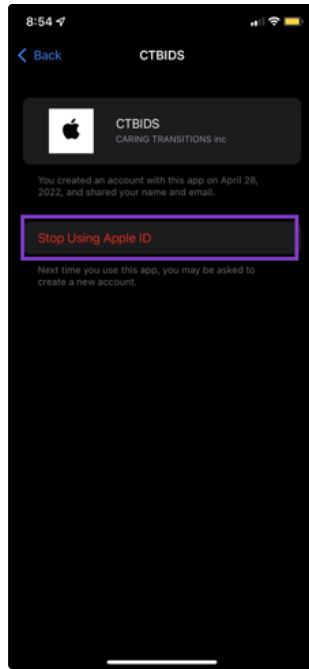
### 3. Select Apps Using Apple ID



### 4. Select the app CTBIDS



### 5. Select Stop Using Apple ID



## Seller App Supported Platforms

With countless devices and browsers available on the market, we have documented the best recommendations to use with the CTBIDS Seller App. Please use the below as guidance moving forward.

### **Android**

**OS Version:** Supported OS Version → 5.0+

#### **Devices Tested and Certified with OS Version.**

Nexus 6 → Android Version 7.1.1,

Samsung galaxy S10 Lite → Android Version 11,

Samsung M31 → Android Version 11,

Moto X4 → Android Version 9

Samsung Galaxy A20 → Android Version 9.0

Galaxy Tab S7 → Android Version 11.0

Google Pixel 5 → Android Version 11.0

Google Pixel 2 → Android Version 9.0

#### **Devices Supported. Supported OS Version → 5.0+**

### **iOS**

**OS Version: 9.2**

#### **Devices Tested and Certified with OS Version**

iPhone 6s → iOS Version 14.6,

iPad Air (4th Generation) → iOS Version 14.6,

iPhone 12 → iOS Version 14.5,

iPhone SE (2nd Generation) → iOS Version 14.5,

iPhone 11 → iOS Version 15.4.1

iPhone 8 → iOS Version 14.4.2

### **Image and Video Supported**

Image Size: 5MB

Image Formats: All Formats Video Size 50MB

Video Formats: All video formats except hevc (iOS)

In App Camera: 20 concurrent images are supported on a 2GB RAM Mobile.

Maximum Images Supported: 40 Images can be added to a single item

Maximum Images Video combination tested for Publish from Queue is 1GB (using 4GB RAM Quad Core Processor).

### **RAM and Storage Supported**

RAM: 2GB and above. Recommended minimum is 4GB

Storage: 32GB and above. Recommended minimum is 64GB

Free Space for Processing: 1GB RAM (Recommended to close other application on 2GB RAM Mobile)

### **Network Supported**

Mobile Network: 3G and above. (4G LTE, 4G+ is recommended)

Broadband/ Wi Fi: Speed of over 50 kbps is recommended.

Bandwidth / Network availability will determine the time taken to upload pictures or videos to the servers for publishing.

### **Device Specific Information**

Some Android devices might show a black/white screen when the images are processing. Please wait for the images to process and list in the sale item.

### **How to find out the specifications for any device:**

[G How to Find the Specs for Any Device You Own](#)

## Helpful Hints Before Reporting an Issue

Here are some helpful hints for you to try troubleshooting before submitting a ticket for bugs/errors

### Mobile

- Always check to make sure you are on the most up to date version of the app (Upgrade Needed)
- Try logging out and logging back in
- Try rebooting your device (Turning off and back on again)
- Check your internet connection
- Uninstall and Reinstall the app
  - Do not do this if you have items in Queue- please Publish items before as they will all be lost with the uninstall
- Clear your website/browser history
- Close the browsers and re-open

### Desktop

- Clear your cache/browser history
- Check your pop-up notification settings
- Check to see if your browser needs to be updated
- Reboot your system (Shutdown/Restart the desktop)
- Try logging out and back in again
- Are you getting the same error on another browser?
- Close the browsers and re-open

**If you are still getting errors and need to submit a ticket- Please make sure to have the following information included:**

- Description of the issue -
- What device are you using?
  - Mobile or Desktop?
    - Mobile- what is the make and model of the mobile device?
    - Desktop - what browser are you using when this error occurs?
- Where did the issue occur?
  - Mobile - on a browser or the app?

- Desktop - what browser are you using?

## How to View Bid History

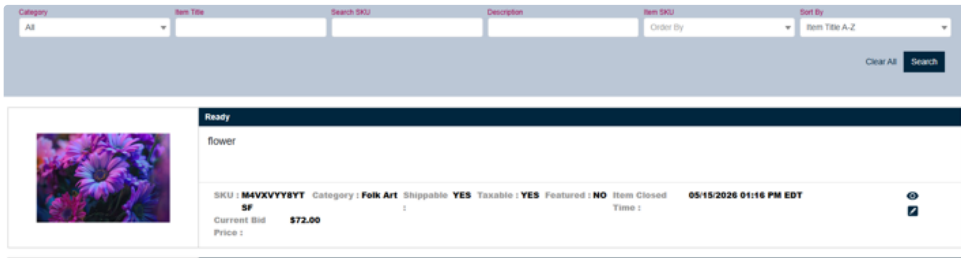
To view bids on an item (active or sold), do the following:

1. Sign in to your Seller account
2. Click on 'Sales' from the left-side menu
3. Search for the sale the item was a part of
4. Select the 'Dashboard' icon of the sale
5. Find the item you would like to view the bids on and select the 'Eye' icon to view. If there are bids listed on the item, you will see the bid history.

## Current Bid on Dashboard

You now have the ability to see all current bids on the Sale Dashboard

1. Login to [Seller.ctbids.com](https://Seller.ctbids.com)
2. Select Sales on the left-hand side
3. Search for the sale you want to view and click on the Dashboard icon
4. When the sale is live, you will now see the 'Current Bid Price' next to each item in the sale.
  - a. Please note that once the sale is over, it will change to 'Sold price'



The screenshot shows a search bar at the top with filters for Category, Item Title, Search SKU, Description, Item SKU, and Sort By. Below the search bar is a 'Ready' item listing. The item is titled 'flower' and has a thumbnail image of purple flowers. The listing includes the following details: SKU: **M4XCVYYBYT**, Category: **Folk Art**, Shippable: **YES**, Taxable: **YES**, Featured: **NO**, Item Closed Time: **05/15/2026 01:16 PM EDT**. The current bid price is **\$72.00**. There are also icons for eye and a document.



The screenshot shows a 'Sold' item listing. The item is titled 'test1' and has a thumbnail image of a wooden dining table. The listing includes the following details: SKU: **MSM37TIXHC**, Category: **Furniture**, Shippable: **YES**, Taxable: **NO**, Featured: **NO**, Item Closed Time: **05/13/2026 08:30 AM EDT**. The sold price is **\$2.00**. A purple arrow points to the 'Sold Price \$2.00' text. There are also icons for eye and a document.