DonorView Auctions Module

Volunteer Field Guide

Quick-reference troubleshooting for event day

Keep this guide accessible throughout the event.

📌 **KEY CONTACTS | DonorView Support: support@donorview.com**

What's inside:

01 — Login & Account Issues	06 — Checkout Issues
02 — Password & Account Locked	07 — Credit Card Problems
03 — Portal Setup & Registration	08 — Bid Entry & Override
04 — Duplicate Constituent Records	09 — Communication Quick-Send
05 — Bidding Errors	10 — Common Volunteer Tasks

01 — Login & Account Issues

Error Message	What It Means	How to Fix It
Login Not Found	No portal account exists, or wrong email was used	Go to Admin Menu → Users → Portal Users. If not listed, have them register at the auction page. If listed, confirm they're using the correct email address exactly (no extra spaces).
Account Has Not Been Verified	Account created but confirmation email link was never clicked	Direct them to check email for confirmation link. OR: Admin Menu → Portal Users → click Pending status → change to Active → Update.
Wrong Password	Account exists, email is correct, but password is wrong	Ask them to check CAPS LOCK and no leading/trailing spaces. Or click Forgot Password on sign-in screen — they'll receive a reset email.
Account Has Been Locked	Too many failed login attempts	Admin Menu → Portal Users → find user → click Reset Password. Password resets to: password123 (all lowercase, no spaces). Tell them to log in with this and change it after.

Quick Fix — Admin Password Reset Steps:

1. Click your Organization name (top right corner)
2. Click Users → Portal Users
3. Search for the constituent by email or name
4. Click Reset Password next to their record
5. New password is: password123 (all lowercase, no spaces)
6. Tell the bidder their new password — they can update it after logging in

02 — Password Issues & Locked Accounts

If a bidder says they forgot their password or can't get in:

1. Ask: Are you entering the correct email address? (No typos, no extra spaces)
2. Ask: Is CAPS LOCK on? Are you pasting with extra spaces before/after?
3. Option A — Self-service: Click Forgot Password on the auction sign-in page. A reset link goes to their email.
4. Option B — Admin reset: Portal Users grid → find user → Reset Password → password resets to password123
5. After reset, have them log in with password123 and update their password immediately

If Reset Password shows 'Login Not Found'

This means they do NOT have a portal account yet (or are using the wrong email).
Action: Have them register fresh at the auction page instead of trying to sign in.

🌐 03 — Portal Setup & New Bidder Registration

To bid online, every bidder needs: ① a portal account AND ② a credit card on file

✅ Desktop Registration

- Go to auction page URL
- Click Register (top right of page)
- Fill in name, address, email
- Enter credit card number
- Click Save — account is created
- Bidder can now place bids immediately

✅ Mobile Registration

- Go to auction page on phone/tablet
- Tap the ☰ (three lines, top right)
- Tap Register or Sign In
- Follow same steps as desktop
- If no email access on phone → you can activate their account from Admin Portal Users grid

🚨 Most Common Registration Problem: Duplicate Email

Every bidder needs their OWN unique email address.
Spouses trying to share an email? Options:
Option A: Each spouse creates their own account with their own email
Option B: They share one login (same email + password) — only one can bid at a time
Two people cannot use the same email to create separate portal accounts.

👥 04 — Duplicate Constituent Records

Duplicates happen when a bidder uses a different name or email than what's in your database.

Do NOT panic — duplicates do not need to be merged immediately.

What to do at the event:

The bidder can still place bids with no problem — their online bids will work.
They may need to re-enter their credit card if they used a different email to buy tickets.
At checkout: you may need TWO separate checkouts — one for each bidder ID (items won online vs. live/paddle raise items).
To identify duplicates: Auction Bidders grid → sort by Last Name column.
If you choose to merge records, keep the record WITH the portal account as the master record.
To find which record has the portal: Constituents grid → look for Login Name column.

05 — Bidding Errors & Issues

Problem	Likely Cause	Solution
Bidder clicks Bid Now, gets 'Login or Register' message	Not signed into portal	Have them click Sign In (or Register if new) before placing a bid.
Bidder signed in but still can't bid — sees payment warning	No credit card on file	Bidder: click their name (top right) → Payment Options → +Add credit card. Or staff: right-click red CC icon on Event Attendance grid to send them a secure update link.
Bidder entered a wrong bid (e.g. $3,000 instead of $300)	Input error	Admin: Auctions Grid → Tools on item row → Assign Bid → Remove Bid. Item reverts to last valid bid or starting bid.
Bidder wants to bid but has no phone or prefers paper	Comfort with technology	Staff can place a bid for them: Auctions Grid → Tools → Assign Bid → enter their bidder ID and bid amount. Note: no CC required this way — verify their card separately.
Bidder not receiving outbid text notifications	Did not enable text notifications, or no phone number on file	When placing a bid, toggle 'Notify me via text' to YES and enter phone number. Or update their constituent record with a mobile number.

06 — Checkout Issues

Before starting checkout: sort the Auctions Grid by Last Name/Constituent to see all items per bidder together.

Situation	What to Do	Notes
Bidder won one item only	Tools menu on item row → Process Payment	Add-ons/paddle raises auto-include in window. Select payment type → Process.
Bidder won multiple items	Check the box on each item row → click Checkout at top	All checked items appear in one checkout window. One thank-you email sent.
Bidder wants to split payment methods	Do separate checkouts — check boxes for items in each batch separately	Each batch triggers its own thank-you email.
Bidder wants to split item cost with someone else	Select item → Actions → Split Winning Bid → enter each person's share + name	Cannot edit after any one portion is paid. Each person checks out independently.
Bidder left early without paying	Use Auctions Grid to see Amount Due → Actions → Send Direct Email or Text	Can also run a report showing all outstanding balances.

Situation	What to Do	Notes
Item shows Amount Due but bidder says they paid	Switch to All Transactions view in Auctions Grid	Look for the paid entry. If missing, process payment again with 0 amount or correct entry.

> 💡 **Checkout View Tip**
> Use the 'Check Out' view from the Views Library — it shows only items with Amount Due > $1, sorted by last name.
> After payment is processed, items disappear from this view automatically.
> Switch to 'All Transactions' to see everything (paid and unpaid).

💳 07 — Credit Card Problems

Problem	Cause	Solution
Card on file is declined during batch process	Card expired, insufficient funds, or wrong info	Item stays blue (unpaid). Process this bidder manually from Auctions Grid using a different payment method.
Bidder wants to add a credit card at checkout	No card was pre-loaded	In the Process Auction Payment window: select Credit Card as Payment Type → enter card number, expiration date, and CCV at bottom of window.
Bidder wants to update/change their card	Old card expired or closed	Staff: Event Attendance grid → right-click red CC icon → Send Update Request → send secure email link. OR Bidder: portal account → name (top right) → Payment Options → +Add credit card.
Wrong card charged	Multiple cards on file, wrong one selected	Contact DonorView support to reverse. For future: hover over green CC icon to see last 4 digits before selecting.

✏️ 08 — Bid Entry & Override (Staff)

Assigning a winning bid manually:

6. Auctions Grid → find the item → Tools menu → Assign Bid
7. Search for the constituent by Bidder ID number or name
8. Enter the Bid Amount (Number of Bids is optional)
9. Click Assign Bid to save

Removing a bid (bidder made an error):

10. Auctions Grid → item row → Tools → Assign Bid → Remove Bid
11. Item resets to previous highest bid, or to starting bid if no other bids exist

Editing a bidder ID number:

12. Confirm 'Allow to Edit Bidder #' is set to YES in Event Settings
13. Auction Bidders Grid → click pencil/edit icon on the row
14. Enter new Bidder # → click Update
15. The new number must be unique — duplicate numbers will not save

09 — Quick Communication Guide

What to Send	Where to Go	Notes
Notify ALL bidders (text or email)	Auctions Module → Auction Bidders Grid → Actions → Send Text / Send Direct Email	Includes all bidders, even those not at the event in person
Notify winners only	Auctions Grid → Actions → Winning Bid Email Notify OR Winning Bid Text Notify	Standard non-customizable message. Use Direct Email for custom wording.
Notify specific attendees	Event Attendance Grid → Actions → Send Text / Send Direct Email	May miss bidders who registered online only
Contact bidder with outstanding balance	Auctions Grid → filter by Amount Due → Actions → Send Direct Email	Can also use the Auction Bidders grid to find and message them
Send add-on / paddle raise bidders a message	Auctions Grid → select rows → Actions → Send Direct Email or Text	Filter to add-ons or paddle raise view first

⚠ Daily Text Message Limit

You can send up to 2,000 direct text messages per day.
Example: 500 bidders × 4 texts = 2,000 max for the day.
Automated system messages (bid confirmations, outbid alerts) do NOT count toward this limit.

10 — Common Volunteer Tasks At-a-Glance

Task	Where + How
Activate a pending portal account	Admin → Users → Portal Users → click Pending → change to Active → Update
Reset a bidder's password	Admin → Users → Portal Users → find user → Reset Password → 'password123'
Add a new bidder ID number	Auction Bidders Grid → edit icon → enter unique new Bidder # → Update
Record a raffle ticket purchase (add-on)	Auctions Grid → Purchase Add-On Item (top of grid) → select item, bidder, qty → Process
Record a paddle raise donation	Auctions Grid → Add Paddle Raise & Add-On → select amount → enter bidder IDs one at a time → Save
Remove a bid entered by mistake	Auctions Grid → item row → Tools → Assign Bid → Remove Bid

Place a bid on behalf of a bidder	Auctions Grid → item row → Tools → Assign Bid → enter bidder ID + amount
Check out a single bidder	Auctions Grid → item row → Tools → Process Payment → select payment type → Process
Check out a bidder with multiple items	Auctions Grid → check box on each item row → click Checkout → Process
Batch process all credit cards (no add-ons)	Bid History Grid → Actions → Process Bids → type YES → OK
See all outstanding balances	Auctions Grid → Views Library → Check Out view
Print all bid sheets at once	Auctions Grid → Actions → Print Bid Sheets
Send winning bid notification to all winners	Auctions Grid → Actions → Winning Bid Email Notify or Winning Bid Text Notify

Need More Help?

DonorView Support: support@donorview.com

For account-level issues, you must have Admin access to resolve portal problems.