DONORVIEW

Live Event Frequently Asked Questions - Rev 2

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Pre-Event

What training videos and documents should be reviewed prior to the event?

1. For events linked to an auction, we recommend a different guide and FAQs. Find the guide here: https://support.donorview.com/en/support/solutions/articles/9000236081-auction-event-guide-and-checklist And the auction-event FAQs here: https://support.donorview.com/en/support/solutions/articles/9000236625-faqs-for-an-auction-event
2. An outline and checklists are available for creating and managing an event here: https://support.donorview.com/en/support/solutions/articles/9000236150-event-management-outline-checklist
3. Event Training Videos
    a. Single Day Event Setup - https://vimeo.com/736154790/28f017a613
    b. Event & Attendee Questions - https://vimeo.com/732471168/ab2a288419
    c. Event Summary Grid - https://vimeo.com/735773292/a2775b4c3a
    d. Events Detail Grid - https://vimeo.com/736213633/4644b47beb
    e. Event Attendance Grid - https://vimeo.com/728826049/8dfe9b27d3
    f. Event Table Assignments - https://vimeo.com/741142781/7d79d8b591
    g. Event Group Assignments - https://vimeo.com/735850438/5b93b0c7a7
    h. Event Auto Reminders - https://vimeo.com/722260141/aa62e84e84
4. Event Support Articles - https://support.donorview.com/support/solutions/9000074823
5. Mobile App
    a. Mobile App - iPad: https://vimeo.com/738265241/450ca22c8a
    b. New Stripe Swiper - https://vimeo.com/1024079232/ec89adabb3
    c. ID Tech Swipers - https://vimeo.com/1024081097/a09b8ceeed
6. Donor Portal - Constituent/Donor Portal - https://vimeo.com/197283655/e26186c271
    a. Some auction participants may encounter issues logging in to their donor portal account. You can see all the most common issues and how to address them in this support article: https://support.donorview.com/support/solutions/articles/9000218757-how-can-i-help-a-donor-who-has-trouble-logging-in-to-the-portal-

Software, Mobile App & Portal

What are the differences between the cloud-based version of the DonorView software platform, the mobile app, and the donor portal?

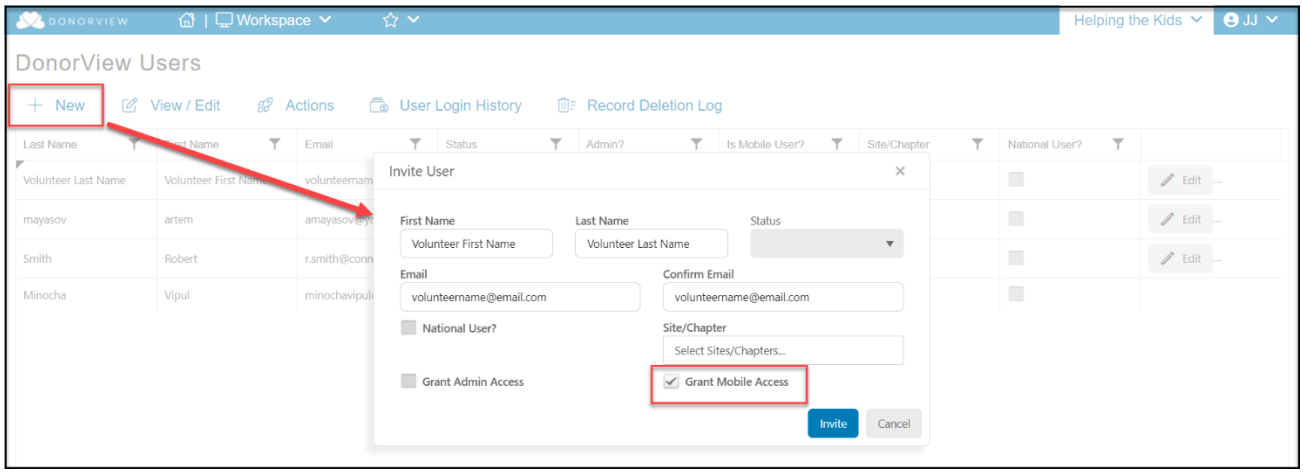
1. The cloud-based version of DonorView software is accessed via a browser like Chrome or Firefox typically using a laptop or desktop computer.

   a. The software platform allows access to all of the back end features of the software like building and managing the event registration, auction and donation pages.
   b. It is also where you can update guest information, record auction add-ons, and manually check-in and check-out guests.
   c. Some activities performed during an event can only be done using the software platform.

2. There is also a mobile app version of the software called **DV Connect** available from iTunes.
   a. The mobile app is a pared down version of the software platform and has limited functionality compared to the desktop/laptop software.
   b. The same user email and password is required to login to desktop version and the mobile app.
   c. The mobile app is not currently available for Android devices.
   d. The mobile app can be used at events to check-in guests, sell tickets and other items, and swipe credit cards to store in a constituent's account.
3. The Donor Portal allows the donors to access their own information and manage their own accounts.
   a. With the advanced portal feature activated, donors can access the event calendar and event pages to purchase tickets and manage their own guest list.
   b. Without the advanced portal features activated, donor portal activities are limited to just updating contact information or accessing active auction or peer-to-peer campaigns.

How do I set up users to help at the event?

1. An admin user will need to send new user invitations to the personnel supporting the event that will need access to the back end of the software or use the mobile app.
2. An overview of Donor View User Management can be found in this video https://vimeo.com/855057481/b5e75d53ea
3. Support personnel should be assigned as "Mobile User" so that they can access all the necessary features in the software and mobile app for managing the event.



Can a DonorView User be logged in to multiple devices at once?

1. Yes, the same DonorView user credentials can be logged into multiple devices.
2. It is recommended that only non-admin users IDs be shared at the event.

Can a DonorView user have the same login for the backend software and the donor portal?

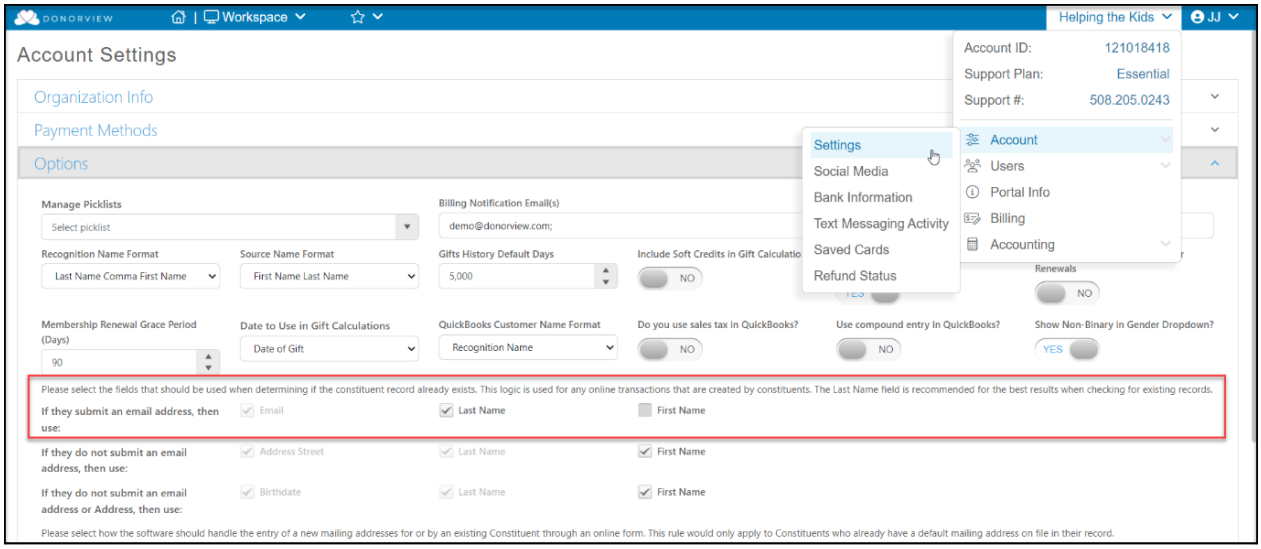
1. Technically, yes, however a different browser must be used.
2. If you use the same email address to login to the software platform and the portal and are using the same browser, you will be locked out of the backend of the software platform and will need the DonorView support team to unlock your account.
3. **To prevent issues with login, it is strongly recommended that a different email address be used to login to the software platform and the portal.**
4. Using two different emails – one for managing the back end of the software and one for logging into the portal as a donor – will allow you to use the same browser, however as soon as you log in to the portal, you will be logged out (but not locked out) of the software platform.
5. For best performance, use one email address to login to the back end of the software platform, then open a new browser (not just new browser tab) or incognito tab and access the portal using a different email address.

Constituent Records

Why are duplicate records formed when someone is registering for the event?

1. Duplicate records are formed when the constituent uses a different name or email address than the one that is already on file in the database.
2. To manage attendees, it is helpful to understand how duplicate constituent records are created and the importance of the primary email address for constituents.

3. By default, the software will create a new constituent if the combination of First Name, Last Name, and Email is unique.
4. With the default settings all three fields must match exactly in order to link a transaction to an existing constituent record.
5. Some organizations will elect to create new constituents on Last Name and Email fields only, or the Email field alone.
6. The benefit of removing First Name from the duplicate check is that spouses can share the same record or someone with a name like Robert can enter their name as Rob, Robert, Bob, Bobbie, or any other nickname and still be linked to their constituent record with just their Last Name and Email.
7. The options set up for the organization can be found in the menu under the organization name, under the **Account** menu, then the **Settings** menu.



Can a company constituent and an individual constituent record share an email address?

1. Yes, a company and an individual (contact) record can share the same primary email address.
2. Two individuals or two company records should not share the same email address.
    a. When attempting to save or update a constituent record where another record has the same primary email address, an error message will appear, and you won't be able to save the record.
    b. If you would like to save the information in both records, choose which one you would like to be the primary contact and enter the email address in the spot at the top of the constituent's profile page under their name.
    c. For the secondary constituent, you can save the email addresses farther down the constituent's profile record under **Emails.**

Do I have to merge duplicate records at the event?

1. No, duplicate records can be merged after the event, there is no urgency to merge them at the event.
2. If you decide to merge them at the event, be sure to keep the constituent record that has the portal account as the master record.

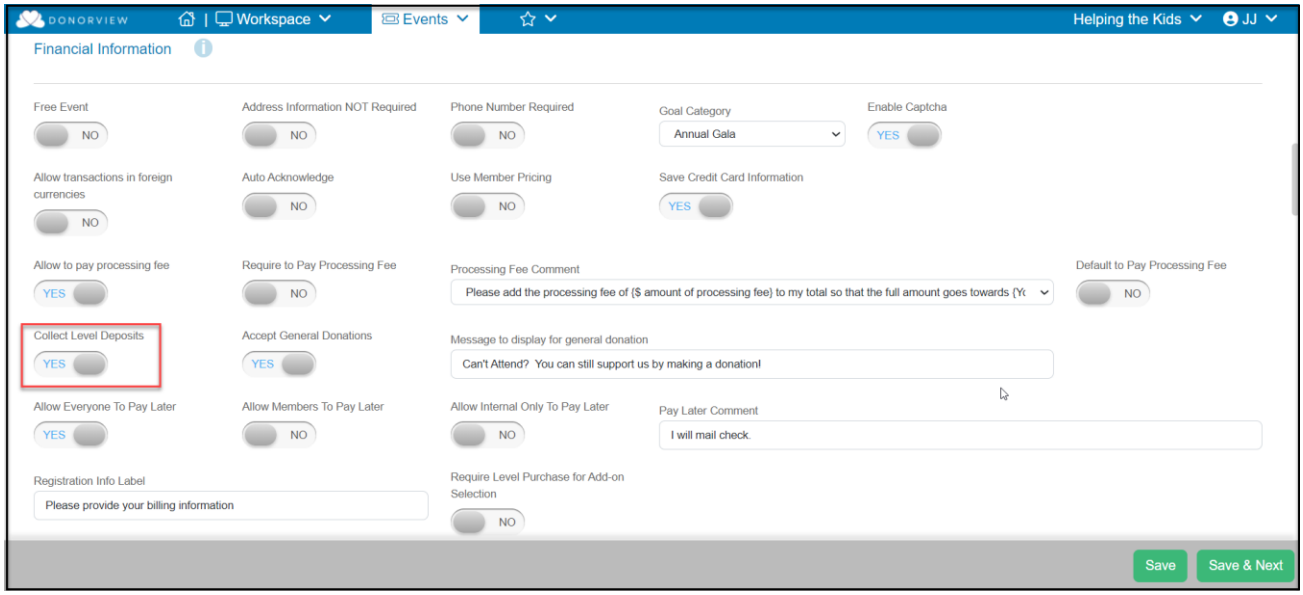
Pre-Event

Should sponsorships be an event level?

1. Including event sponsorships as an event level depends on whether the sponsorship includes tickets to the event.
2. Sponsorships that are event levels will allow all the sponsor's guests to be included on the same event attendance grid as other attendees.
3. If sponsorships do not include tickets, they can be add-ons or be collected using a donation page.

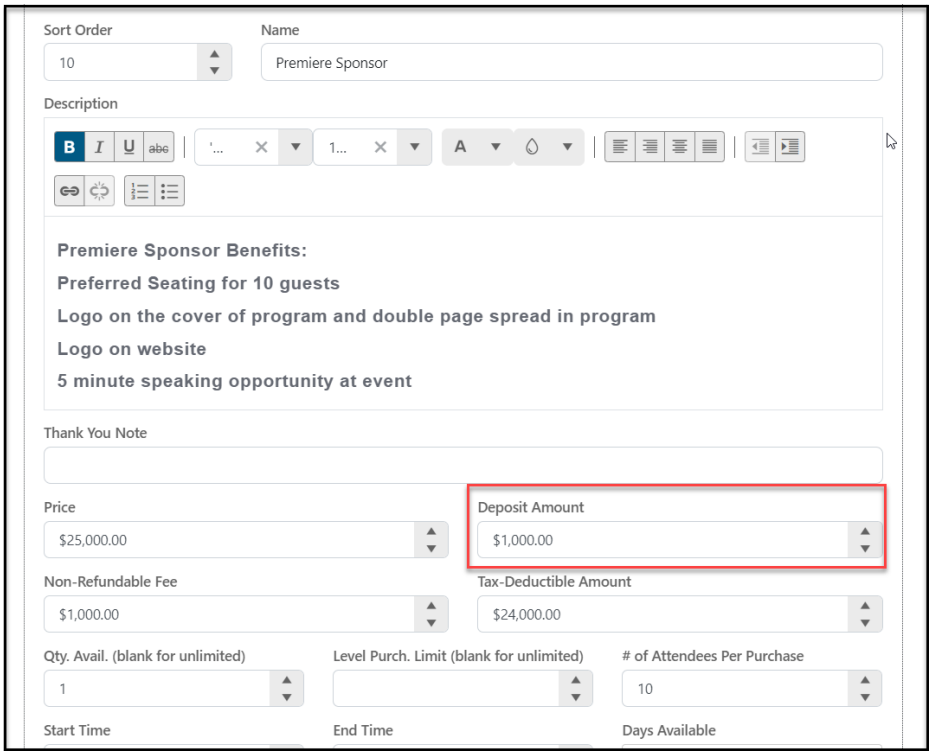
Can I take a deposit for an event purchase?

1. Yes, to turn on the deposit feature, set the **Collect Level Deposits** toggle to **YES** under the Financial Information section of the Event Settings Tab.



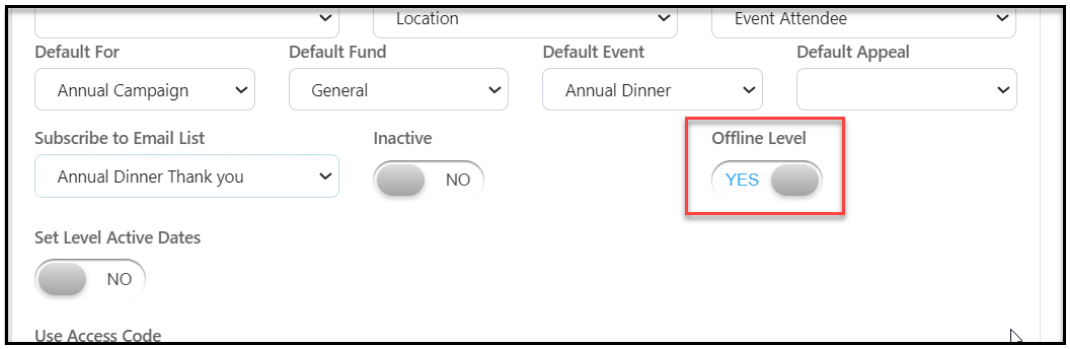
2. You can establish the deposit in the individual levels as needed.
   a. Enter the amount of the deposit required in the **Deposit Amount** field.
   b. When the transaction is made, the deposit amount will be shown in the Events Grid under the Amount Paid column and the remaining balance will be shown in the Amount Due column.

c. Leave the **Deposit Amount** field blank when the full purchase price is required.



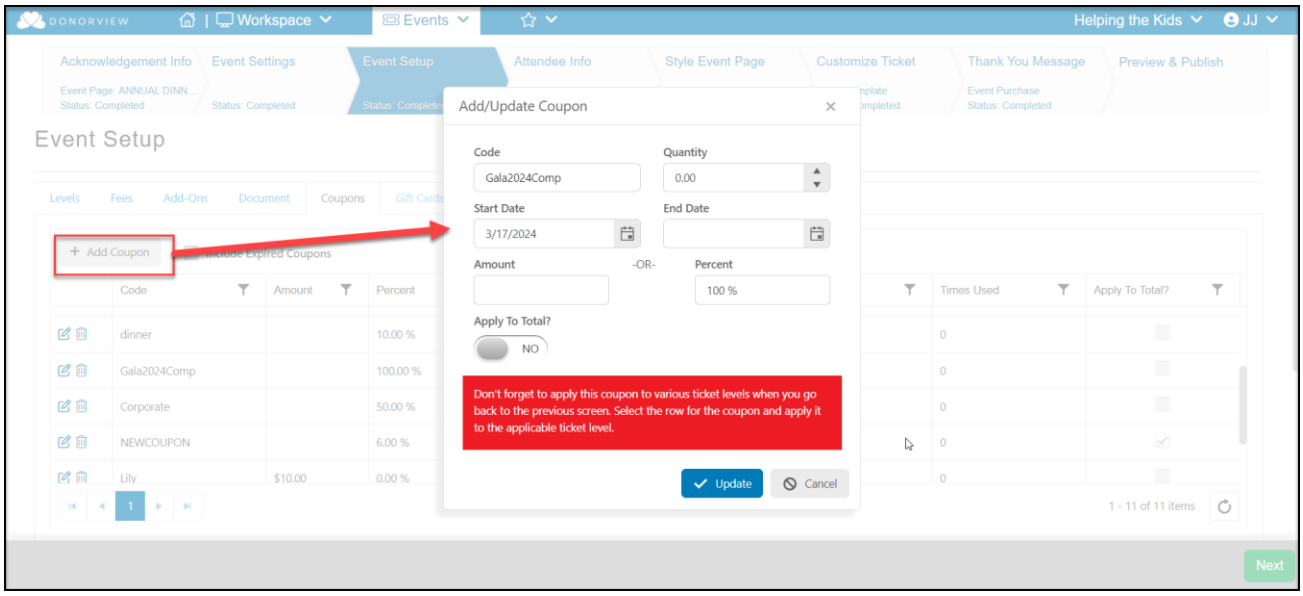
Can you create or assign complimentary tickets?

1. Yes, in the event set up tab, complimentary tickets can be created two ways, by creating an Offline Level or by creating a 100% off coupon.
2. From the event level, toggle the **Offline Level** to **YES.**

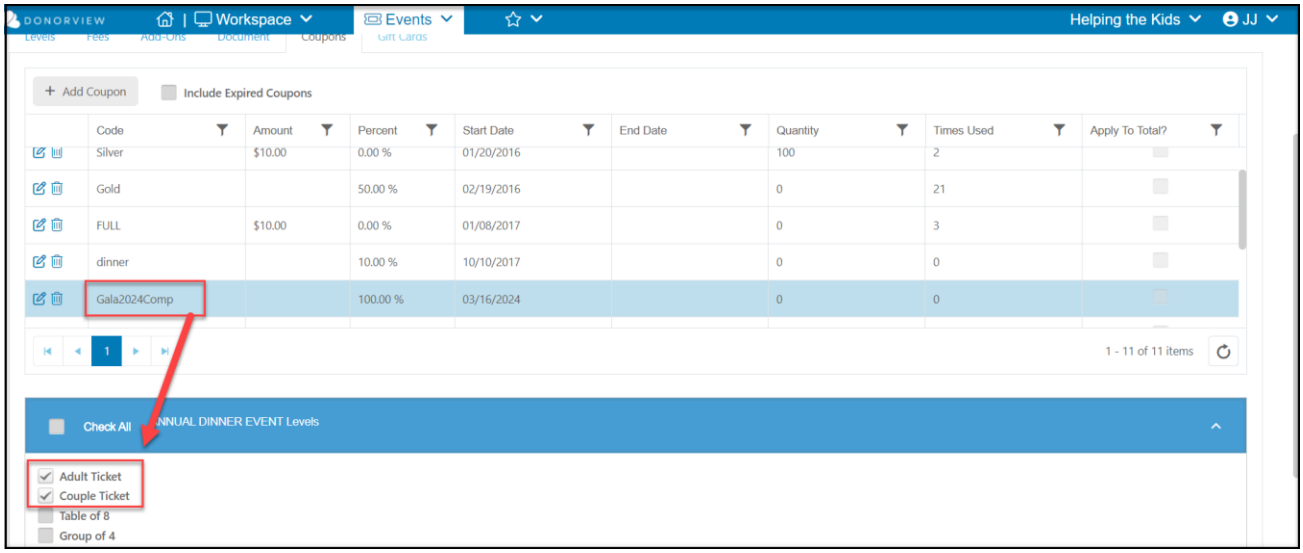


3. Any ticket levels identified as Offline Level will only be visible when logged into DonorView and using the same browser to view the page. They are not visible to the public.

4. You also have the option to create a 100% off coupon using the coupon tab under Event SetUp.



5. After creating the coupon, ensure that the coupon is turned on for the appropriate ticket levels.



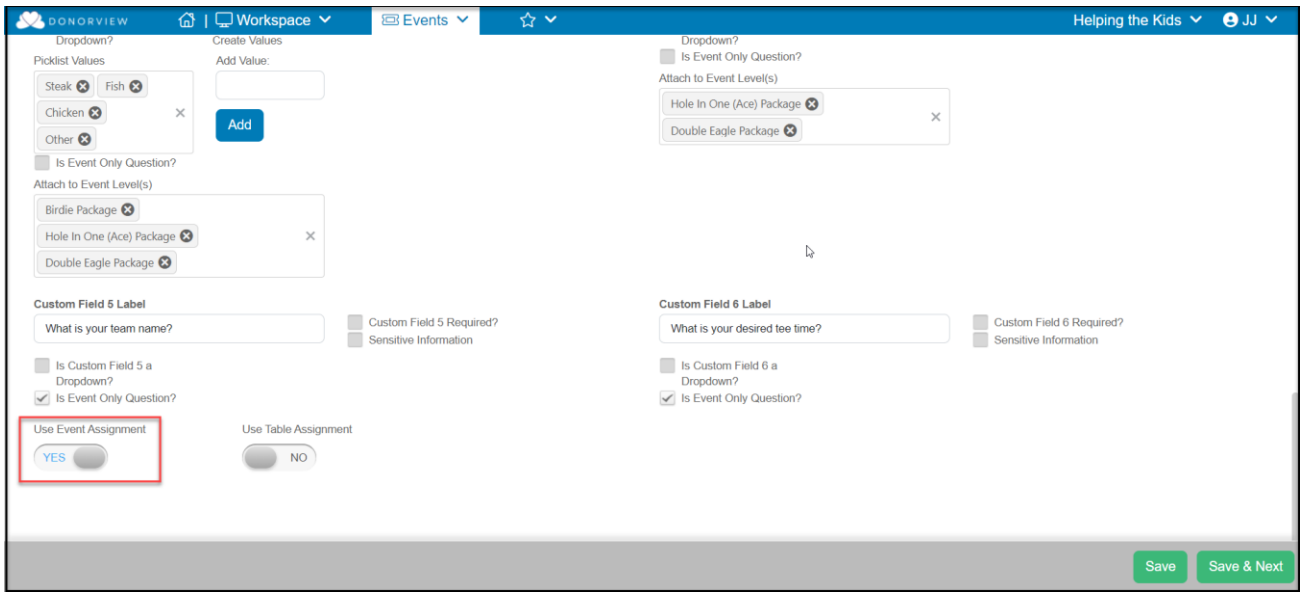
Can I hide free tickets or other ticket levels from the event page?

Yes, by using the Offline Only level as described above.

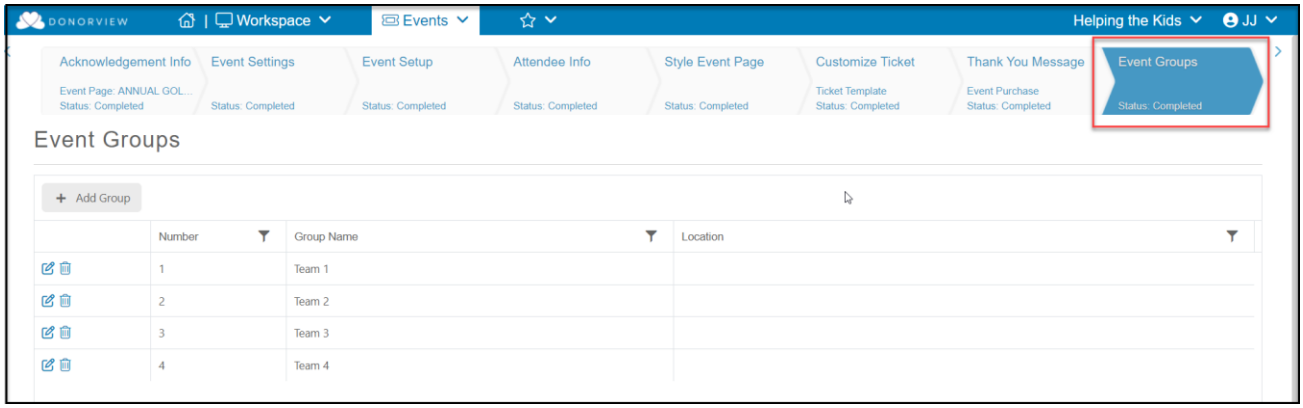
I have a golf tournament - can I assign event attendees into teams with a team leader?

1. Yes, attendees can be assigned into teams or groups using the Event Assignments feature.

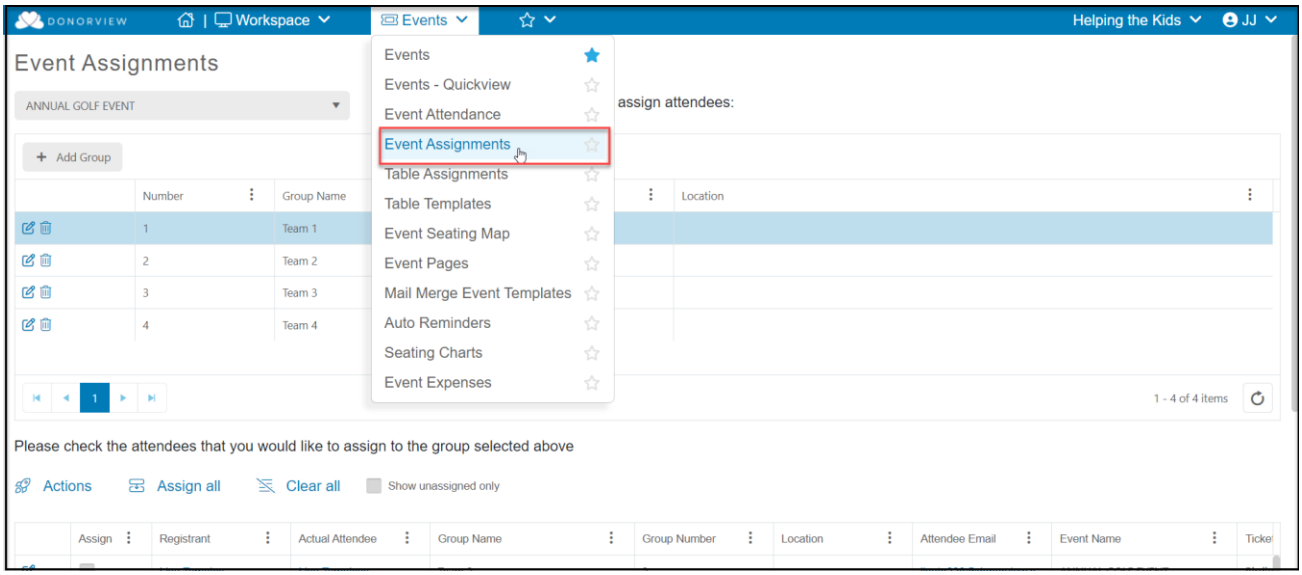
2. This feature is especially useful if you allow individual golfers to sign up for the event that need to be grouped into teams.
3. You must activate the Attendee Info section and request the names and emails of guests and set the **Use Event Assignments** toggle to **YES** at the bottom of the page.



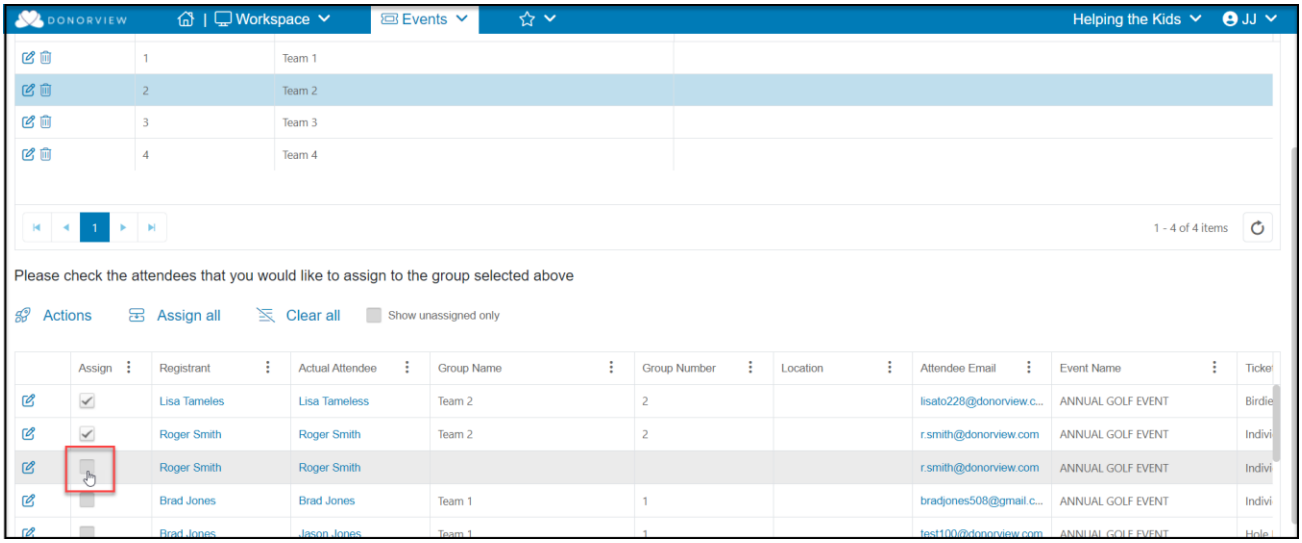
4. With Event Assignments activated, a new tab will appear in the event page editor for Event Groups.
5. Under the Event Groups tab, you can start creating your team names or numbers, but your do not need to enter all the information yet. Only one group designation is required to move forward.



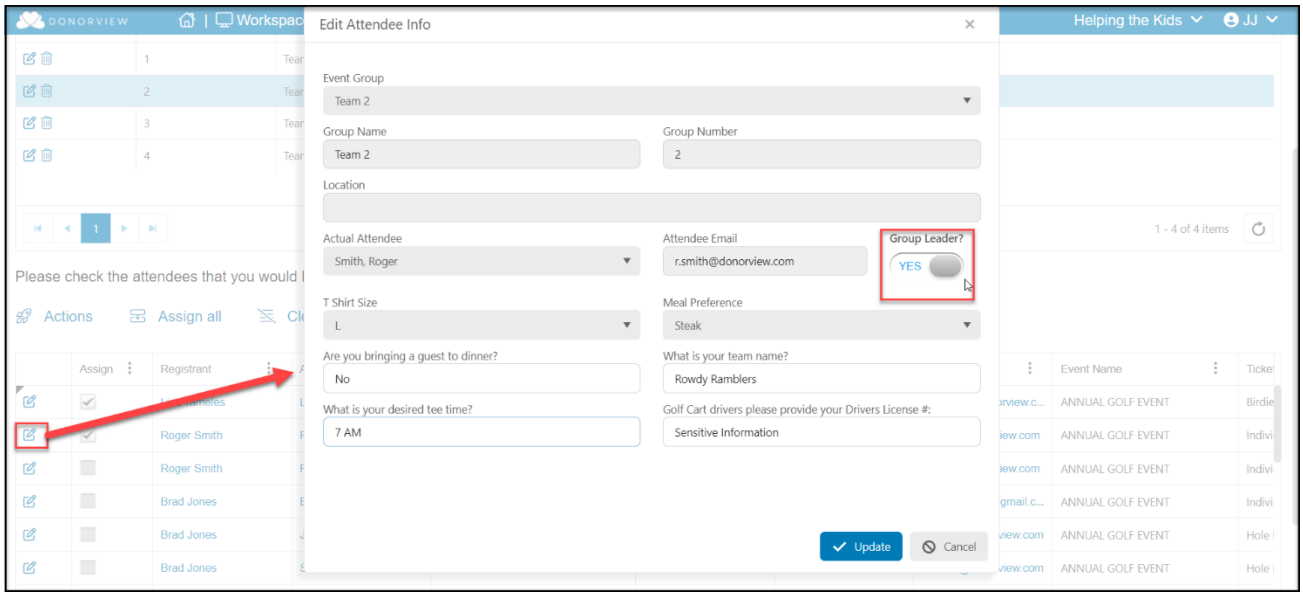
6. Once the page is saved and when the first ticket level has been sold, you can open the Event Assignments feature under the Events menu to begin assigning attendees to their groups (teams) and assign a team leader.



7. With the row selected for the team (group) you can check the box next to the attendee's name to add them to that team or group.



8. You can assign the team leader by clicking on the edit icon on the right side of the grid to open a new window.
9. Mark the **Group Leader** as **YES.**
10. Note that if you do not have all the attendee's name information yet, you can see which record is marked as the Group Leader on the Event Attendance grid.
11. Group information can be exported to Excel with the Action menu.



Do I need to have all the guest names (not just purchaser name) to use Table Assignments?

No, you can assign all the attendees to their tables and update the names later.

What if the ticket purchaser doesn't know the names of all their guests when they buy the tickets?

1. The software will use the purchaser's name as a placeholder so you will see the purchaser's name listed in both the Last Name/Constituent column and the actual attendee columns on the Event Attendance grid.
2. You can update the information using the edit icon on the event attendance grid. See the information below on updating guest information.

How can I get the guest names prior to an event?

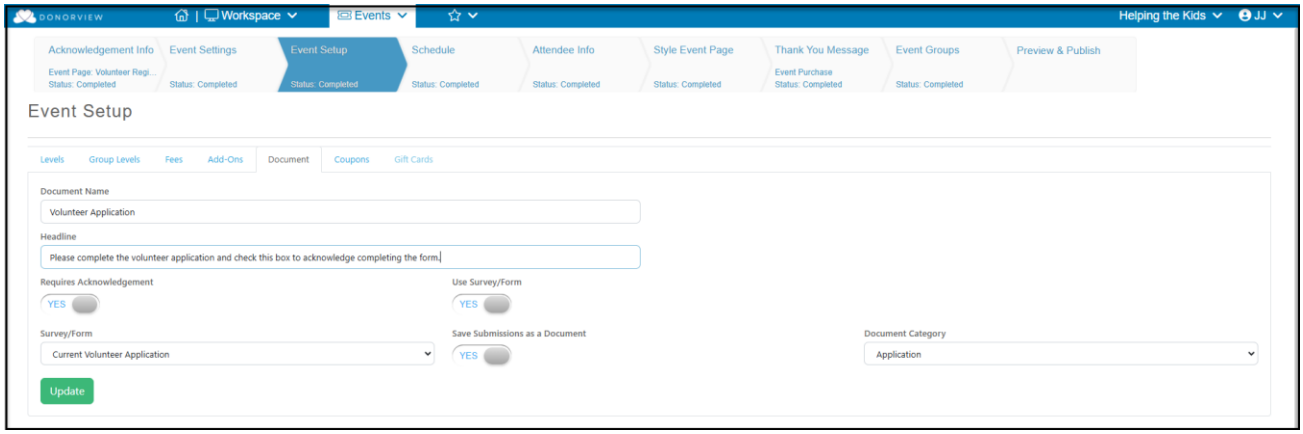
You can reach out to the purchasers as needed using the direct email and text features from the Actions menu.

Does the information collected in the Attendee Info tab populate into the constituent's profile record?

Only the name and email address are saved in a new constituent's record. Other answers or information is only saved in the Event Attendance Grid, not the attendee's constituent record.

What if I need to collect more information about the purchaser and save it in their constituent profile record?

1. You can use the documents survey feature to collect information that will populate into a constituent's record.
2. On the Event Setup tab, go to the Document sub tab.
3. Click on Use Survey/Form, then select the applicable survey to use and determine if this will be required and if you'd like to save it in the constituent's record.

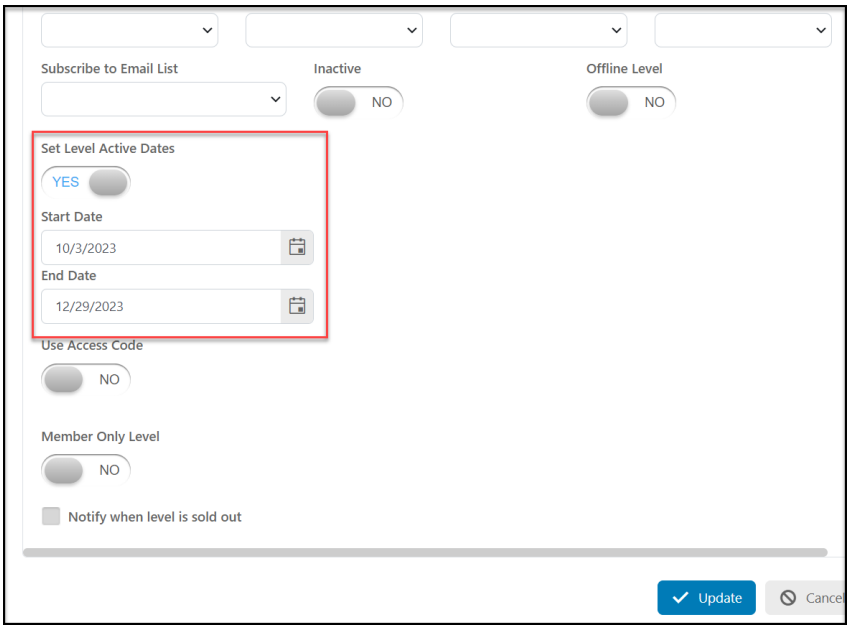


Do guests get counted as constituents?

Yes, each guest (actual attendee) name either links to an existing constituent record or creates a new constituent record.

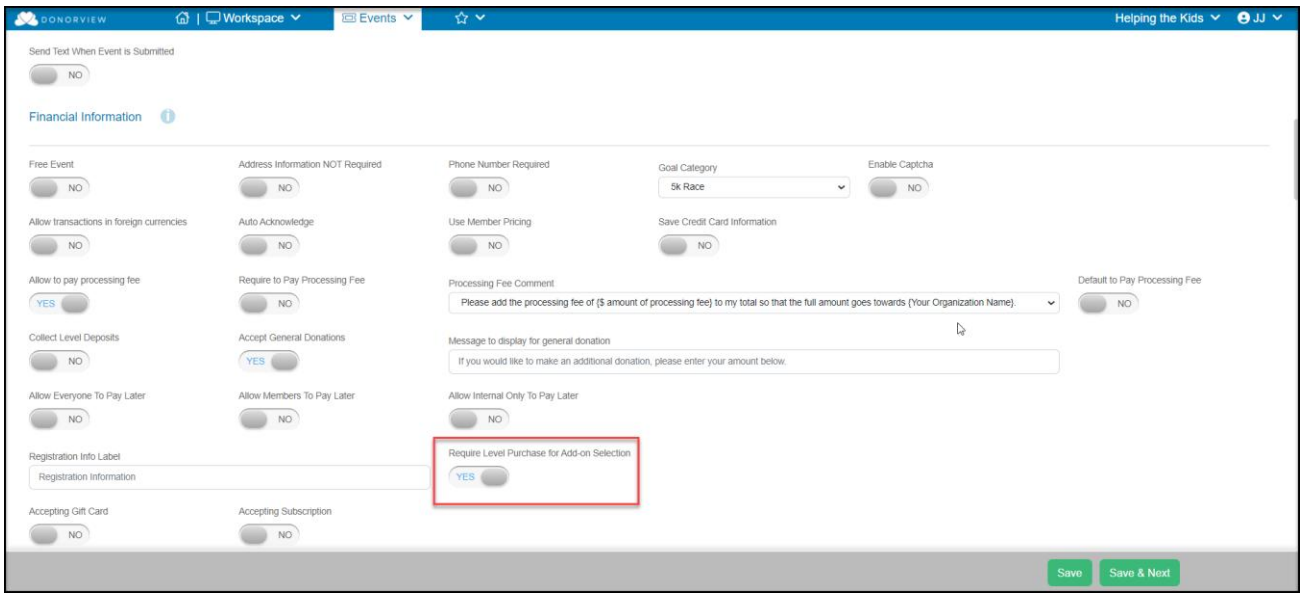
Can I offer early bird or late registration pricing?

1. Yes, using the **Set Active Level Dates** feature in the Event Setup.
2. Switch the Set Active Level Dates toggle to Yes and enter the date ranges you wish that level to be visible on the page.
3. This level will not be visible on your event page outside of these date ranges.
4. If you are doing an early bird and/or late registration tickets, be sure to create a level for standard pricing for the dates outside of those special prices.



When should I use an event add-on versus a ticket level?

1. Event add-ons are specifically designed for purchases that do not include admission to the event.
2. Add-ons can be things that are purchased after a ticket level purchase has been selected or independent of ticket levels by selecting **Require Level Purchase for Add-on Selection** to **YES**.

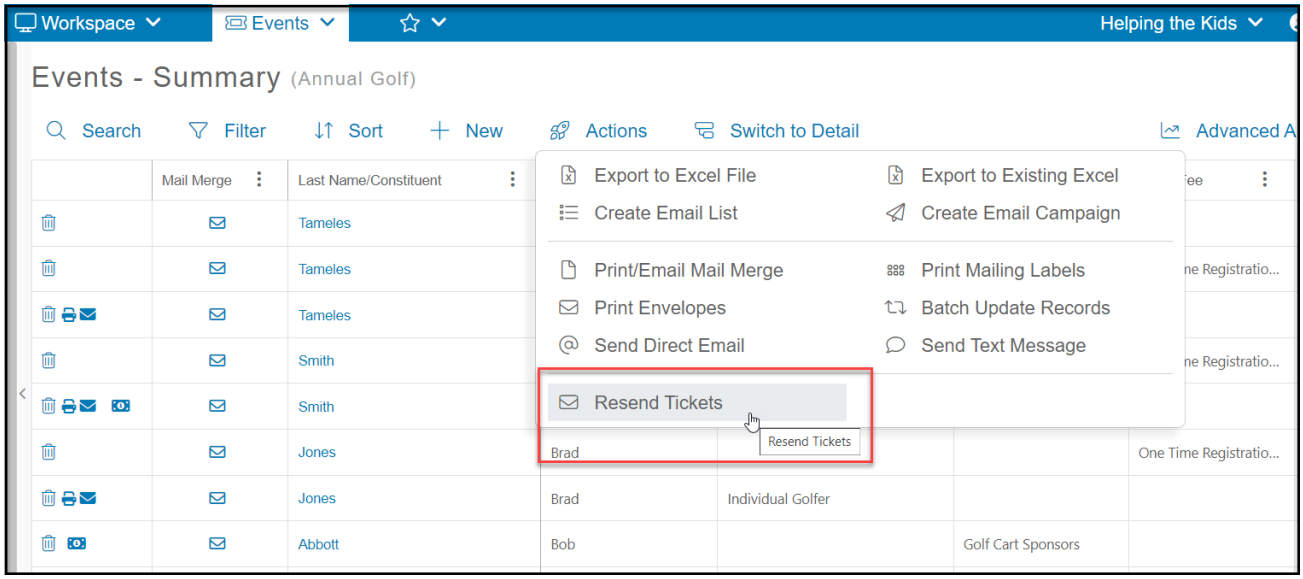


3. Add-ons are generally things like raffle tickets, t-shirts, advertising, and sponsorships that do not include tickets.
4. You can also create event levels with zero attendees if desired.

5. Add-ons and event levels with zero attendees will not appear on the Event Attendance grid, only the Events and Gifts grid will include the transactions.

Can I resend tickets?

1. Yes, but tickets are only sent to the purchaser, not to each of their guests.
2. Click on the solid blue envelope icon on the far left side of the Events grid to resend tickets to a specific purchaser or used the Actions menu to resend all the tickets.



How should spouses be listed as attendees – each with their own record or together in one record?

1. This is a decision your organization needs to make about how you intend to manage couples and spouses.
2. You can have both people share one constituent record if they interact with your organization together and there is no need to track their time, donations, purchases, or communication separately.
3. Each spouse should have their own record if you need to track their time, donations, purchases, or communications independently OR if each spouse wishes to bid in an auction independently.
4. If you keep the couple in one record, you can assign them to two seats and show both of their names in the actual attendee column.
5. If you prefer to have couples share are record and want to prevent duplicates, see the information about preventing duplicates above.

Do purchasers and their guests get their tickets email to them?

1. No, only the purchaser will receive a copy of all the tickets via an email with a pdf attachment.

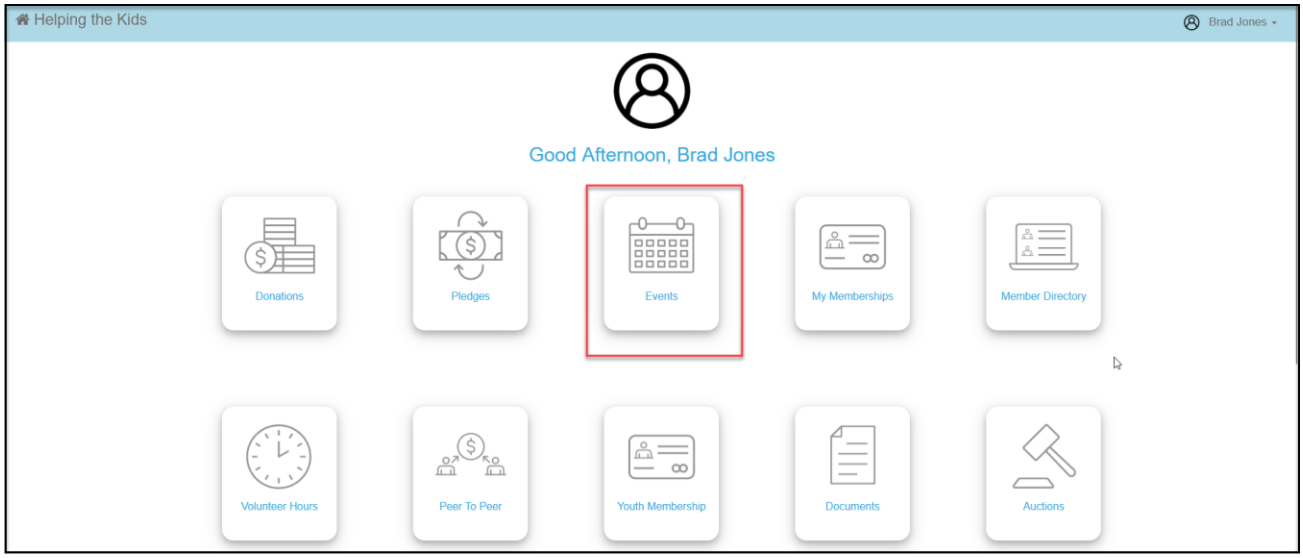
2. Guests do not receive a copy of the ticket unless the purchaser sends it to them.

How can I send invoices to someone who made a deposit or chose to Pay Later?

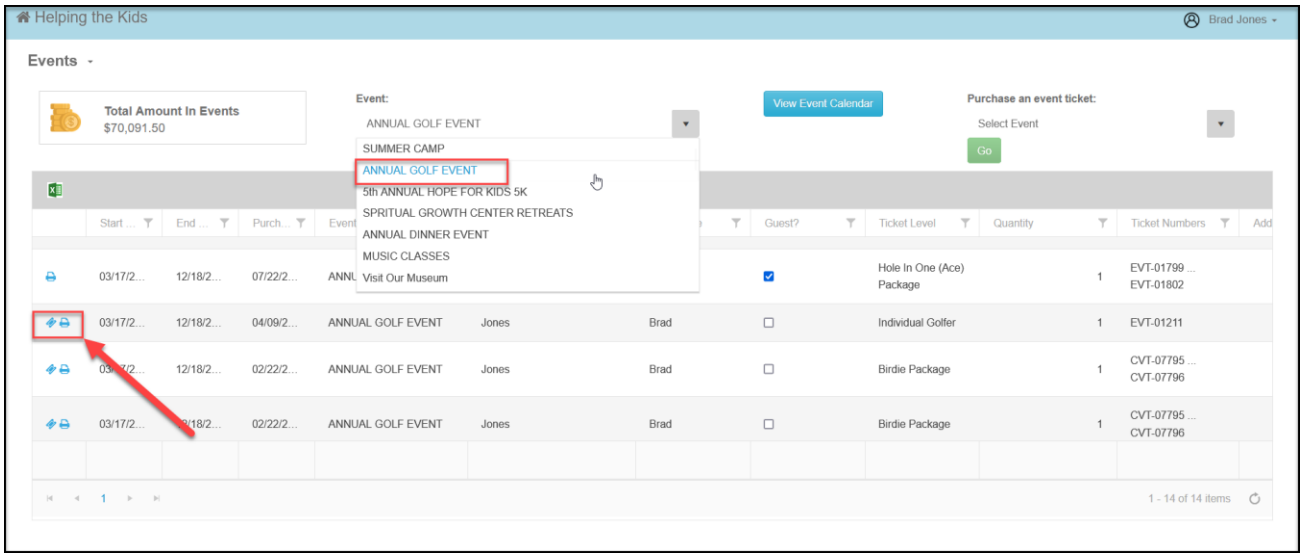
1. Yes, you can create an invoice using the Mail Merge Event Templates.
2. See this video about creating Mail Merge Event Templates https://vimeo.com/728823692/72dad4ab6a
3. The Events grid includes the Amount Due column to be able to filter the grid to identify constituents who still have payments due.
4. When you receive the payment, you can record it using the dollar $ icon on the Events grid.

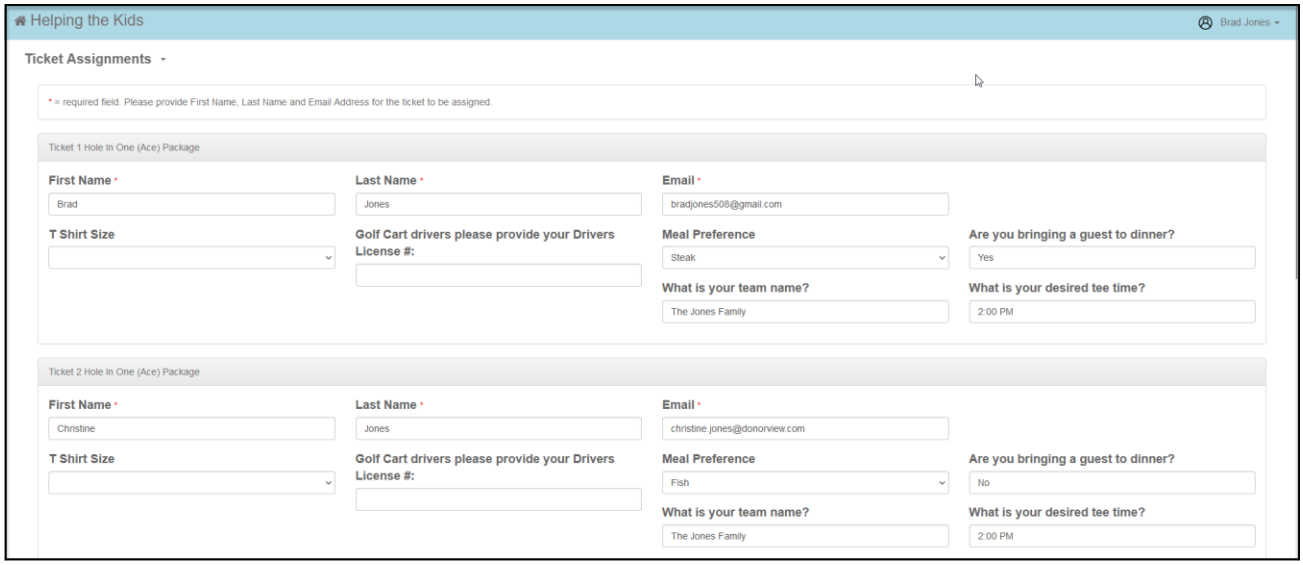
Can a ticket purchaser update their own guest information?

1. Ticket purchasers can only update their guest information if you activate the Advanced Portal.
2. The purchaser will create a portal account using the same email and name they used to purchase the tickets and login.
3. Clicking on the Event module they can see all their ticket purchases.



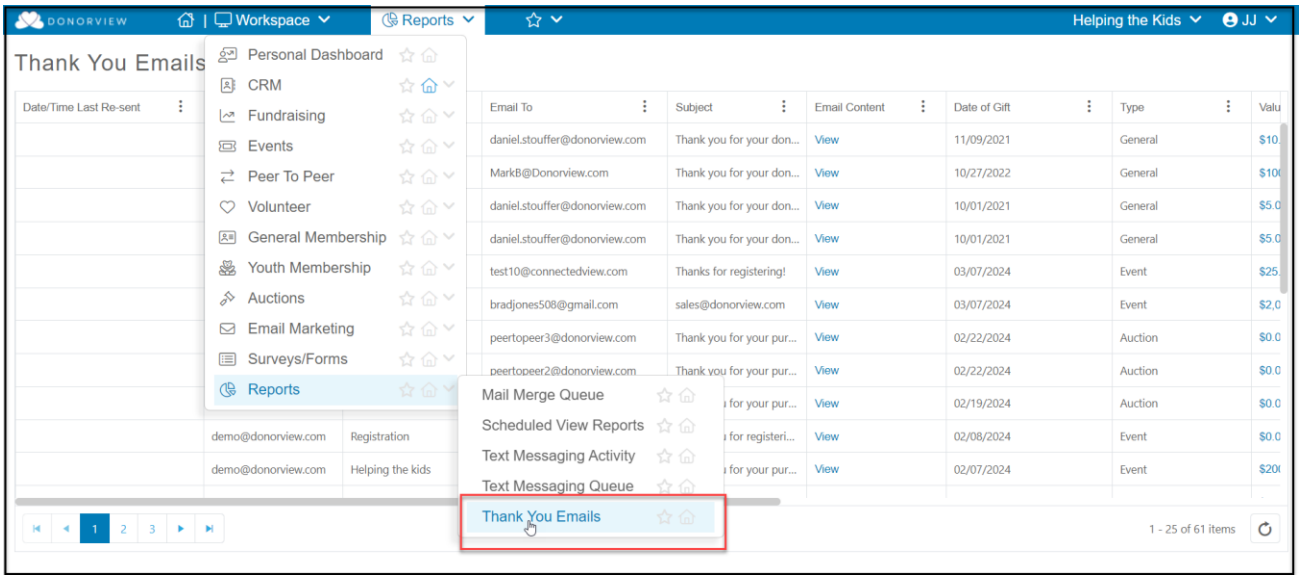
4. The purchaser can select the event and then click on the blue ticket icon on the right side of the grid to update their guest's information.



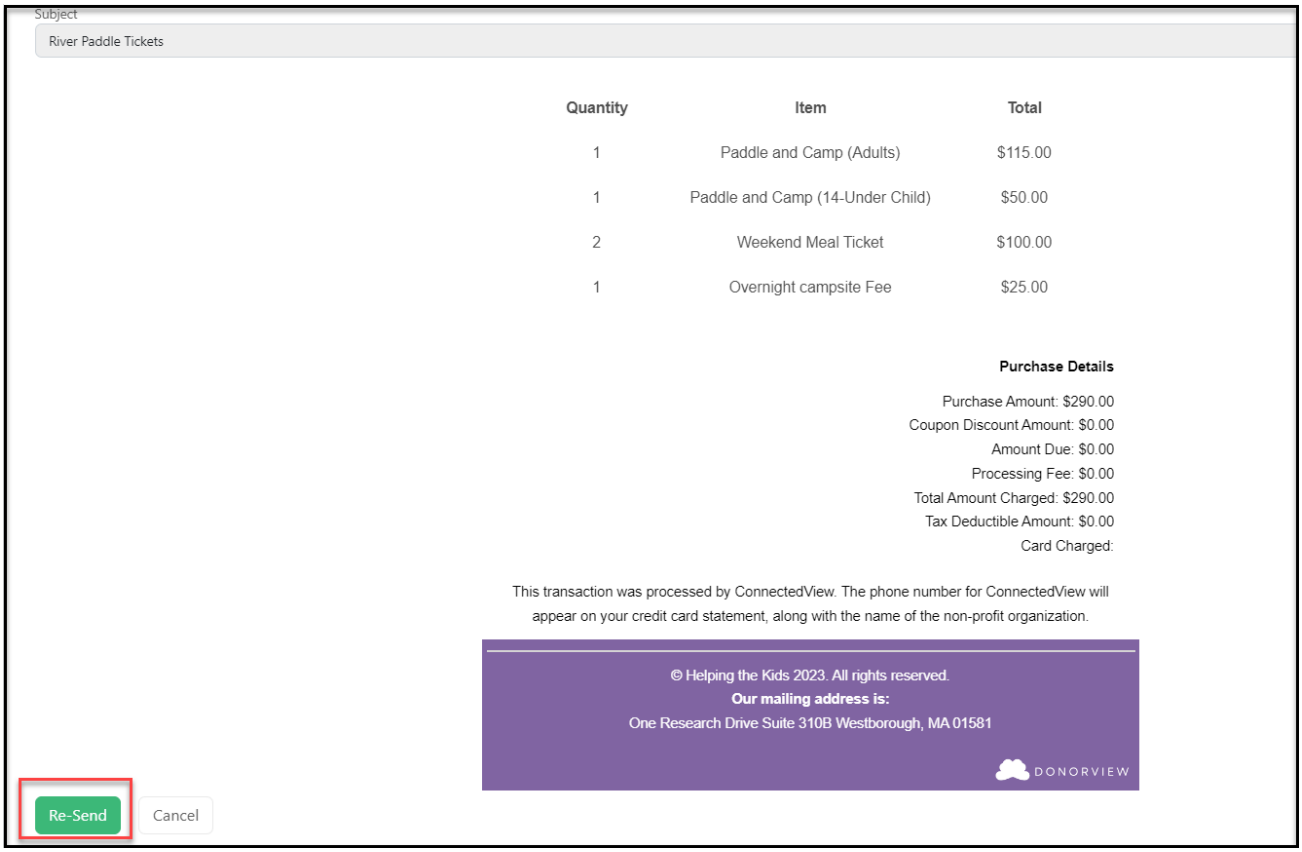


Can I resent the thank you email?

1. Yes, all thank you emails sent from the system can be found under the Workspace>Reports>Thank You Emails.
2. Click on View next to the email you'd like to resend.



3. Scroll to the bottom of the email to click on the green **Resend** button to send the email again.



Equipment

What equipment will I need for the event?

2. Laptops & power cords – laptops are needed to make changes to event pages if needed and edit guest names using the Event Attendance grid.
3. iPads/iPhones – if you will be using the DV Connect app to check in guests, scan tickets, swipe credit cards , or sell tickets at the door.
4. Credit Cards swipers & charging cables – If you would like to swipe credit cards into attendee's profiles or if you would like to process payments and donations using a credit card for payment. **The swipers can only be used with the DV Connect app.**
5. Optional items
    i. Printer – for printing receipts if desired. Note that purchases and donations will be automatically acknowledged with an email.
    ii. Extension cords – Helpful for charging laptops, iPads, swipers, etc.
    iii. Mobile hotspot (usually a feature within a smartphone) – if Wi-Fi is poor at the venue, a cellular hotspot can be helpful to maintain access to the platform.

Do the swipers work with the desktop/laptop version of DonorView?

No, the swipers only work with the mobile DV Connect app.

Can I use a different swiper than the ones provided by DonorView?

No, only the swipers provided by DonorView can be used with the app because they are specifically programmed to work with the encryption features of DonorView.

How do I get the swipers and how much do they cost?

1. Swipers need to be ordered from DonorView prior to the event by sending the request to support@donorview.com.
2. There is a deposit required for renting the first swiper and that swiper can be kept for as long as you like.
3. When the swiper is returned, the deposit will be refunded.
4. Additional swipers will require a monthly rental fee and the current pricing will be provided by the support team.

Do the swipers work automatically?

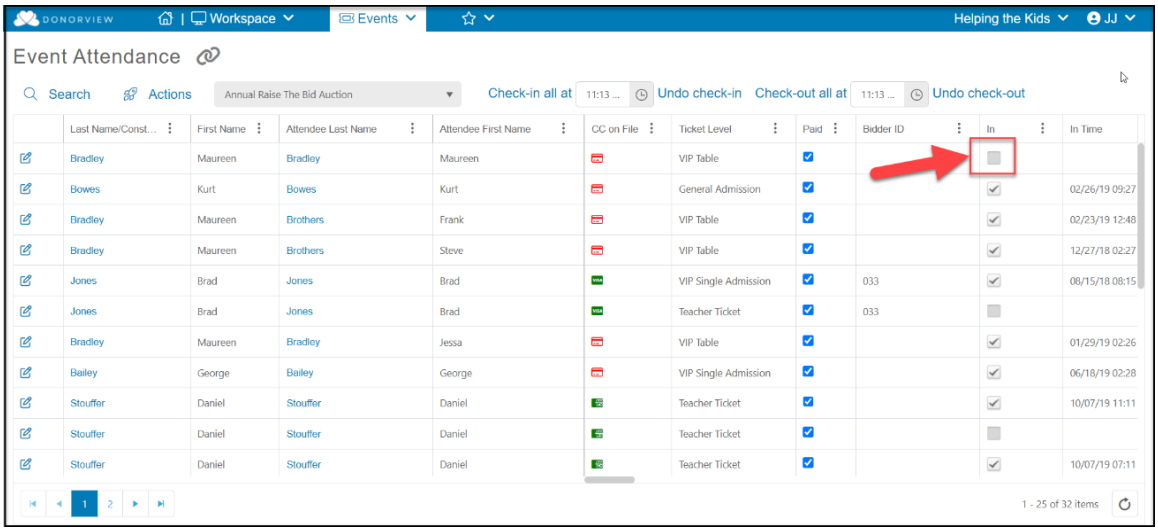
1. No, the swipers need to be paired via the Bluetooth settings on the device.
2. Note that swipers should by synced with just one device.

3. The swipers have about a four hour battery life, so be sure they are fully charged and bring a charging cable for longer events.

Check-In

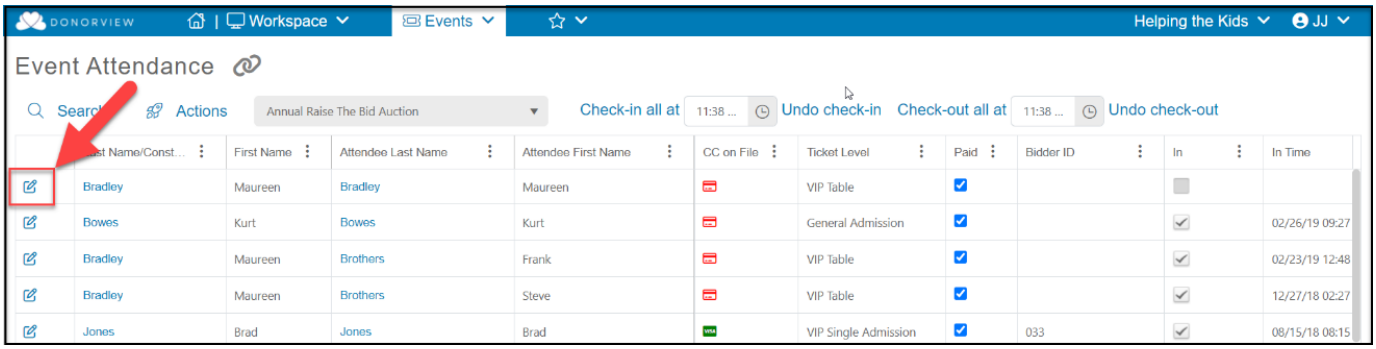
How do I check a guest in for an event?

1. Guests can be checked in by scanning their ticket or searching for their names using the mobile app OR the guests can be checked in using a check box on the Event Attendee grid.
2. If the mobile app is not used, simply check the box under the **In** column on the Event Attendance grid.
3. Be sure the applicable event is selected to reveal the list of attendees.
4. The grid can be sorted by clicking on any column. (One click sorts in descending order, two clicks sorts in ascending order, and three clicks returns to unsorted.)

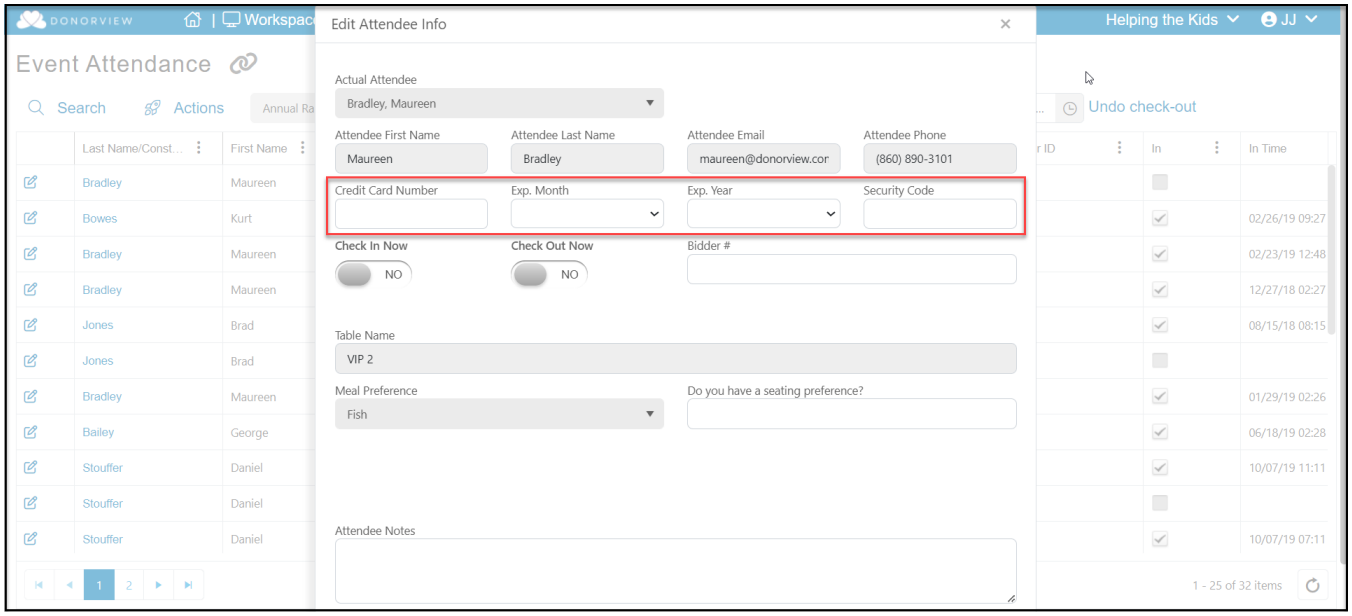


How can I add a credit card to an attendee's record?

1. **Manually Via the Event Attendance Grid**
   a. The fastest way to enter a credit card manually is to click on the edit icon on the row for the attendee.



b. Enter the credit card number, expiration date and security code.



2. Swiping a credit card using the DV Connect App

a. It is strongly recommended that this activity be practiced by all those using the app prior to the event.

b. Log into the DV Connect App.

c. Click on the Authorize icon.

d. Swiping the credit card is demonstrated in these videos:

   i. New Stripe Swiper - https://vimeo.com/1024079232/ec89adabb3

   ii. ID Tech Swipers - https://vimeo.com/1024081097/a09b8ceeed

e. You can choose to swipe the card, then select the matching name in the database, or search for the constituent then swipe to pair it to that specific constituent.

f. Note that if you see a blue **Swipe** button instead of a green **Cancel** button, you need to power on or re-pair the swiper. Click on the **Swipe** button and push the power button on the side of the swiper to reconnect.

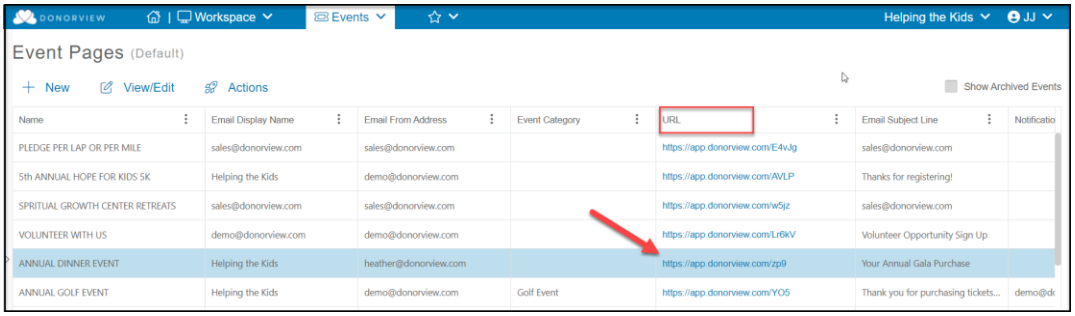
g. Once the card is swiped, the swiper will beep and there will be a confirmation showing on the screen.

Can I save the columns arrangements or views in the Event Attendance grid?

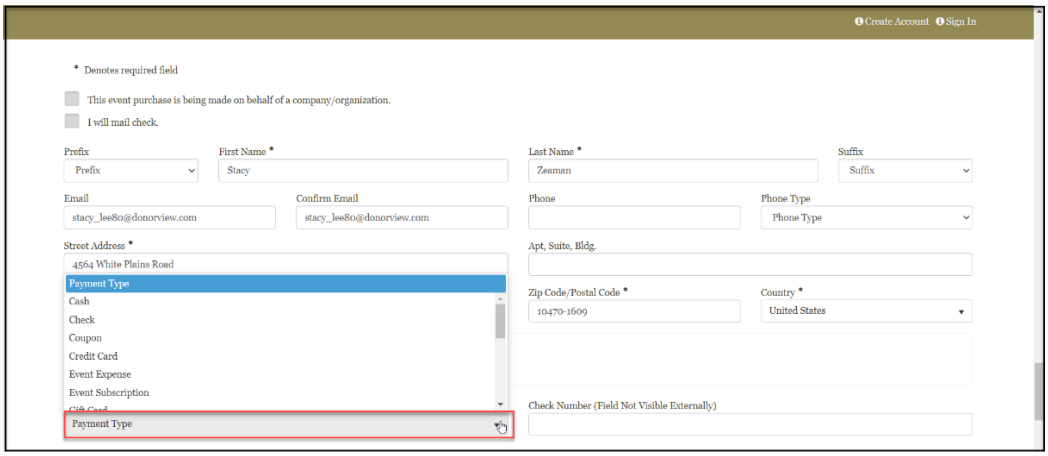
Yes, The Event Attendance grid has been updated to allow users to customize the grid for each of their events. The customization includes which columns are shown or hidden, the columns position on the grid and their width. Any changes made to the grid will be automatically saved for the user and are based on the event that is currently being displayed, meaning each event can have a different looking attendance grid. The views are saved for each user, so different users can also create their own views for the grid.

How can I sell tickets at the door?

1. Tickets can be sold at the door using a credit card and the mobile app.
2. Selecting the Events module in app, then selecting the appropriate event.
3. The number of tickets and/or add-ons can be selected, then the credit card swiped to record the payment.
4. If the constituent is already in the database, you can select the appropriate constituent, if they are new you can enter their name and contact information including email address and billing zip code.
5. Tickets can also be sold in the back end of the software via a laptop by opening the event page URL found on the Events Pages grid.



6. Select the appropriate ticket levels, add-ons, and enter the contact information.
7. Below the contact information, you can record the type of payment including checks and cash if applicable.
8. Choose credit card to manually enter the card number instead of using the swiper.

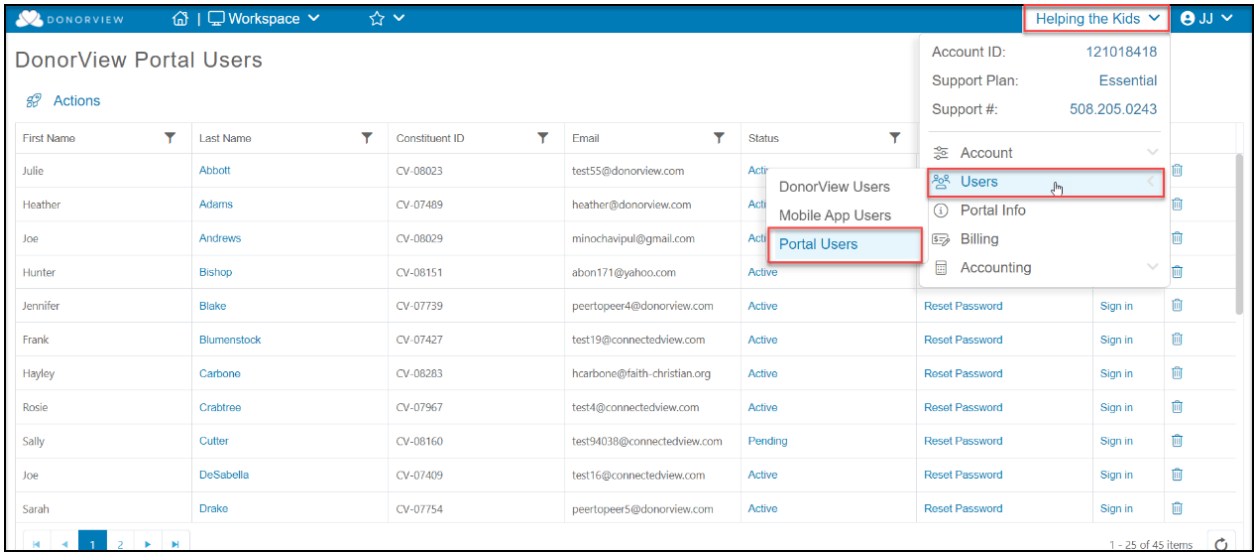


Can I add a guest directly to the Event Attendance grid?

No, attendees either need to purchase a ticket level (not an add-on) or be a guest of someone who did purchase tickets.

Can guests be merged/linked?

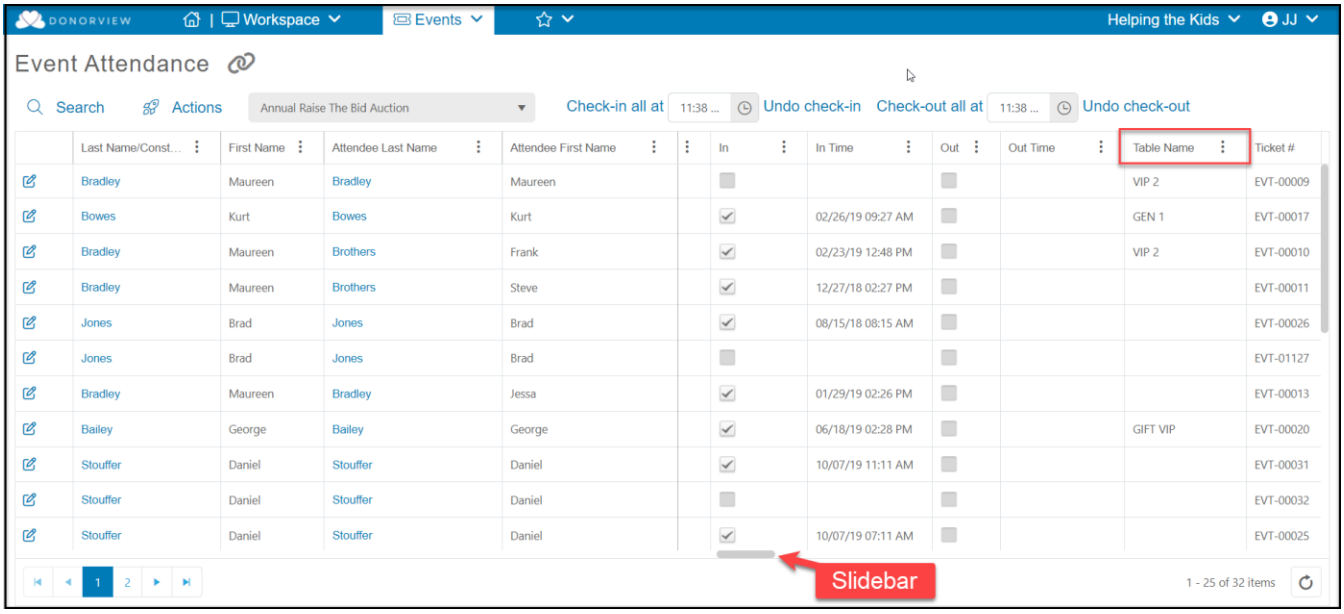
1. Guests can be linked by creating a relationship from the constituent's record, but it does not affect check-in, checkout, or attendance.
2. Two constituents can also be merged if necessary, but it is unlikely that this would be required during an event.
3. Merging constituents must be evaluated to determine which record should be maintained as the master.
    a. Constituents are merged using the Constituent grid.
    b. It is recommended that the constituent record linked to the donor portal be maintained as the master record.



    c. A list of donor portal accounts can be found in the menu under the organization's name, clicking on **Users**, then **Portal Users**. Use this list to validate if the constituent has a portal account created.
    d. See this support article for instructions for merging constituents. https://support.donorview.com/support/solutions/articles/9000027444-can-i-merge-two-constituent-records-together-

Where do I find the guest's table number or assignment?

If the organization used the Table Assignments feature, the table number is shown under the **Table Name** column.



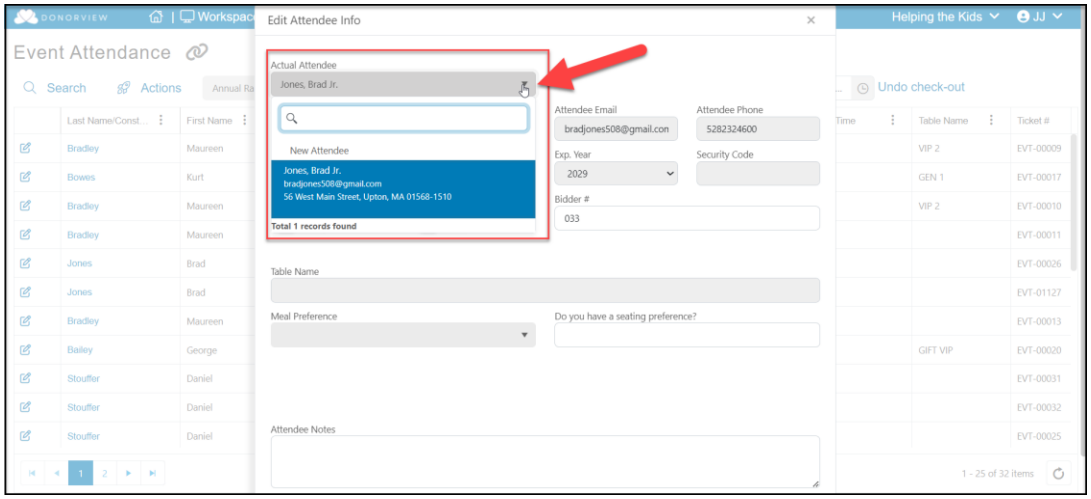
How can I assign or reassign a guest to a table?

1. If guests need to be assigned to a table, use the Table Assignments feature. See more about it from this video https://vimeo.com/741142781/7d79d8b591
2. Some organizations may opt to use the Event Assignments feature instead. This would assign guests to a group instead of a table. To see more about the event assignments feature, see this video https://vimeo.com/735850438/5b93b0c7a7

How do I update guest/attendee name information?

1. Ticket purchasers are identified under the Last Name/Constituent column.
2. All attendees are shown in the Actual Attendee columns.
3. To enter a new guest name (attendee) for a ticket that has already been purchased, click on the edit icon on the left side of the gird.
4. Click on the arrow on the right side of the name under **Actual Attendee**.
5. Use the search bar in the top of the window to see if the constituent already exists in the database.
6. If the constituent already exists in the database, click on their name to identify them as the attendee.

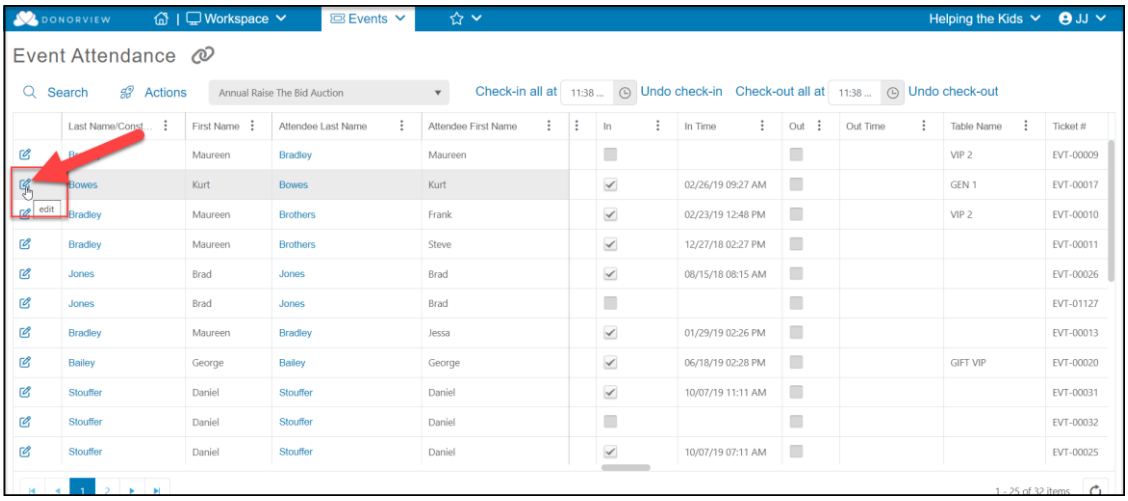
7. If no matching constituent is found, click on **New Attendee** to enter the name and email address to create a new constituent record. Other fields can be updated with credit card information, check in, and answers to custom questions.



8. New tickets can be sold using the event page URL link from a laptop or by using the mobile app.

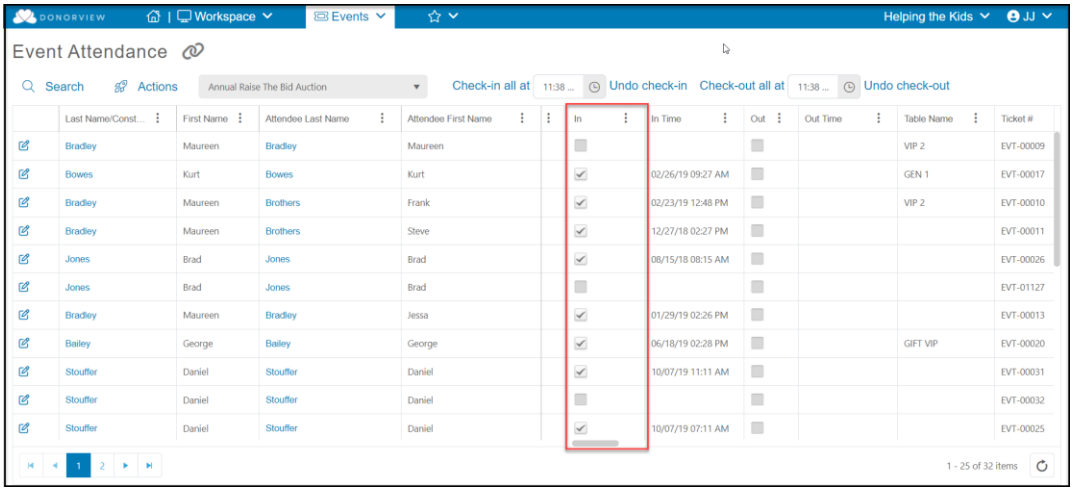
How do I edit a guest's (attendee's) info?

Clicking on the edit icon on the left side of the grid will edit the guest's (actual attendee) info.



How do I see who has checked in?

1. The **In** column will indicate with a check mark if the attendee has been checked in.
2. The **In** column can also be filtered with a True/False function using the three dots on the right side of the column heading.

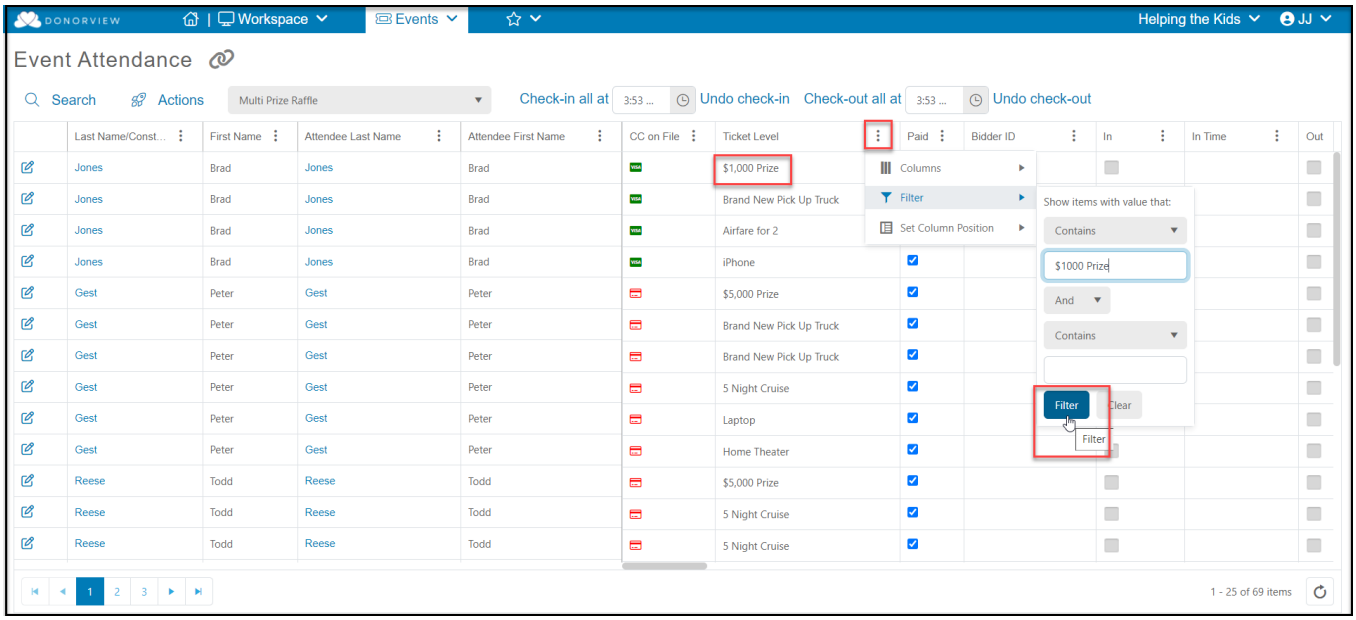


Raffles

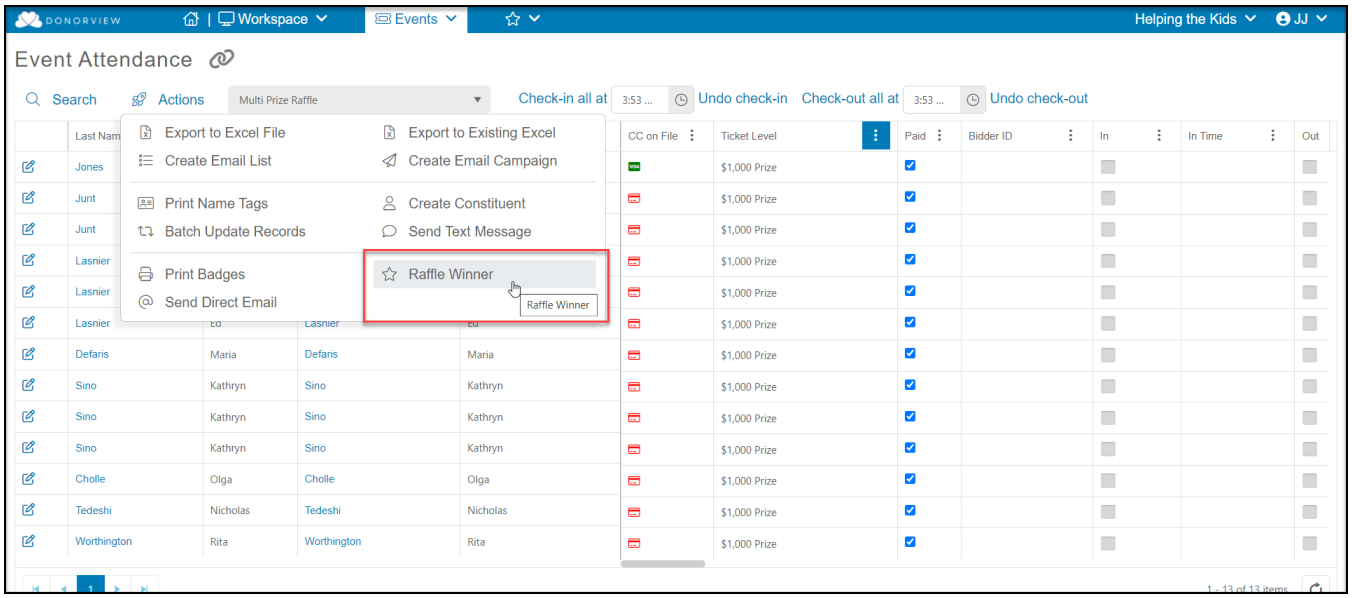
How do I pull a raffle winner?

1. Raffles can be managed multiple ways within the software.
2. Selling raffle tickets as event add-ons items will require a traditional raffle experience with printed tickets and manually pulling the winner.
3. The software does offer an option to sell raffle tickets as an event level.
4. Raffle tickets sold as an event level can be pre-sold or sold at the event by using the mobile app or by manually recording the purchase via the event page.
5. If the raffle tickets are sold as an event level, those purchasers are shown as a raffle ticket level on the Event Attendance grid.
6. The grid can be filtered to just show raffle ticket purchasers.
7. Note that raffle tickets sold as event levels need to show how many "attendees" are included with each purchase.
    a. For example, one ticket = 1 attendee
    b. An event level that includes multiple tickets, like 5 tickets for $100 would be set up for 5 attendees so that all five of their purchases will be included in the raffle chances.

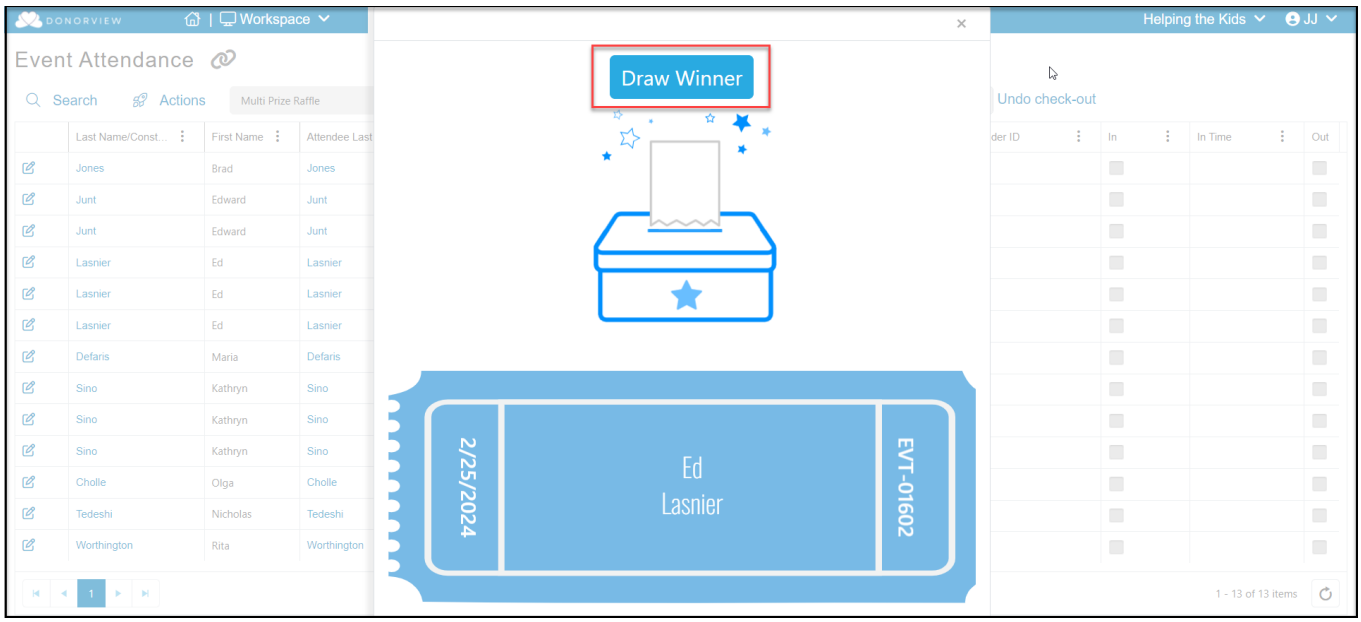
8. Click on the three dots next to the **Ticket Level** column header.
9. Enter the name of the raffle ticket level under **Contains** to identify all the purchasers.
10. Click **Filter** to filter the list.



11. With the filtered list showing just the desired raffle ticket holders, click on the **Actions** menu.
12. Click on **Raffle Winner** to randomly draw the winner.



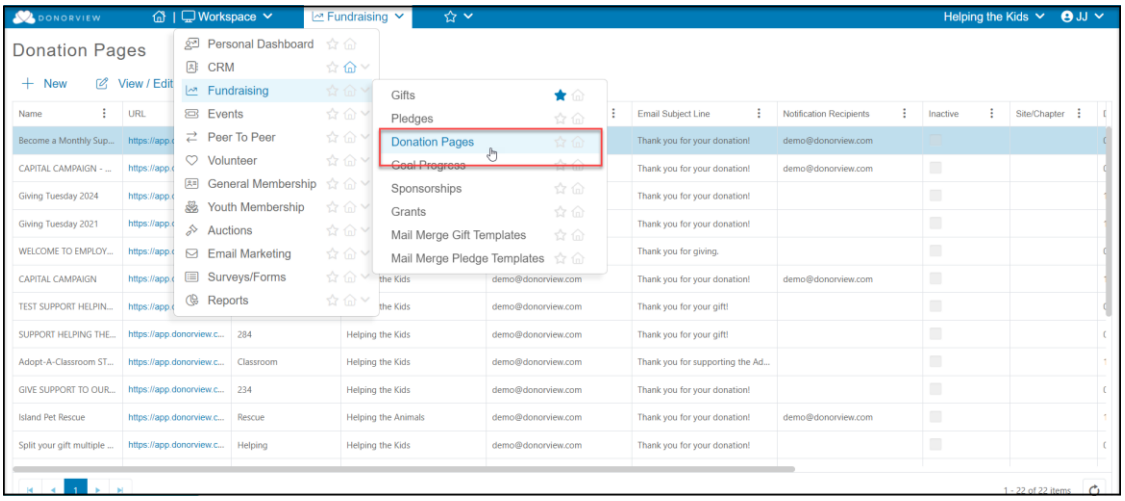
13. The software will randomly choose the winner from the list of attendees on the grid.
14. This feature can also be used for drawing random door prizes for all attendees if no filter is applied to the grid.



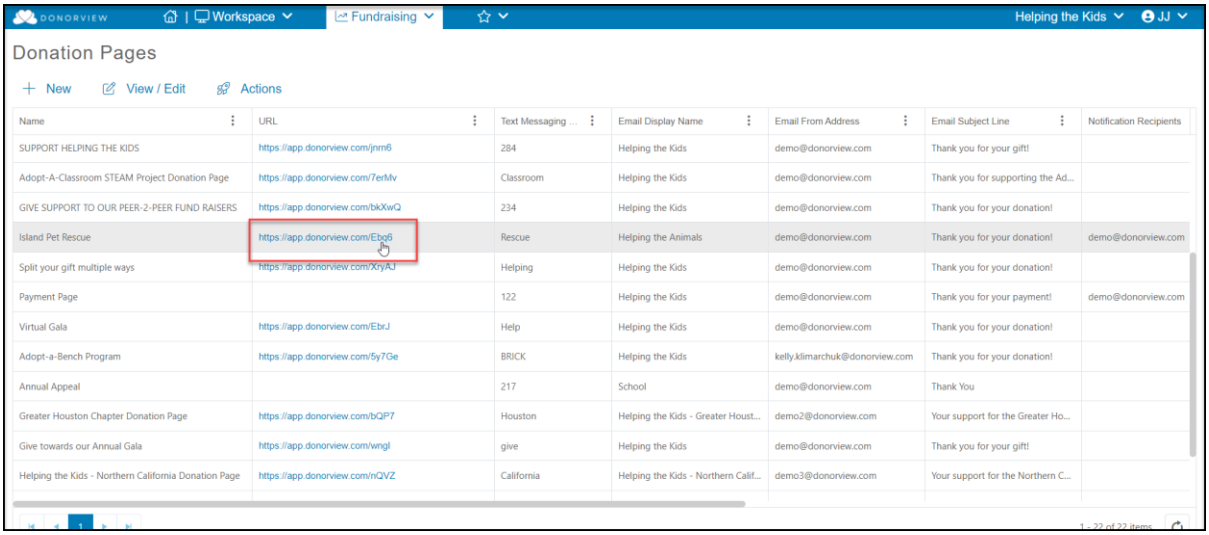
Paddle Raise (a.k.a Fund-A-Need or Call-to-Heart):

How do I record the donations pledged during a paddle raise?

1. Each donation page has a unique URL, Text, and QR code that can be shared with guests to make their donations using their phones.
2. From the mobile app, you can use the Payments feature the swipe credit cards and record donations.
3. You can also write the names down and manually record the donations using a donation page.
    a. Log in to the DonorView desktop software.
    b. Go to the Fundraising module, then click on the Donations Pages link.
    c. This video provides an example of entering a gift via a donation page. Entering a Donation via a Donation Page - https://vimeo.com/846388257/609ad251b6

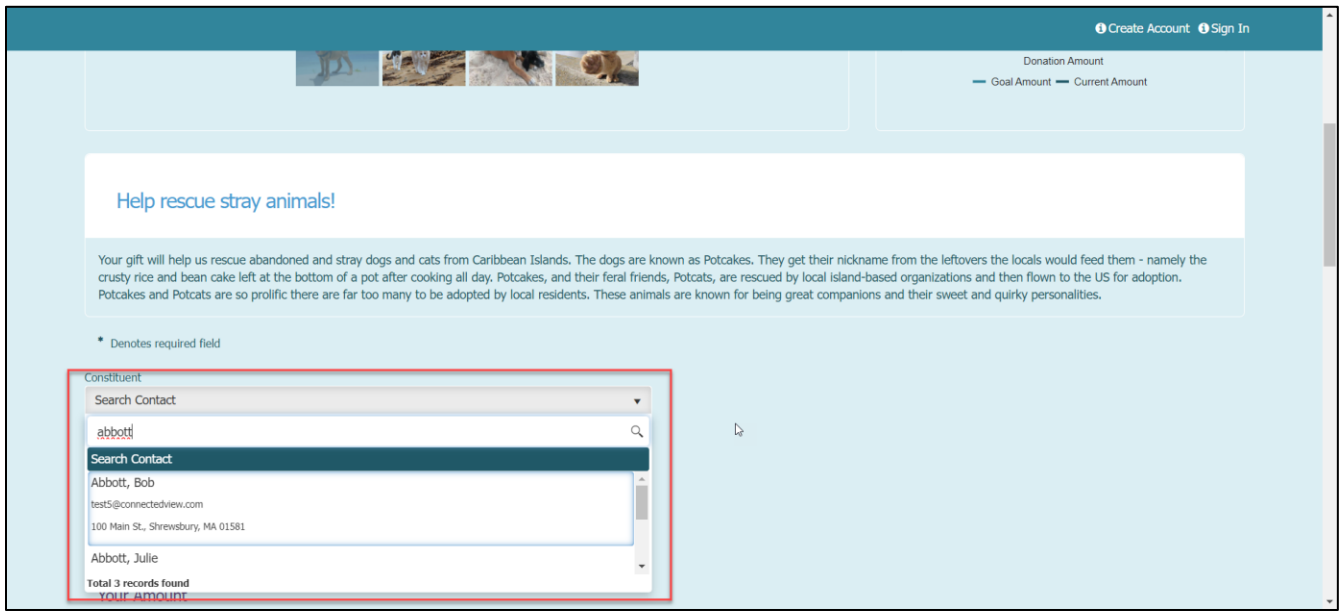


d. Find the appropriate donation page and click on the URL link to open the page using the same browser.



e. At the top of the donation page, use the search bar under Constituent to find the constituent that is making the donation.

f. If the constituent cannot be found, their information can be recorded at the bottom of the page.

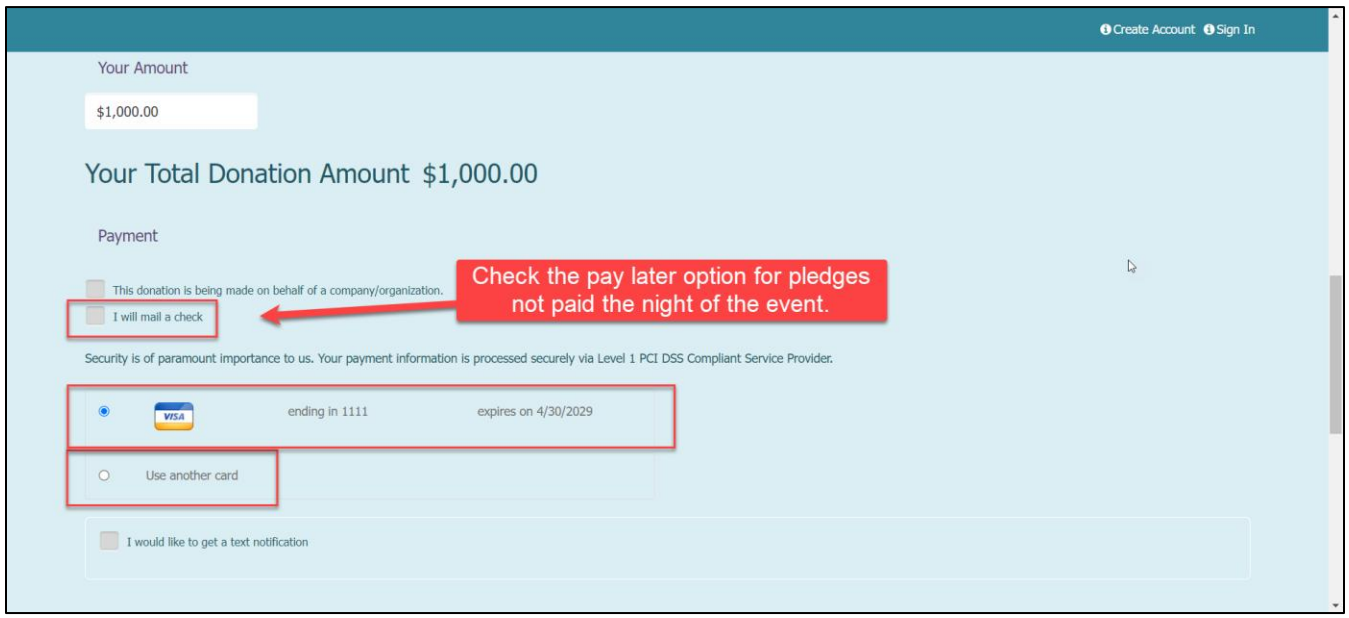


g. Selecting a constituent will auto-populate all the existing information in the payment area.

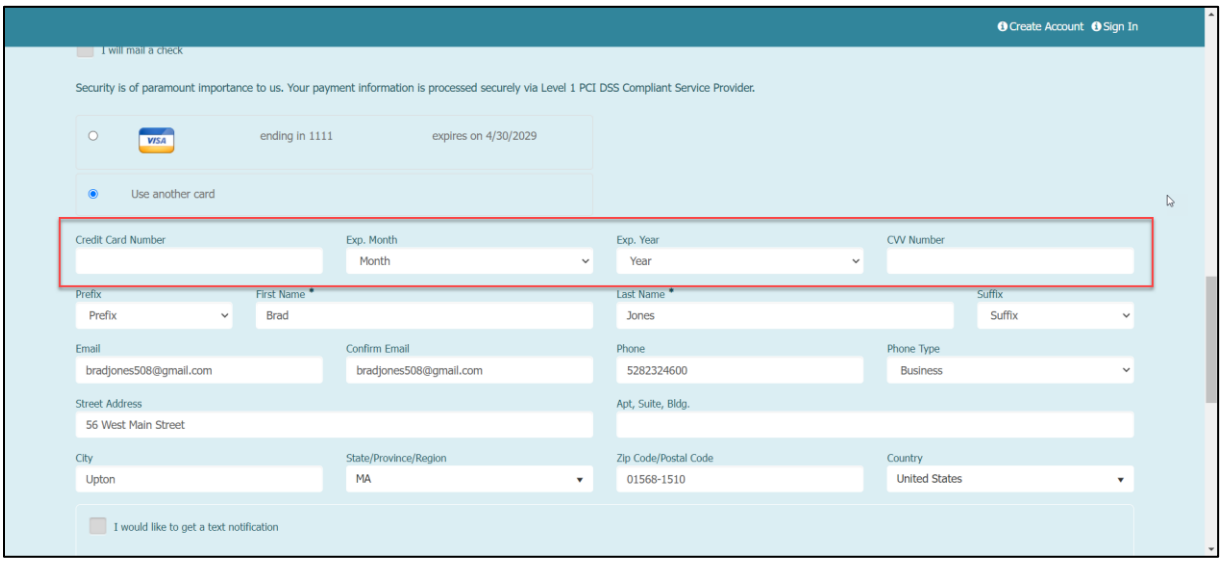
h. Enter the amount of the donation.

i. If activated, pledges can be recorded with a pay later option.

j. If payment is being made immediately and there is a credit card already on file, it will be defaulted to charge that card.



k. If the constituent prefers to use a different credit card, select **Use another card** and enter the information.

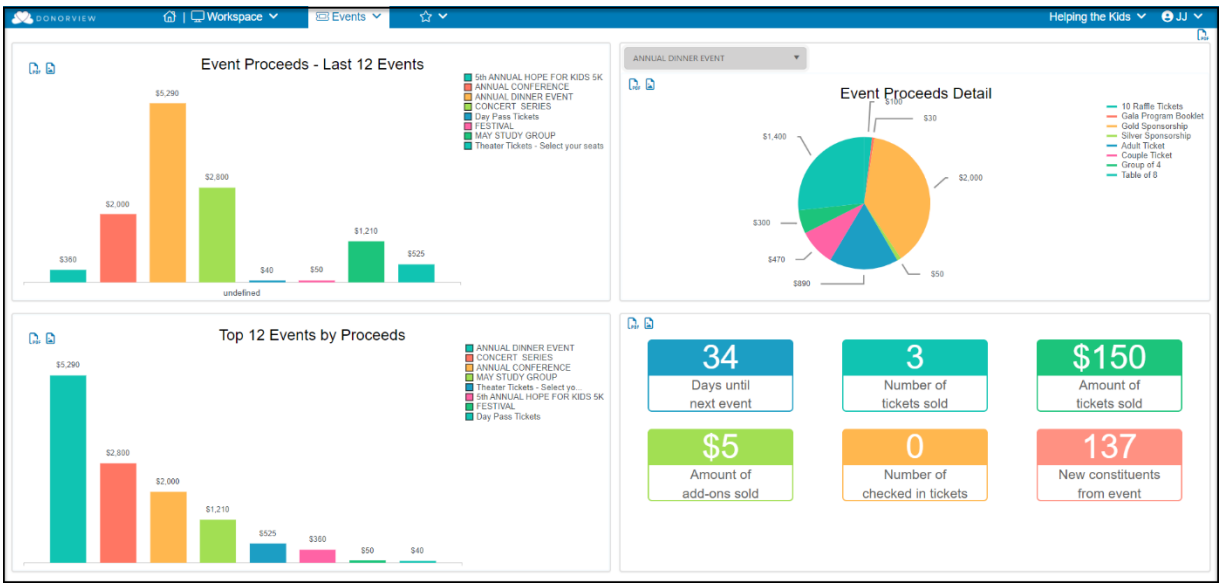


4. Pledges made via check or cash can be recorded via the Add Gift feature. See this video for information on adding a donation https://vimeo.com/770830070/0d7aafea6b and for creating a pledge (future payment) - https://vimeo.com/846378072/4eeb670bcc

Displays and Reporting:

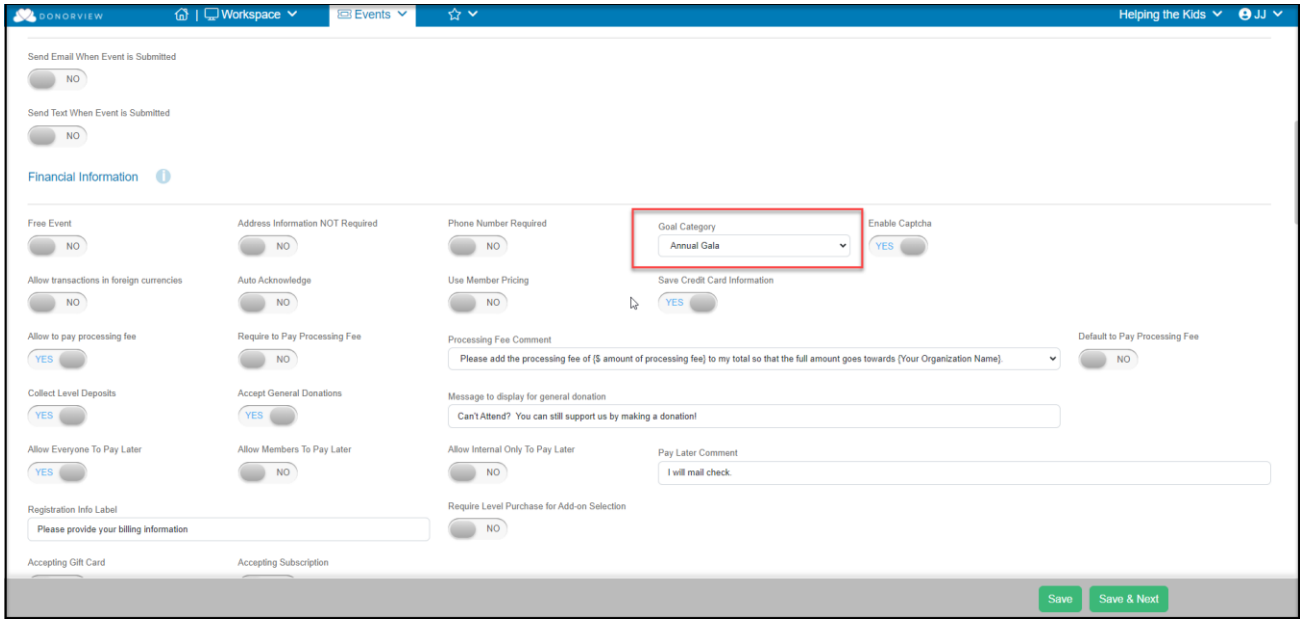
Are there built in reports for events?

1. No, there are no standard event reports, however you can see graphics from under the Workspace>Events Dashboard, which can be downloaded.
2. You also can export the data from the Events grid or using the Gifts Grid and filtering by the appropriate For-Fund-Event-Appeal or date range.

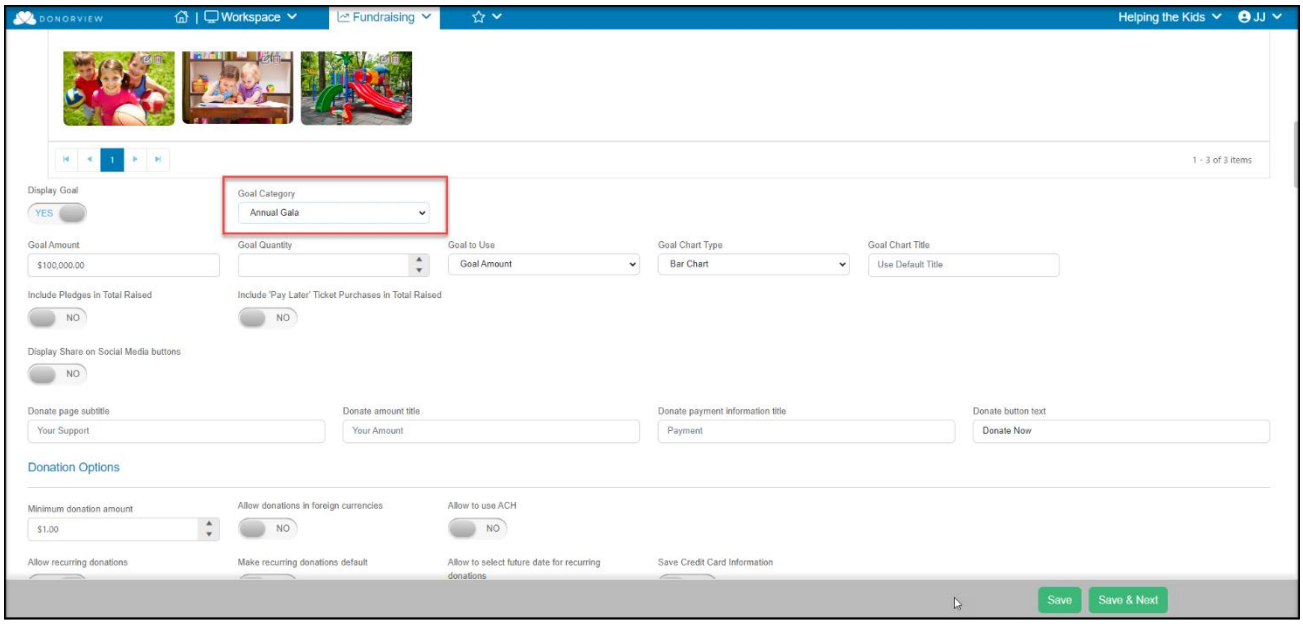


Are there ways to display goal progress?

1. Yes, you can create a widget to share on your website.
2. You can see instructions for creating a goal progress widget with this video: https://vimeo.com/764158934/034650bc79
3. From the event page editor, on the Event Settings tab under Financial Information the **Goal Category** identifies all the revenue that will be included in the goal widget.



4. If you are also collecting donations or sponsorships via a donation page, the **Goal Category** is found under the Page Content section.



5. Click **Save & Next** to save the changes.

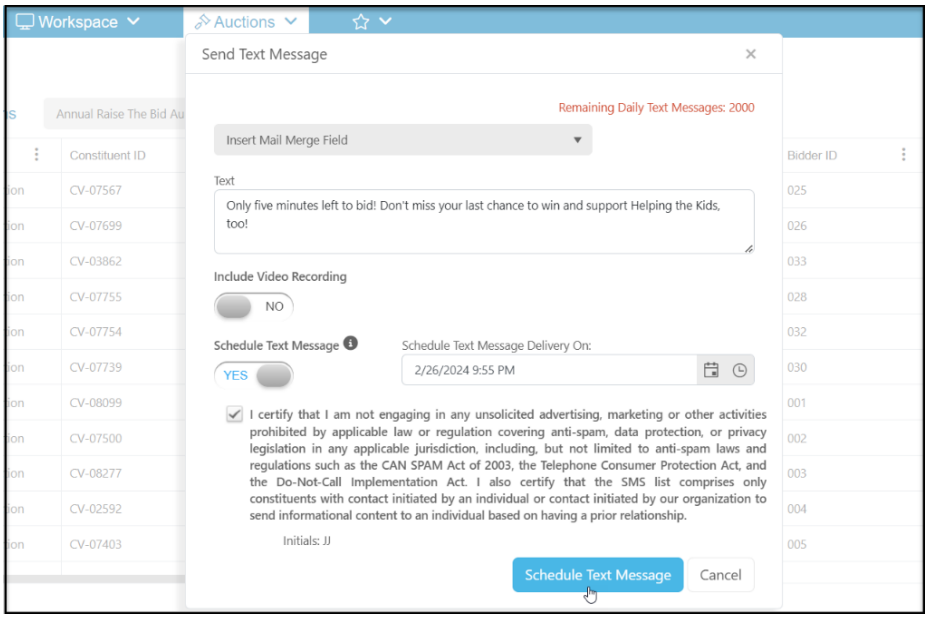
Communications

How do I send out emails to all guests?

1. You can create an email list from the Event Attendance grid's Actions menu if you'd like to use the Email Marketing campaigns feature to send colorful emails and track the response rates.
2. You also can use the Direct Email option to send emails and attachments to all attendees.

How do I send text messages to guests?

1. Text messages can be sent with custom messages from the Event Attendance grid.
2. Click on the **Actions** menu, then **Send Text Message**.
3. Enter the text message info and choose to send the message immediately or prepare texts and schedule them to go at specific times.



4. Note that there is a maximum of 2000 direct text messages per day. The automatic messages sent via the auction process do not count towards the 2000 total. Only those messages generated manually count toward the total.

Checkout:

How do I check out guests at the end of the event?

1. For most events without an auction, check out involves collecting payments for paddle raises, raffle tickets or other add-ons that were purchased during the event.
2. You can utilize the mobile app or record the purchases as described above in the paddle raise or ticket sales descriptions above.

Can you choose which credit cards to use?

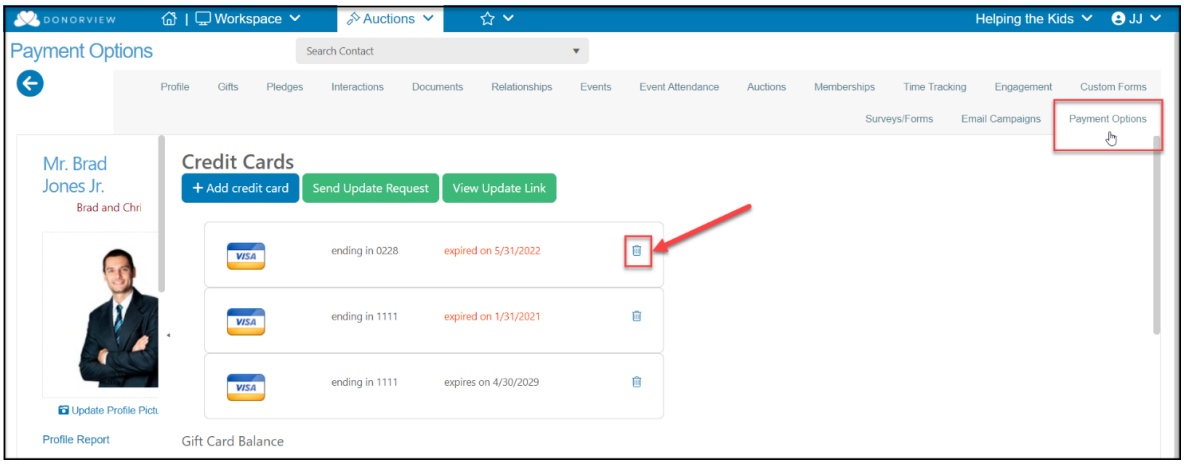
1. Yes, the credit card used can be selected with individual checkout from a donation or event page.
2. With the mobile app, a credit card must be swiped to process a payment.

What if the donor wants to pay with a check?

You will need to use a laptop and record the payment using a page or entering a manual donation to record a check or cash payment.

How do I remove a credit card from a profile?

From the constituent's record on the Payment Info tab, credit cards can be deleted by clicking on the trashcan icon.



Who pays the credit card fee, and can that be changed?

1. Payment of credit card fees needs to be established on the event or donation page on the Settings Tab.
2. If the fees are optional, you can check the box to include the fees with the payment.
3. If the fees are required, you would need to edit the Event Page Settings to change this requirement.

How do I send a receipt?

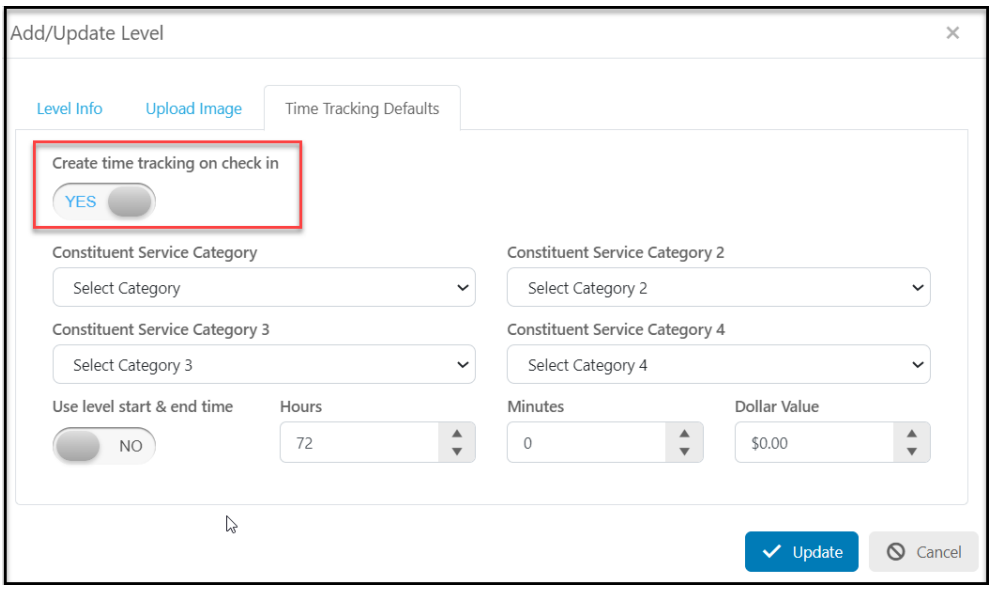
Thank you emails are automatically sent that includes a list of their purchases and donations.

Can receipts be printed?

1. Receipts can only be printed with a screen print feature when viewing the auto email that is sent.
2. You could also generate a mail merge acknowledgement letter from the Gifts or Events grid If desired.

Do I have to check the Check-out box on the Event Attendance grid?

1. No, there is no requirement to check out guests on the Event Attendance grid.
2. If your event is a volunteer event and you are recording the time tracking via the event level, but don't have Use level start & end time activated, you will want to mark the check out box to record the time.



What if I need help with event?

1. Support is provided via email during regular business hours weekdays 8 AM to 8 PM Eastern Time, not including holidays.
2. For organizations with Essential or Essential plus support plans, phone support is also available during regular business hours by calling 508-205-0243 and leaving a message with the name of the organization, contact person's name and phone number, the best time to call back, and a brief description of the issue. A support specialist will return the call during business hours.
3. If the event takes place outside normal business hours, the organization can arrange after-hours, weekend, or holiday virtual support by contacting support@donorview.com prior to the event.
4. If on-site support is desired, contact support@donorview.com for a list of available vendors who provide on-site support for DonorView.