DONORVIEW

Auction-Event Frequently Asked Questions - Rev 6

Table of Contents

Pre-Event **4**

What training videos and documents should be reviewed prior to the event? 4

Software, Mobile App & Portal **5**

What are the differences between the cloud-based version of the DonorView software platform, the mobile app, and the donor portal? 5

How do I set up users to help at the event? 6

Can a DonorView User be logged in to multiple devices at once? 6

Can a DonorView user have the same login for the backend software and the donor portal? 6

Swipers and Terminals **7**

What kind of credit card swipers and terminals are available for DonorView? 7

Can I check out auction winners using the Mobile app? 7

Can I use a different swiper than the ones provided by DonorView? 7

How do I get the swipers and how much do they cost? 7

Do the swipers work automatically? 7

Constituent Records and Bidder IDs **8**

Why are duplicate records formed when someone is registering for the event? 8

How are Bidder IDs assigned? 9

What happens if a person bidding has a duplicate record and two bidder IDs? 9

Do I have to merge duplicate records at the event? 9

Can constituents who share an email both create a portal account with the same email? 9

How can I make sure the portal account matches a constituent record already on file? 10

Credit Card Collection and Online Auction Registration **10**

How do I collect credit cards prior to the event? 10

Are portal accounts created automatically? 12

Can guests register for the auction prior to the event? 14

Can people who are not attending the event still participate in an online auction? 17

What if I only want people who are at the event to participate in the online auction? 18

How does Ticket Purchase Required work? 18

Equipment List **19**

What equipment will I need for the event? 19

Check-In **19**

How do I check a guest in for an event? 19
Is guest check-in required to participate in the online auction? 20
Does checking in a guest automatically sign them up for the auction? 20
If a credit card is swiped and added to a constituent's record, are they checked in? 20
How can I add a credit card to an attendee's record? 20
Can I save the columns arrangements or views in the Event Attendance grid? 23
How can I sell tickets at the door? 23
Can you create or assign complimentary tickets? 24
Can I hide free tickets or other ticket levels from the event page? 25
Can I add a guest directly to the Event Attendance grid? 25
Can guests be merged/linked? 25
Do bidders IDs preassign and can I turn that off? 26
Can multiple guests have the same credit card or Bidder ID number? 27
How do I add a bidder number? 27
Where do I find the guest's table number or assignment? 28
How can I assign or reassign a guest to a table? 28
How do I update guest/attendee name information? 28
How do I edit a guest's (attendee's) info? 29
Do bidding links get sent out automatically? 29
Are cell numbers and emails required? 30
How do I see who has checked in? 30
Online Silent Auction: **30**
How do I turn off bidding for an online auction? 30
Are credit cards required to bid, and can I change that? 31
How do I place a bid for a guest? 31
Is max bid an option? 32
How do you hide/unhide an auction item? 32
How can I remove or edit a bid? 33
How can I create a last minute auction item? 34
What if a bidder has trouble logging into their auction portal account? 35
Traditional Silent Auction **38**
Can the software create paper bid sheets? 38
How do I record traditional paper silent auction bids? 38
Buy It Now **39**
How does the Buy It Now feature work? 39

Can auction items be sold multiple times, and if so, how? 39
Add-Ons **41**
How do I record an Add-on purchase for a guest? 41
Are credit cards required for Add-on items? 45
How do I increase/edit the Add-on quantity? 45
Raffles **46**
How do I pull a raffle winner? 46
Paddle Raise (a.k.a Fund-A-Need or Call to Heart): **48**
How do I record the donations pledged during a paddle raise? 48
What is the fastest way to input bidder numbers for a paddle raise? 52
How do I add a new paddle raise level? 52
Live Auctions **53**
Can live auction items be shown online, but not allow online bids? 53
How do I record a live auction item bid? 53
Can a live auction item be sold multiple times? 54
Displays and Reporting: **54**
Are there built in reports for auctions? 54
Can I look at total raised and by item/donor level? 54
How can I see who is winning an item? 55
Are there ways to display goal progress? 56
Communications **58**
How do I send out text messages to bidders? 58
Are winning bidders notified automatically at the end of the auction? 59
Checkout: **60**
How is sales tax calculated? 60
How do I check out guests at the end of the event? 60
Can you bulk charge credit cards? 63
Can you choose which credit cards to use? 64
How do I remove a credit card from a profile? 64
Can you split the payment for an auction bid? 65
How do I use an alternate payment type? 66
Who pays the credit card fee, and can that be changed? 66
How do I send a receipt? 67
What if I need help with event or auction? 68

Pre-Event

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

1. For events linked to an auction, this guide provides an outline for creating and managing the auction and the event. https://support.donorview.com/en/support/solutions/articles/9000236081-auction-event-guide-and-checklist
2. 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
3. Event Support Articles - https://support.donorview.com/support/solutions/9000074823
4. Auction Training Videos
    a. Auctions - https://vimeo.com/439042880/7b9664929d
    b. Auction Events - https://vimeo.com/758810143/81a48565e8
    c. Text2Bid - https://vimeo.com/290883430/b6c31fbe90 (silent but shows how texting works)
5. Auction Support Articles - https://support.donorview.com/support/solutions/9000114520
6. Credit Card Swipers & Mobile App
    a. S700 Terminal User Assignment- https://vimeo.com/1124262653/1ec96b5d98
        i. S700 Auction Checkout https://vimeo.com/1123645497/0bfbc8710a
        ii. S700 Event Checkout https://vimeo.com/1123344172/1eb54e7b4d
        iii. S700 Donation Checkout https://vimeo.com/1123312889/40b5fbba05
    b. Mobile App - iPad: https://vimeo.com/738265241/450ca22c8a
        i. New Stripe Swiper - https://vimeo.com/1024079232/ec89adabb3
        ii. ID Tech Swipers - https://vimeo.com/1024081097/a09b8ceeed

7. 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-

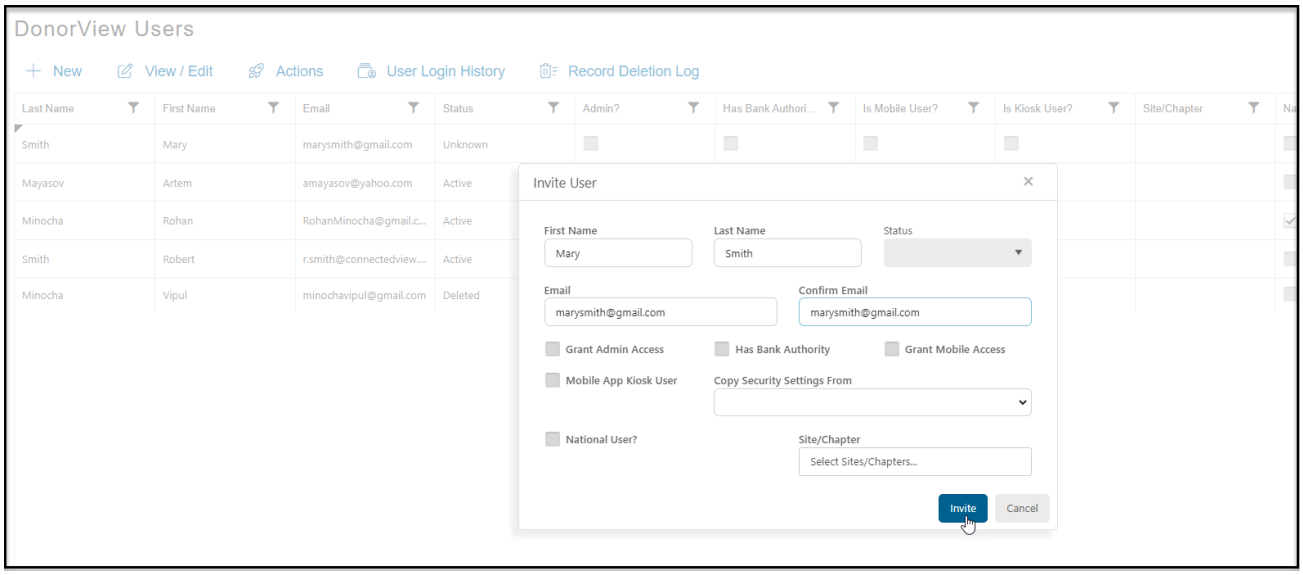
Software, Mobile App & Portal

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.
    d. You can sync the S700 Terminal to the platform for credit card processing.
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 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 or bidders to access their own information and manage their own accounts.
    a. The portal is an integral part of the online auction process as the bidders must have a portal account with a credit card in their account in order to place a bid online or via text.
    b. The auction module is activated in the donor portal when an online auction is created, and the donors have the ability to update contact information and credit card information.
    c. Unless the advanced portal features are activated, donor portal activities are limited to just the auction and contact information.

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



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.

Swipers and Terminals

What kind of credit card swipers and terminals are available for DonorView?

1. There are two kinds of credit card swipers, one that only works with the DV Connect mobile app and another, the S700 Terminal, that works with the regular platform.

2. The swipers that work only with the DV Connect App, Stripe M2, are shown in this video https://vimeo.com/1024079232/ec89adabb3

3. There is also an older version of the swipers for the DV Connect App, the ID Tech, and it is shown in this video: https://vimeo.com/1024081097/a09b8ceeed

4. The swipers that sync directly with the platform for auction checkout, S700 Terminals, are shown in this video https://vimeo.com/1123645497/0bfbc8710a

5. You can also learn more about the various kinds of swipers in the support articles here: https://support.donorview.com/support/solutions/9000117840

Can I check out auction winners using the Mobile app?

1. The mobile app can only check out one item a time and requires the credit card to be swiped for the checkout.

2. It is easier to use either the batch processing feature of the Bid History Grid or use the Auctions grid for individual checkout.

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

No, only the swipers provided by DonorView can be used because they are specifically programmed to work with the encryption and security 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. You have the option to purchase or rent the swipers and the support team will provide the pricing when requested.
3. There is a deposit required for renting and when the swiper is returned, the deposit will be refunded.

Do the swipers work automatically?

1. Mobile App Swipers:

a. Swipers that sync with the mobile app need to be paired via the Bluetooth settings on the device.
b. Note that swipers should be synced with just one device.
c. The swipers have about a four hour battery life, so be sure they are fully charged and bring a charging cable for longer events.

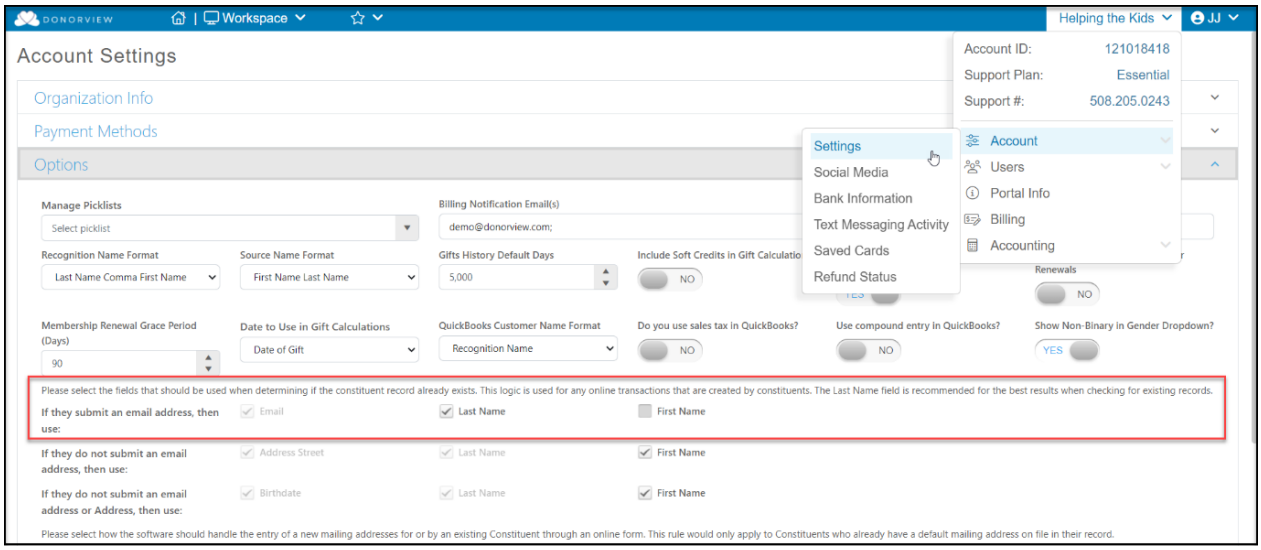
2. S700 Terminals:
    a. Once set up for your organization and a specific user, the S700 Terminals do not require Bluetooth or other pairing.
    b. You will see an option to select the Terminal as the payment method when processing auction checkout or event purchases or donations from a DonorView page.

Constituent Records and Bidder IDs

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 when using the donor portal and online auctions.
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.



How are Bidder IDs assigned?

1. Bidder IDs can be created two ways:
    a. As an attendee at an event linked to an auction.
    b. By a constituent registering for the auction from the auction page.
2. Bidder IDs are only assigned to unique constituents.
3. Two different constituents cannot share the same Bidder ID.

What happens if a person bidding has a duplicate record and two bidder IDs?

1. There is no problem with a person having duplicate constituent records and/or multiple Bidder IDs.
2. They can still bid on the auction; however, they may need to re-enter their credit card if they used a different email address to purchase their event tickets than the one they used to create a portal account.

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.

Can constituents who share an email both create a portal account with the same email?

1. No, Every portal account requires a unique email address.

2. Constituents cannot share an email address and have separate donor portal accounts, even if their names are different.

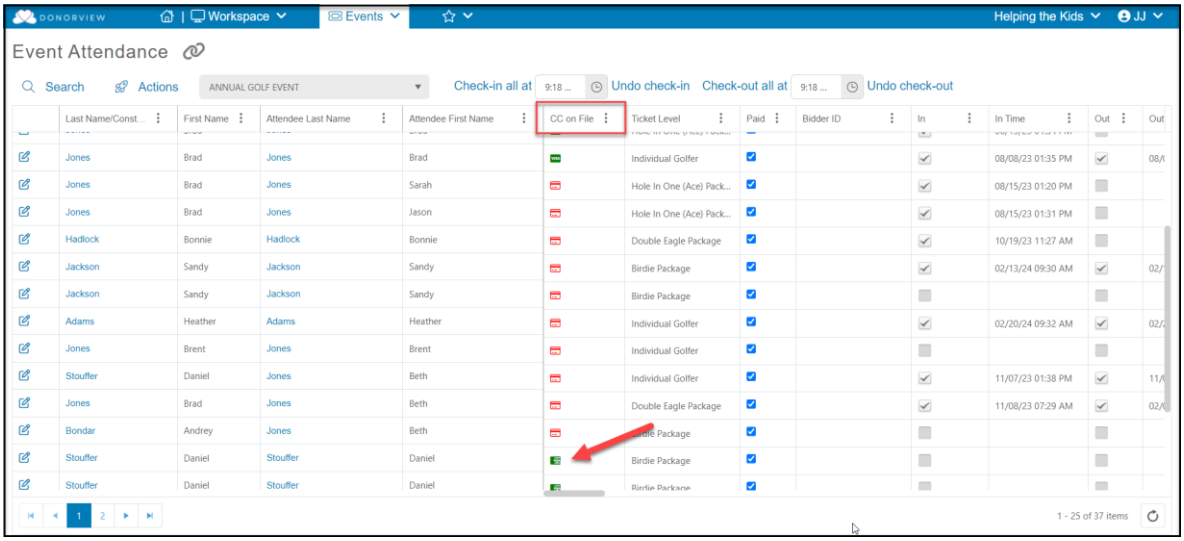
How can I make sure the portal account matches a constituent record already on file?

1. The donor portal login must match the first name, last name, and primary email address for the constituent in order to link to an existing constituent record.
2. If a constituent creates a donor portal account using a different email or name than the one that is already in the database, a new constituent record will be created that is tied to that portal account.
3. As described above, the donor will be able to do their online bidding, but you may need to take special care at checkout if they used another bidder ID for a paddle raise or other add-on item.

Credit Card Collection and Online Auction Registration

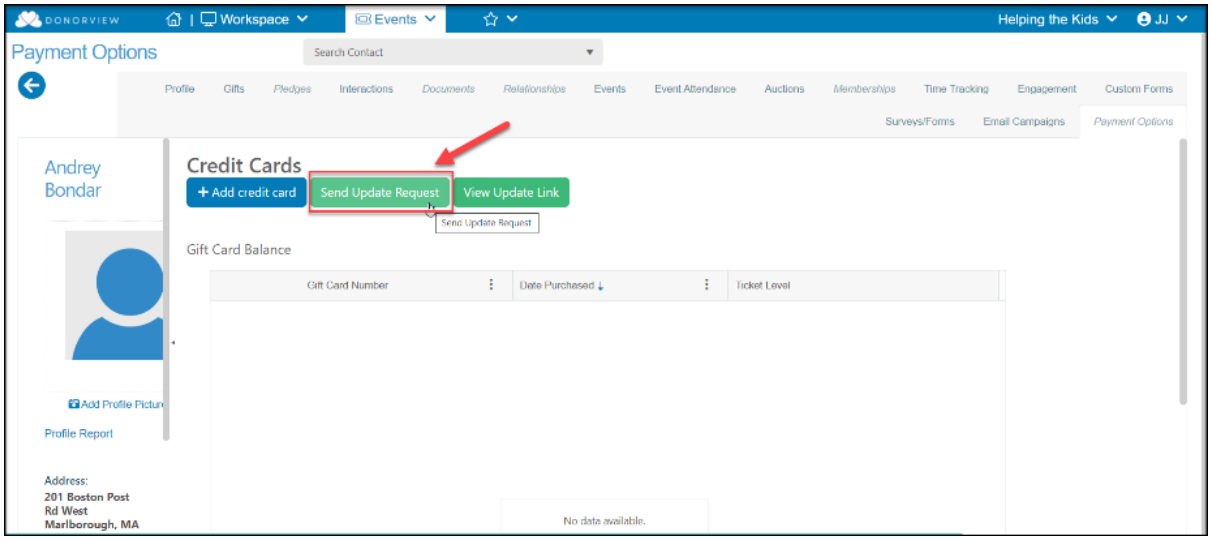
How do I collect credit cards prior to the event?

1. Prior to the event credit cards can be collected, and bidders can be pre-registered for the auction by contacting the event attendees from the Event Attendance grid.
2. The Event Attendance grid includes a column, **CC on File**, which indicates if the event attendee has a credit card on file. This column may be on the far right side of the grid.
    a. A red icon indicates there is no card on file.
    b. A green icon indicates there is at least one credit card on file. Hovering over the green icon will reveal the last four digits of the card and the expiration date.

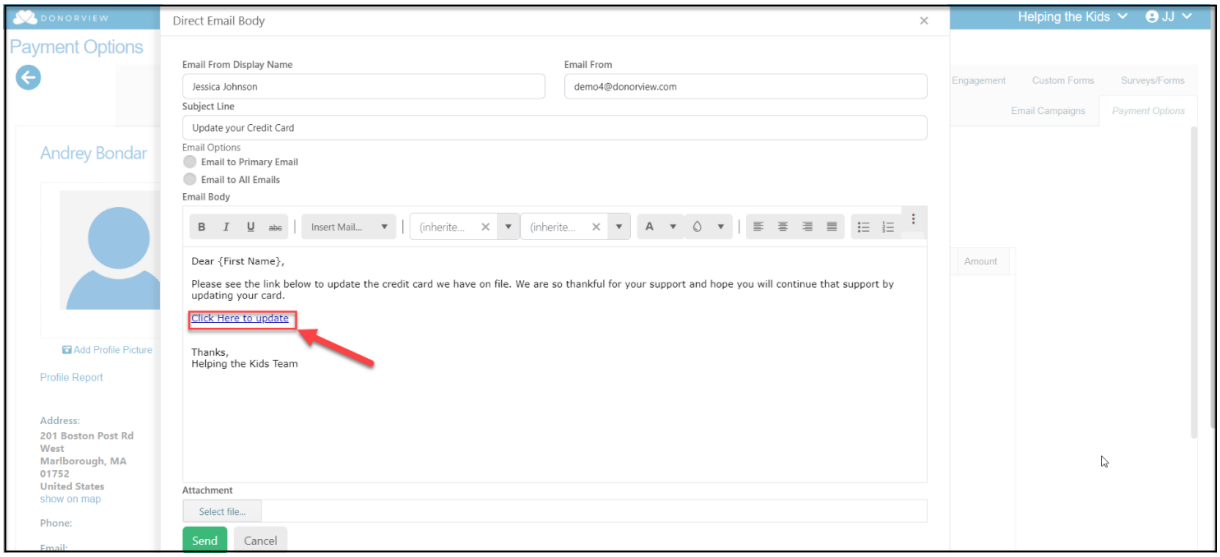


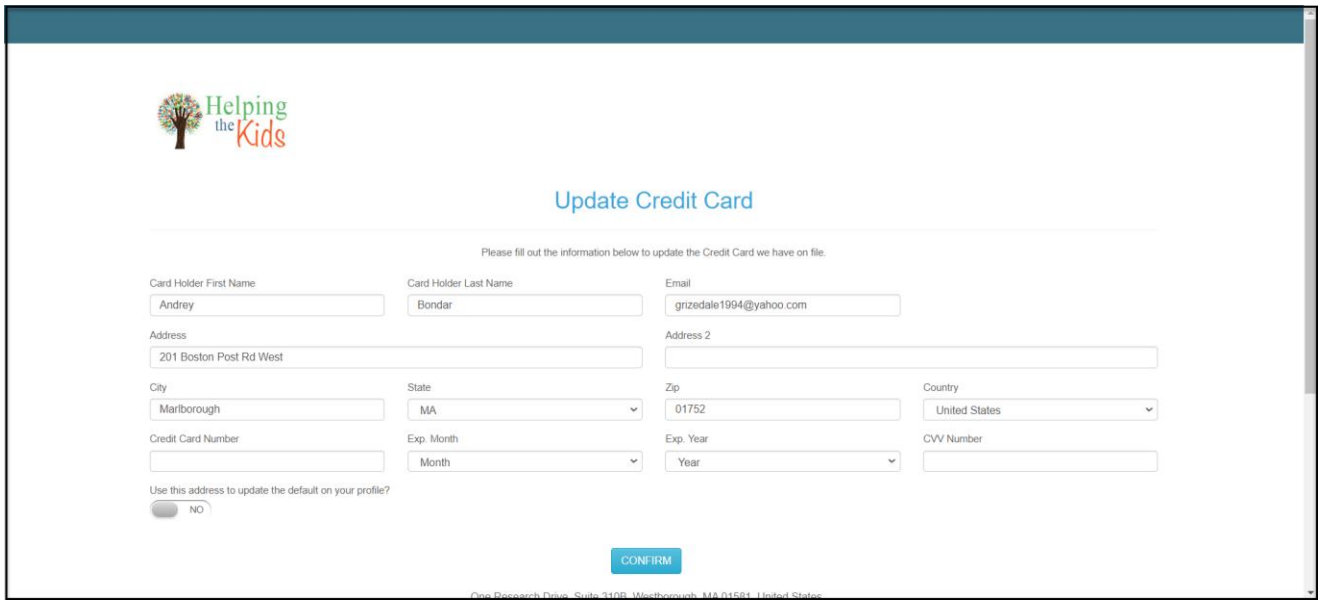
3. If there is an email address for the attendee, be sure it is a unique email address for the attendee if you are having an online auction and text-2-bid.

4. Right click (or control CTRL click) on the credit card icon to open the constituent's **Payment Options** tab in their record.
5. Each credit card update request must be sent individually. There is currently no way to send this as a batch due to encryption requirements for the update links.
6. Click on the green **Send Update Request** to generate an email to the constituent to request that they add a credit card to their account.



7. When the recipient clicks on the "**Click here to update**" link they will be directed to a unique, encrypted link to allow them to add their credit card information securely and it will be stored in their account.



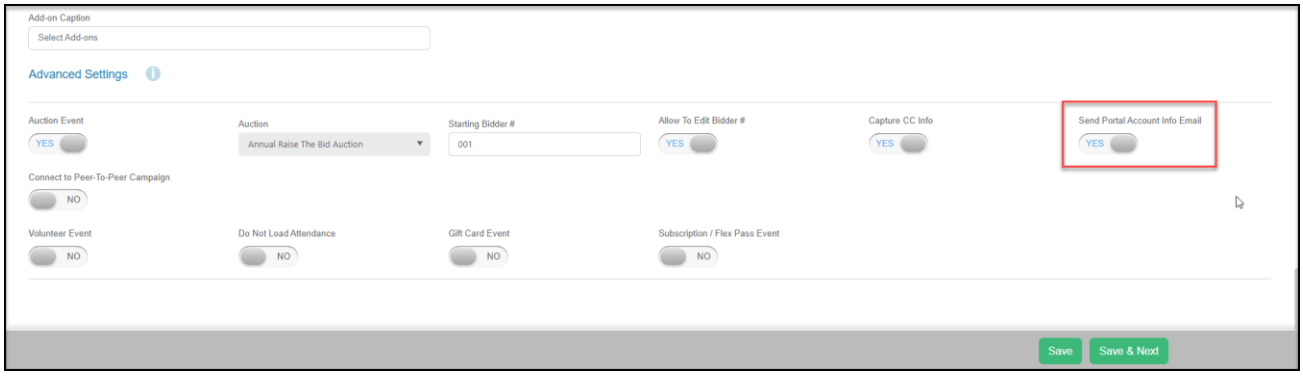


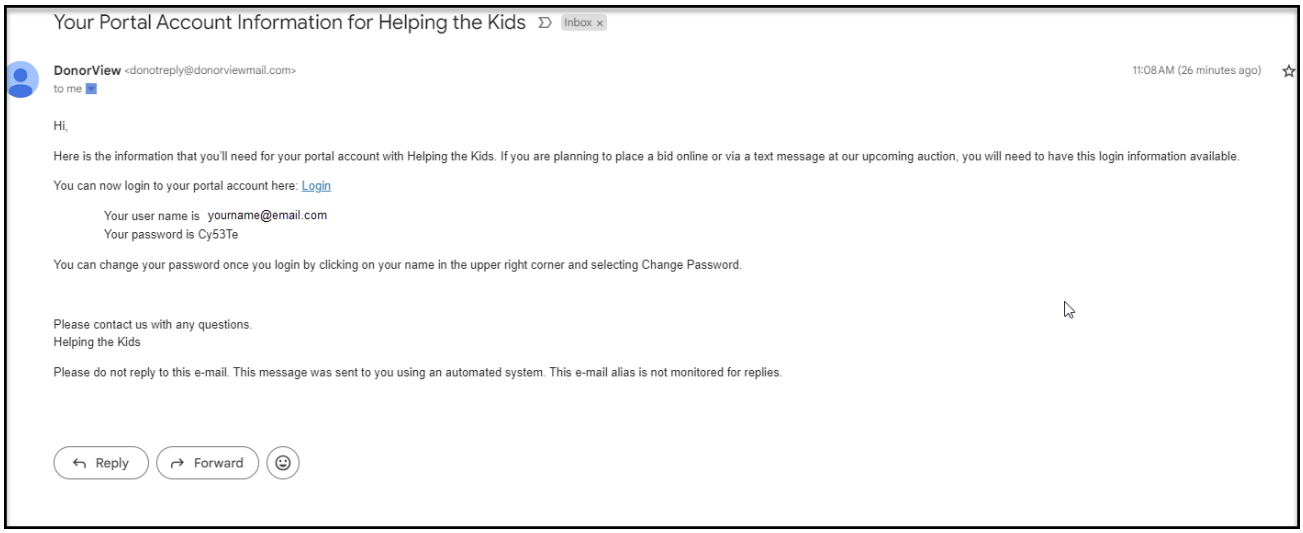
8. Once a credit card is on file for the constituent, the icon under the **CC on File** column on the Event Attendance grid will change to green.

Are portal accounts created automatically?

1. No, just because the attendee has a credit card on file and a bidder ID does NOT mean that they have a portal account created, which is required for online or mobile auction bidding.

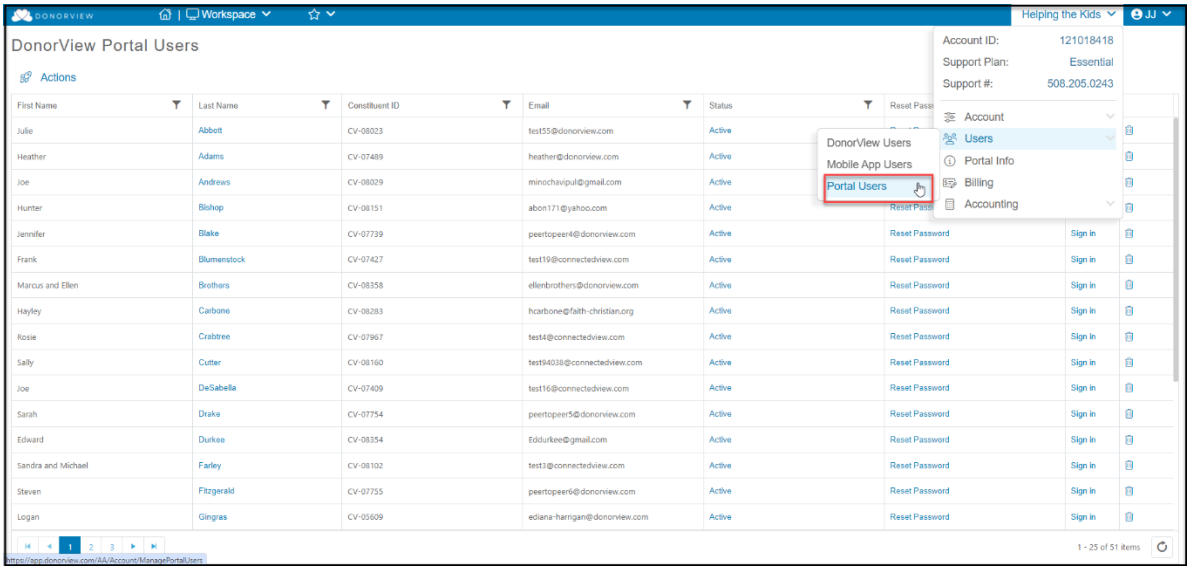
2. However, if your Event Settings page is linked to the auction and you have enabled Send Portal Account Info Email, then the ticket purchaser and each attendee with an email address that was provided at the time of purchase will receive an email link with their portal account information.





3. Since ticket purchasers often do not know the names of their guests (actual attendees), those guests will not receive the automatic email notification if their guest name and information is updated on the Event Attendance grid after the purchase is complete.

4. Also, tickets are frequently purchased several weeks prior to an event, and the attendees may not log in to the portal at the time they receive the email. They may also forget they received it or it could go into their spam folder. You can validate if a portal account already exists for a guest by looking in the Portal Users grid.

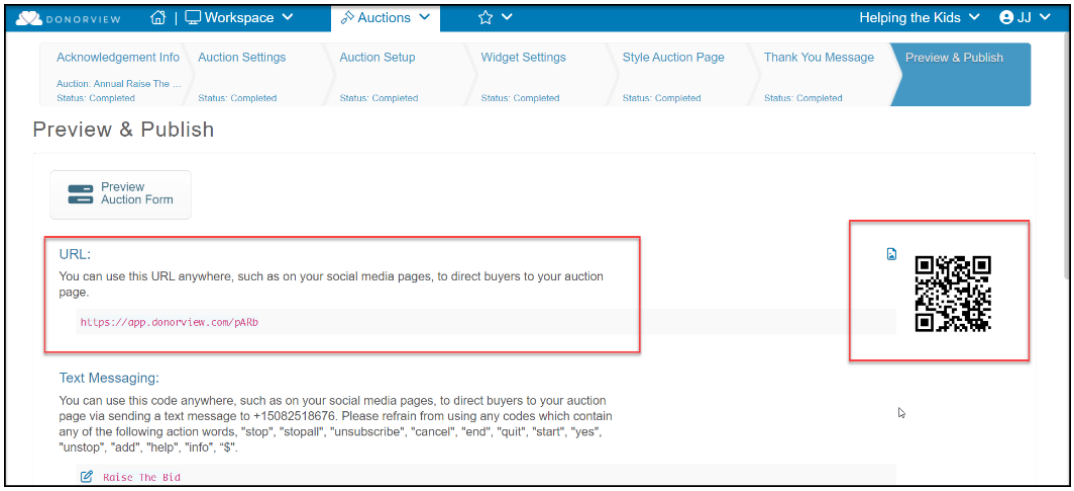


5. Portal users can update their password themselves by clicking on Forgot Password or you can reset it for them by clicking on Reset Password from the Portal Users Grid.

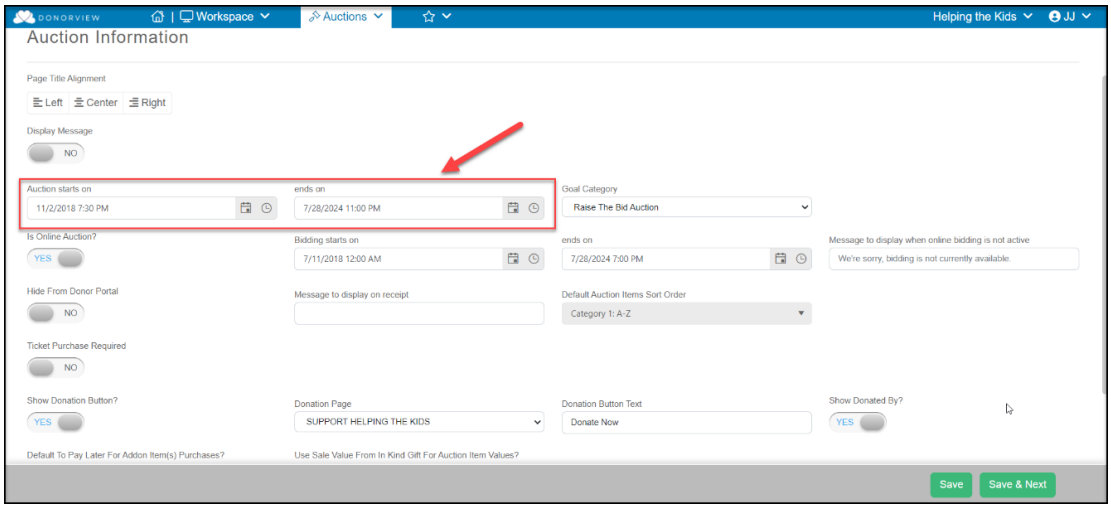
6. Anyone who does not have a portal account will need to register for the auction by using the Register and Sign Up link on the auction page.

Can guests register for the auction prior to the event?

1. Yes, the URL link to the auction page can be shared via direct email, text, or an email marketing campaign.
2. The URL link, text code, and QR code are available on the Preview & Publish tab of the auction page.
3. The QR code can be downloaded and included in marketing activities like mailed invitations and social media posts. It can also be used the night of the event with table tents, the program, and posters.

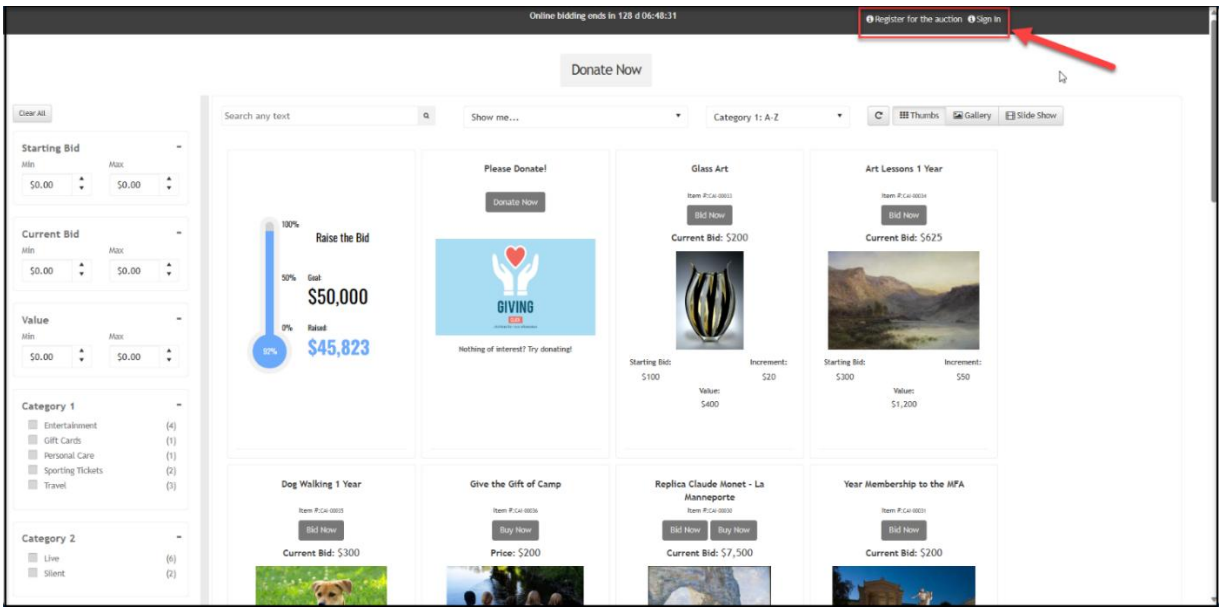


4. Be sure the auction page is active prior to inviting attendees to register. The bidding does not need to be open yet, but the page must be active. The page is only viewable to the public between the **Auction starts on** and the **ends on** dates/times.

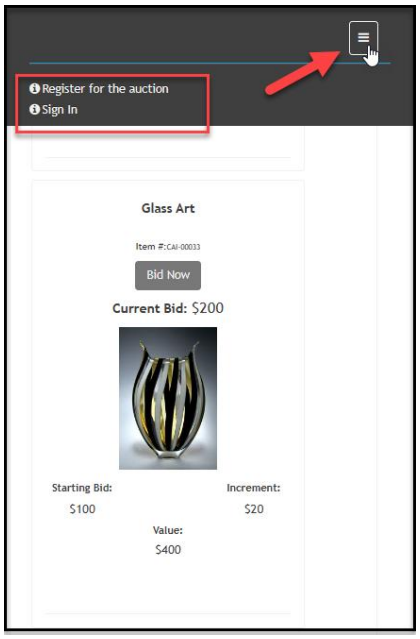


5. If you activated the **Send Portal Account Info Email** on the Event Settings page, then the ticket purchaser and each attendee with an email address that was provided at the time of purchase will receive an email link with their portal account information.

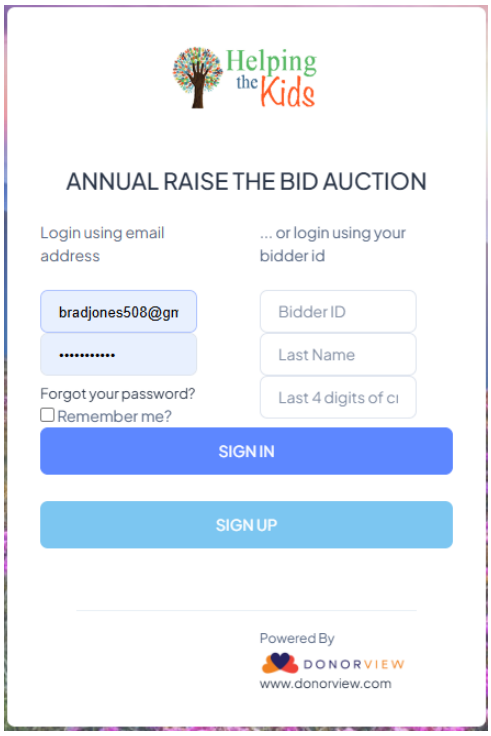
6. Those with a portal account can sign in to the auction using their email and password provided. They can reset their password anytime using Forgot Password on their log in screen.
7. From a desktop, auction bidders can click on Register or Sign In.



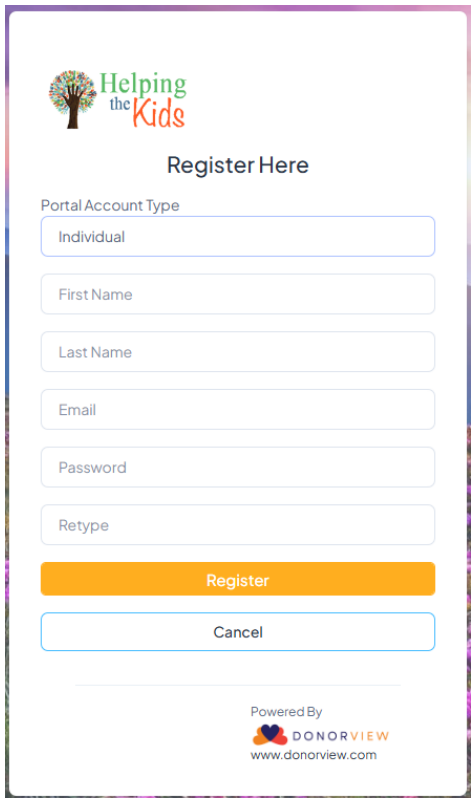
8. From a mobile device, auction bidders will click on the three lines in the top right corner to reveal the Register or Sign in options.



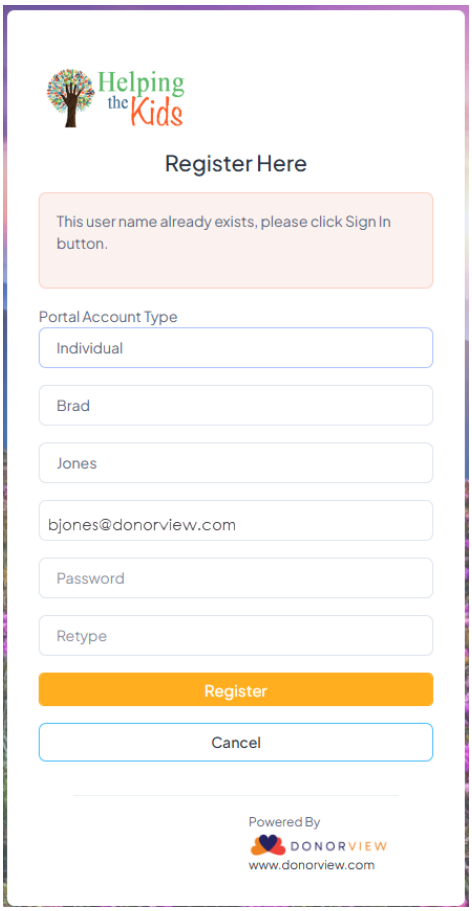
9. If they have a portal account or have a bidder ID and credit card on file already, they can use the Sign In link and get this this login:



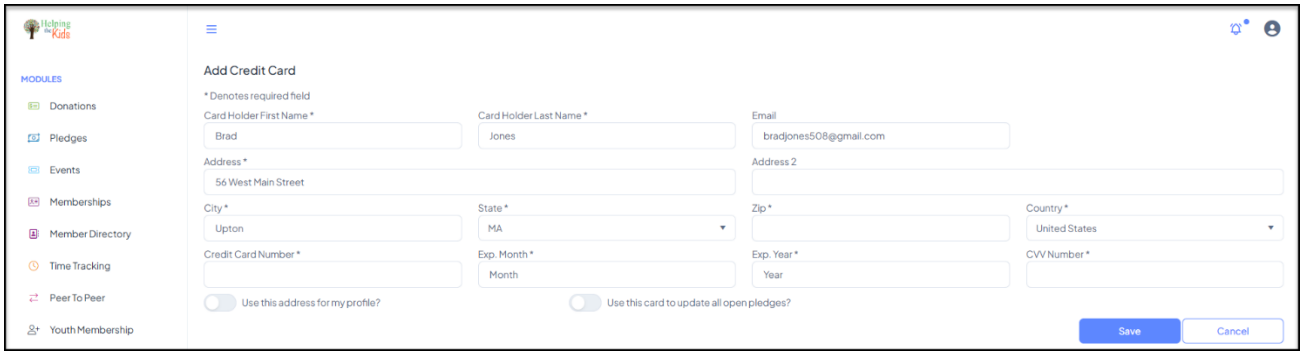
10. If they do not have a portal account yet or if they don't know, they can use the Sign Up link to see this screen:



11. If account has already been created with that email address, they will get this message and will instead click Cancel and then choose Sign In instead.



12. If they forgot their password, they can reset it by clicking on Forgot Password on the sign in screen.
13. If an account has not already been created, they will be directed to this screen to add their credit card or confirm their information.

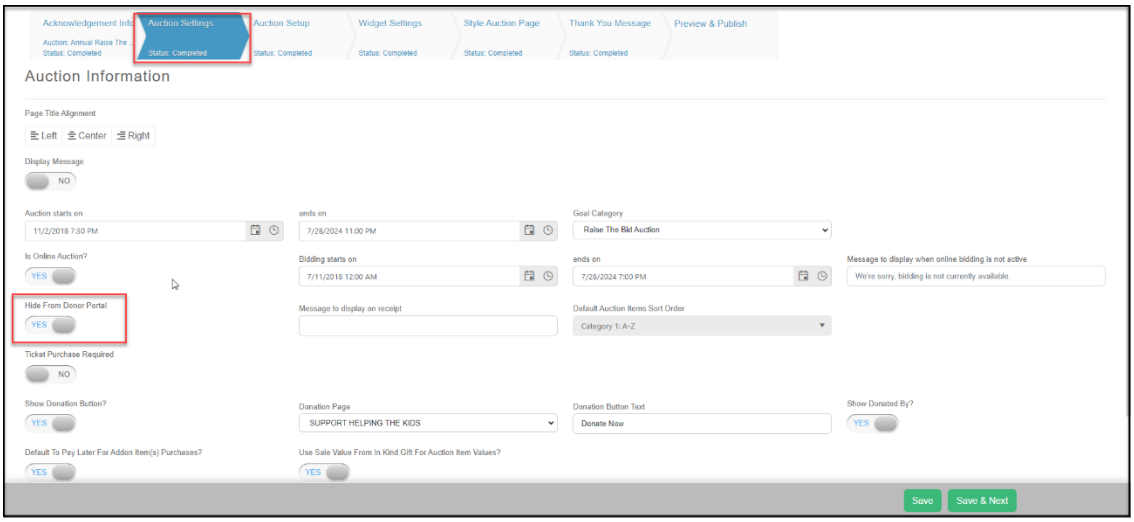


Can people who are not attending the event still participate in an online auction?

Yes, you can open the auction to non-attendees by sharing the URL link, text code, or QR code.

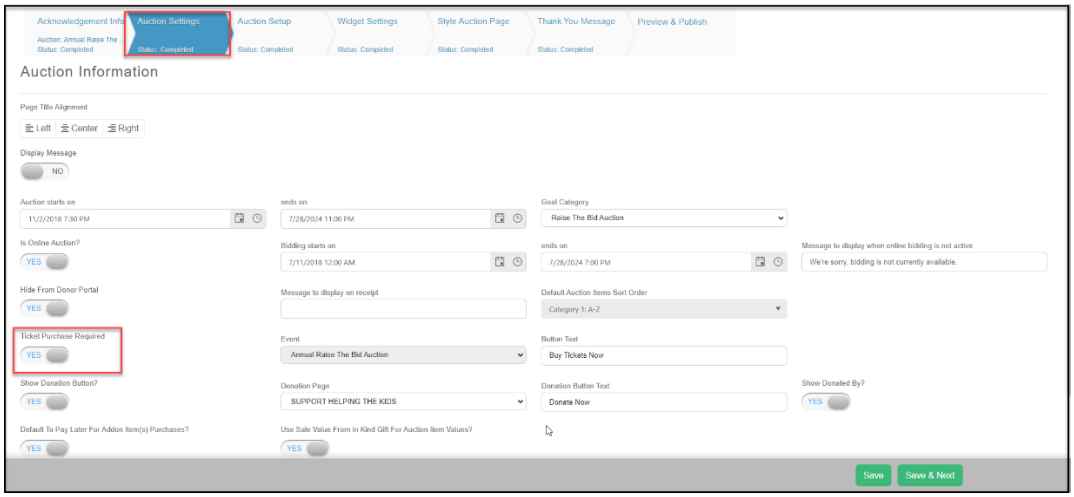
What if I only want people who are at the event to participate in the online auction?

1. You can hide the auction from the Donor Portal by toggling **Hide From Donor Portal** to **YES** on the Auction Settings tab.
2. The only way someone would know about the auction is if the auction page link or QR code is shared with them.



How does Ticket Purchase Required work?

1. You can add a button to purchase tickets to a linked event by toggling **Ticket Purchase Required** to **YES** on the Auction Settings tab.
2. However, a ticket purchase is **NOT** required to participate in the auction.
3. This label will be updated soon in the software to reflect the change.



Equipment List

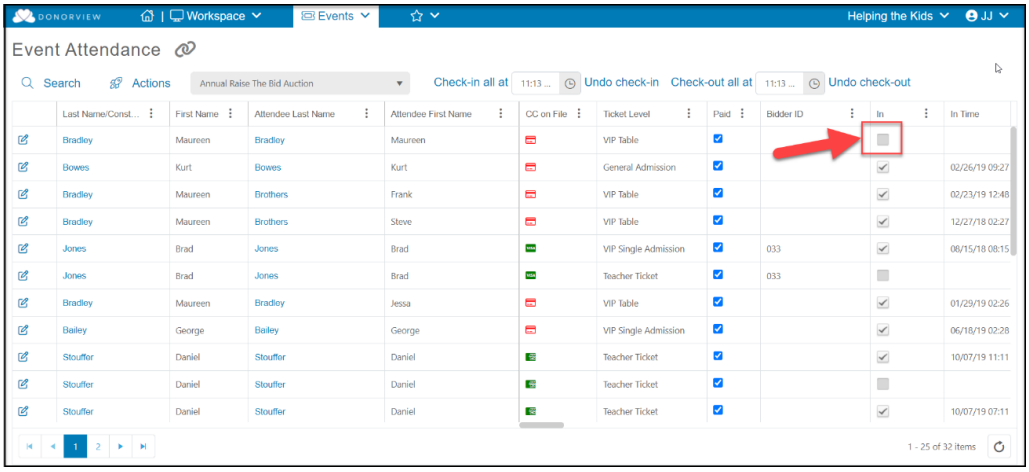
What equipment will I need for the event?

1. Laptops & power cords – laptops are needed for auction checkout, to make changes to pages, and perform other activities using the main software platform.
2. 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.
3. 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 and have purchased/rented the equipment from DonorView.
4. 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.

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 <u>not</u> 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.)



Is guest check-in required to participate in the online auction?

No, guest check-in is not required or linked to the online auction.

Does checking in a guest automatically sign them up for the auction?

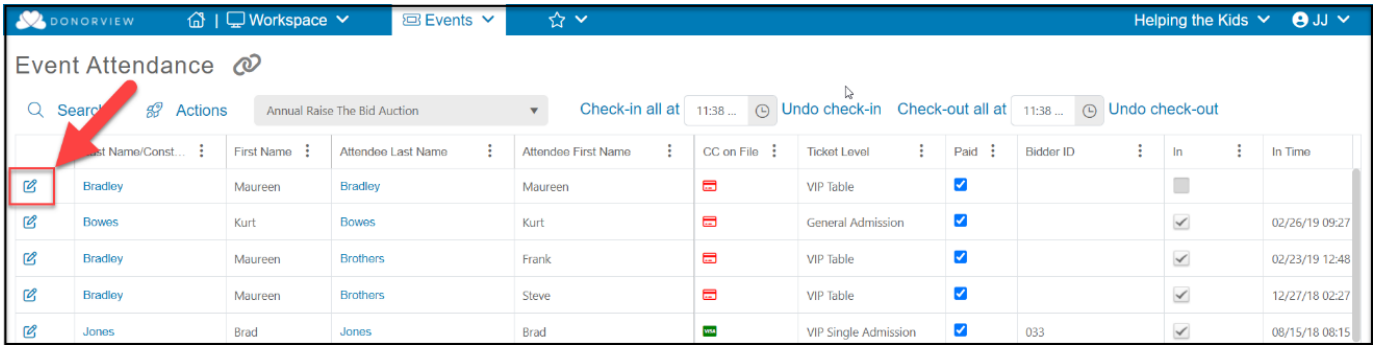
1. No, guest check-in does not automatically sign them up for the auction.
2. If they have a bidder ID, email address, and credit card on file, they can use this information to **Sign In** to the auction.
3. If a guest (actual attendee) does not have this information and has not already created a portal account, they will need to create one using the **Register** link on the auction page.

If a credit card is swiped and added to a constituent's record, are they checked in?

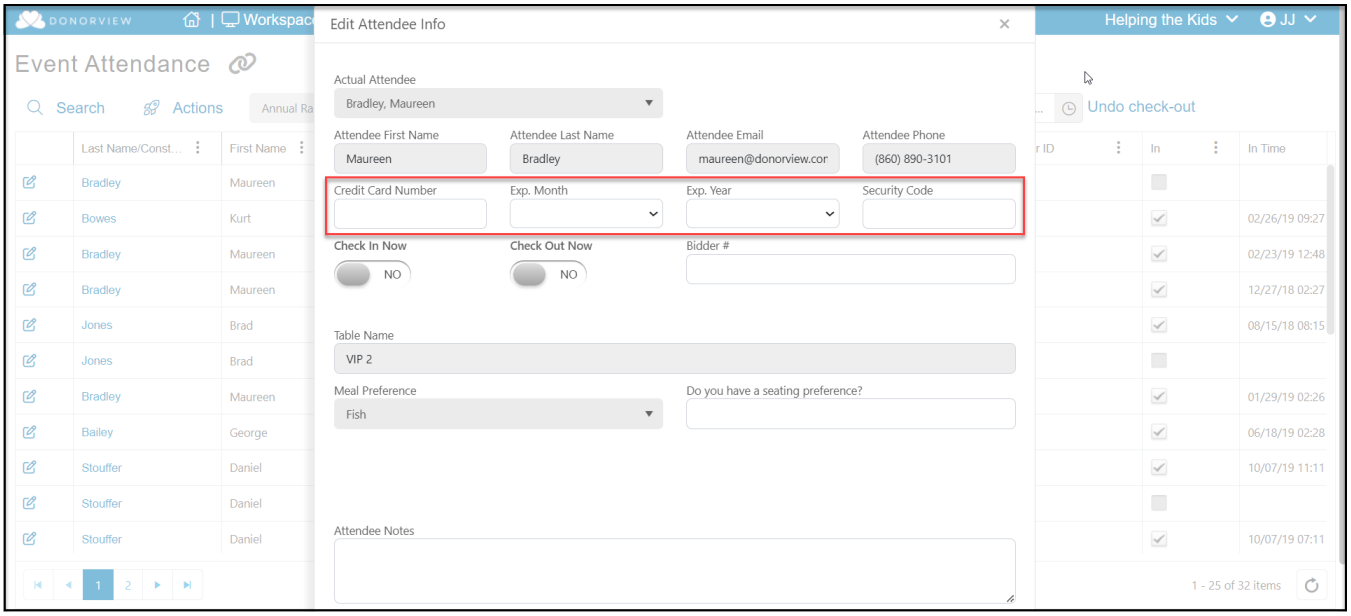
No, swiping a credit card does not check them into the event. The checkbox under the **In** column must be manually checked on the Event Attendance grid, or they can be checked in using the mobile app by scanning their ticket or checking their name on the list.

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

1. Credit cards can be entered several ways:
    a. Manually via the Event Attendance grid or constituent's record.
    b. By swiping a credit card with the mobile app.
    c. By the constituent when they register for the auction or try to bid on an item.
2. **Manually**
    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.



3. Swiping a credit card

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

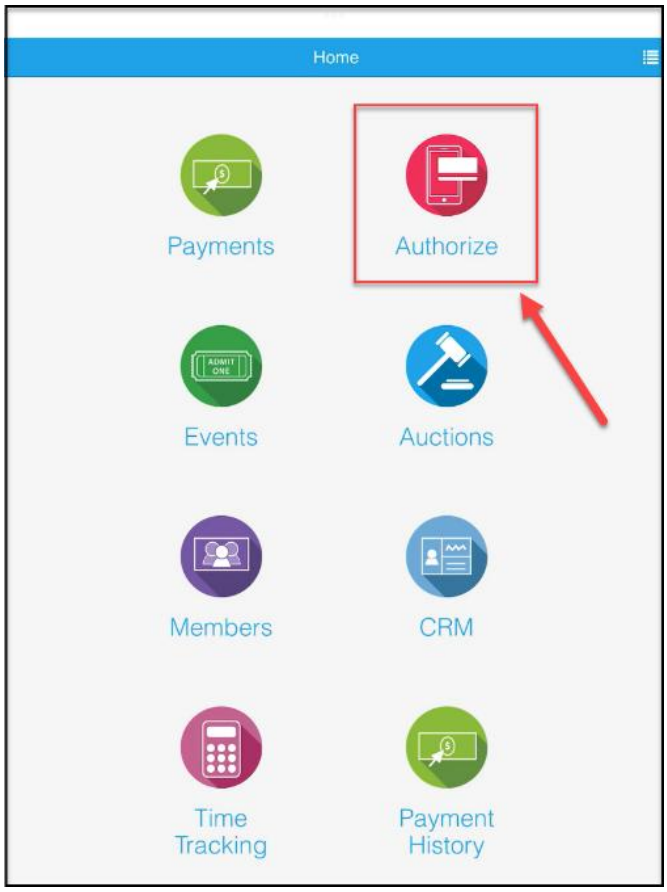
b. Log into the DV Connect App.

c. Click on the Authorize icon.

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

i. White M2 Stripe Swiper - https://vimeo.com/1024079232/ec89adabb3

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

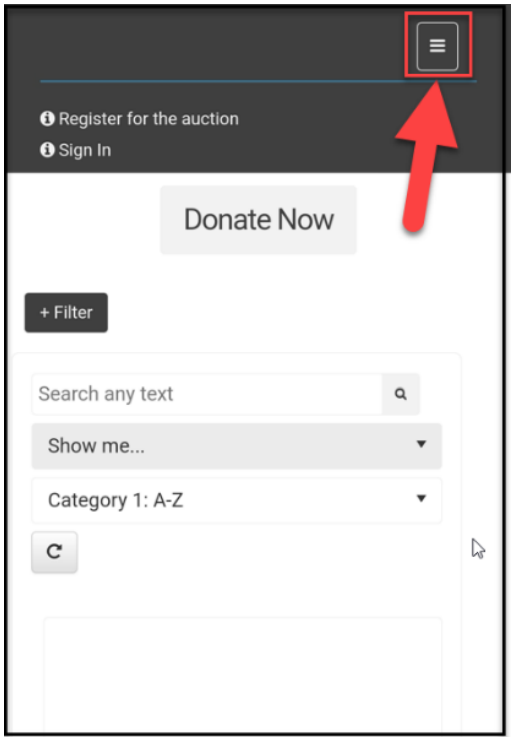


e. You can choose to swipe the card, then select the matching name in the database, or search for the constituent then swipe to pair it to that specific constituent.

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.

4. **Donor Portal Auction Registration**



   i. The attendees can add or update their own credit cards through the donor portal.
   ii. The easiest way to do this is via the link provided for the auction.
   iii. The attendee can click the URL link for the auction or scan the auction QR code with their phone, and use the menu at the top right corner of the screen to either register or sign in.
   iv. They will click on **Register for the auction** to create a new account.
   v. If they already have an account, they can click on **Sign In** to enter their email address and password.
   vi. If they have not already created an account, they will click on **Sign Up.**
   vii. To link to an existing constituent record, the attendee should use the same name and email address that is shown for the attendee on the Event Attendance grid.
   viii. Using the same email is especially important if they just swiped their credit card and want that card to be included in their account information.
   ix. After they enter their information, a new window will open to allow them to enter a billing address and credit card number.
   x. Once they click the orange **Save** button, they are all set for bidding.

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 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. You can learn more about customizing the Event Attendance grid in this article: https://support.donorview.com/en/support/solutions/articles/9000246762-can-i-save-the-view-for-the-event-attendance-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 or using the S700 Terminal.
2. Mobile App:

a. Be sure to watch the applicable video for examples of purchasing tickets via the app.

b. If you have the black swipers, ID Tech, please view this video for an example.

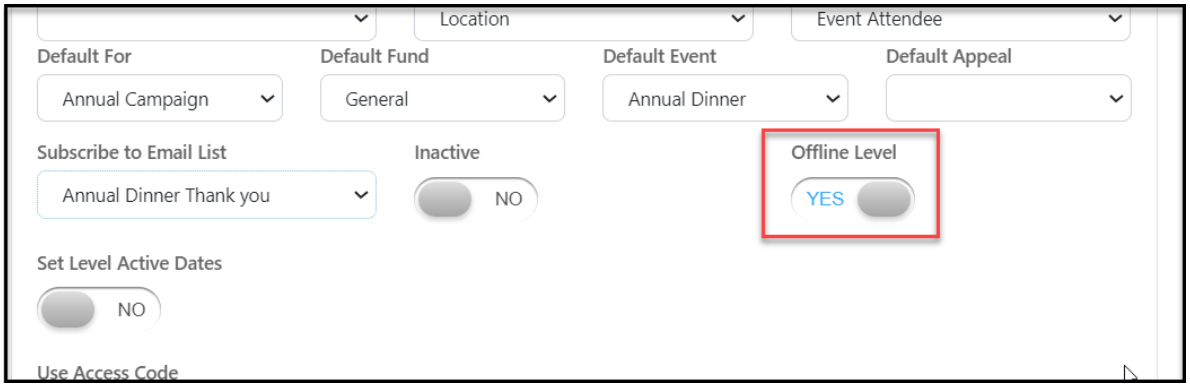
c. If you have the white swipers, M2, please view this video for an example.

3. S700 Terminal:

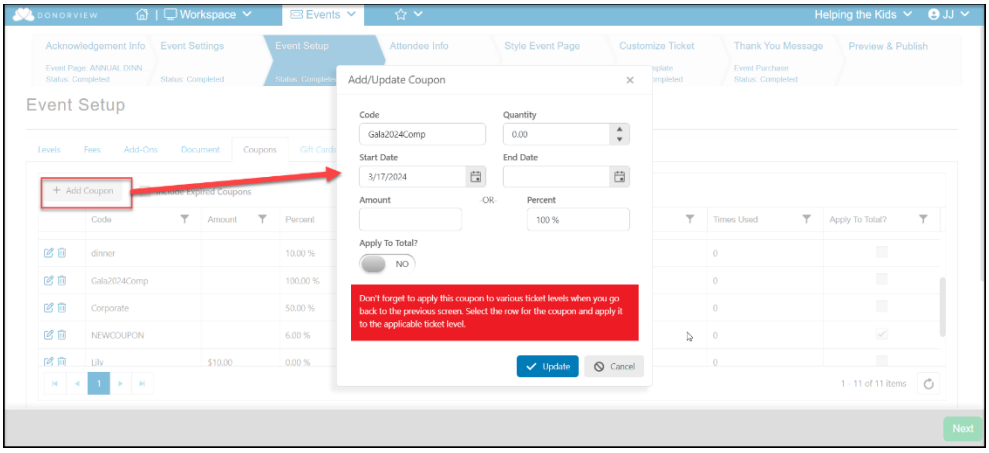
   a. This video provides an example of selling tickets using your event page and the S700 terminal. https://vimeo.com/1123344172/1eb54e7b4d

Can you create or assign complimentary tickets?

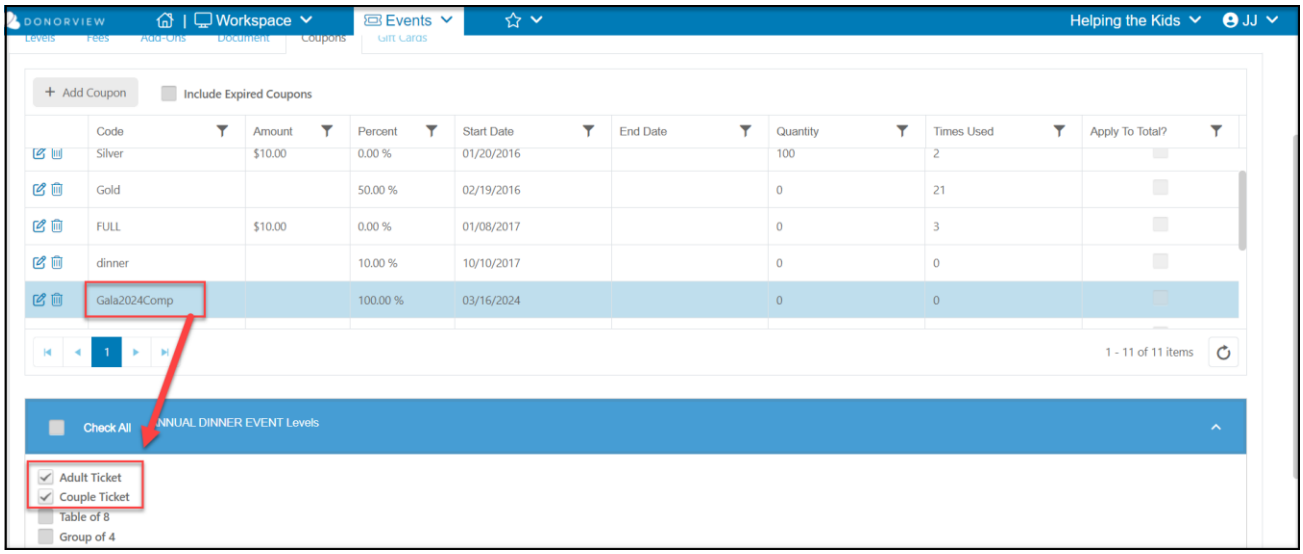
1. Yes, in the event set up tab, complimentary tickets can be created two ways, by creating an Offline Level or by creating a 100% off coupon.
2. From the event level, toggle the **Offline Level** to **YES.**



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?

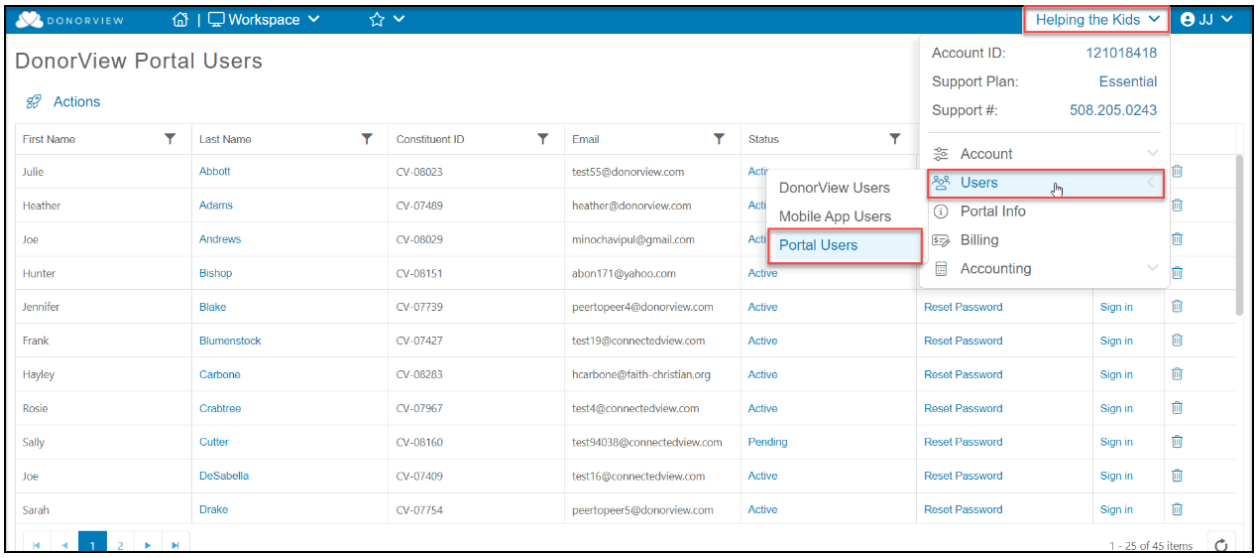
Yes, by using the Offline Only level as described above.

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 will 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-

Do bidders IDs preassign and can I turn that off?

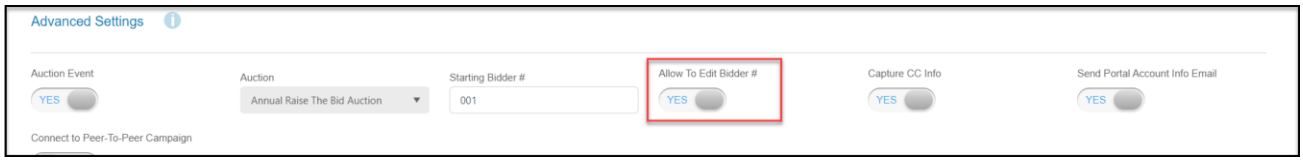
1. Yes, the Bidder IDs are preassigned but only if the event is linked to the auction page.
2. For events linked to auctions, this function cannot be shut off, however the Bidder IDs can be edited if that feature was enabled on the Event Settings page.
3. If the event is NOT linked to the auction page, the Event Attendance grid cannot be updated with bidder ID numbers.
4. Auctions that are not linked to an event can be managed as a stand-alone online auction or a more traditional silent or live auction where winners are manually assigned.
    a. If there is an online auction and it is not linked to an event, only those bidders who have registered for the auction may participate.
    b. If it is not an online auction, any constituent in the database may be manually assigned as the winner for the auction item.
5. For auctions linked to event, Bidder IDs are only assigned to unique constituents.
6. A unique name and email is required for a unique Bidder ID.

Can multiple guests have the same credit card or Bidder ID number?

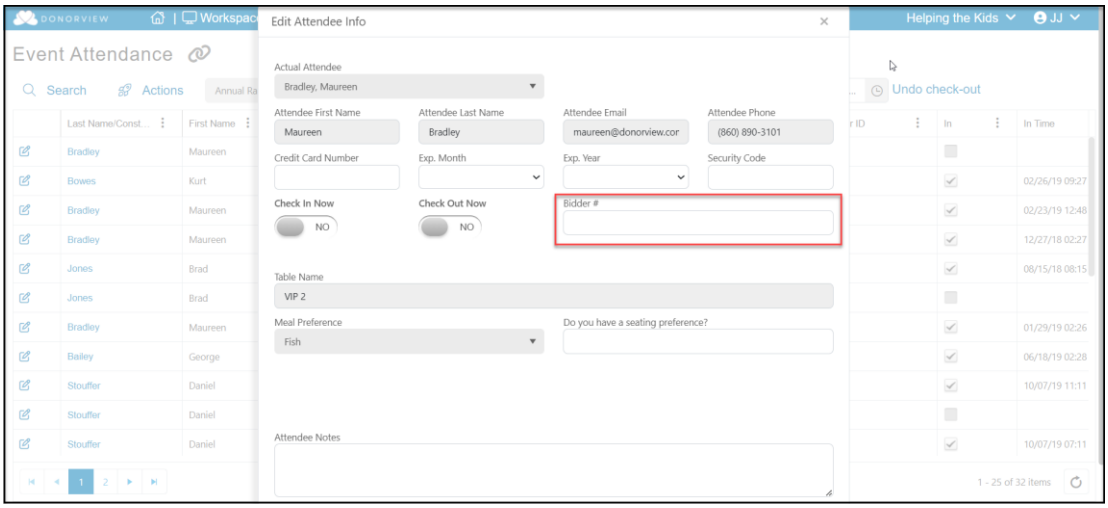
1. Yes, multiple guests can share the same credit card number.
2. No, multiple constituents cannot share the same Bidder ID number.
    a. If you wish spouses to share the same paddle number, they also need to share the same constituent record – for example Brad and Christine Jones are entered as Brad and Christine in the first name field.
    b. If they are separate constituent records, you could assign Christine bidder ID number 156 and her husband, Brad, as bidder ID number 1156.

How do I add a bidder number?

1. Within the Event page editor, on the Event Settings tab, the **Allow To Edit Bidder #** must be set to **YES** in order to add or edit bidder numbers.

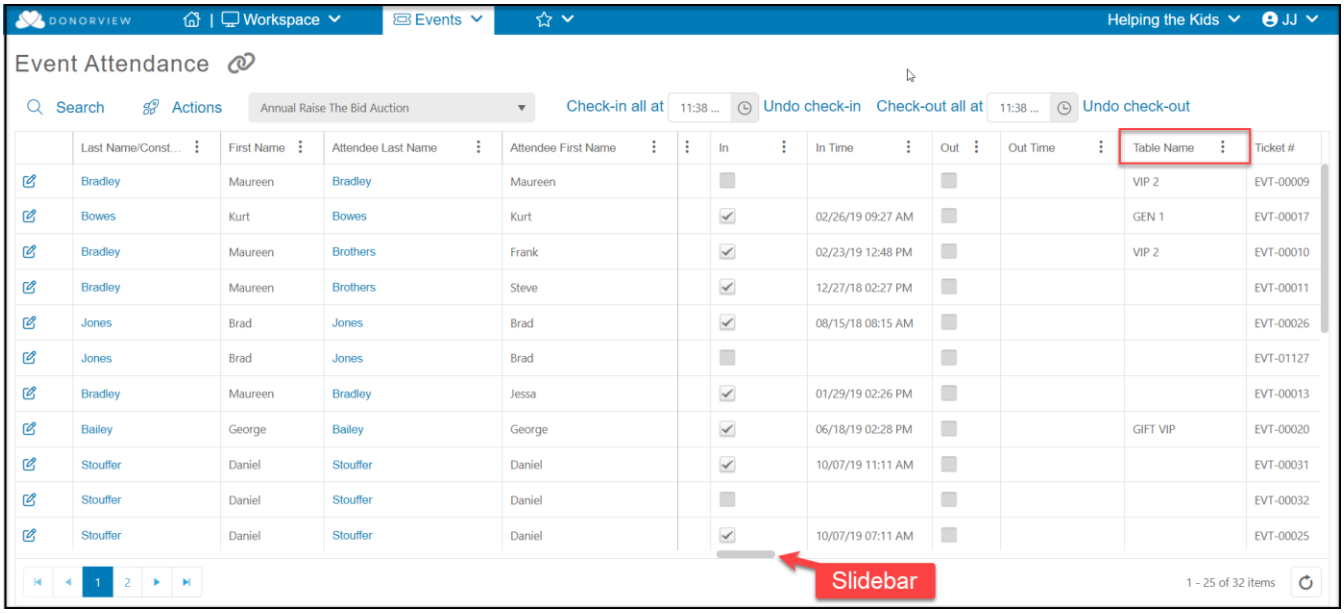


2. Bidder numbers can then be added by clicking on the edit icon from the Event Attendance grid.
3. Bidder numbers can only be added one at a time.



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

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



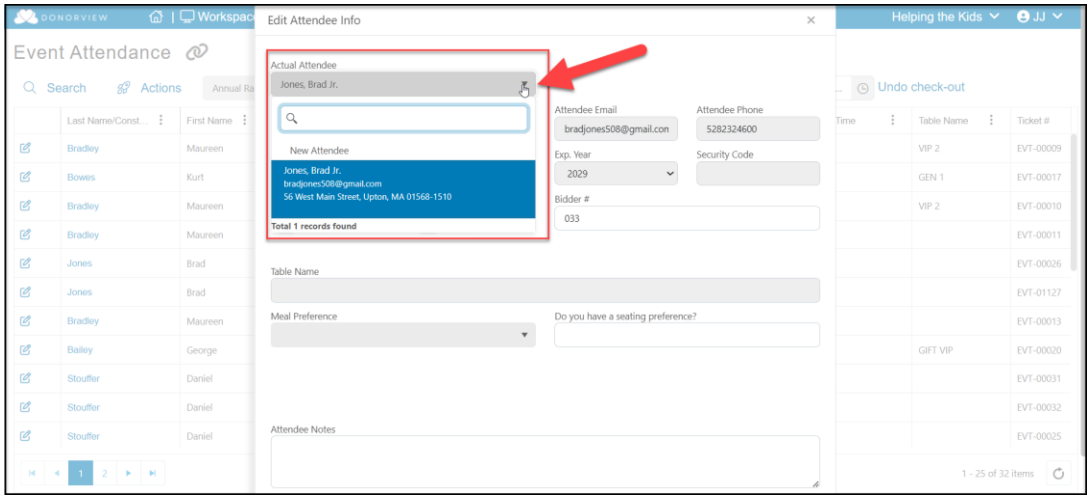
How can I assign or reassign a guest to a table?

1. If guests need to be assigned to a table, use the Table Assignments feature.
2. Some organizations may opt to use the Event Assignments feature instead. This would assign guests to a group instead of a table.

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.

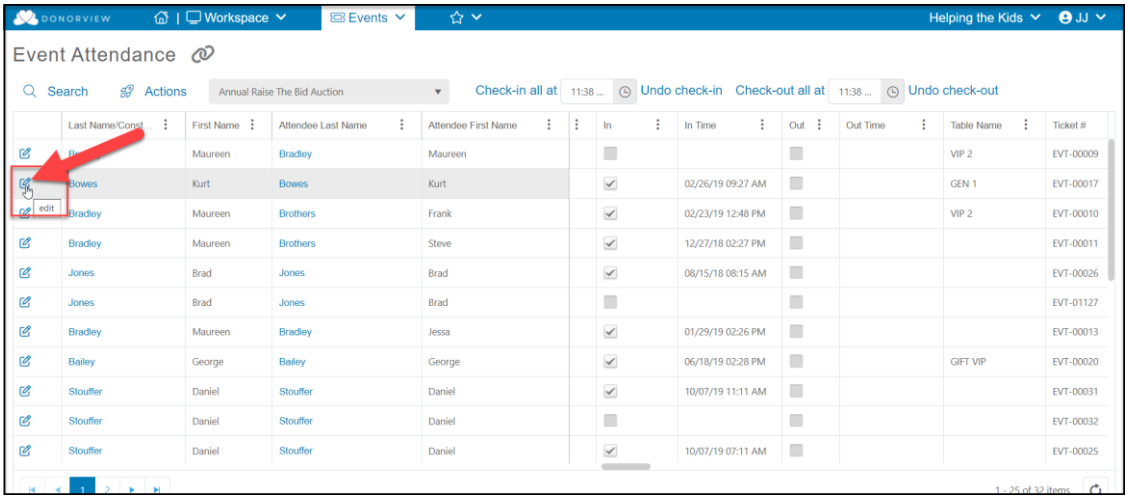
7. If no matching constituent is found, click on **New Attendee** to enter the name and email address to create a new constituent record. Other fields can be updated with credit card information, check in, and answers to custom questions.



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 open the window to edit the guest's (actual attendee) info.



Do bidding links get sent out automatically?

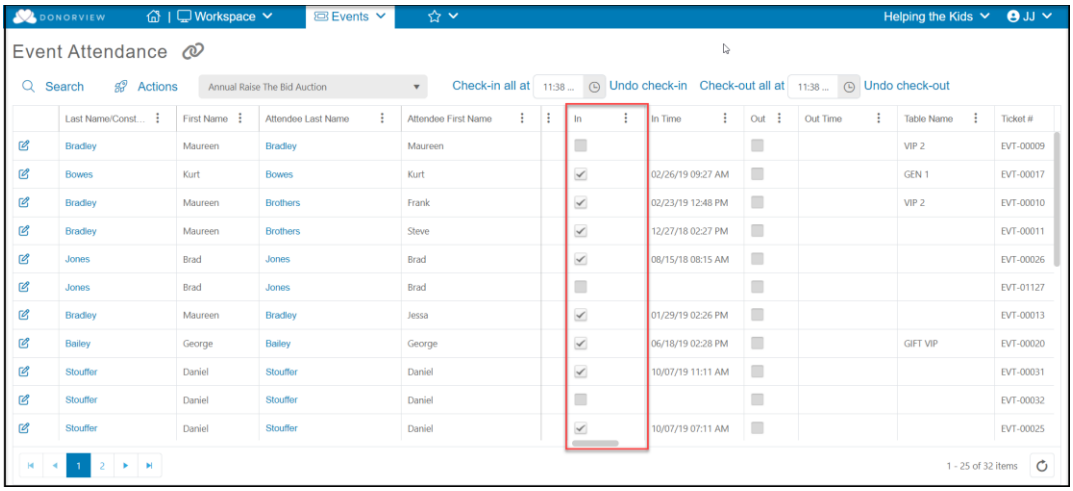
1. No. The URL, QR code, or text code need to be shared with bidders in order to register and bid.
2. You can include this information in the Event Auto reminders if desired.

Are cell numbers and emails required?

Only email is required for creating an account, however if the bidder would like to opt in or out of cell phone notifications while placing bids for an auction, they can.

How do I see who has checked in?

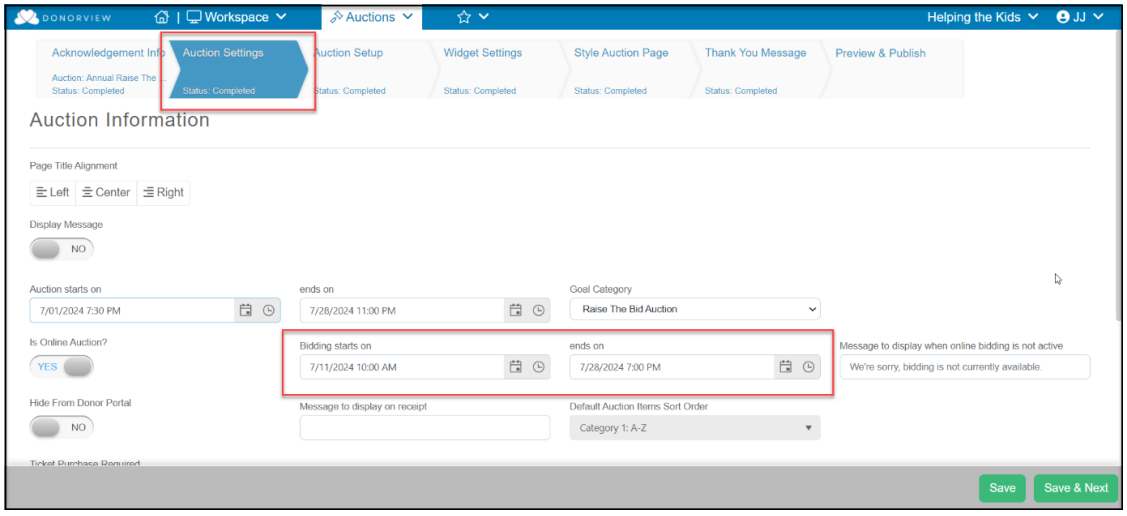
1. The **In** column will indicate with a check mark if the attendee has been checked in.
2. The **In** column can also be filtered with a True/False function using the three dots on the right side of the column heading.



Online Silent Auction:

How do I turn off bidding for an online auction?

1. For online bidding, the specific ending bid time is set on the auction page editor.
2. Click on the Auction Settings tab and enter the time and date to end the bidding.
3. Click the green **Save** button to save the changes.

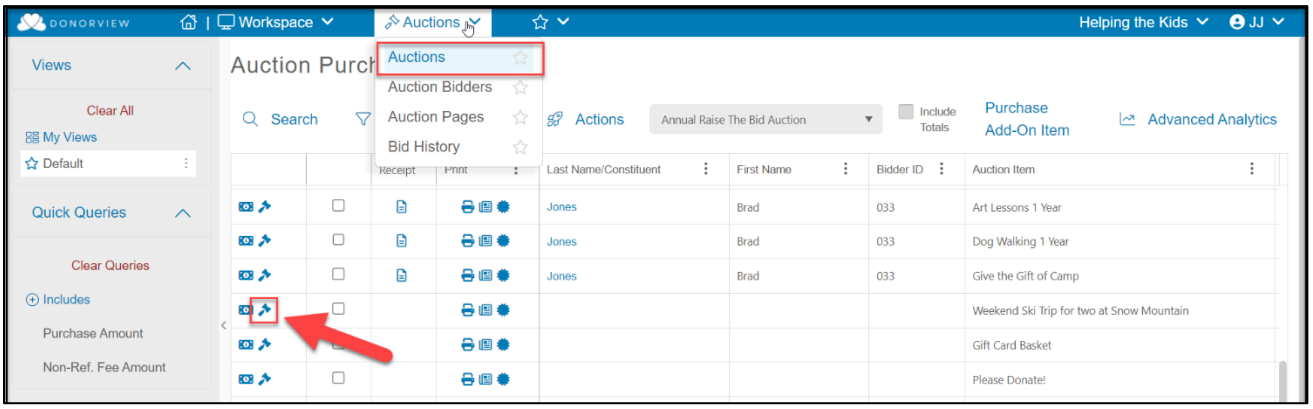


Are credit cards required to bid, and can I change that?

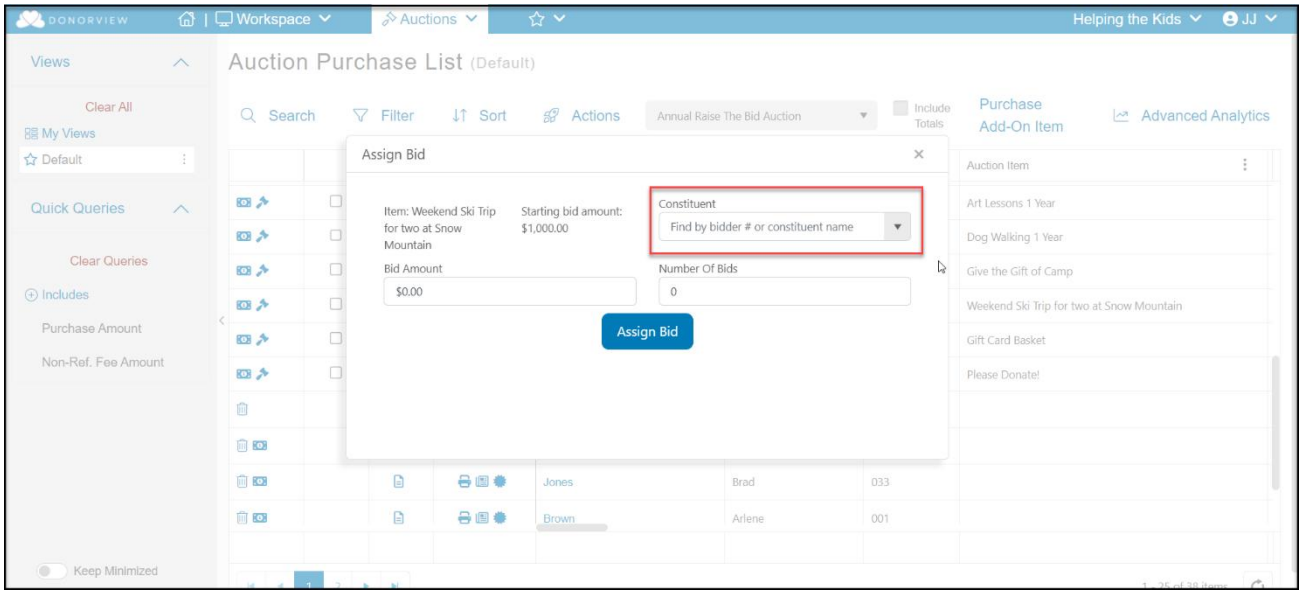
1. Yes, credit cards are required for a bidder to place a bid online and that cannot be changed.
2. Credit cards are not required for manually recording bids or add-on items.
3. If desired, a bid can be placed on behalf of an event attendee. See the response below for "How to place a bid for a guest" for more information.

How do I place a bid for a guest?

1. Click on the gavel icon from the Auctions grid on the row of the auction item.

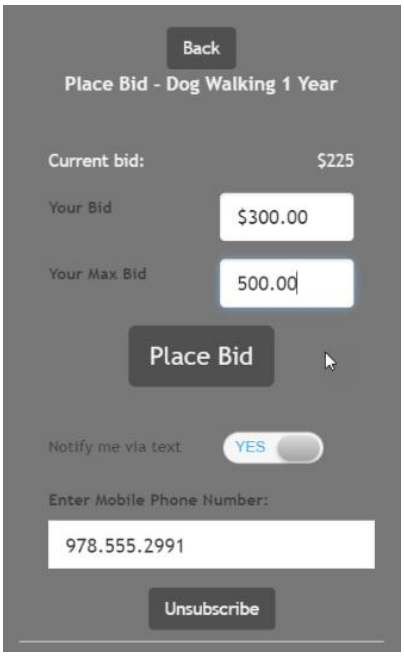


2. Search by bidder number or attendee last name to identify the bidder.
3. Enter the bid amount.
4. Entering the number of bids is optional.
5. Click the blue **Assign Bid** button to record the bid.



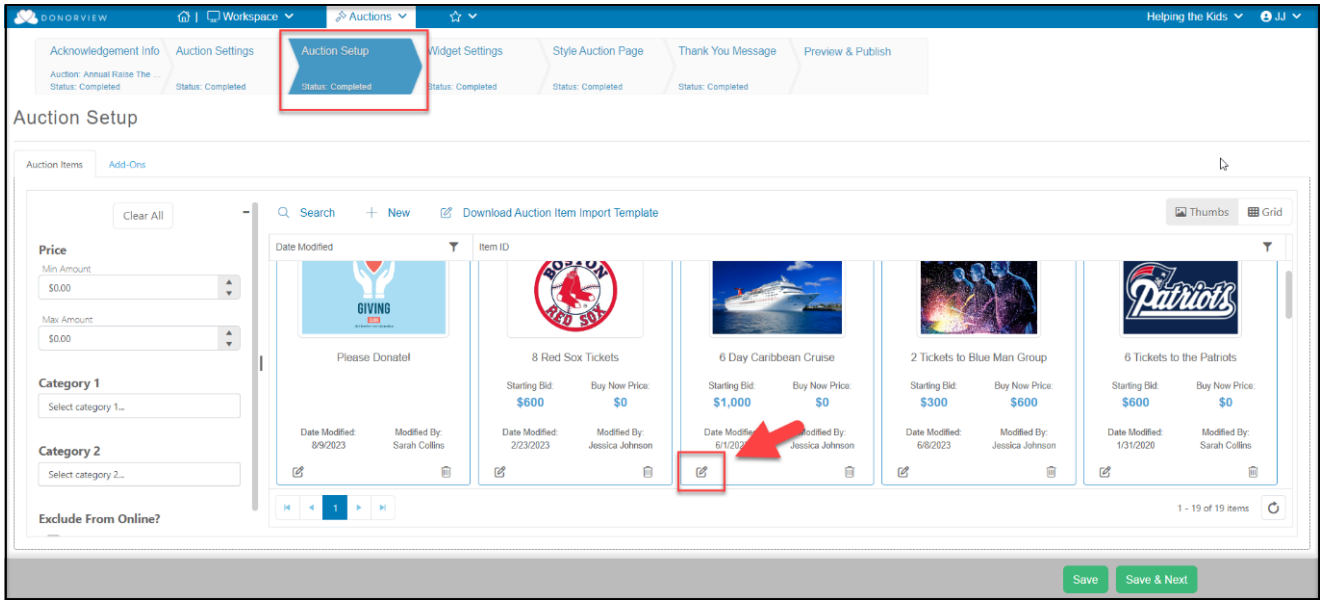
Is max bid an option?

1. Yes, but only for the bidder when they are logged into their account.
2. The bidder can choose to include a max bid and the system will continue to bid on their behalf up to that max bid amount.
3. When a new bid comes in that exceeds the max bid, the bidder will receive a text notice with an option to bid again.
4. The max bid placed by a bidder can be viewed on the Bid History grid.

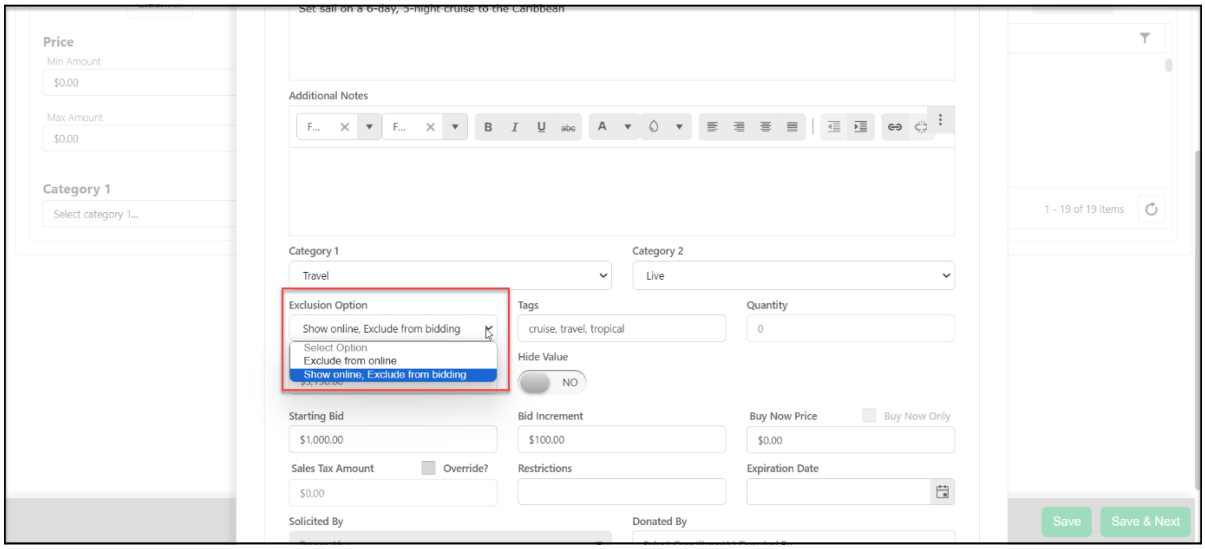


How do you hide/unhide an auction item?

1. Items can be included in the auction but not shown online.
2. They can also be included and shown but excluded from bidding.
3. Items that are excluded from bidding are not included in the Bid History for batch checkout.
4. From the auction page editor, click on the Auction Setup tab.
5. On the item to hide/unhide, click on the edit icon in the bottom right corner of the item window.

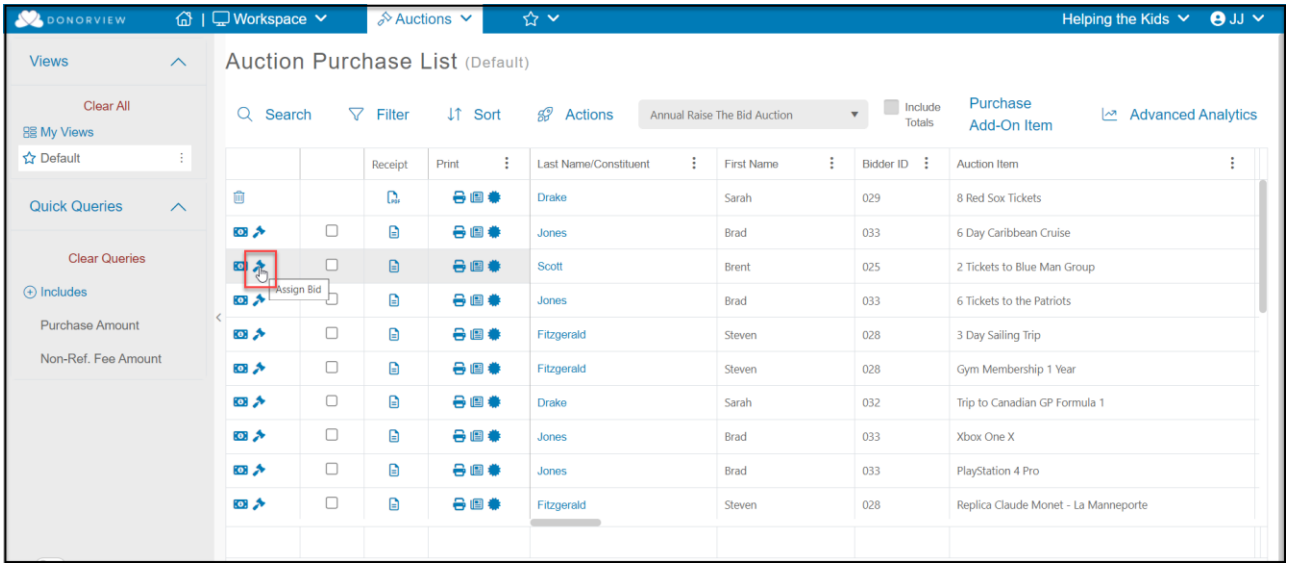


5. Under **Exclusion Option**, select **Exclude from online** if the item is included for internal bid assignment and checkout.
6. Select **Show online, Exclude from bidding** to show the item to bidders, but keep bid assignment internal only from the Auctions grid.
7. To open bidding to all bidders, leave the field **Select Option** blank.



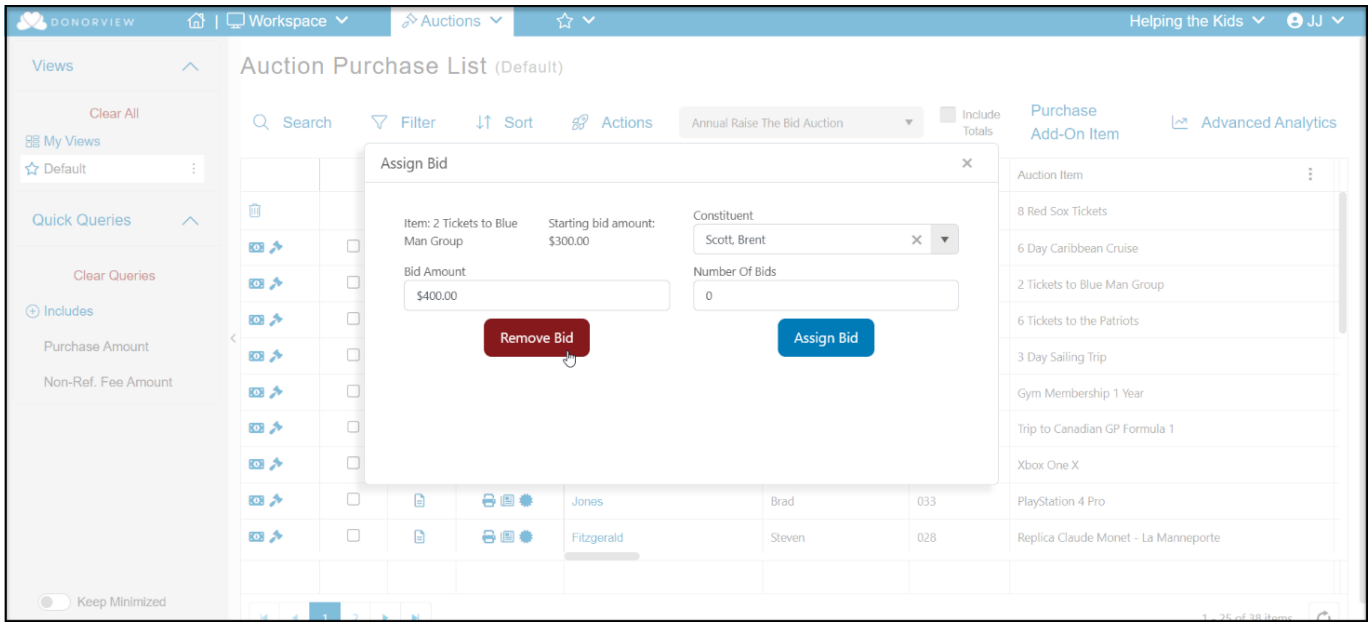
How can I remove or edit a bid?

1. Click on the edit icon next to the item with the bid that needs to be edited or removed.



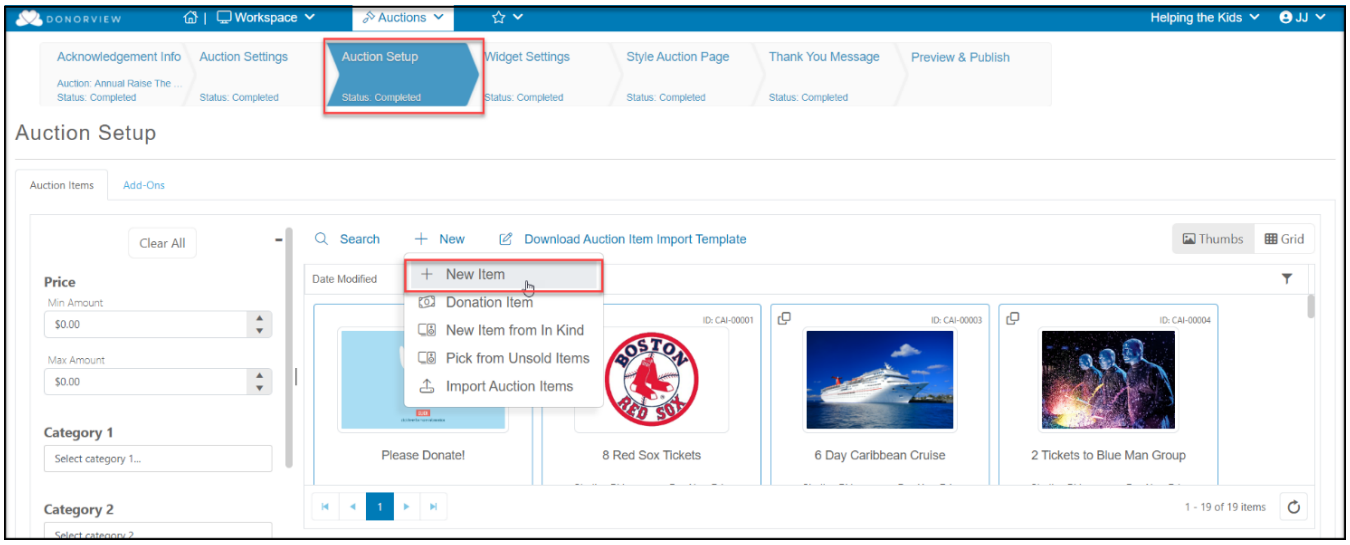
2. Click the red **Remove Bid** button to remove the bid and allow the next highest bidder to be shown as the current winning bid.

3. The bidder and/or bid amount can also be edited and saved by clicking on the blue **Assign Bid** button.

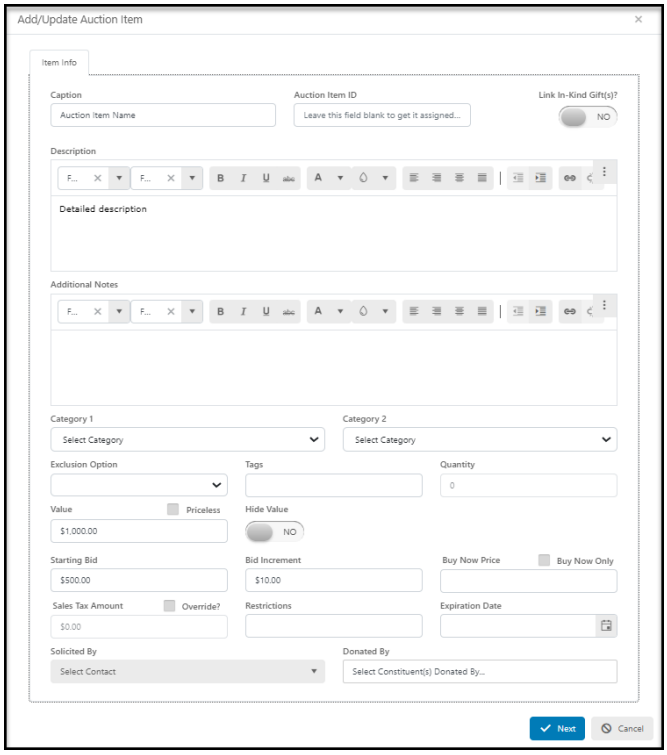


How can I create a last minute auction item?

1. New auction items are added via the auction page editor. See this article for a detailed description for adding items https://support.donorview.com/support/solutions/articles/9000150881-auction-setup.
2. On the Auction Settings tab, click on **+New**, then **+New Item**.
3. Enter the information for the item and click **Next** to add pictures if desired.



4. Click **Update** once the pictures are uploaded or the information is completed.



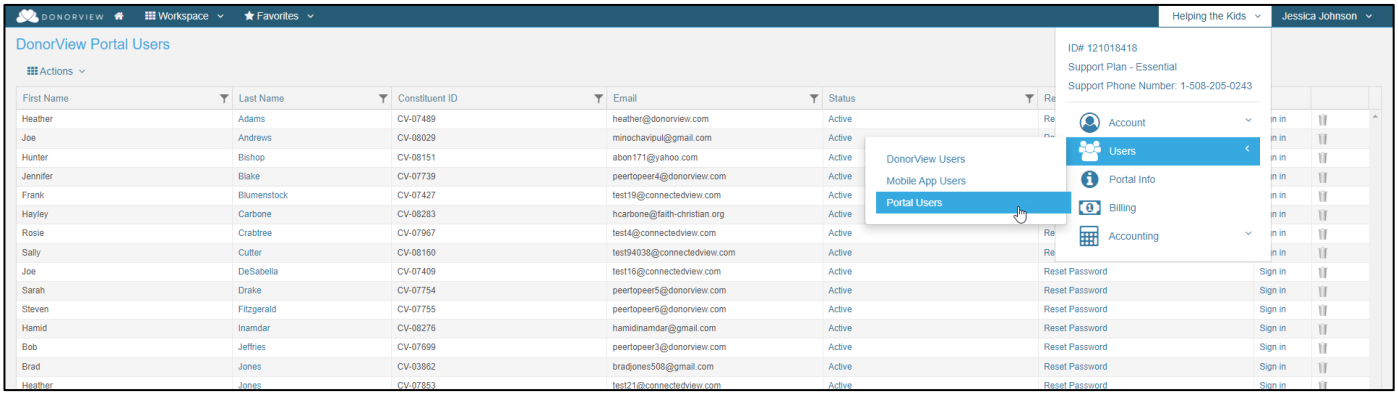
What if a bidder has trouble logging into their auction portal account?

A. If a bidder cannot log in, ask them what message shows when they attempt to log in. Each message has a different approach to resolve the issue.

B. Error Message: Login Not Found

1. Verify that the member has a portal account created.
2. You can find a grid of all your Portal Users listed under the organization admin menu on the top right-hand side of the page.
3. You must have Administrator access to view.
4. You can sort the list for specific users.
5. If they are on the list, check to make sure they are attempting to login using the correct email.
6. If they are on the list and are using the correct email, ensure they are not inadvertently adding a space before or after their email address.

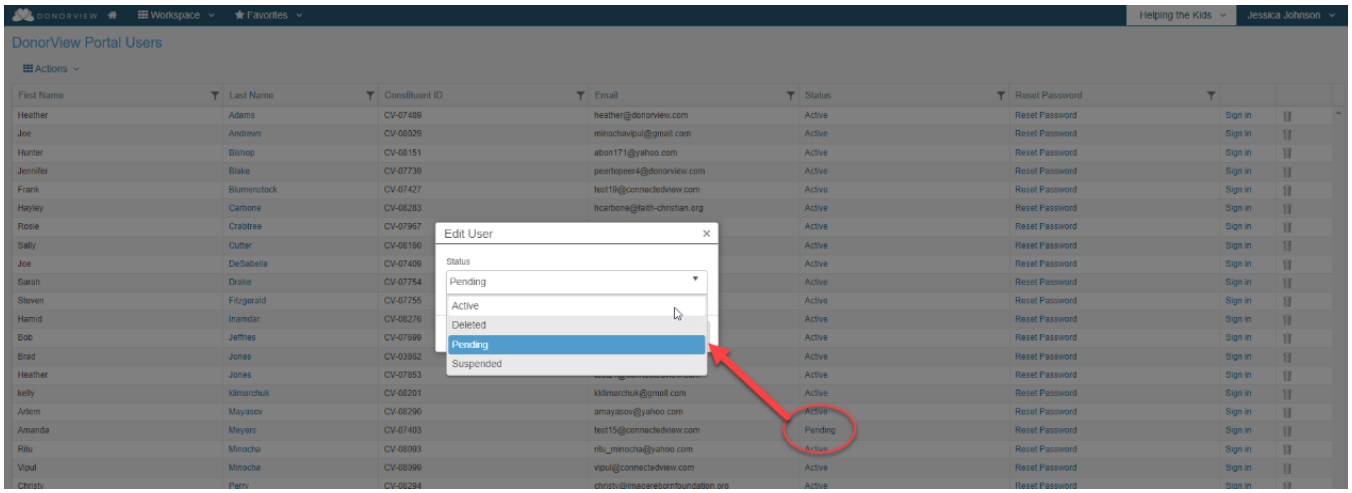
7. If they are not on the list, they need to create an account first before they can access the portal.



8. To create an account, have them go to the auction page and click the link to register found at the top right side of the screen under the three lines. For more information about creating an account, see page 17, Donor Portal Auction Registration.

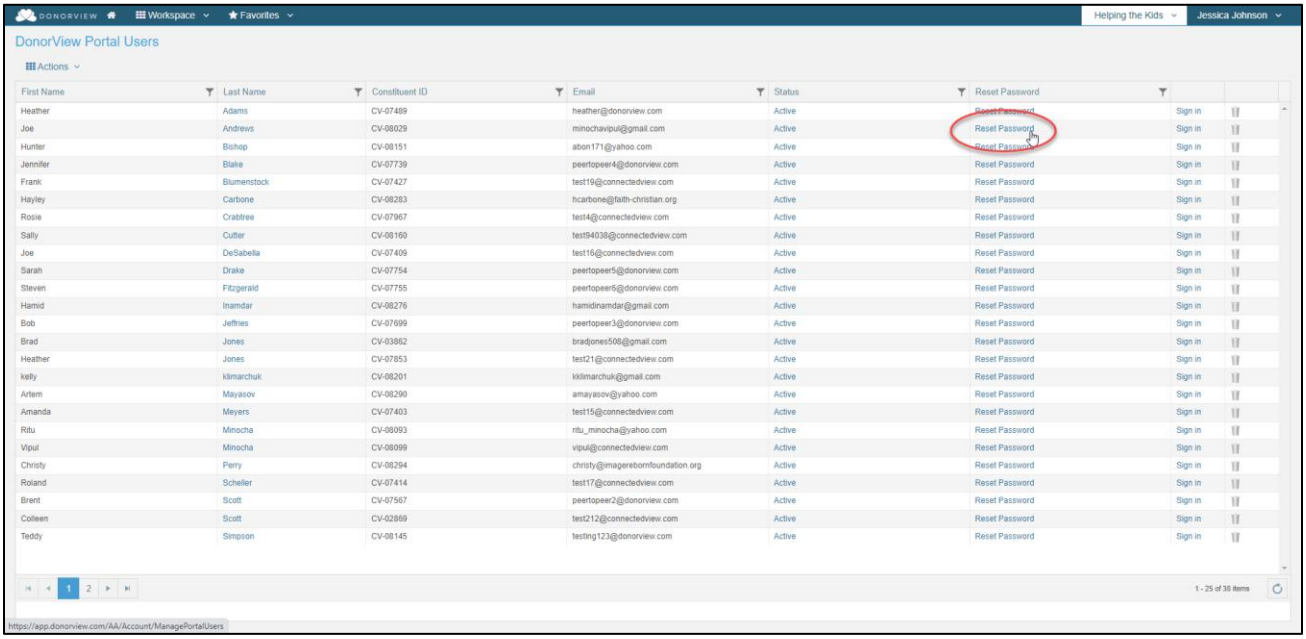
C. Error Message: Account Has Not Been Verified

1. The user has signed up for the account but did not click on the link in the confirmation email sent when they initially signed up.
2. They can click the link in the email to verify their account and then log in using the email and password they selected.
3. If the confirmation email cannot be found, you can also activate their account from the portal users grid.
4. To access the grid, go to the organization admin menu on the top right-hand side of the page, click on Users, then Portal Users.
5. Click on the Pending status next to their email address.
6. A new window will open to allow you to change the status to Active. Click on Update to save the change.
7. The user will now be able to login using their email address and password.



D. Error Message: Wrong Password

1. If the member receives the message "Wrong password," they have a portal account, they have used the correct email, however they are entering the wrong password.
2. Ask the member to ensure they do not have Cap Locks on or are not accidentally adding a space before or after the password, which sometimes happens using a copy-paste function.
3. If the member cannot recall the correct password, the member can reset their password on their own by clicking on the Forgot your Password link.
4. If they reset on their own, they will see a message that the reset instructions are sent to their inbox.
5. If the member enters their email address after requesting a password reset and instead receives a message “Login not found,” they do not have a portal created yet or they are using the wrong email address.
6. You can also assist the member and reset their password from the Portal Users grid.
7. Select the correct user and click on **Reset** Password.
8. The password will reset to "password123" all lower case, no spaces.
9. This will unlock the account, and the bidder can update their password after they log back in.



E. Error Message: Account Has Been Locked

1. If the member receives a message that their account has been locked, it is typically caused by attempting to log in using the wrong password too many times.
2. You can reset their password from the Portal Users grid as shown above.
3. Select the correct user and click on **Reset** Password.
4. The password will reset to "password123" all lower case, no spaces.
5. This will unlock the account, and the bidder can update their password after they log back in.

Traditional Silent Auction

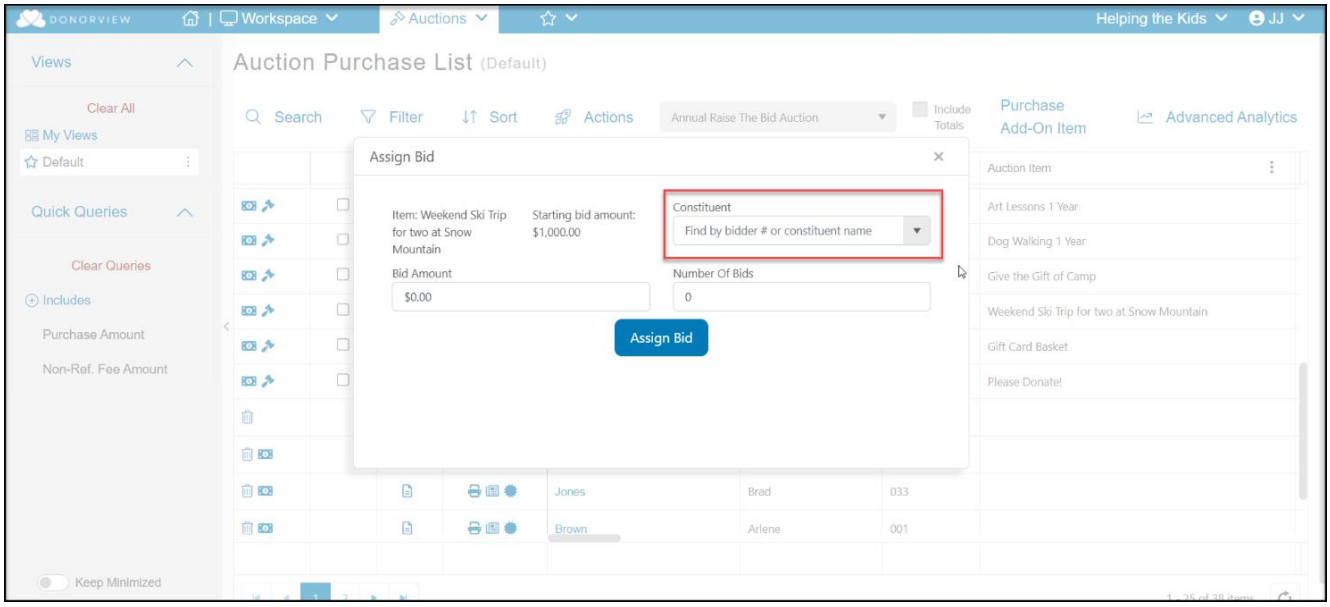
Can the software create paper bid sheets?

1. Yes, from the Auctions grid you can print individual bid sheets or use the actions menu to print all the bid sheets.
2. You can also choose the format for the bid sheet and if you export it to Word, you can edit the bid sheets.

How do I record traditional paper silent auction bids?

1. If your auction is using traditional paper silent bid sheets, you will use the gavel icon to assign the winning bidders.
2. Click on the gavel icon from the Auctions grid on the row of the auction item.

3. Search by bidder number or attendee last name to identify the bidder.
4. Enter the bid amount.
5. Entering the number of bids is optional.
6. Click the blue **Assign Bid** button to record the bid.



Buy It Now

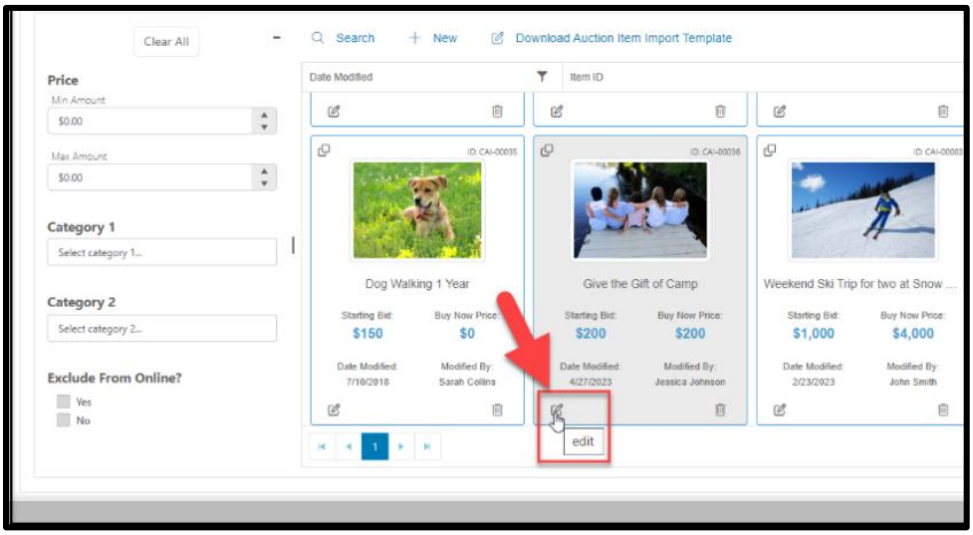
How does the Buy It Now feature work?

1. If you want an item to be bought (not bid on) in an auction, then it is identified as **Buy Now Only** with a set price and quantity available for purchase.
2. Multiple bidders can purchase the **Buy Now Only** item, based on the quantity available.
3. **Buy Now Only** items cannot be assigned/purchased like add-ons, these items are only available to external bidders via the auction webpage.\
4. Auction items can also have a **Buy It Now** price (like eBay) which allows the item to be bid on until it reaches the **Buy It Now** price.
5. The **Buy It Now** price is usually set high (usually at least twice the value) so as not to impede bidding.
6. If a bidder wants to win the item immediately, they enter the **Buy It Now** price as their bid.

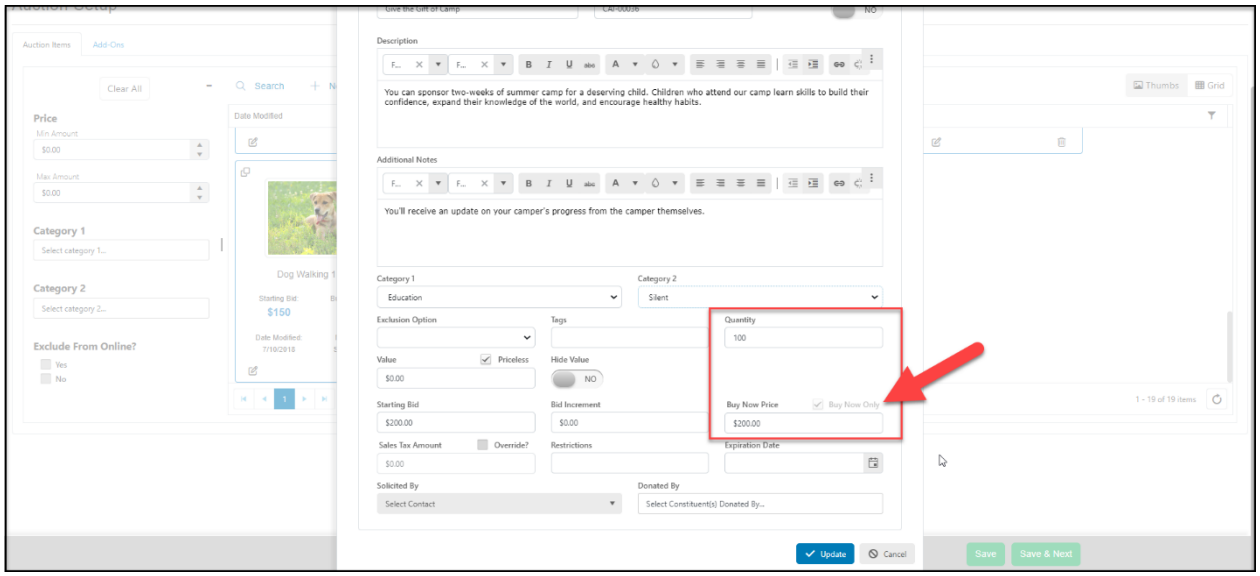
Can auction items be sold multiple times, and if so, how?

1. There is a **Buy It Now** option available for auction items.
2. Only an item assigned as **Buy It Now Only** can have multiple items for sale.

3. Buy It Now Only items cannot be assigned via the Auctions menu, they can only be purchased from the online auction page by a bidder. If you want to be able to assign an item, use the Add-ons feature instead.
4. Click on the edit icon on the specific item to change the quantity.



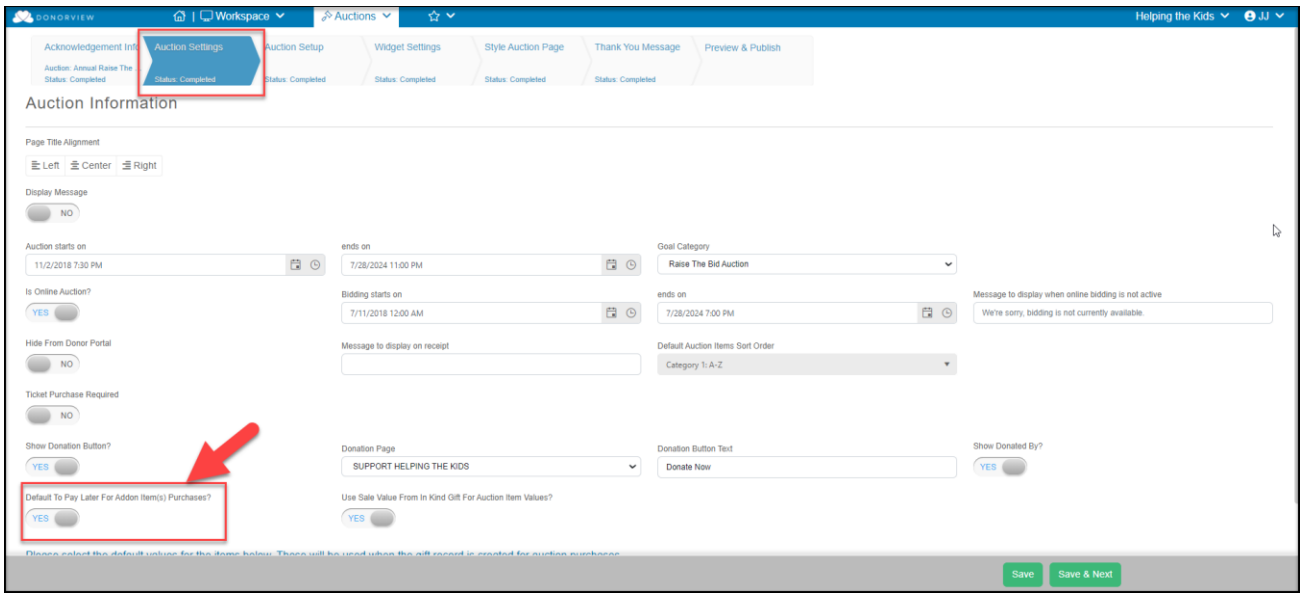
5. Check the **Buy Now Only** box above the **Buy Now Price**.
6. Enter the **Quantity** and **Buy Now Price** after the box has been checked.
7. The quantity available and price can be edited as needed.
8. Click the blue **Update** button to save the changes.



Add-Ons

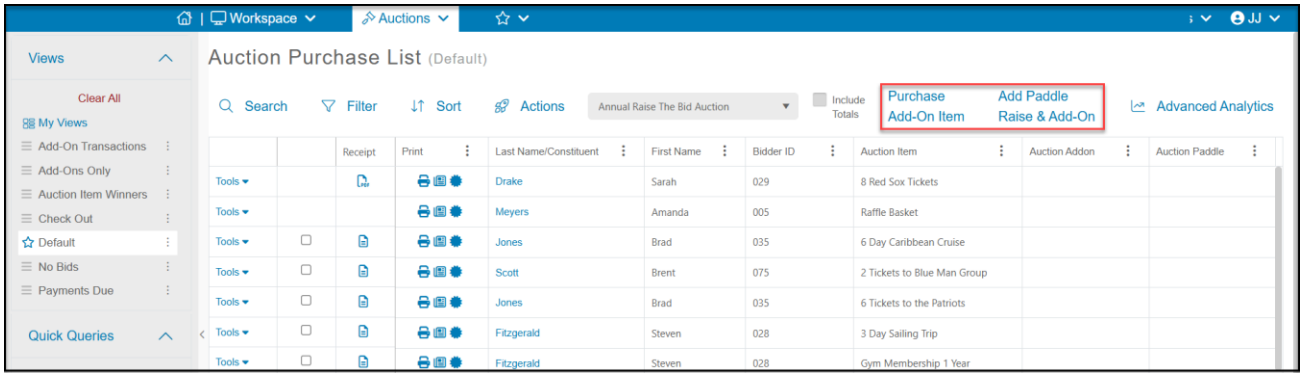
How do I record an Add-on purchase for a guest?

1. **Add-ons** include things like raffle, game, and wine or purse pull tickets.
2. **Add-ons** can only be viewed and recorded in the back end of the software using the Auctions grid. They are not visible on the auction page.
3. **Add-ons** can be an instant purchase or can be identified for payment later and included with other items for a single checkout at the end of the evening.
4. You can establish if **Add-on** purchases are recorded immediately or as pay later. To see the current setting for the auction, view the Auction Settings tab in the auction page editor.
5. With the **Default To Pay Later For Addon Item(s) Purchases?** toggle marked **Yes**, then the add-ons can be recorded, but checked out later. If it is marked as **No**, a payment is recorded at the time of the entry.

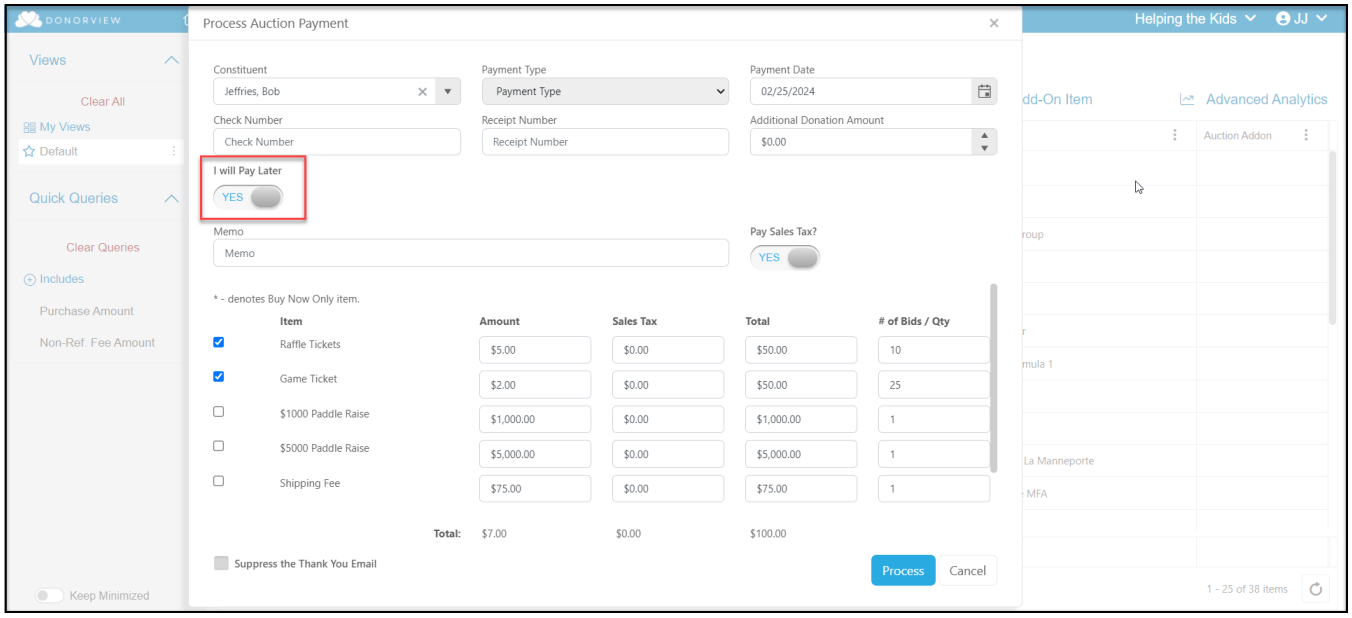


6. A credit card is not required; payments can be made with other methods as desired.
7. To record add-on items, go to the Auctions grid.

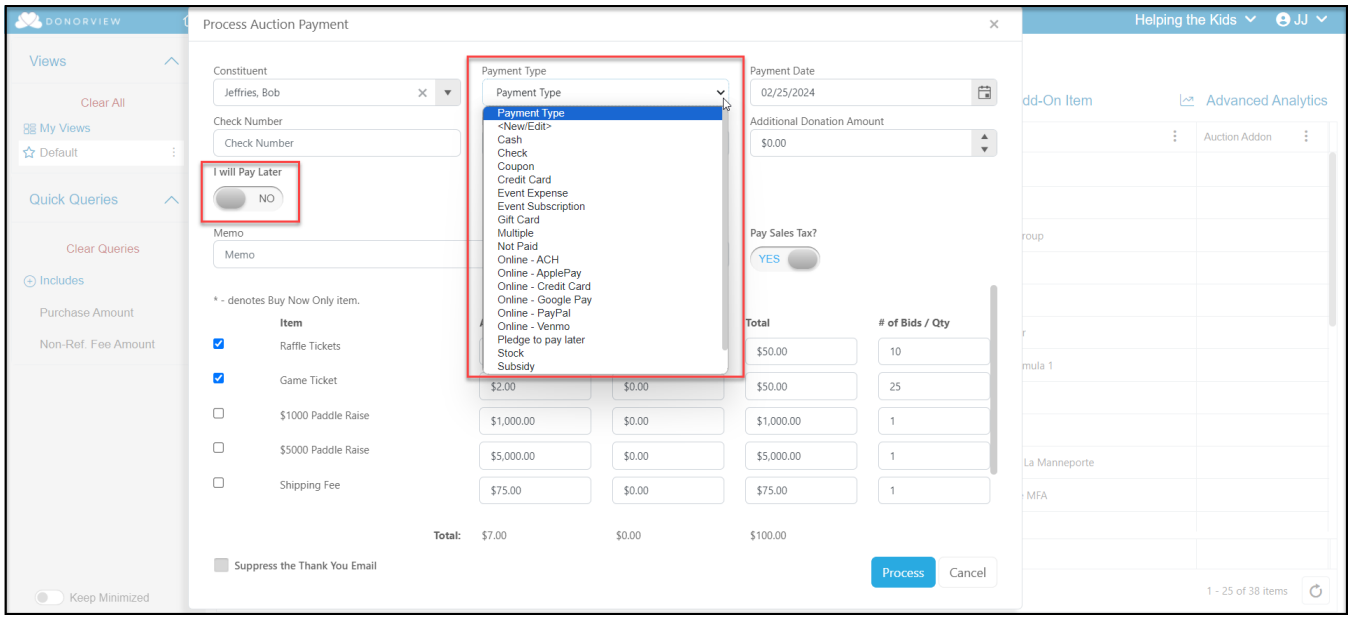
8. There are two options for entering add-ons, you can purchase one at a time by clicking on **Purchase Add-on** Item or you can add them in batches with the **Add Paddle Raise & Add-On** link.



9. For single entries:
    a. Select the appropriate event attendee/bidder under Constituent.
    b. If add-ons are marked for **I will Pay Later**, there is no need to select a payment method.
    c. Check the box next to the items being recorded and enter the quantity on the right columns under **# of Bids/Qty**.
    d. Click the blue **Process** button at the bottom of the window to record the order.



    e. If the items are not being recorded for payment later, "**I will Pay Later**" is marked **No**.
    f. Record the payment type.



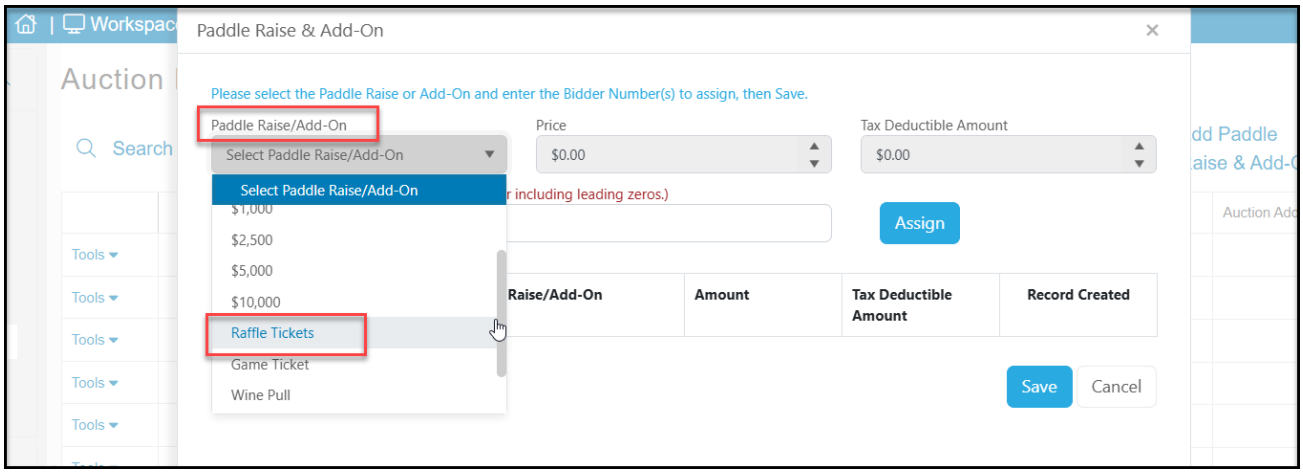
g. If a credit card was not previously entered, the card can be manually entered at the bottom of the window.

h. Click the blue **Process** button at the bottom of the window to complete the purchase.

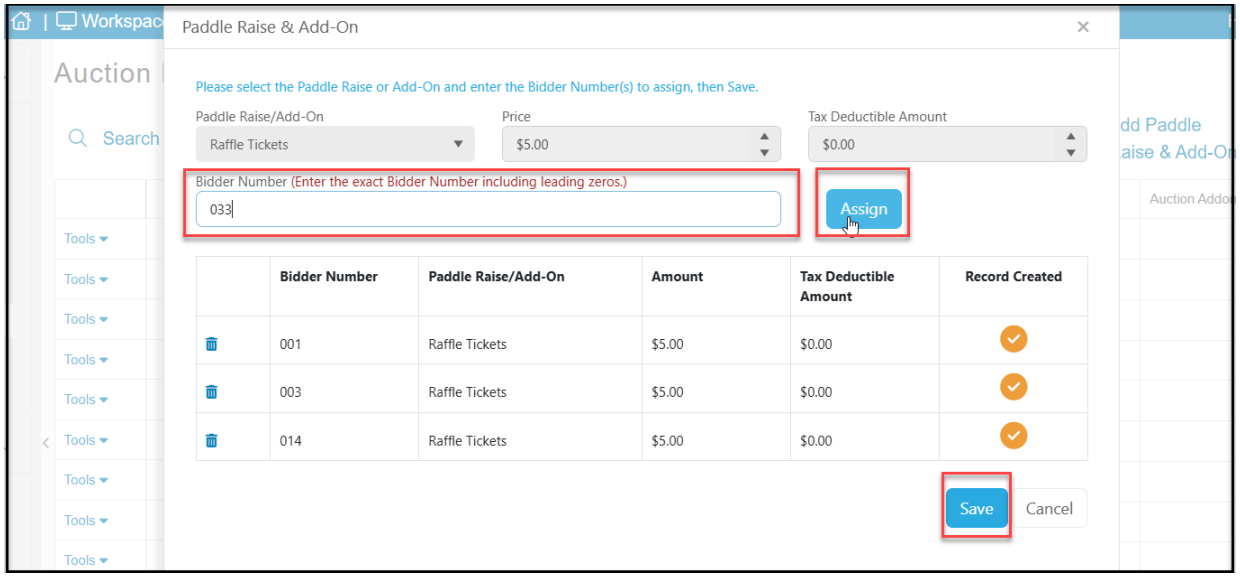
i. A thank you email will automatically be generated and sent to the constituent.

10. For batch entry of add-ons:
    a. Click on the **Add Paddle Raise & Add-On** link at the top of the grid.

    b. In the new window, choose the add-on you would like to enter all the bidders for at once. You can do this multiple times as needed.



c. Under Bidder Number, enter the bidder IDs to record this add-on item for. Each number is entered, then click Assign to add it to the list. Be sure to include the number exactly as it appears in the software, including any leading zeros.

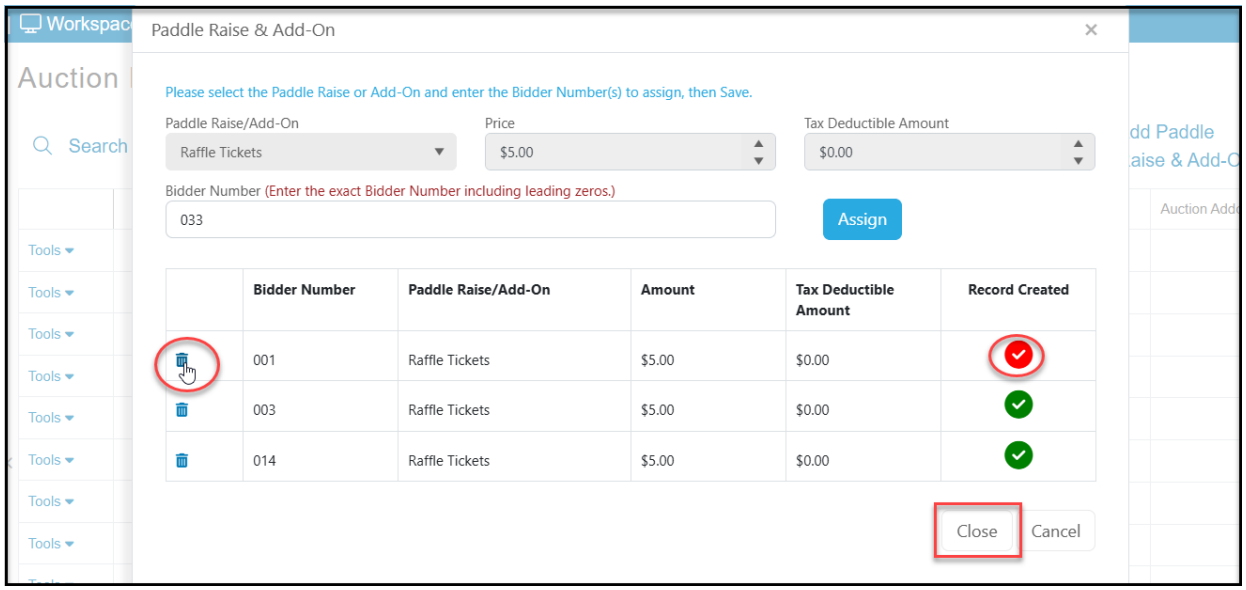


d. Once you have entered the bidder ID numbers, click **Save** to update the grid with these new add-on purchases.

e. If any of the bidder IDs do not exist, you will receive an error message and see a red check mark under the Record Created column.

f. You can delete any erroneous entries with the trash can icon.

g. Click **Close** to close the window.

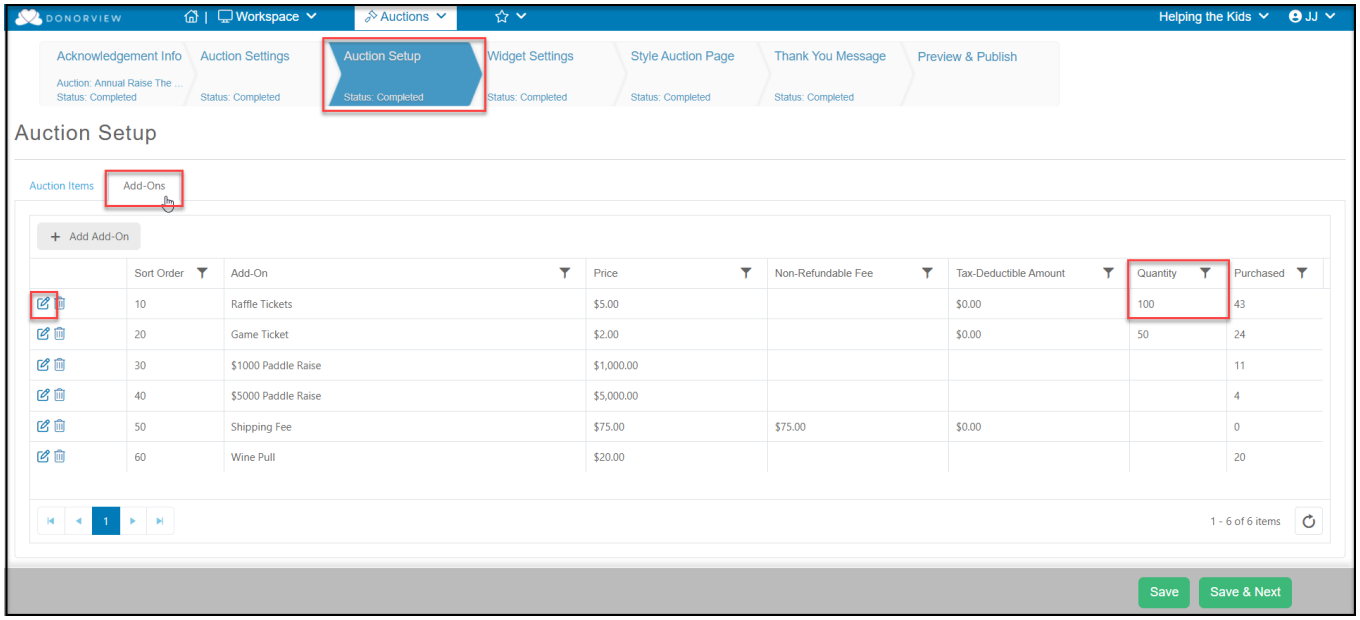


Are credit cards required for Add-on items?

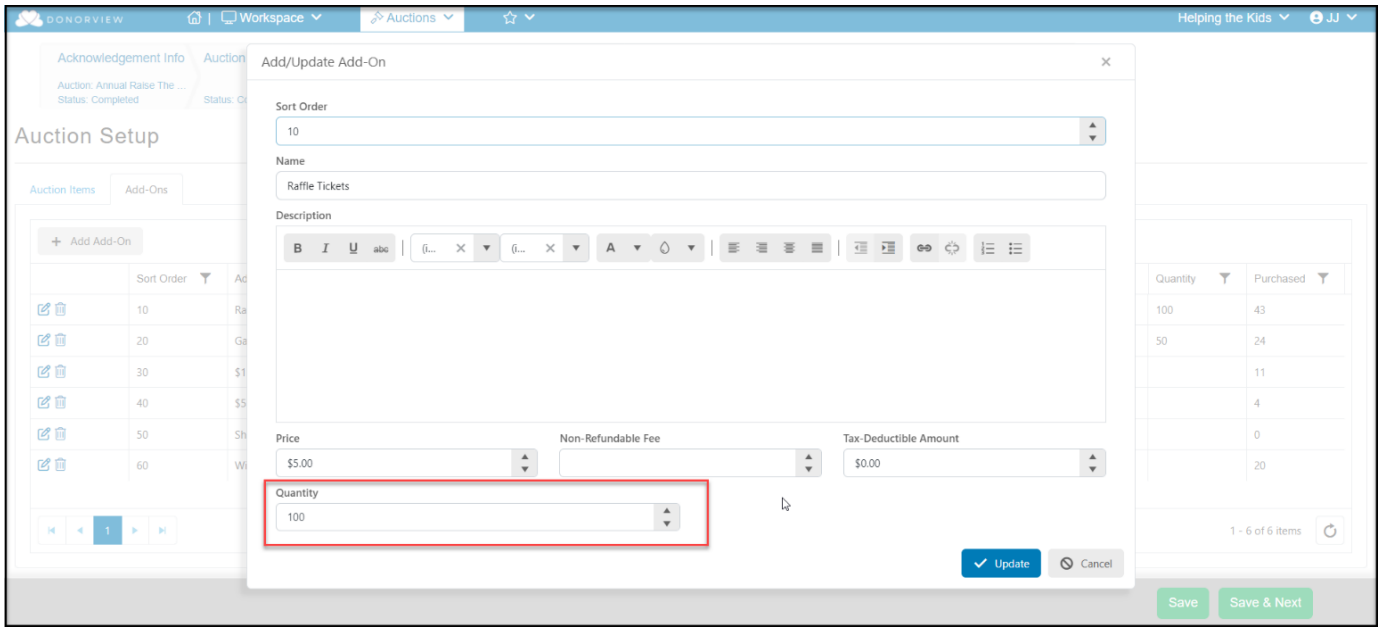
1. Credit cards are not required for recording purchases or checking out add-on items.
2. Credit cards are only required by the bidders when they are placing their bids online.

How do I increase/edit the Add-on quantity?

1. A quantity limit can be placed on the add-on items.
2. To view and edit the quantity available, go to the auction page editor.
3. Click on the **Auction Setup** tab and then the **Add-ons** tab.
4. The add-ons items and the current quantity can be viewed on the grid.
5. Next to the item, click on the edit icon to change the quantity.



6. Edit the quantity as desired and click on the blue **Update** button to save the changes.

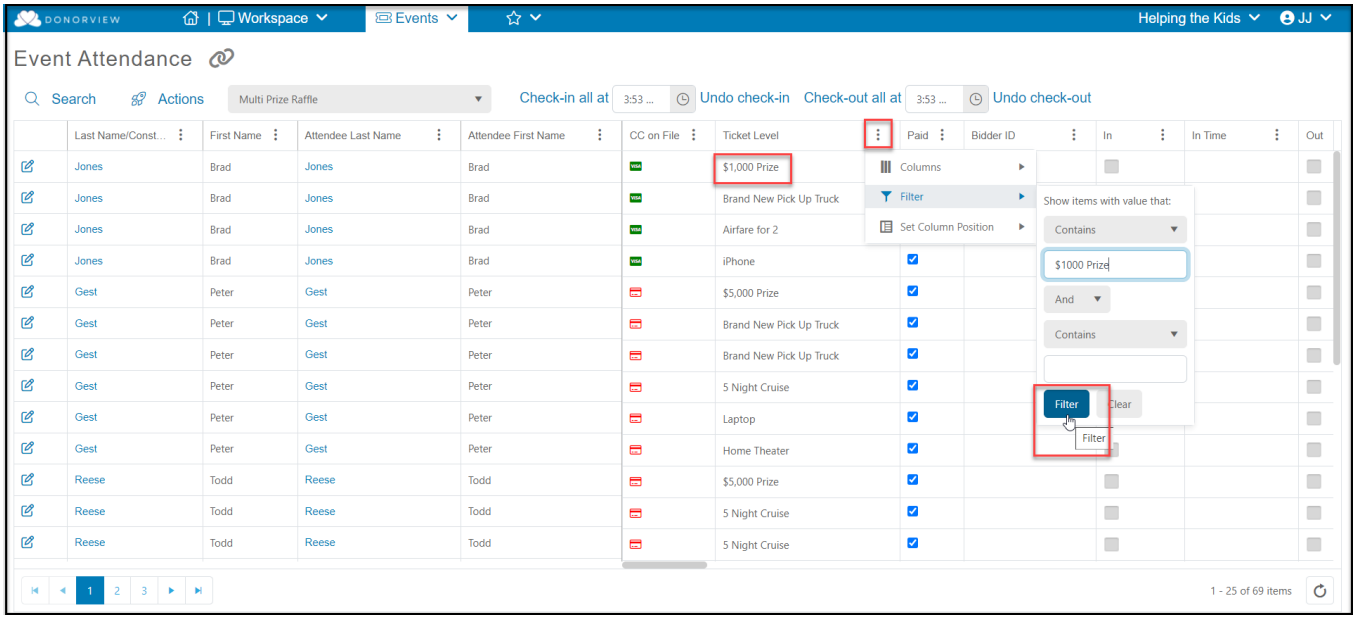


Raffles

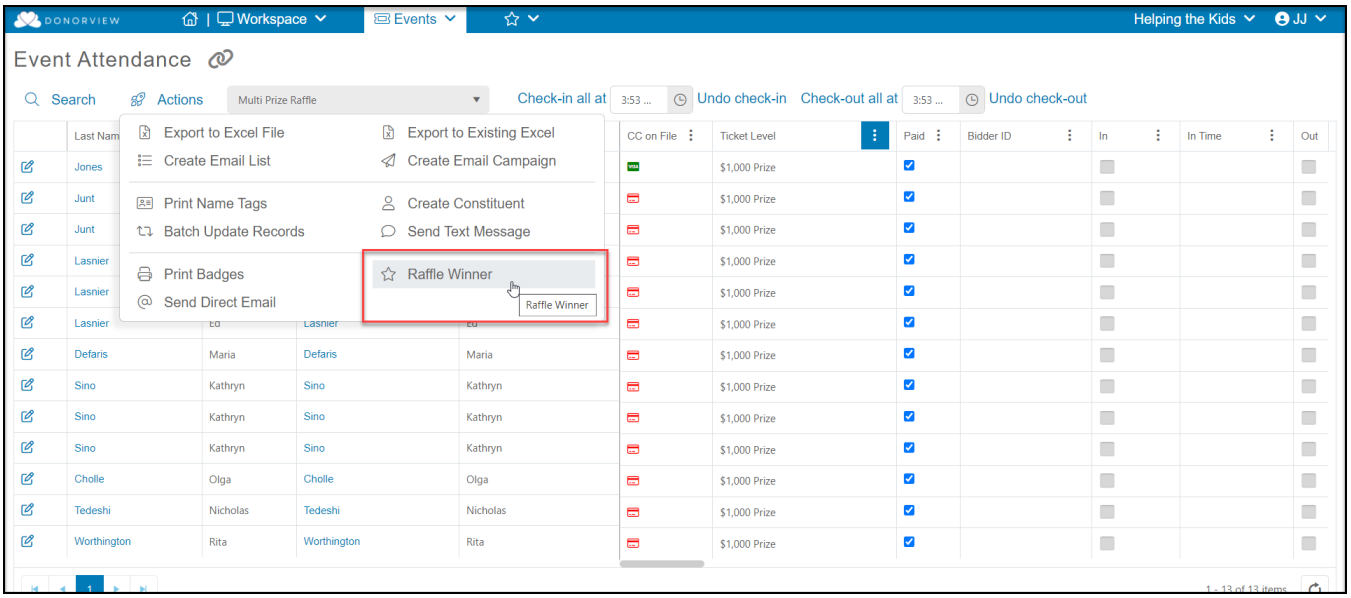
How do I pull a raffle winner?

1. Raffles can be managed multiple ways within the software.
2. Selling raffle tickets as add-ons items within the auction will require a traditional raffle experience with printed tickets and manually pulling the winner.
3. Tickets can also be sold as add-on items from the Event page, and they also require a traditional experience.
4. The software does offer an option to sell raffle tickets as an event level.
5. 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.
6. If the raffle tickets are sold as an event level, those purchasers are shown as a raffle ticket level on the Event Attendance grid.
7. The grid can be filtered to just show raffle ticket purchasers.
8. 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.
9. Click on the three dots next to the **Ticket Level** column header.

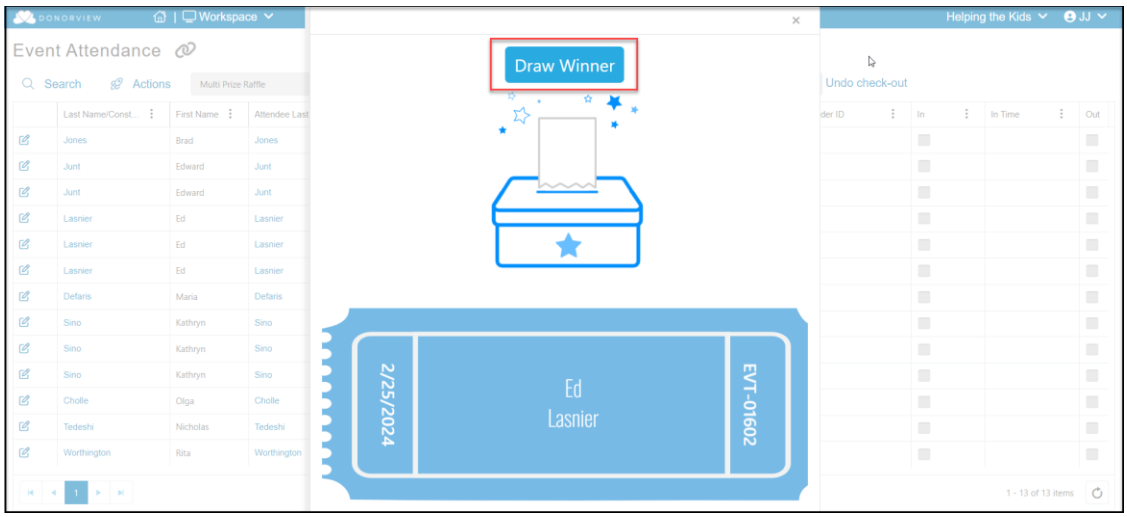
10. Enter the name of the raffle ticket level under **Contains** to identify all the purchasers.
11. Click **Filter** to filter the list.



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



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



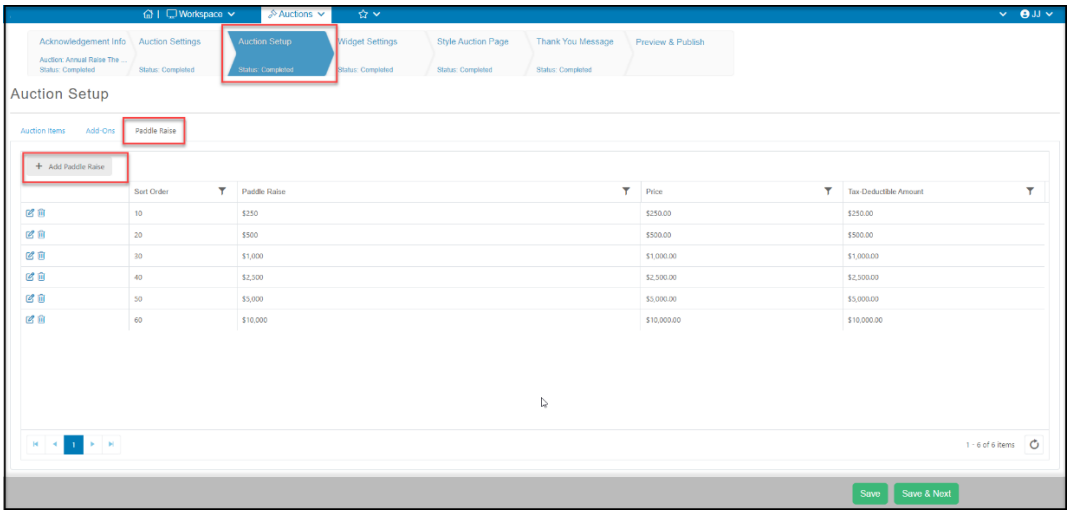
Paddle Raise (a.k.a Fund-A-Need or Call to Heart):

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

1. You can set up paddle raise (a.k.a fund-a-need or call-to-heart) donations via the auction page.

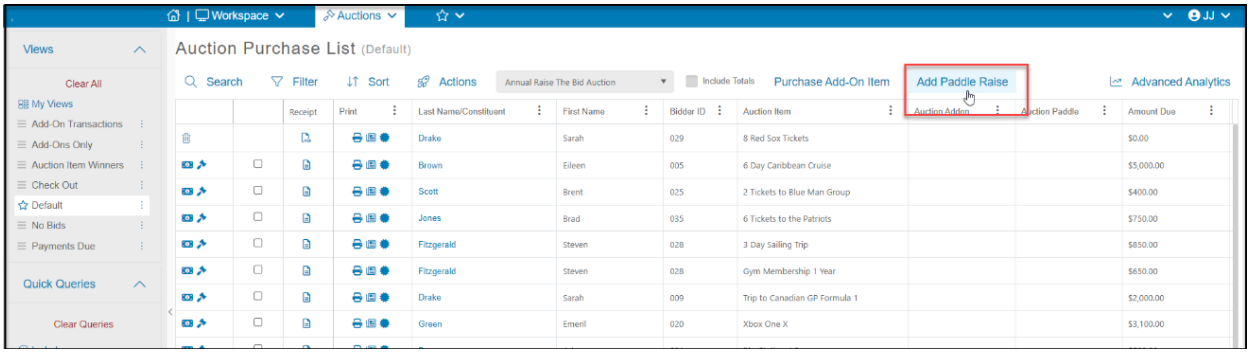
2. From the Auction page editor, on the Auction Setup tab, click on the Add-ons tab to add any items you wish to be able to record at your event.

3. Paddle raises are not visible on the auction page and can only be entered via the desktop version of the software.

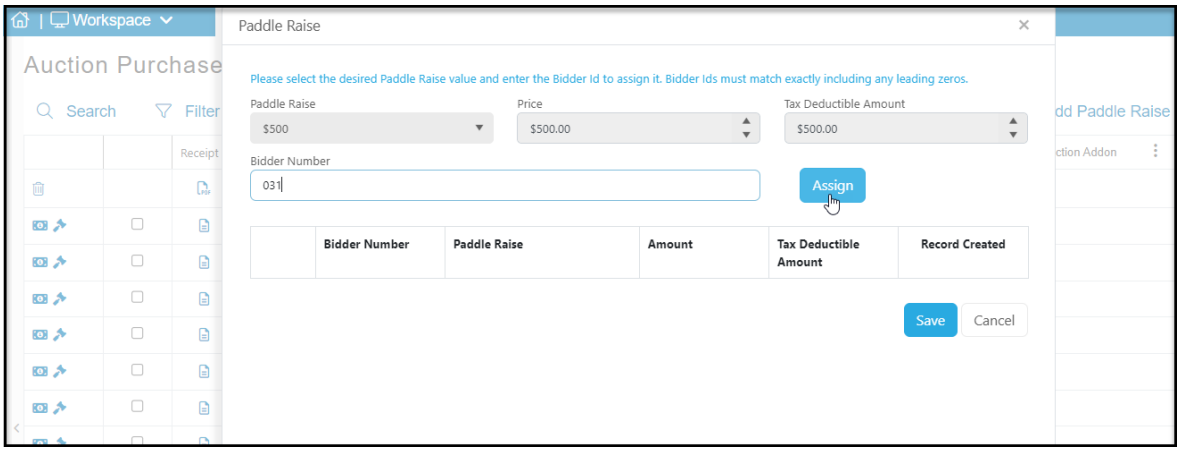


4. To record a paddle raise, go to the Auction grid and select the appropriate auction from the dropdown menu at the top of the grid.

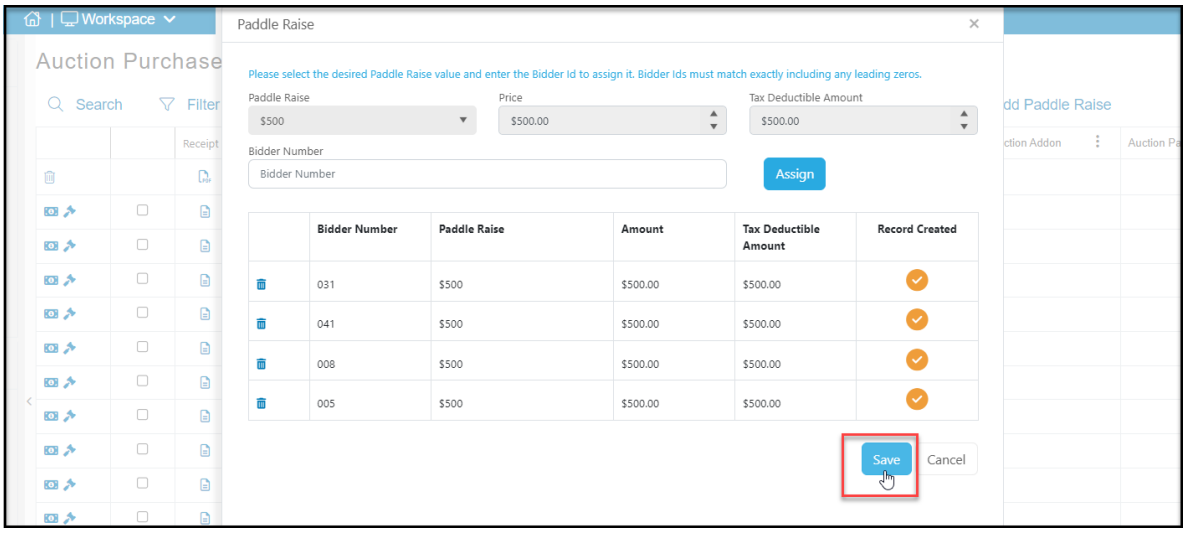
5. Click on **Add Paddle Raise**.



6. Select the appropriate **Paddle Raise** amount and enter the **Bidder Number**. Click **Assign** to add the bidder to the assignment list.



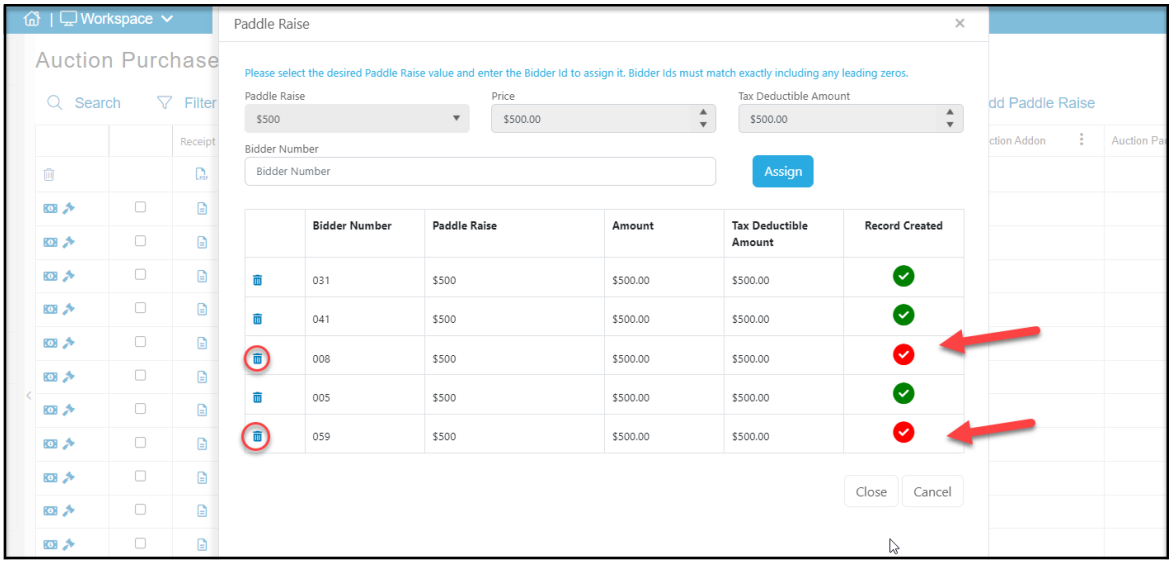
7. Once all the bidder IDs and paddle raise amounts have been entered, click on **Save** to record the transactions.



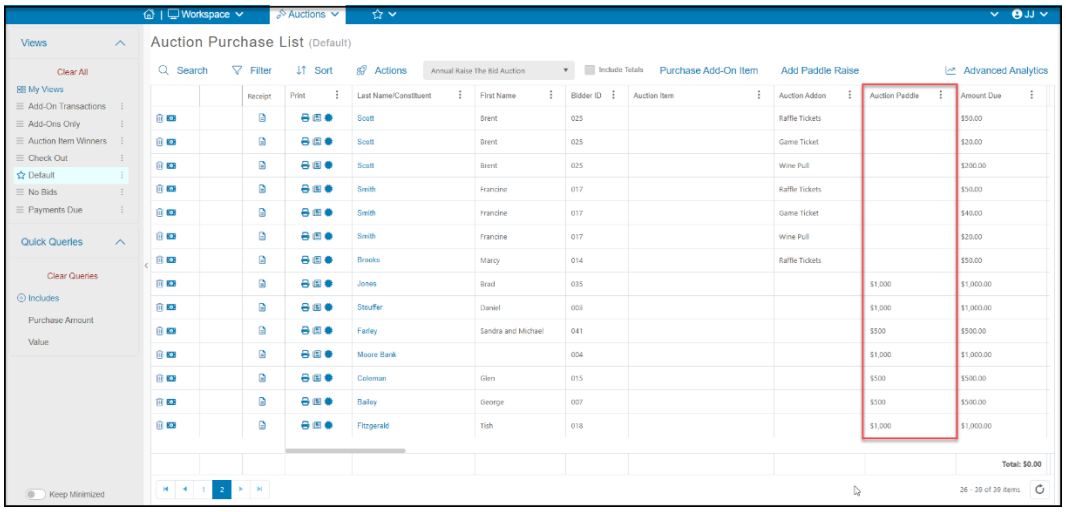
8. The transaction is recorded if there is a green checkmark next to the row. If any of the bidder IDs are not valid, you will see a red check mark on the row with their bidder ID number.

9. Those that are invalid can be removed by using the trash can icon to delete them.

10. You can continue adding paddle raise amounts and bidder IDs as long as the window is open. When complete, click **Close** to close the window. You can reopen and add more anytime.



11. Paddle raises are recorded and shown on the Auctions grid as their own line item with the level showing under the Auction Paddle column.



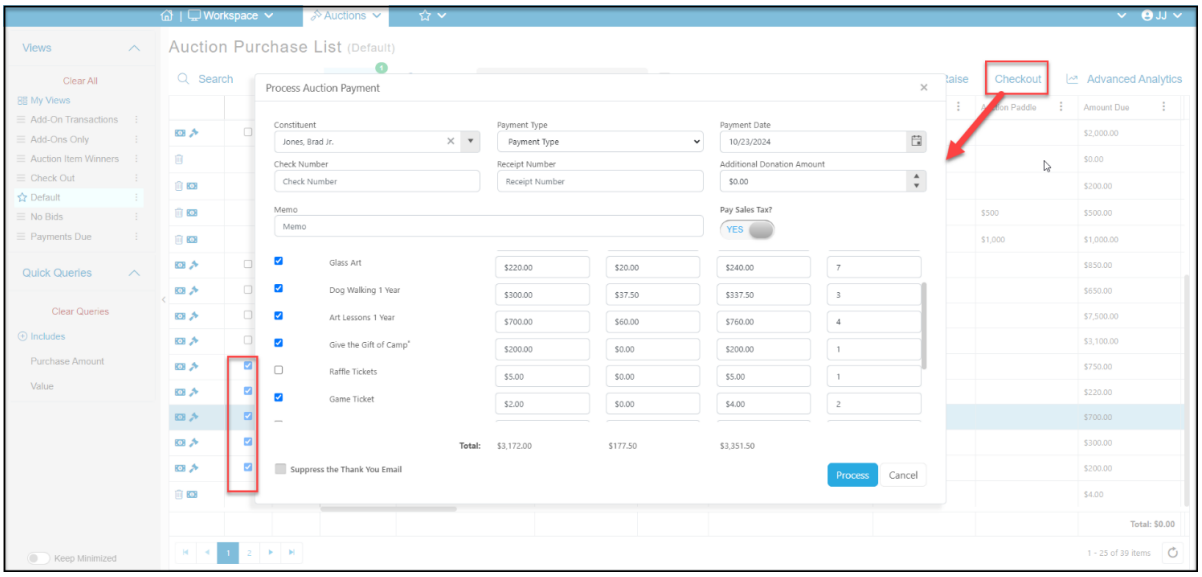
12. It is recommended that you sort the grid by Last Name/Constituent for check out.

13. When checking out a guest, you can click on the dollar bill icon to check out any paddle raises or add-ons. All add-ons and paddle raises will be listed and be checked out together in one transaction.

14. If the constituent also has auction items, check the box next to the auction items to include in the transaction and click on **Check Out** at the top of the grid.

15. The pop up window will allow you to check out all their auction items, add-ons, and paddle raises in one transaction.

16. Select the **Payment Type**, then click **Process** to complete the transaction. The bidder will automatically receive an email thank you.



What is the fastest way to input bidder numbers for a paddle raise?

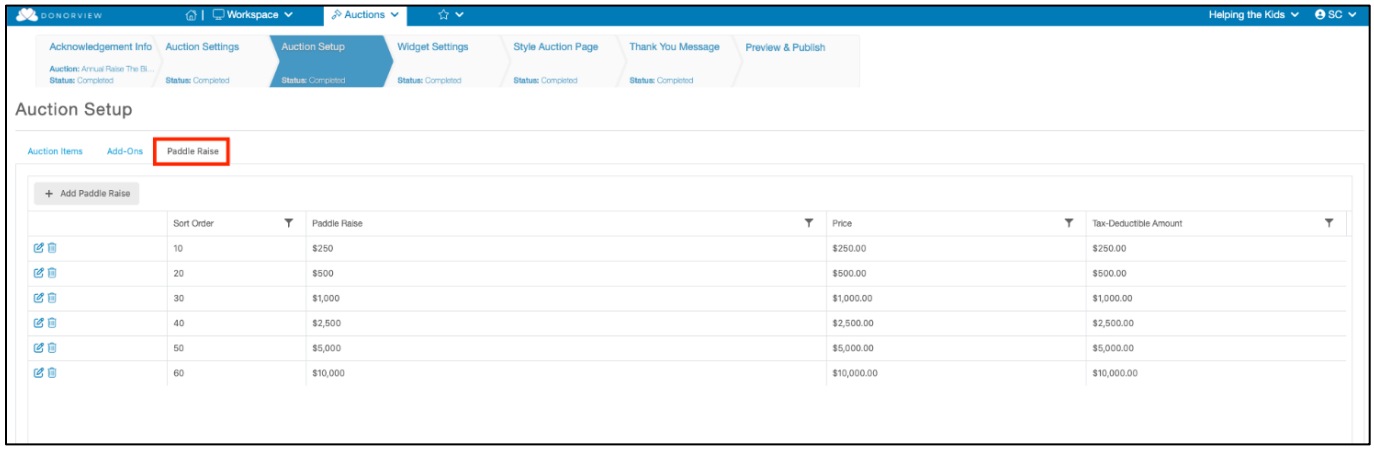
1. It is recommended that all bidder numbers be assigned prior to the event, and the event must be linked to an auction to assign bidder numbers. Purchasers who provide names of their guests will automatically receive a bidder number.

2. If attendees are updated after the ticket levels are purchased, each number must be manually assigned as outlined in, How do I add or edit a bidder number.

3. Entering paddle raise donations is done using the Paddle Raise feature in the Auctions grid.

How do I add a new paddle raise level?

1. The setup of Paddle Raise level will take place on the "Auction Setup" page within the setup of your Auction. Directly next to the "Level" and "Add-on" sub-tabs you will see the "Paddle Raise" option.



2. Once on that sub-tab you will be able to add, edit or removal Paddle Raise level under your Auction. To add a new Paddle Raise level click the "+Add Paddle Raise" button above the grid. You will then be able to populate the following fields:

   a) **Sort Order** – Enter a number that will determine the order you wish this Paddle Raise level to appear in the selection picklist. The lower the number the higher it will appear in the picklist.

   b) **Name** – Enter the display name of this Paddle Raise level.

   c) **Description** – Enter any text you want to internally describe this Paddle Raise level.

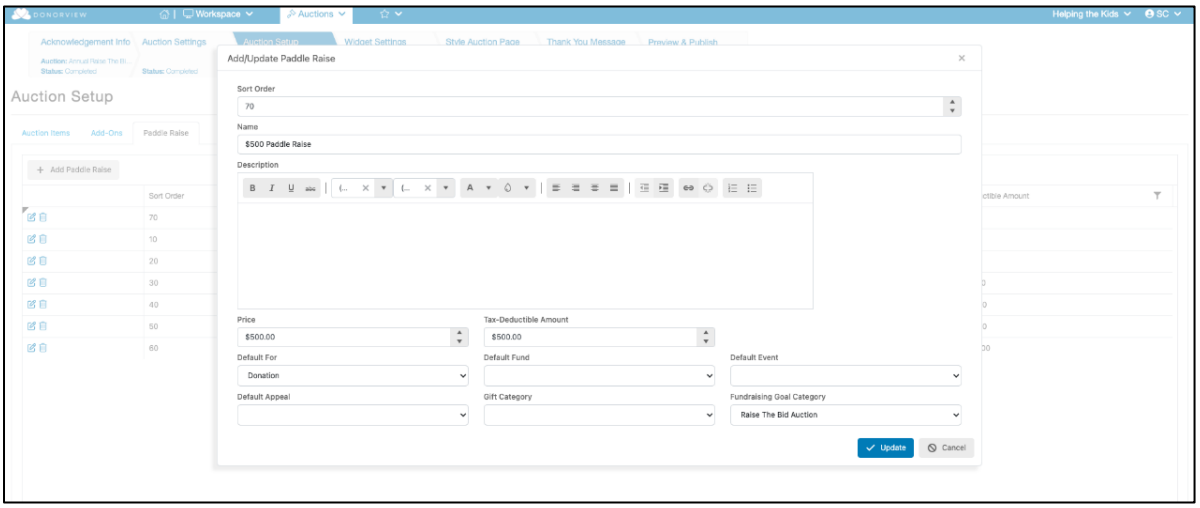
   d) **Price** – Enter the total Amount of this Paddle Raise level.

   e) **Tax-Deductible Amount** – Enter the total Amount of the Paddle Raise level that is Tax-Deductible.

   f) **Default For, Fund, Event, Appeal** – Select which designation(s) you wish to assign to the Paddle Raise transaction.

g) **Gift Category** – Select a category you wish to assign to the transaction record for this Paddle Raise.

h) **Fundraising Goal Category** – Select which Goal Category this transaction should be assign to. This will allow for the own or paid balance to appear on a fundraising goal widget graphic.



3. When you have completed this setup click the blue "Update" button. You can then repeat this process for each of the Paddle Raise levels you wish to add. After adding a Paddle Raise you can then click the pencil and paper icon to edit its setup. Or click the Trash-can icon to remove it.

Live Auctions

Can live auction items be shown online, but not allow online bids?

1. Yes, live auction items can be shown online to allow bidders to see the item and read a description, but not be able to place a bid.
2. See the description above for Hiding/Unhiding an auction item.

How do I record a live auction item bid?

1. Bids are recorded using the gavel icon on the Auction grid.
2. See the instructions above for How do I place a bid for a guest.

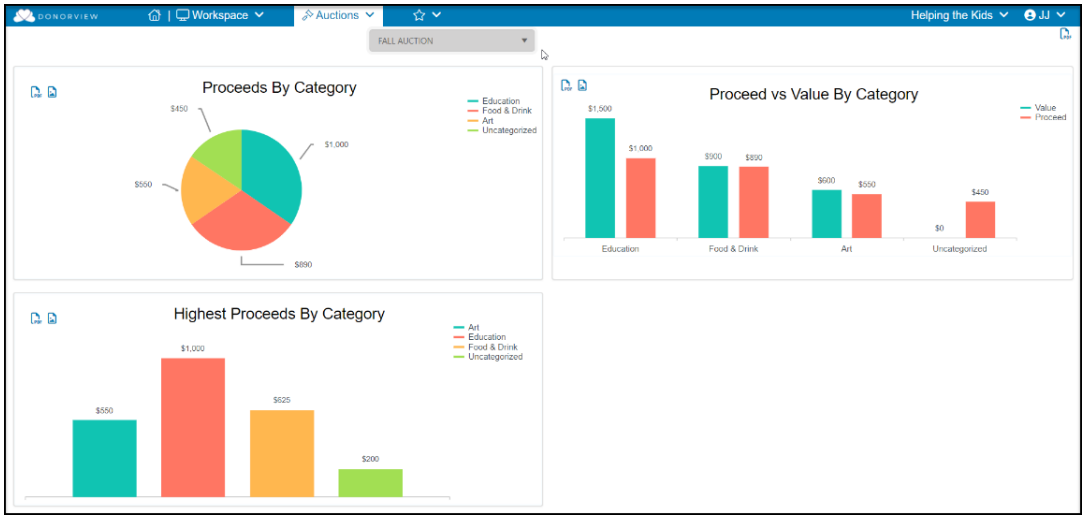
Can a live auction item be sold multiple times?

1. Yes, and there are a couple of options.
2. You can create the live auction item multiple times and hide any of the extra items from view.
3. You could also create the live auction item as an Add-on and then it can be purchased by any number of bidders up to the maximum quantity you establish.

Displays and Reporting:

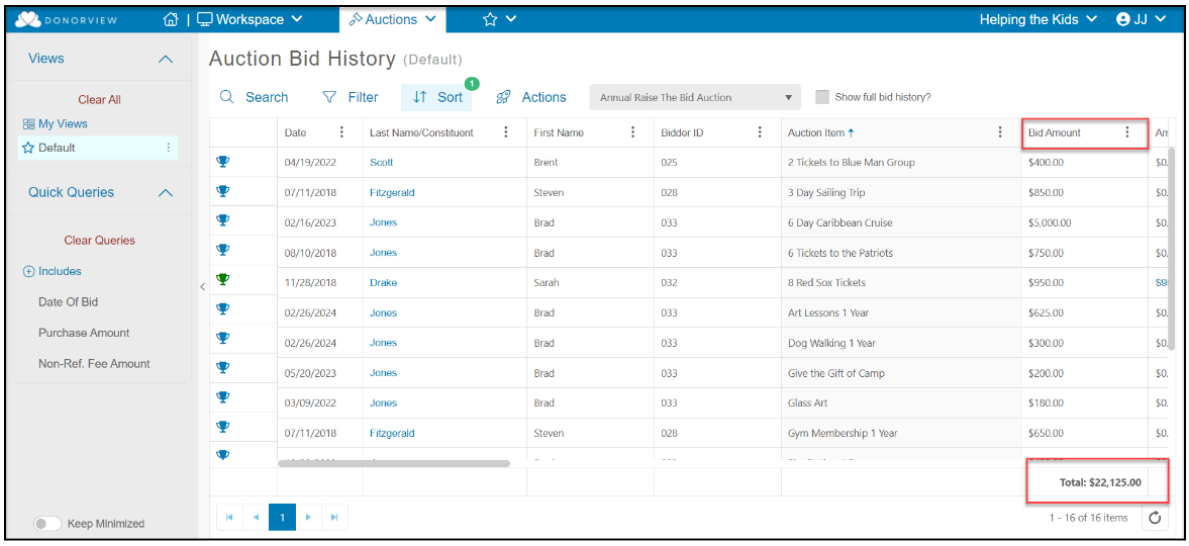
Are there built in reports for auctions?

1. No, there are no standard auction reports, however you can see graphics from under the Workspace>Auctions Dashboard, which can be downloaded.
2. You also can export the data from the Auctions grid, Bid History grid, or using the Gifts Grid and filtering by the gift type "Auction."

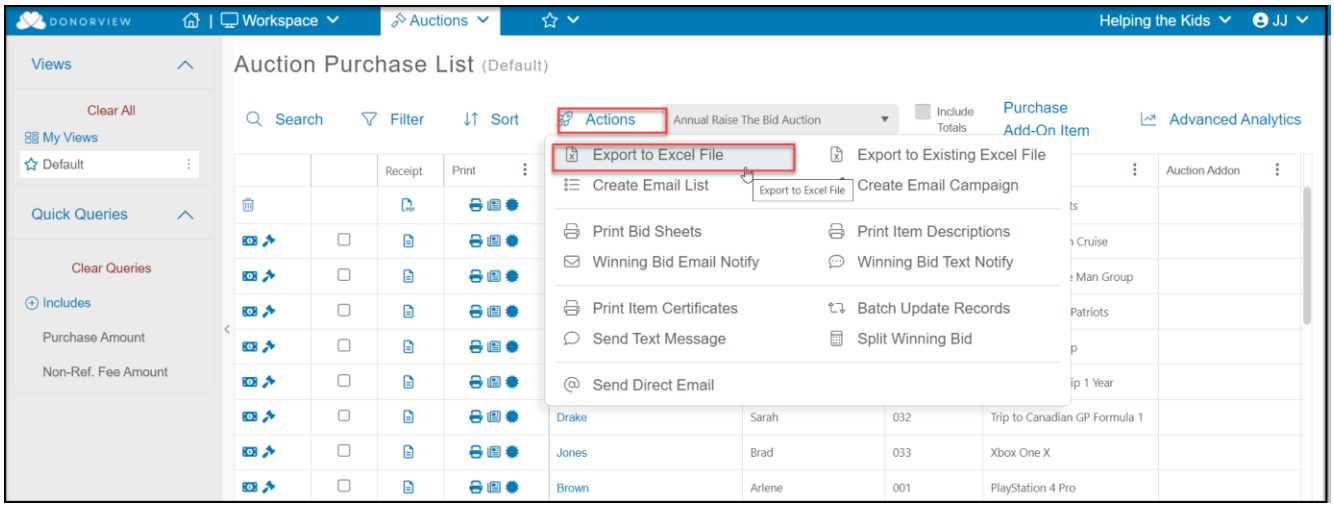


Can I look at total raised and by item/donor level?

1. The total for auction items can be viewed in the Bid History grid under the **Bid Amount** column. This does not include add-ons.
2. If enabled, the goal progress widget on the auction page will also show the total amount raised per the settings.

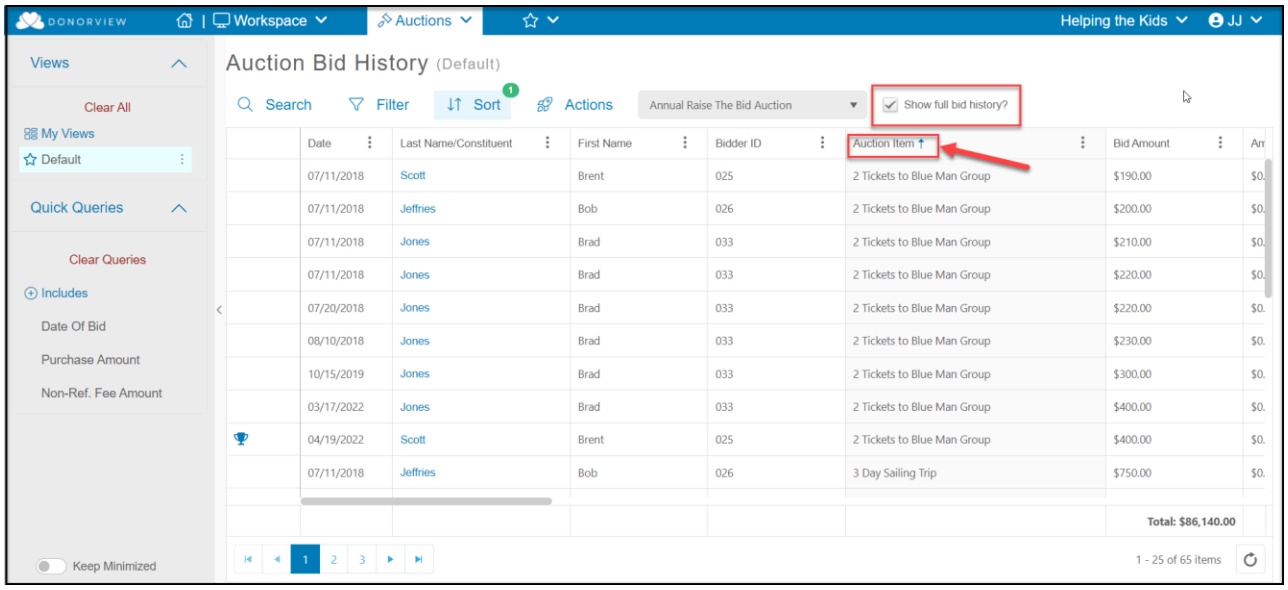


3. The list can be filtered by the **LastName/Constituent** field for a specific donor.
4. To see auction items and add-ons, export the data from the Auctions grid using the **Actions** menu. Click on **Export to Excel** and sort the data as needed.



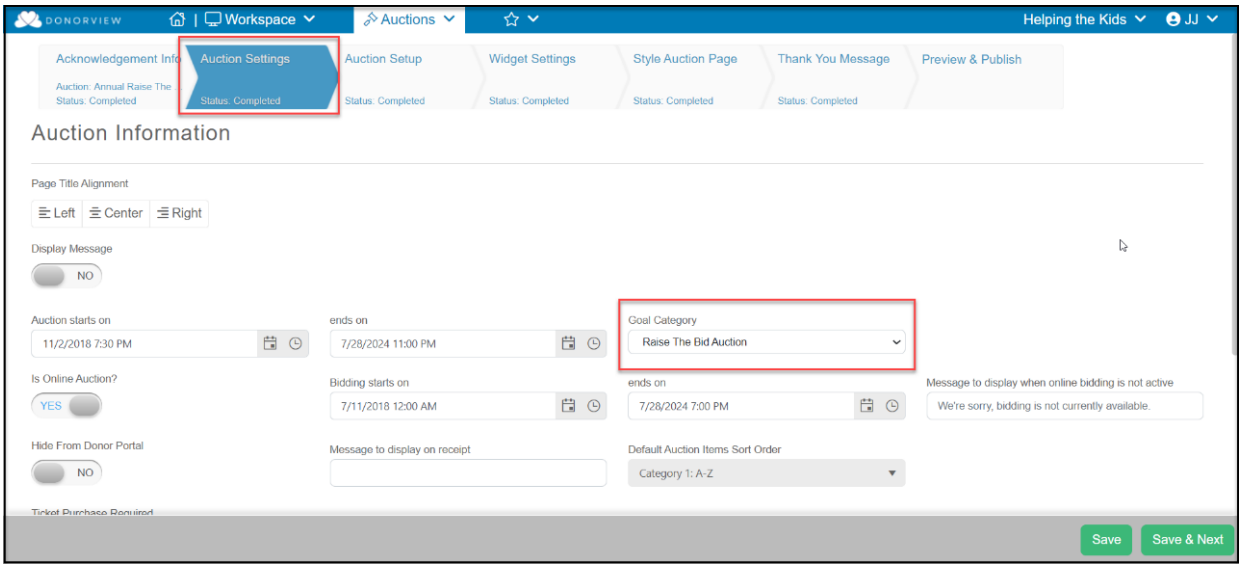
How can I see who is winning an item?

1. Current auction winners can be seen on both the Auctions grid and Bid History grid.
2. The entire bid history can be seen on the Bid History grid by checking the **Show full bid history** box.
3. Clicking on the **Auction Item** column will sort the column so that the full history of each item is revealed.
4. The current winner is identified with a blue loving cup icon.
5. A green loving cup icon indicates the item has already been checked out.



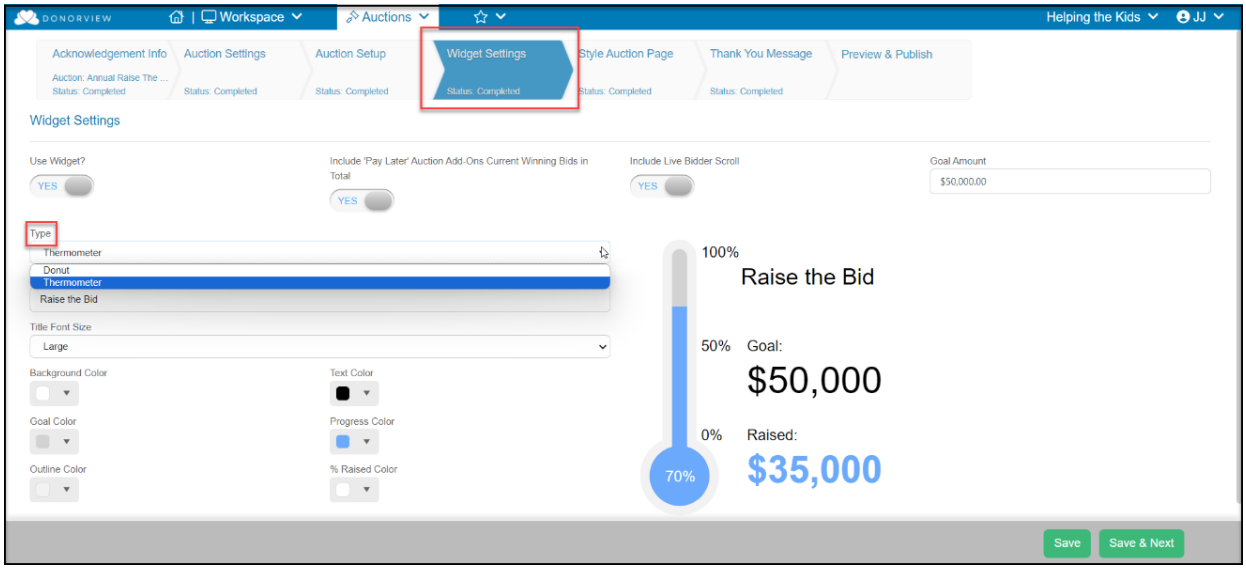
Are there ways to display goal progress?

1. Yes, the auction page can be set up to include a thermometer or donut progress and live bidders scroll.
2. From the auction page editor, on the Auction Settings tab the **Goal Category** identifies all the revenue that will be included in the goal widget.
3. This **Goal Category** can also include sources like donation and event page revenue if desired.
4. Click **Save & Next** to save the changes.

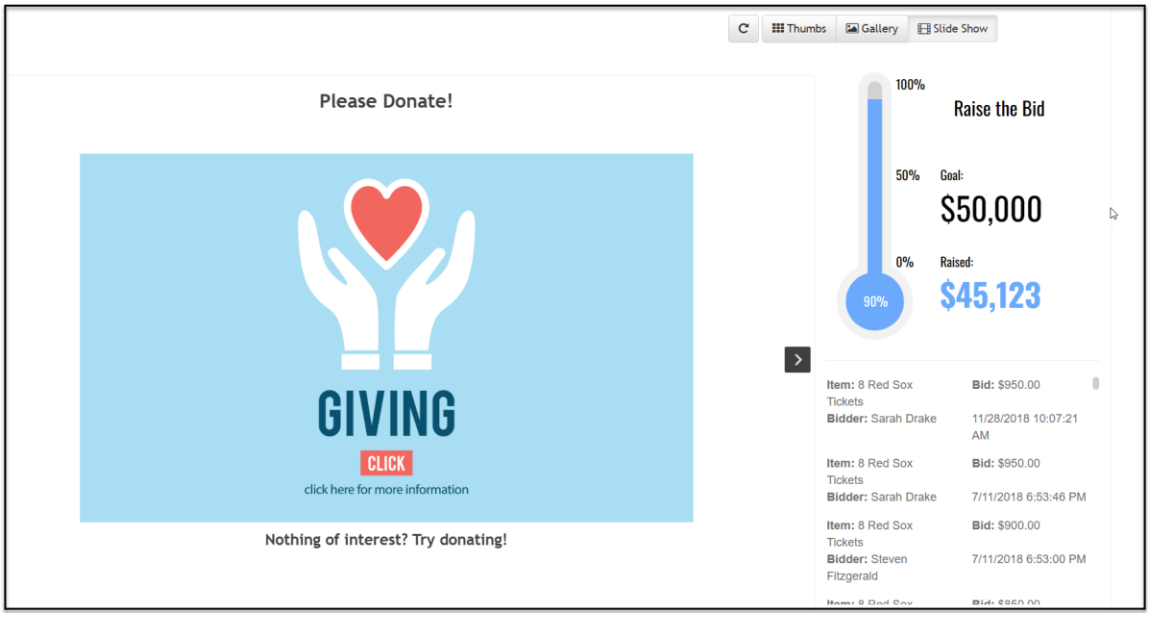


5. Next, go to the Widget Settings tab to select the type of goal progress to display, enter the total goal amount, and customize the colors and labeling.

6. Determine if **Pay Later Add-ons** and the **Live Bidder Scroll** will be enabled.
7. Click **Save & Next** to save the changes.



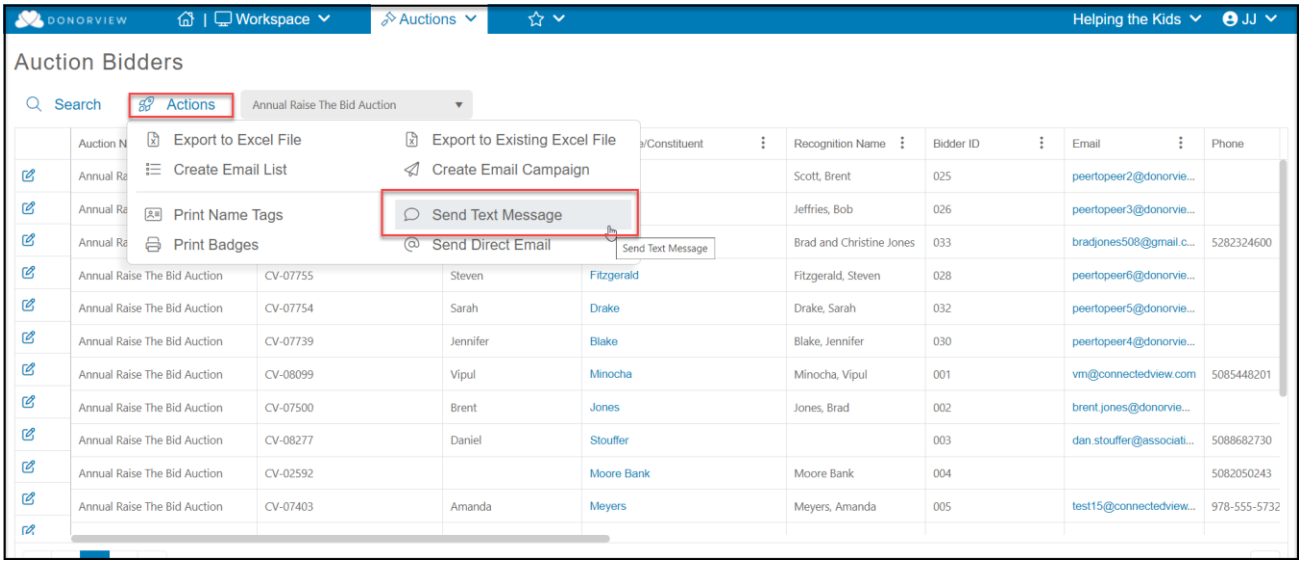
8. With the widget enabled, the widget can be best viewed (and projected) on the auction page from the **Gallery** or **Slide Show** views.
9. You can read more about the auction goal progress widget in this support article. https://support.donorview.com/support/solutions/articles/9000230952-auction-widget-settings
10. There is also an option to create another goal progress widget to include on another website, for example the organization's own website. See this video to learn more about the Fundraising Goal Progress feature - https://vimeo.com/764158934/034650bc79



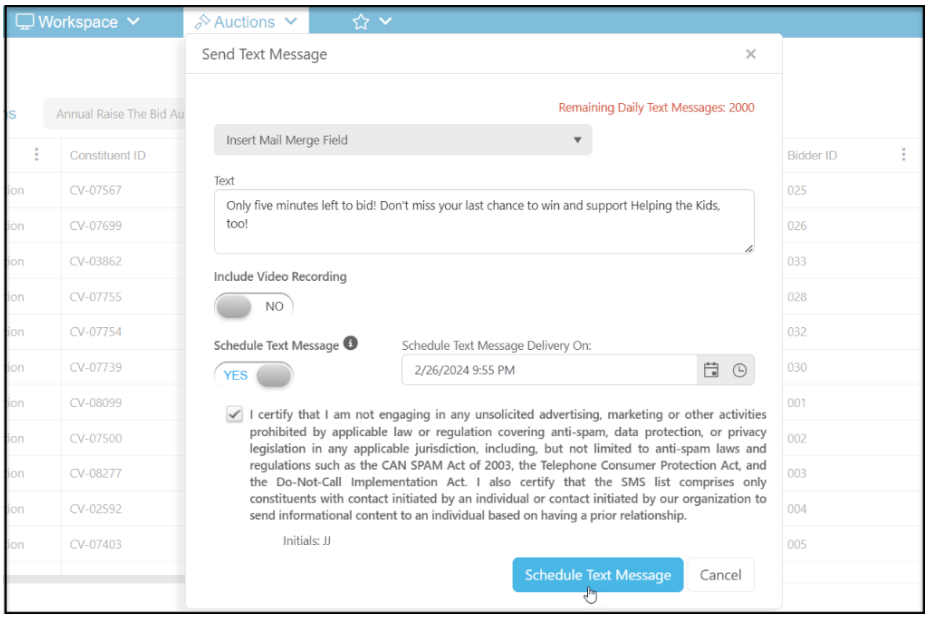
Communications

How do I send out text messages to bidders?

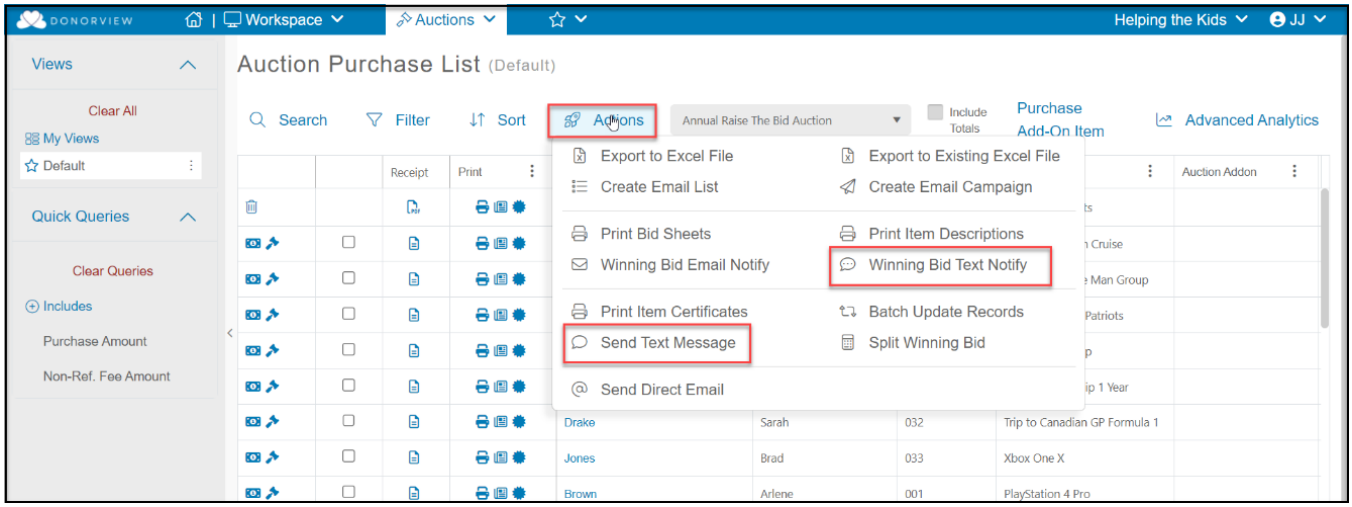
1. Text messages can be sent with custom messages or standard messages for winning bid notifications.
2. To send messages to all bidders, use the Auction Bidders grid.
3. Click on the **Actions** menu, then **Send Text Message**.



4. Enter the text message info and choose to send the message immediately or prepare texts and schedule them to go at specific times.

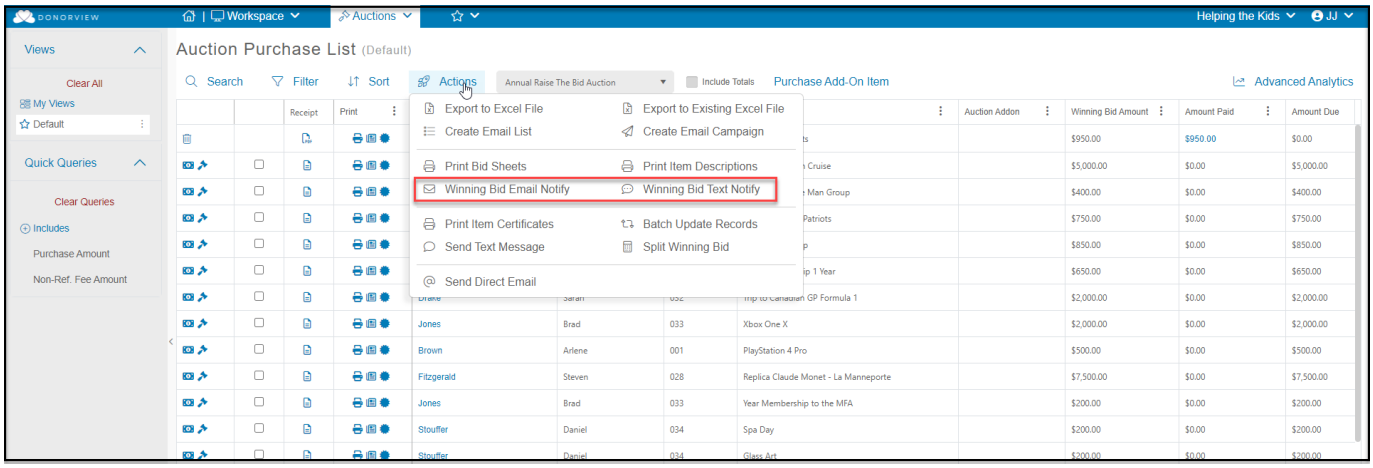


5. Note that there is a maximum of 2000 direct text messages per day. The automatic messages sent via the auction process do not count towards the 2000 total. Only those messages generated manually count toward the total.
6. To send messages to winning bidders, use the Auctions grid.
7. Click on the Actions menu, then either **Winning Bid Text Notify** or **Send Text Message**.
8. **Winning Bid Text Notify** will send a notification to the bidder that they have won the item. It is a standard message that is not editable.
9. Using **Send Text Message** allows a custom message to be sent as described above.



Are winning bidders notified automatically at the end of the auction?

1. No, you can send the notification manually from the Auctions grid in the Action menu by clicking on **Wining Bid Email Notify** and/or **Winning Bid Text Notify**.
2. These are standard messages and cannot be edited.
3. To send a custom message, use **Send Text Message** or **Send Direct Email** instead to create a personal message.



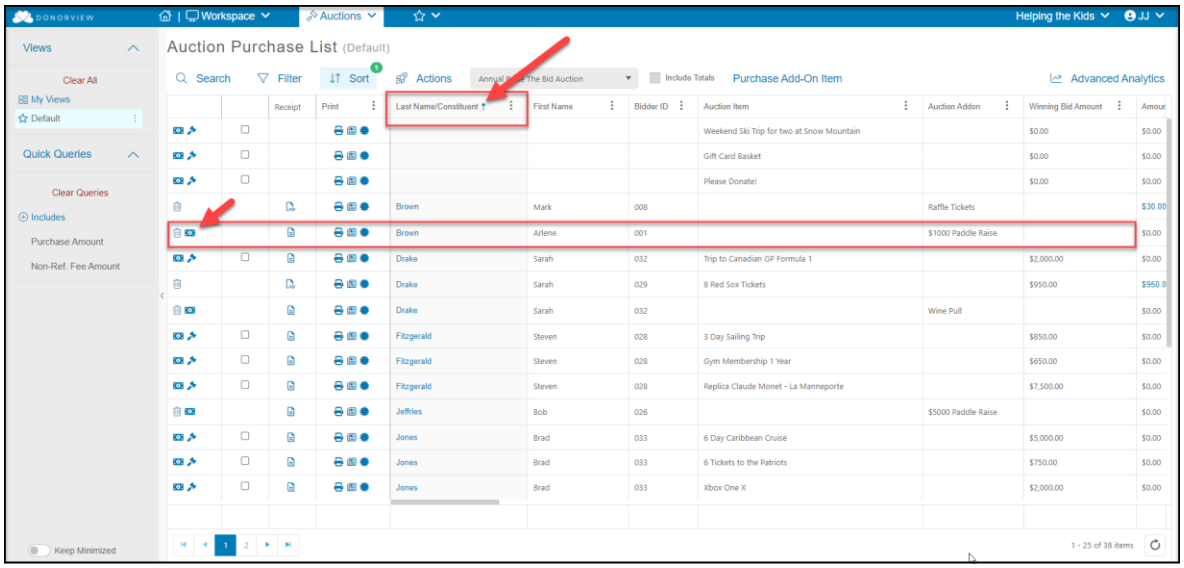
Checkout:

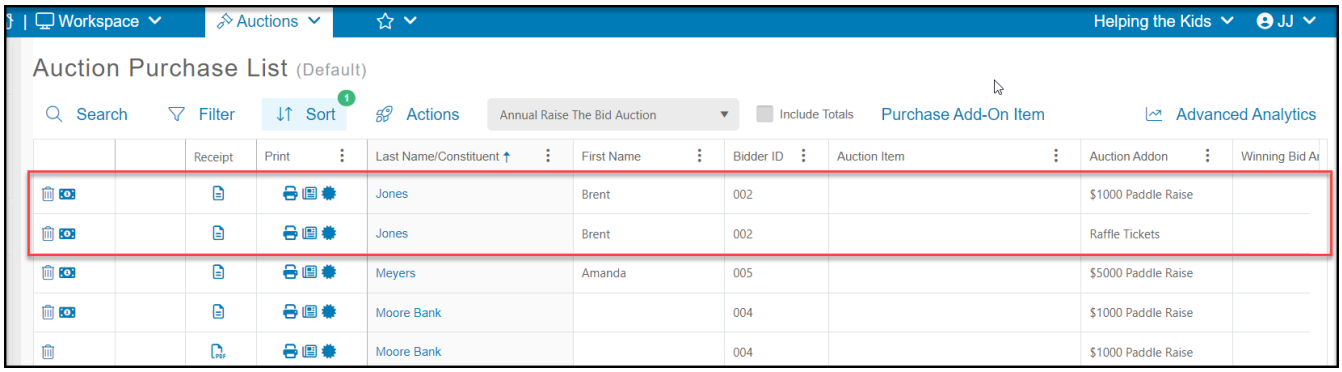
How is sales tax calculated?

1. Sales tax is calculated by the settings established in your organization's settings.
2. Check your state's sales tax requirements for the auction.
3. See this support article for information about the settings and how sales tax is calculated. https://support.donorview.com/en/support/solutions/articles/9000215421-auction-item-sales-tax
4. Sales tax is not included in the item's invoice.
5. Sales tax is calculated during checkout and can be printed with the receipt.

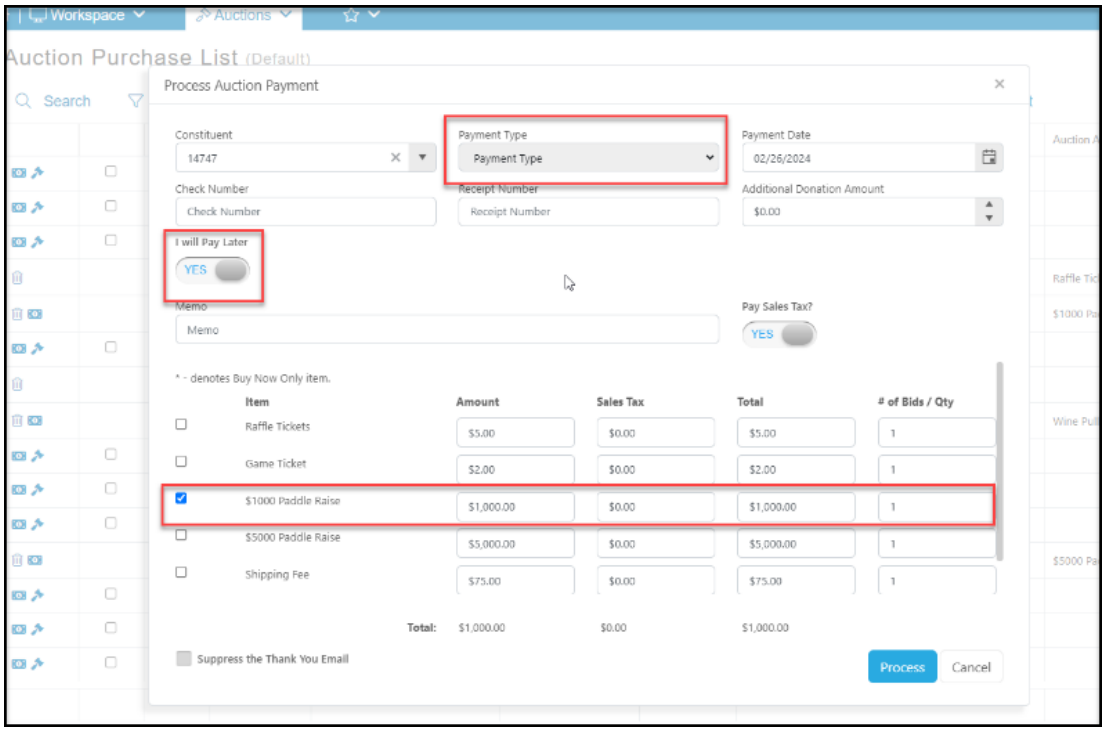
How do I check out guests at the end of the event?

1. If your guests have created a portal account, they can check themselves out using the portal. You can learn more about the portal checkout option in this article: https://support.donorview.com/en/support/solutions/articles/9000277052-mobile-checkout-using-the-constituent-portal
2. To manually check out a guest, go to the Auction grid.
3. The easiest way to see all the items a constituent has purchased is to sort the **Last Name/Constituent** column.
4. You can click on the **Last Name/Constituent** column once to alphabetize the list. Clicking twice will reverse the order and clicking a third time will remove the sort.
5. For constituents with only one auction item or just add-ons to check out, you can click on the dollar $ icon to open the checkout window.
6. If a bidder has multiple Add-on items, clicking any of the dollar $ icons will open the checkout window and will automatically include all the items.

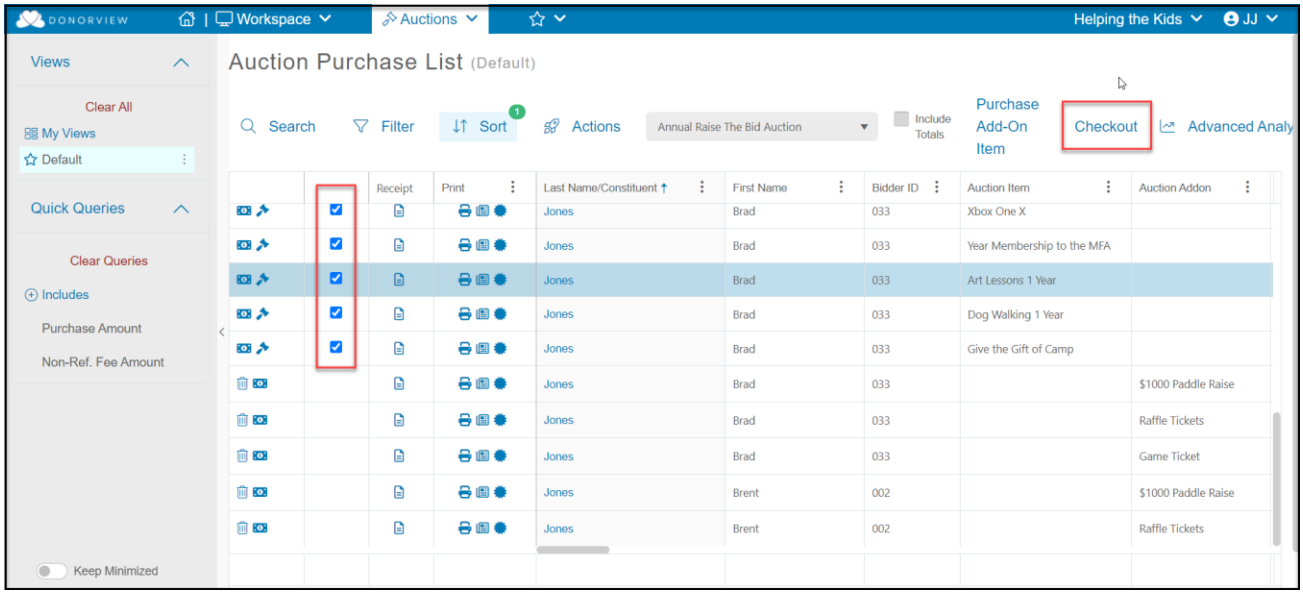




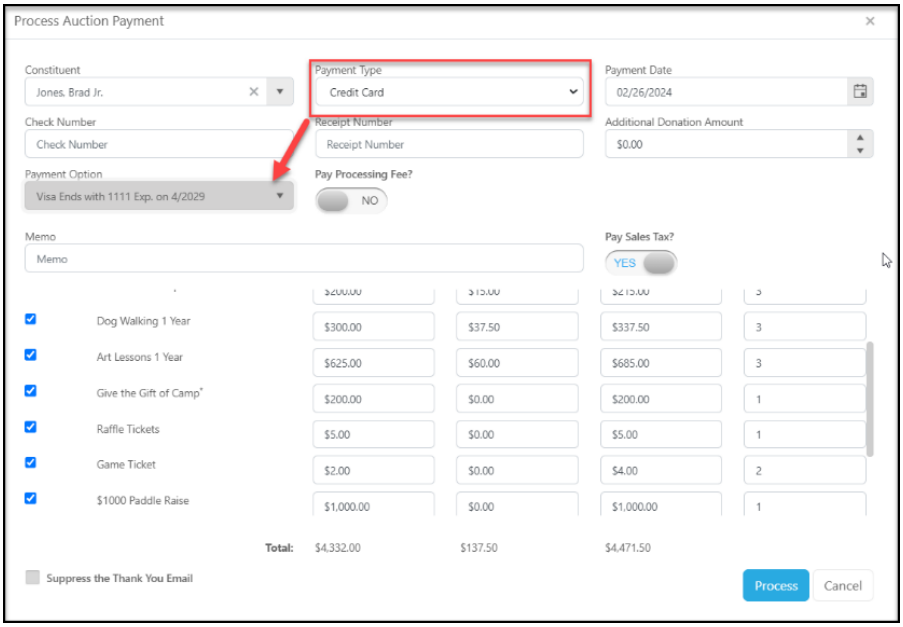
6. From the checkout window, you can select the payment type.
7. If the items were marked for **I Will Pay Later**, turn the toggle to **No** to be able to select the payment type.
8. The items included in the checkout are shown with a blue check mark below.
9. Check to see if Sales Tax is included properly.
10. All the amounts can be edited.
11. Click the blue **Process** button to complete the checkout. The constituent will receive an automatic thank you email.
12. For constituents who won auction items, check the boxes next to the items to include in their checkout.
13. The software will automatically include any of the add-on items recorded for that constituent.



14. Click on **Checkout** to open the checkout window.

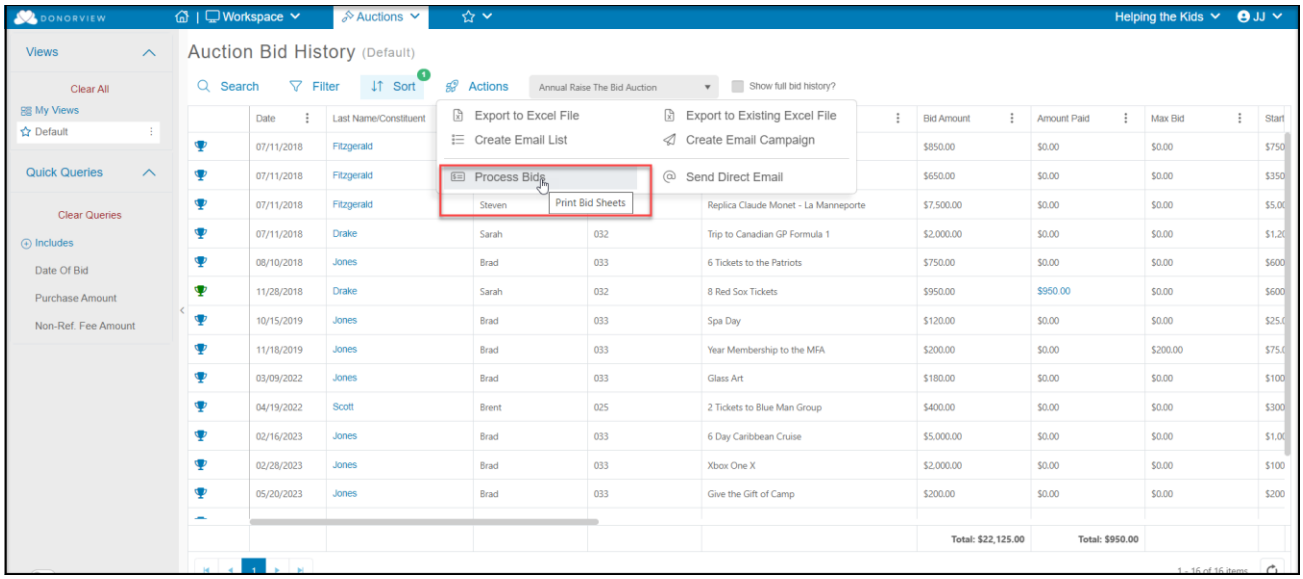


15. The checkout window will include all the items included in the transaction.
16. Choose the **Payment Type**.
17. If Credit Card is selected, either choose the card or file, or if there is no card, enter the credit card information at the bottom of the page.
18. Click the blue Process button to complete the transaction. The constituent will receive an automatic thank you email.

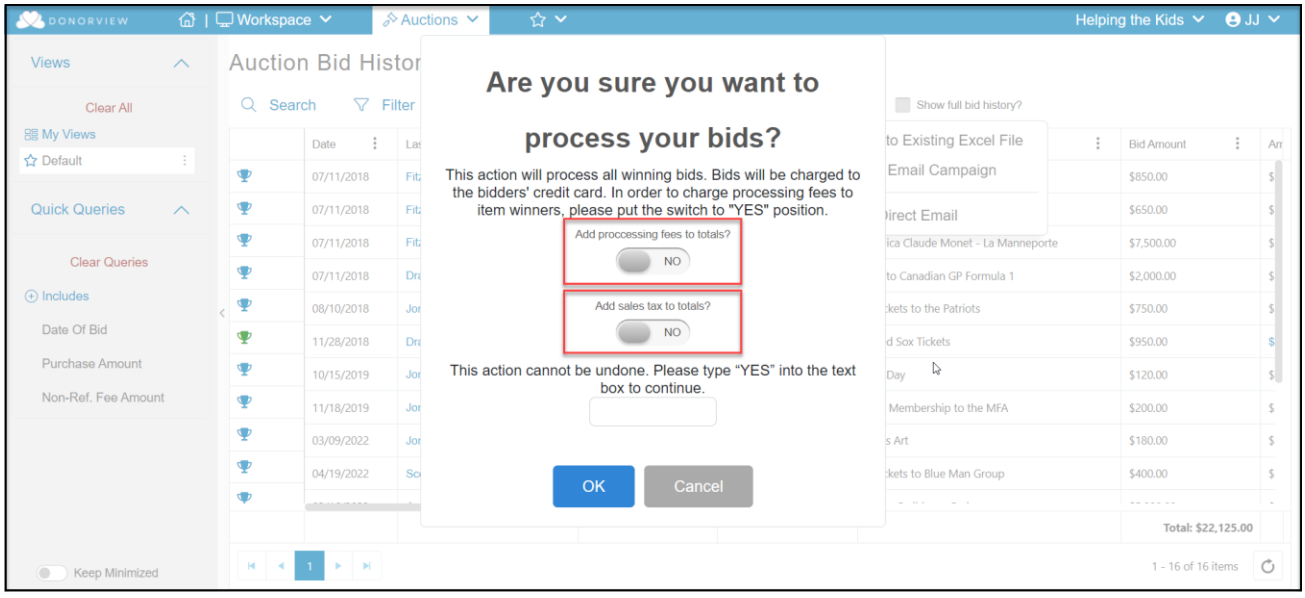


Can you bulk charge credit cards?

1. Yes, by using the Bid History grid.
2. **This will only process bids for auction items, it does not include auction items that are marked as "Exclude from bidding," add-ons, or paddle raise items.**
3. All bidders must have a credit card on file.
4. Click on the **Actions** menu and select **Process Bids**.

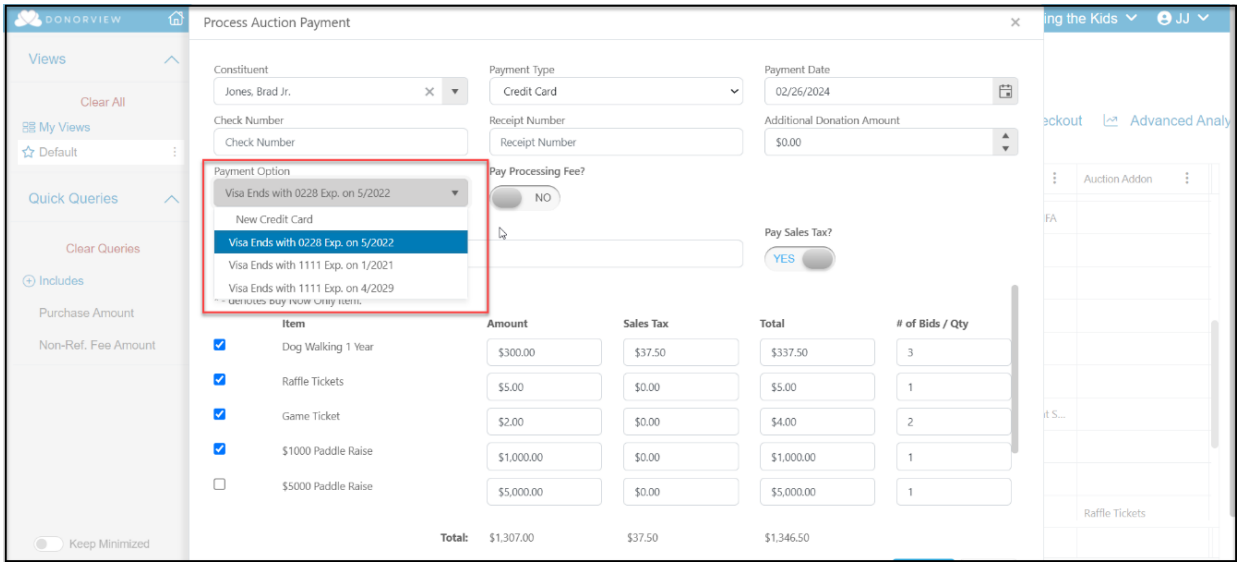


5. A new window will open.
6. If processing fees will be included, toggle **Add processing fees to totals** to **Yes.**
7. To include the pre-determined sales tax, toggle **Add sales tax to totals** to **Yes.**
8. Type **YES** in the box and click **OK** to process all the bids.



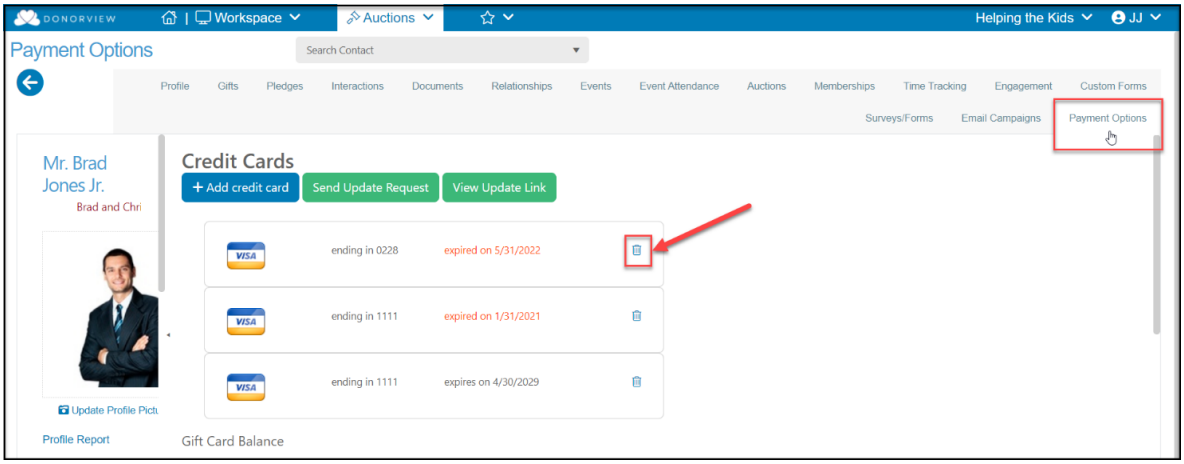
Can you choose which credit cards to use?

1. Yes, the credit card used can be selected with individual checkout, but not in the Bid History Batch Process charges.
2. For Bid History Batch Process charges, the system will choose the credit card with the farthest expiration date as the default.
3. If the bidder wants to use a different card than the default, the other credit cards will need to be deleted from their record.
4. From the checkout window with the **Payment Type** "Credit Card" selected, all credit cards on file will be listed under **Payment Options**.
5. Choose the appropriate card or click on **New Credit Card** to enter a new number.



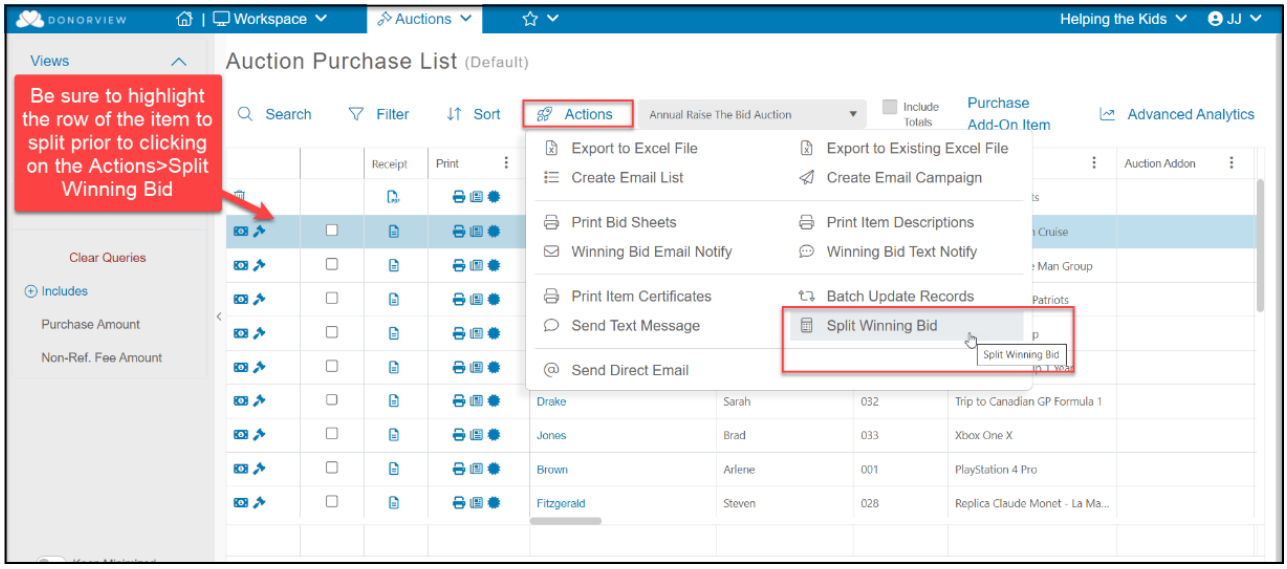
How do I remove a credit card from a profile?

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



Can you split the payment for an auction bid?

1. Split payments can be accommodated by clicking on the row of the item from the Auctions grid.
2. Click on the **Actions** menu, then **Split Winning Bid**.

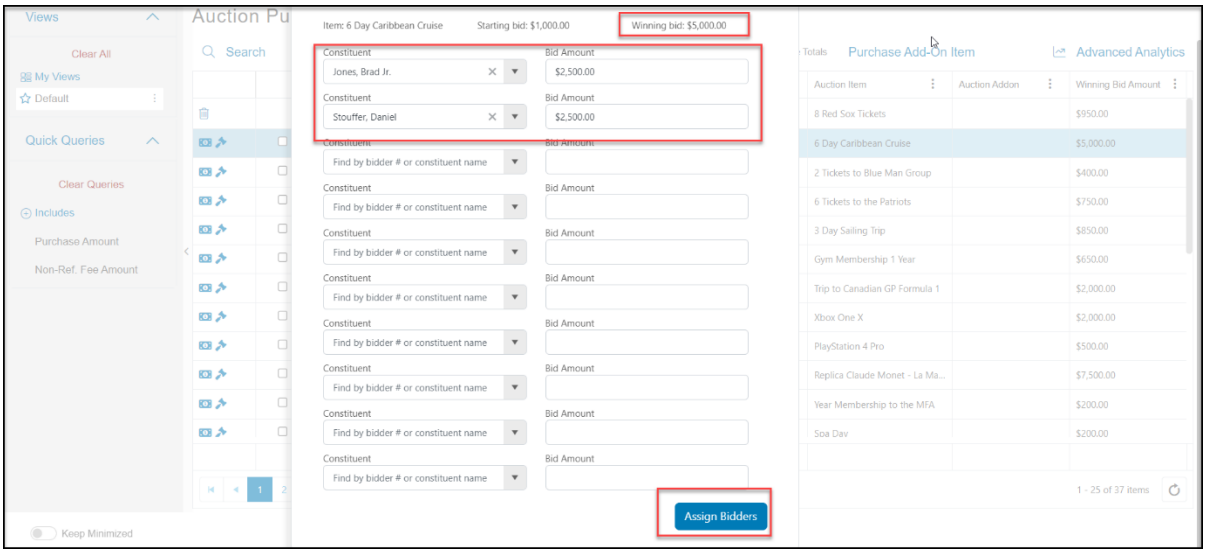


a. In the new window, the winning bid amount is listed in the top right corner.

b. Select the constituent name in the right column, then enter the amount each constituent will contribute to the total.

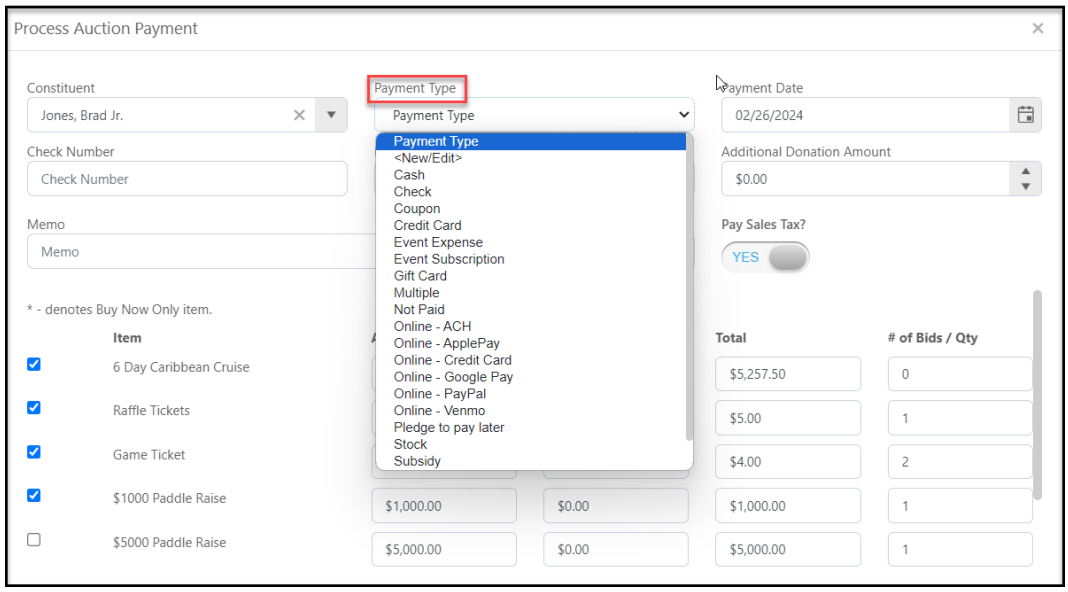
c. Click the blue **Assign Bidders** button at the bottom to split the bid.

d. After the split, the constituents can be checked out with their appropriate split.



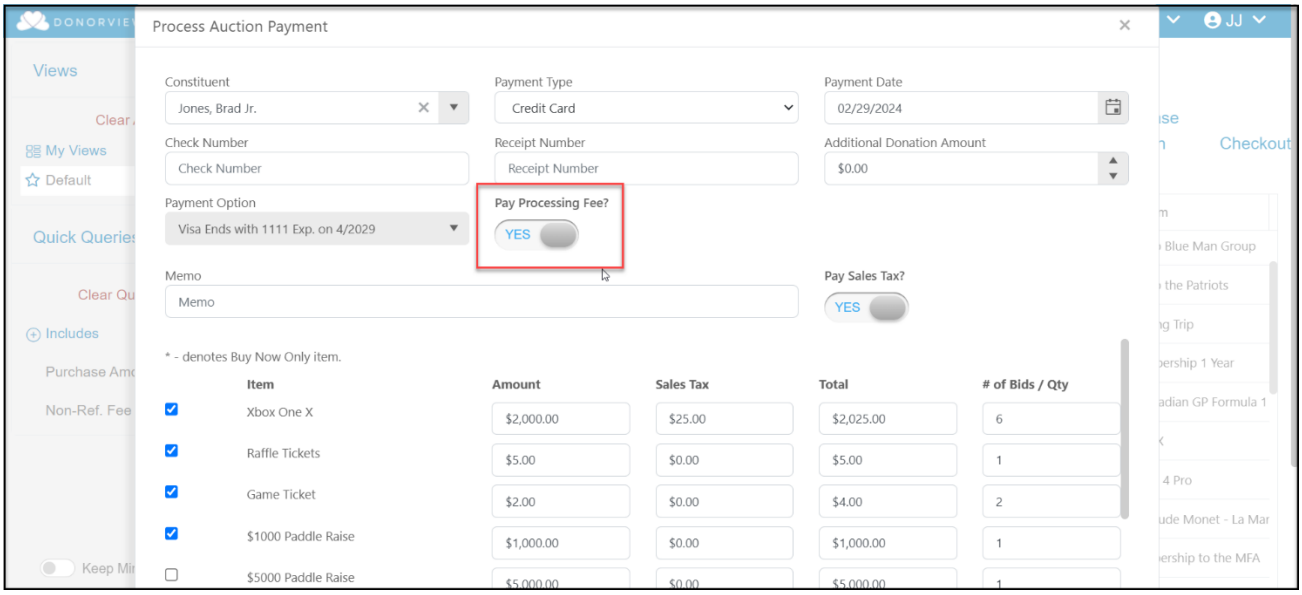
How do I use an alternate payment type?

1. **Payment types** are selected from the dropdown menu in the checkout window.
2. If other forms of payment will be collected, ensure the proper payment type has been included in the list of options using the **<New/Edit>** feature.



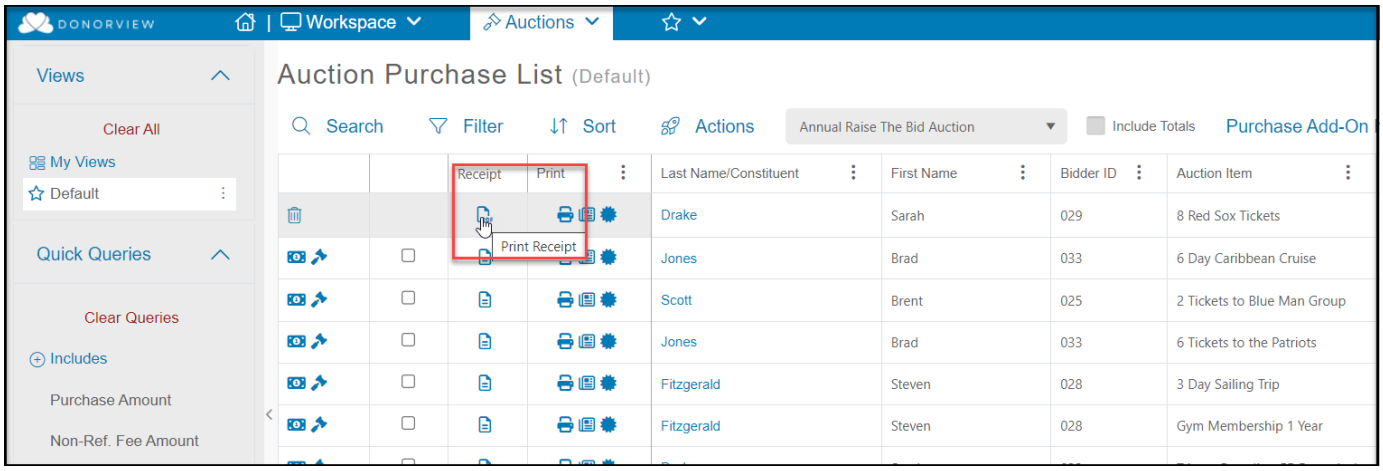
Who pays the credit card fee, and can that be changed?

1. When auction items are manually checked out, by default the organization pays the credit card processing fees. This can be toggled to allow the bidder to pay the fee.
2. When batch credit card processing using Bid History, charging the credit card fees to the bidders is optional.

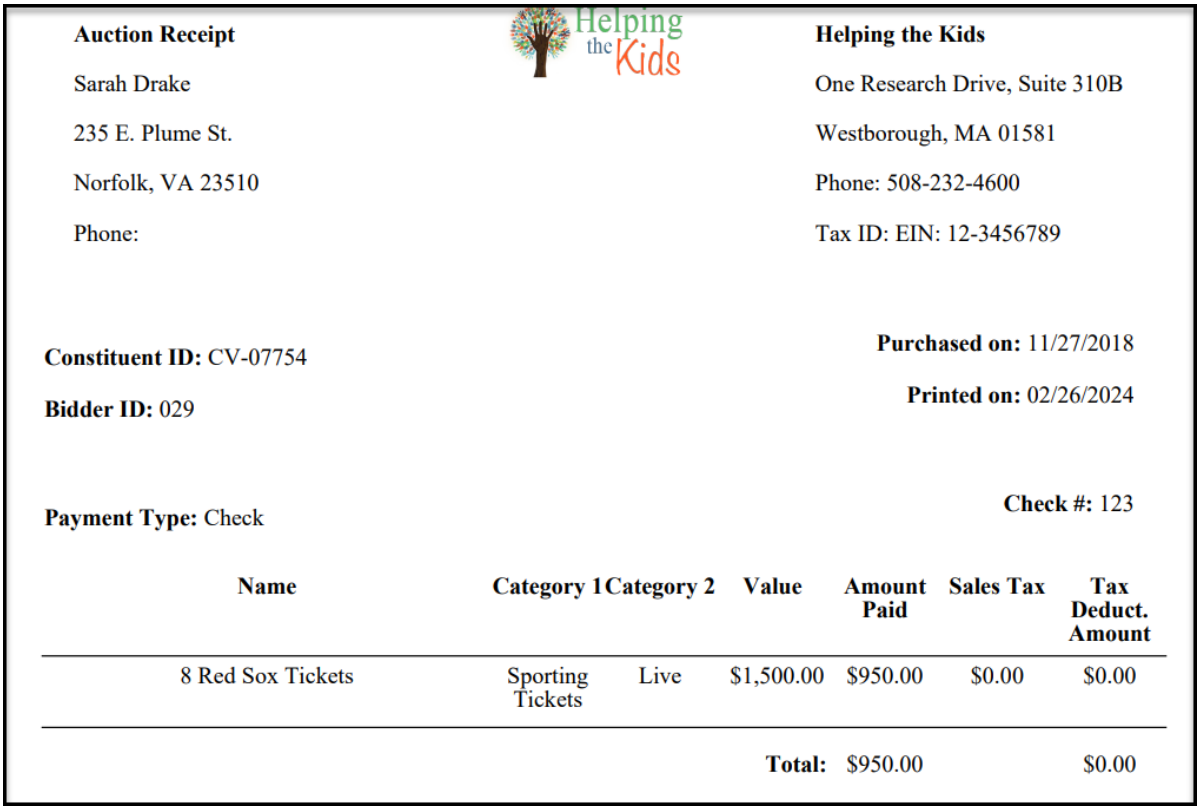


How do I send a receipt?

1. Bidders are automatically sent a thank you email that includes a list of their purchases.
2. A receipt can be printed for individual items, but not all items for a donor at once.
3. Each receipt must be printed individually.
4. After checkout, click on the receipt icon on the row of the item.



5. The receipt is produced as a pdf. An example is shown below.



Auction Receipt

Sarah Drake
235 E. Plume St.
Norfolk, VA 23510
Phone:

Helping the Kids

Helping the Kids
One Research Drive, Suite 310B
Westborough, MA 01581
Phone: 508-232-4600
Tax ID: EIN: 12-3456789

Constituent ID: CV-07754
Bidder ID: 029

Purchased on: 11/27/2018
Printed on: 02/26/2024

Payment Type: Check

Check #: 123

Name	Category 1	Category 2	Value	Amount Paid	Sales Tax	Tax Deduct. Amount
8 Red Sox Tickets	Sporting Tickets	Live	$1,500.00	$950.00	$0.00	$0.00
			Total:	$950.00		$0.00

What if I need help with event or auction?

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 Empower (formerly Essential) or Elevate (formerly 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.