



Auction-Event Frequently Asked Questions

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I. 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.associationsphere.com/en/support/solutions/articles/67000729627-auction-event-guide-checklist>
2. Event Training Videos (all use password: AS2021)
 - a. Event Management (Old User Interface) - <https://vimeo.com/528894431>
 - b. Event & Attendee Questions - <https://vimeo.com/732524596>
 - c. Event Calendar - <https://vimeo.com/743040429>
 - d. Event Summary Grid - <https://vimeo.com/742261700>
 - e. Events Detail Grid - <https://vimeo.com/741951994>
 - f. Event Attendance Grid - <https://vimeo.com/729647615>
 - g. Event Table Assignments - <https://vimeo.com/743079044>
 - h. Event Auto Reminders - <https://vimeo.com/724864435>
3. Event Support Articles -
<https://support.associationsphere.com/en/support/solutions/folders/67000454073>
4. Auction Training Videos (all use password: AS2021)
 - a. Auctions - <https://vimeo.com/527522336>
 - b. Text2Bid - <https://vimeo.com/290883430/b6c31fbe90> (silent but shows how texting works)
5. Auction Support Articles -
<https://support.associationsphere.com/en/support/solutions/folders/67000537399>
6. Mobile App - <https://vimeo.com/738653150> (Password: AS2021)
7. Member Portal - <https://vimeo.com/536906471> (Password: AS2021)
8. Some auction participants may encounter issues logging in to their member portal account. You can see all the most common issues and how to address them in this support article:
<https://support.associationsphere.com/en/support/solutions/articles/67000705787-how-can-i-help-a-member-troubleshoot-problems-logging-in-to-the-portal->

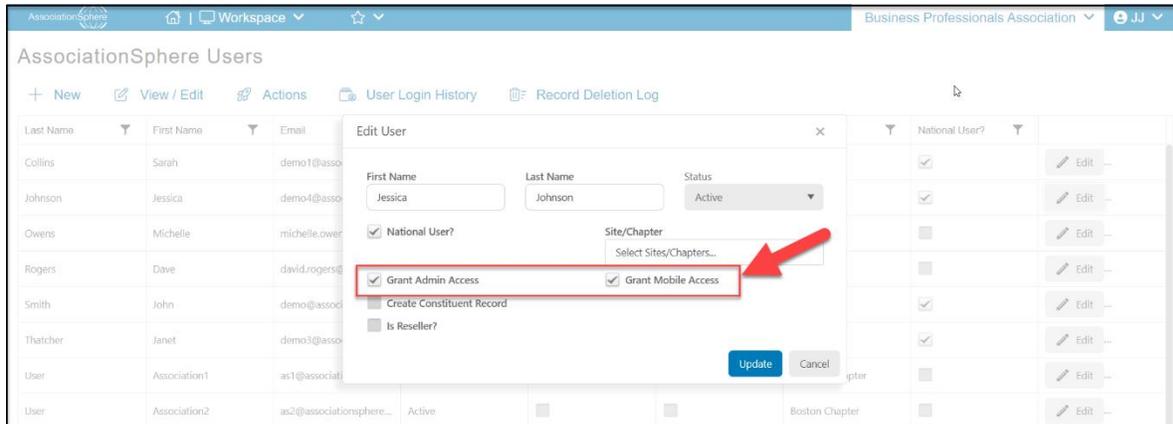
II. Software, Mobile App & Portal

A. What are the differences between the cloud-based version of the AssociationSphere software platform, the mobile app, and the member portal?

1. The cloud-based version of AssociationSphere 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 **AssociationSphere** 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.
 - e. See more about the features of the mobile app in this video.
<https://vimeo.com/738653150> (Password: AS2021)
3. The Member Portal allows the members or bidders to access their own information and manage their own accounts.
 - a. The portal is an integral part of the auction process as the bidders must have a portal account with a credit card in their account in order to place a bid.
 - b. You can learn more about the advanced portal features in this video Member Portal - <https://vimeo.com/59031566> (Password: AS2021)
 - c. The auction module is activated in the member portal when an online auction is created, and the members have the ability to update contact information and credit card information.
 - d. Unless the advanced portal features are activated, member portal activities are limited to just the auction and contact information.

B. 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 User Management can be found in this video <https://vimeo.com/855091980> (password: AS2021).
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.



C. Can an AssociationSphere User be logged in to multiple devices at once?

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

D. Can an AssociationSphere user have the same login for the backend software and the member portal?

4. Technically, yes, however a different browser must be used.
5. 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 AssociationSphere support team to unlock your account.
6. **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.**
7. Using two different emails – one for managing the back end of the software and one for logging into the portal as a member – 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.
8. 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.

III. Swipers

A. Do the swipers work with the desktop/laptop version of AssociationSphere?

No, the swipers only work with the mobile AssociationSphere app.

B. Can I use a different swiper than the ones provided by AssociationSphere?

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

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

1. Swipers need to be ordered from AssociationSphere prior to the event by sending the request to support@AssociationSphere.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.

D. 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 be 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.

IV. Constituent Records and Bidder IDs

A. 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 member 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.

Account Settings

Organization ID: 121018418
Support Plan: Essential
Support #: 508.205.0243

Organization Info

Payment Methods

Options

Manage Picklists
Select picklist

Billing Notification Email(s)
demo@donorview.com

Recognition Name Format: Last Name Comma First Name
Source Name Format: First Name Last Name
Gifts History Default Days: 5,000
Include Soft Credits in Gift Calculation: NO

Membership Renewal Grace Period (Days): 90
Date to Use in Gift Calculations: Date of Gift
QuickBooks Customer Name Format: Recognition Name
Do you use sales tax in QuickBooks?: NO
Use compound entry in QuickBooks?: NO
Show Non-Binary in Gender Dropdown?: YES

Please select the fields that should be used when determining if the constituent record already exists. This logic is used for any online transactions that are created by constituents. The Last Name field is recommended for the best results when checking for existing records.

If they submit an email address, then use:
 Email
 Last Name
 First Name

If they do not submit an email address, then use:
 Address Street
 Last Name
 First Name

If they do not submit an email address or Address, then use:
 Birthdate
 Last Name
 First Name

Please select how the software should handle the entry of a new mailing addresses for or by an existing Constituent through an online form. This rule would only apply to Constituents who already have a default mailing address on file in their record.

B. 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.

C. 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.

D. 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.

E. Can constituents who share an email address 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 member portal accounts, even if their names are different.

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

3. The member 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.
4. If a constituent creates a member 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.
5. As described above, the member 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.

V. Credit Card Collection and Online Auction Registration

A. 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.

	Last Name/Const...	First Name	Attendee Last Name	Attendee First Name	CC on File	Ticket Level	Paid	Bidder ID	In	In Time	Out	Out
	Jones	Brad	Jones	Brad	CC	Individual Goller	✓		✓	08/08/23 01:35 PM	✓	08/...
	Jones	Brad	Jones	Sarah	CC	Hole In One (Ace) Pack...	✓		✓	08/15/23 01:20 PM		
	Jones	Brad	Jones	Jason	CC	Hole In One (Ace) Pack...	✓		✓	08/15/23 01:31 PM		
	Hadlock	Bonnie	Hadlock	Bonnie	CC	Double Eagle Package	✓		✓	10/19/23 11:27 AM		
	Jackson	Sandy	Jackson	Sandy	CC	Birdie Package	✓		✓	02/13/24 09:30 AM	✓	02/...
	Jackson	Sandy	Jackson	Sandy	CC	Birdie Package	✓					
	Adams	Heather	Adams	Heather	CC	Individual Goller	✓		✓	02/20/24 09:32 AM	✓	02/...
	Jones	Brent	Jones	Brent	CC	Individual Goller	✓					
	Stouffer	Daniel	Jones	Beth	CC	Individual Goller	✓		✓	11/07/23 01:38 PM	✓	11/...
	Jones	Brad	Jones	Beth	CC	Double Eagle Package	✓		✓	11/08/23 07:29 AM	✓	02/...
	Bondar	Andrey	Jones	Beth	CC	Birdie Package	✓					
	Stouffer	Daniel	Stouffer	Daniel	CC	Birdie Package	✓					
	Stouffer	Daniel	Stouffer	Daniel	CC	Birdie Package	✓					

- 1. A red icon indicates there is no card on file.
 - 2. A green icon indicates there is at least one credit card on file. Hoovering over the green icon will reveal the last four digits of the card and the expiration date.
- B. 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.
- C. Right click (or control CTRL click) on the credit card icon to open the constituent's **Payment Options** tab in their record.
- D. 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.
- 1. 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.

Payment Options

Search Contact

Profile Gifts Pledges Interactions Documents Relationships Events Event Attendance Auctions Memberships Time Tracking Engagement Custom Forms

Surveys/Forms Email Campaigns Payment Options

Andrey Bondar

Credit Cards

+ Add credit card Send Update Request View Update Link

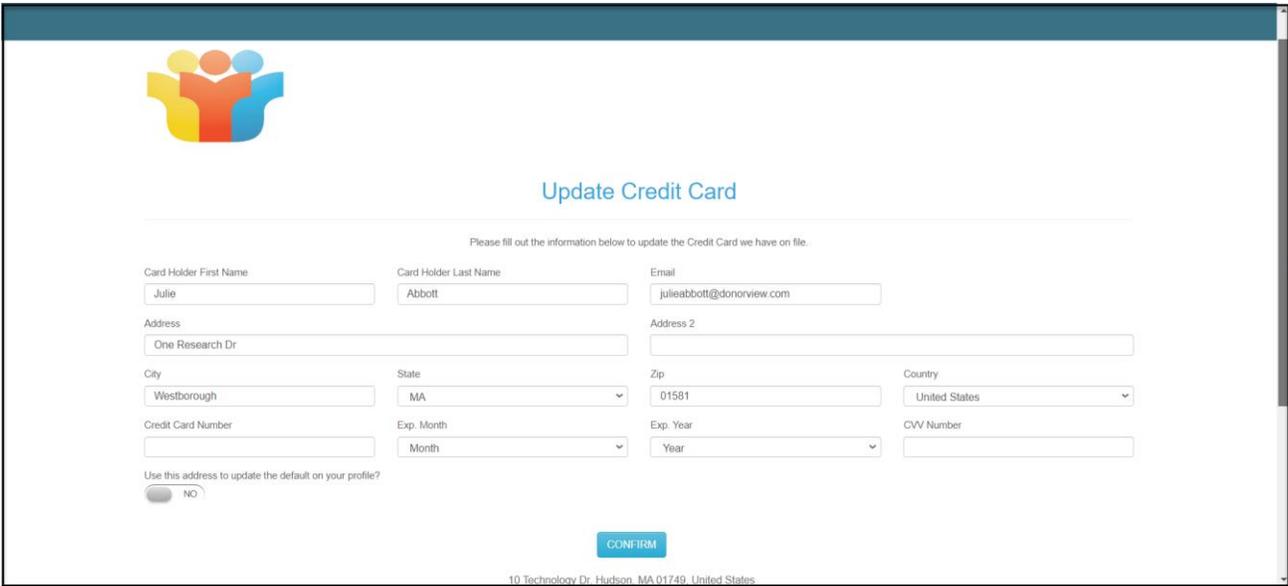
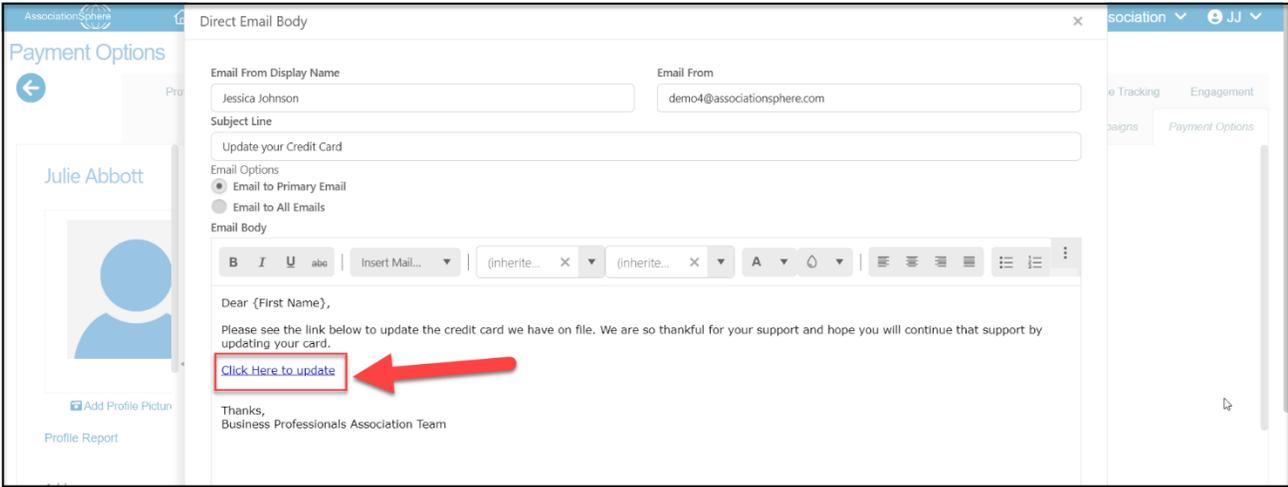
Send Update Request

Gift Card Balance

Gift Card Number	Date Purchased	Ticket Level
No data available.		

Address:
201 Boston Post Rd West
Marlborough, MA

2. 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.



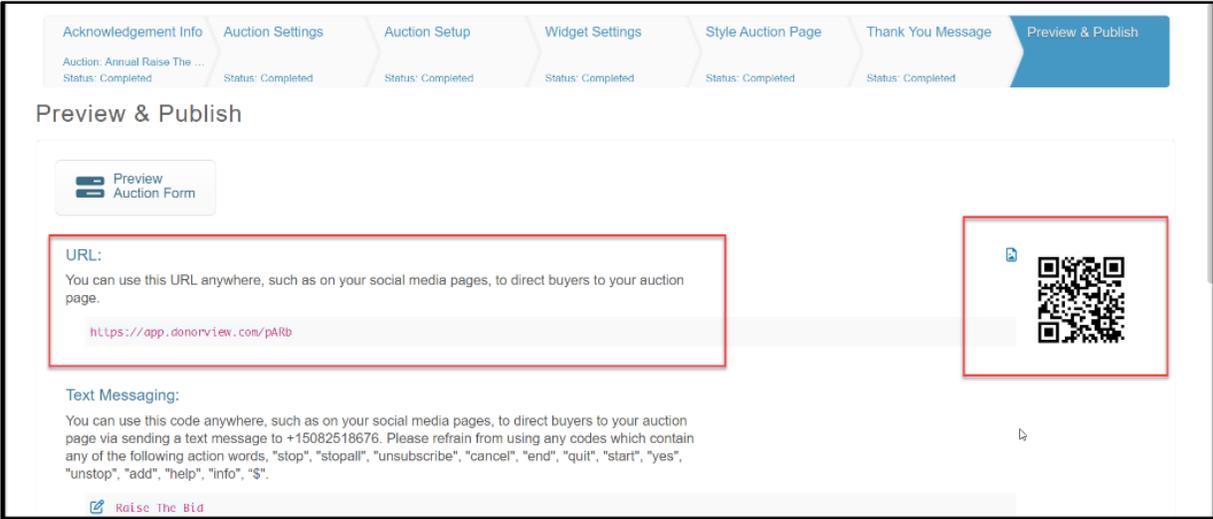
3. Once a credit card is on file for the constituent, the icon under the **CC on File** column on the Event Attendance grid will change to green.

B. Are portal accounts created automatically?

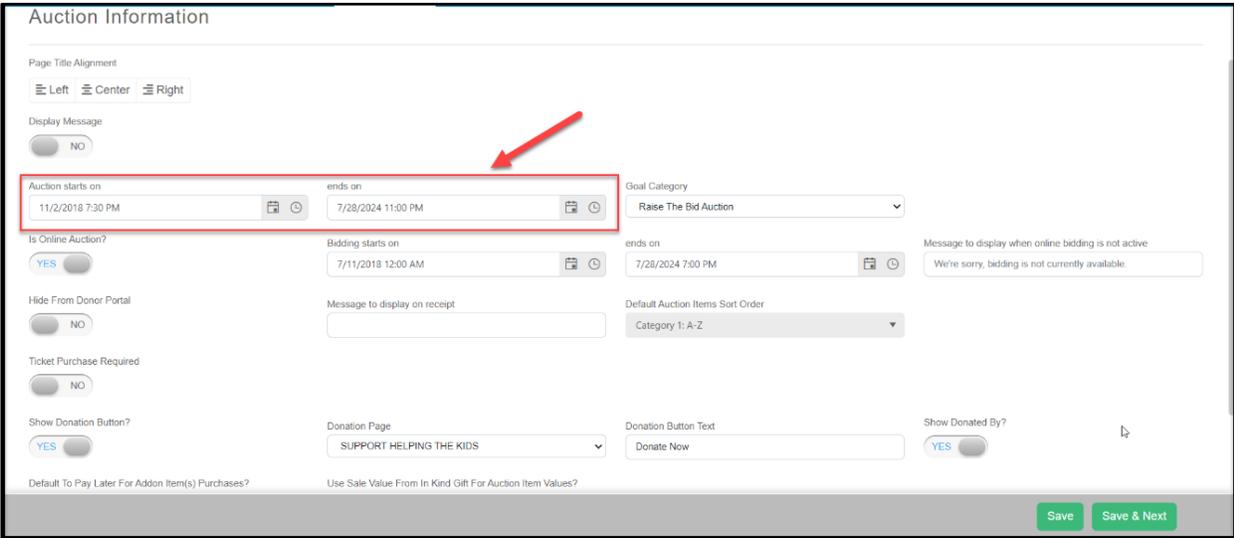
1. No, just because the attendee has a credit card on file and a bidder ID does **NOT** mean that they have a portal account created, which is required for online or mobile auction bidding.
2. The auction URL link, QR code, or text code can be shared with all attendees to encourage them to set up their account prior to the event.

C. 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.

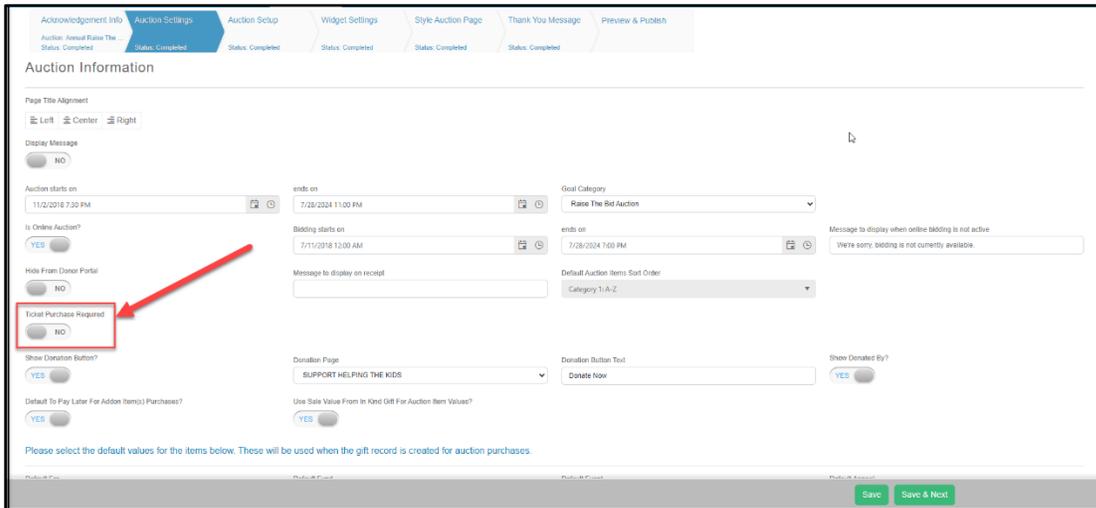


- 4. Be sure the auction page is active prior to inviting attendees to register. The bidding does not need to be open yet, but the page must be active. The page is only viewable to the public between the **Auction starts on** and the **ends on** dates/times.



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

1. Yes, you can open the auction to non-attendees by sharing the URL link, text code, or QR code.
2. If non-attendees do not have to purchase a ticket to the event, be sure to turn off any link between the auction and the event from the auction page only.
3. The auction can still be linked in the event page's event settings tab.
4. On the Auction Settings tab, select the **Ticket Purchase Required** toggle to **No** so that non-attendees can participate without purchasing an event ticket.



VI. Equipment List

What equipment will I need for the event?

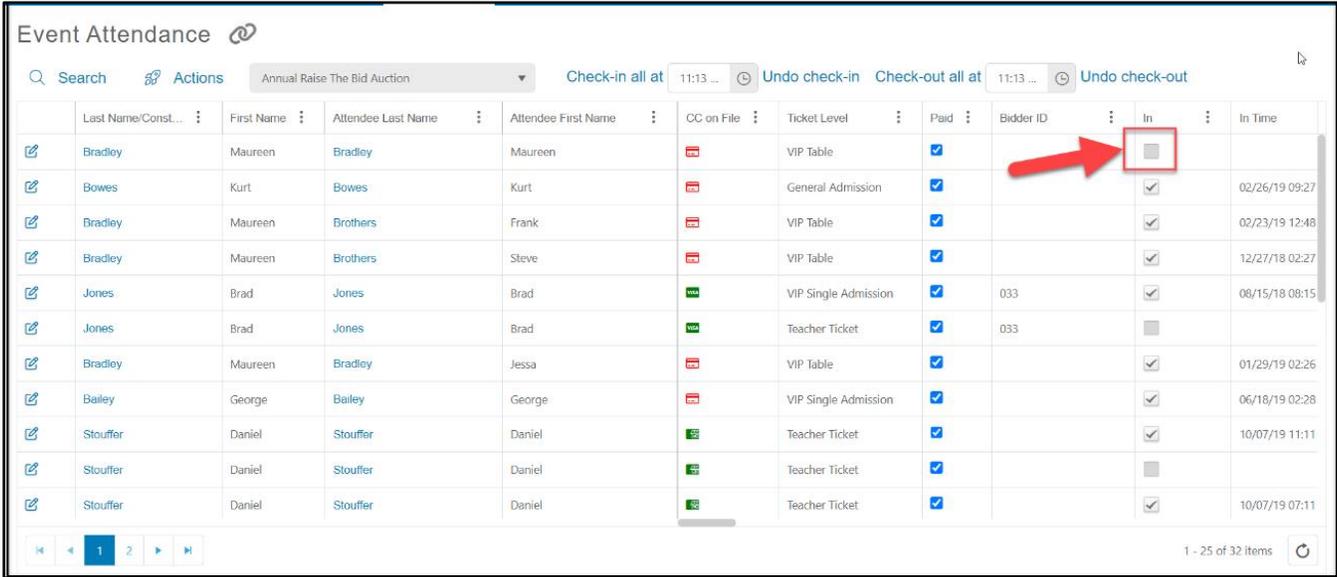
1. Laptops & power cords – laptops are needed for auction checkout, to make changes to pages, and perform other activities using the main software platform.
2. iPads/iPhones – if you will be using the AssociationSphere app to check in guests, scan tickets, swipe credit cards, or sell tickets at the door.
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. **The swipers can only be used with the AssociationSphere app.**
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.

VII. Check-In

A. 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.)



	Last Name/Const...	First Name	Attendee Last Name	Attendee First Name	CC on File	Ticket Level	Paid	Bidder ID	In	In Time
	Bradley	Maureen	Bradley	Maureen		VIP Table	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
	Bowes	Kurt	Bowes	Kurt		General Admission	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	02/26/19 09:27
	Bradley	Maureen	Brothers	Frank		VIP Table	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	02/23/19 12:48
	Bradley	Maureen	Brothers	Steve		VIP Table	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	12/27/18 02:27
	Jones	Brad	Jones	Brad		VIP Single Admission	<input checked="" type="checkbox"/>	033	<input checked="" type="checkbox"/>	08/15/18 08:15
	Jones	Brad	Jones	Brad		Teacher Ticket	<input checked="" type="checkbox"/>	033	<input type="checkbox"/>	
	Bradley	Maureen	Bradley	Jessa		VIP Table	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	01/29/19 02:26
	Bailey	George	Bailey	George		VIP Single Admission	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	06/18/19 02:28
	Stouffer	Daniel	Stouffer	Daniel		Teacher Ticket	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	10/07/19 11:11
	Stouffer	Daniel	Stouffer	Daniel		Teacher Ticket	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
	Stouffer	Daniel	Stouffer	Daniel		Teacher Ticket	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	10/07/19 07:11

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

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

C. 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.

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.

The screenshot shows a table titled "Event Attendance" with columns: Last Name/Const..., First Name, Attendee Last Name, Attendee First Name, CC on File, Ticket Level, Paid, Bidder ID, In, and In Time. A red arrow points to the edit icon (pencil) in the first row, which corresponds to the attendee Bradley, Maureen.

Last Name/Const...	First Name	Attendee Last Name	Attendee First Name	CC on File	Ticket Level	Paid	Bidder ID	In	In Time
Bradley	Maureen	Bradley	Maureen		VIP Table	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Bowes	Kurt	Bowes	Kurt		General Admission	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	02/26/19 09:27
Bradley	Maureen	Brothers	Frank		VIP Table	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	02/23/19 12:48
Bradley	Maureen	Brothers	Steve		VIP Table	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	12/27/18 02:27
Jones	Brad	Jones	Brad		VIP Single Admission	<input checked="" type="checkbox"/>	033	<input checked="" type="checkbox"/>	08/15/18 08:15

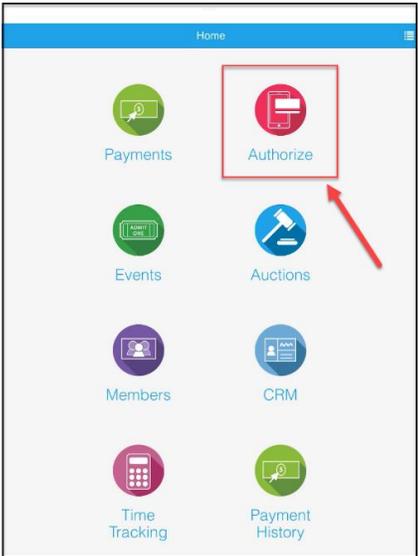
- i. Enter the credit card number, expiration date and security code.

The screenshot shows the "Edit Attendee Info" form for Bradley, Maureen. The fields for "Credit Card Number", "Exp. Month", "Exp. Year", and "Security Code" are highlighted with a red box. Other fields include "Actual Attendee", "Attendee First Name", "Attendee Last Name", "Attendee Email", "Attendee Phone", "Check In Now", "Check Out Now", "Bidder #", "Table Name", "Meal Preference", "Do you have a seating preference?", and "Attendee Notes".

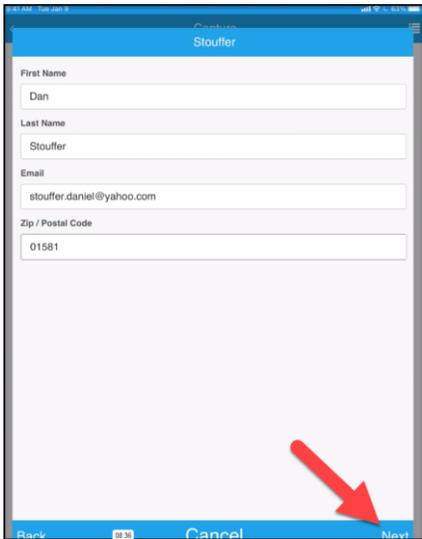
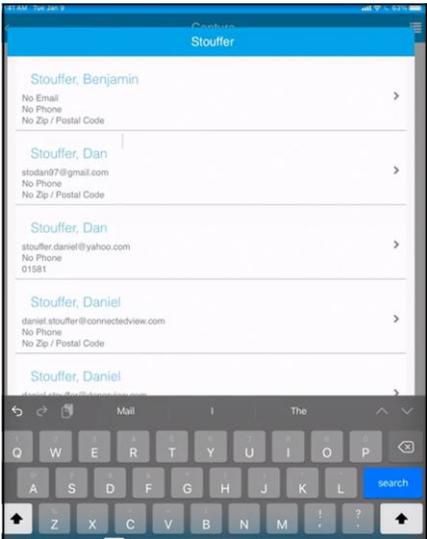
3. Swiping a credit card

- a. It is strongly recommended that this activity be practiced by all those using the app prior to the event.
- b. Log into the AssociationSphere App.
- c. Click on the Authorize icon.
- d. Swiping the credit card is demonstrated in this video <https://vimeo.com/738653150> (password: AS2021).
- e. The swiper needs to be synced with the device first (example starting at minute 4:45 in above video)

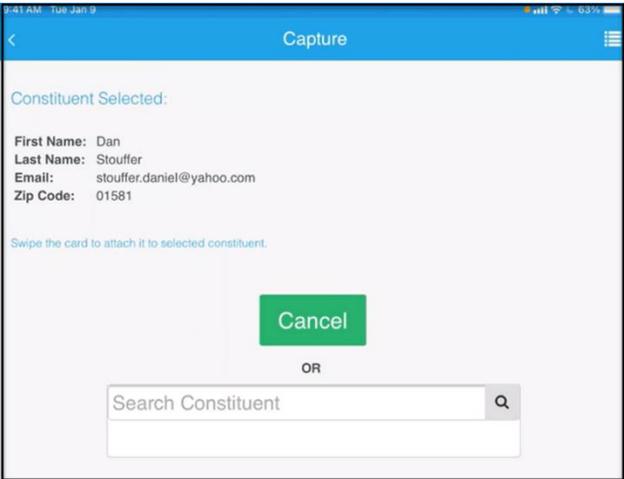
- f. You can choose to swipe the card, then select the matching name in the database, or search for the constituent then swipe to pair it to that specific constituent.
- g. Note that if you see a blue **Swipe** button instead of a green **Cancel** button, you need to power on or re-pair the swiper. Click on the **Swipe** button and push the power button on the side of the swiper to reconnect.
- h. To search for a constituent, type in their last name and click **Search** from the keyboard.



- i. Click the arrow next to the name you want to select – taking note of the [email address](#) associated with the account.
- j. **This will be the email address they will use to sign up or sign in to the portal.**
- k. **Be sure to update the record with email and zip code if it is blank.**
- l. With the constituent selected and all fields completed, click **Next** at the bottom right corner of the screen.

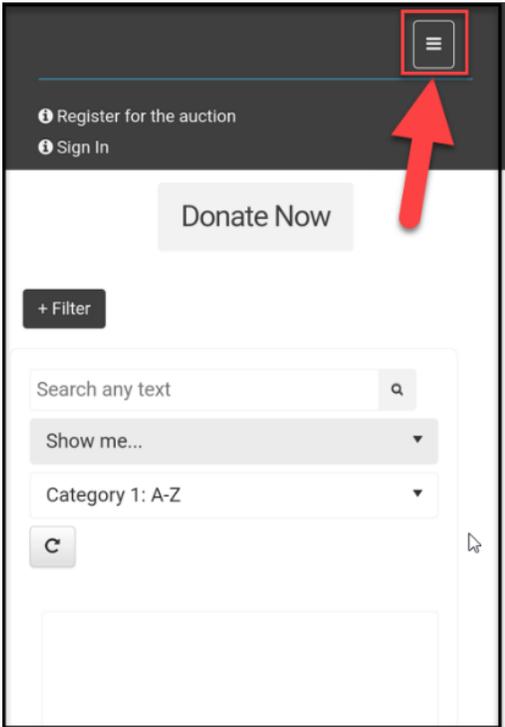


- m. If the button shows a blue **Swipe**, the Bluetooth has gone to sleep. Click on the power button on the swiper to reconnect. With the Bluetooth connected, there will be a green **Cancel** button showing on the screen.
- n. Hold the swiper so that the name ID Tech is facing you and swipe the card.
- o. Once the card is swiped, the swiper will beep and there will be a confirmation showing on the screen.



4. Member Portal Auction Registration

- a. The attendees can add or update their own credit cards through the member portal.
- b. The easiest way to do this is via the link provided for the auction.
- c. 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.
- d. They will click on **Register for the auction** to create a new account.



- e. If they already have an account, they can click on **Sign In** to enter their email address and password.
- f. If they have not already created an account, they will click on **Sign Up**.
- g. 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.
- h. 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.
- i. After they enter their information, a new window will open to allow them to enter a billing address and credit card number.
- j. Once they click the orange **Save** button, they are all set for bidding.


Sign Up Here

Sign up
Sign In
[Cancel](#)

Powered By

www.AssociationSphere.com

🏠
👤 name@email.com

Add Credit Card

* Denotes required field

Card Holder First Name * <input type="text" value="First Name"/>	Card Holder Last Name * <input type="text" value="Last Name"/>	Email <input type="text" value="name@email.com"/>
Address * <input type="text"/>		Address 2 <input type="text"/>
City * <input type="text"/>	State * <input type="text" value="Select state"/>	Zip * <input type="text"/>
		Country * <input type="text" value="United States"/>
Credit Card Number * <input type="text"/>	Exp. Month * <input type="text" value="Month"/>	Exp. Year * <input type="text" value="Year"/>
		CVV Number * <input type="text"/>

Save

D. 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. 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 member portal be maintained as the master record.

The screenshot shows the AssociationSphere interface. At the top, there is a navigation bar with 'Workspace' and 'Business Professionals Association'. Below this is a 'Portal Users' table with columns for First Name, Last Name, Constituent ID, Email, and Status. The table contains several rows of user data. To the right of the table is a navigation menu with options: Account, Users, Portal Info, Billing, and Accounting. The 'Users' option is highlighted with a red box, and the 'Portal Users' option is also highlighted with a red box. The URL at the bottom of the page is <https://app.associationsphere.com/AA/Account/ManageUsers>.

- c. A list of member 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.associationsphere.com/en/support/solutions/articles/67000615464-can-i-merge-two-constituent-records-together->

E. Can multiple guests have the same credit card or paddle number?

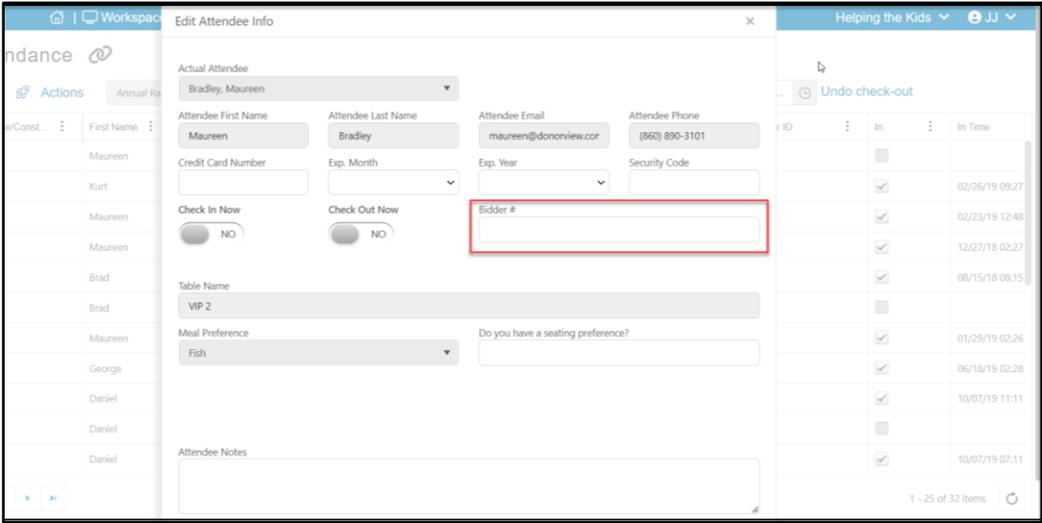
1. Yes, multiple guests can share the same credit card number.
2. No, multiple constituents cannot share the same paddle number.
 - a. If you wish spouses to share the same paddle number, they also need to share the same constituent record – for example Brad and Christine Jones are entered as Brad and 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.

F. 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.



G. Do bidders IDs preassign and can I turn that off?

1. Yes, the paddles (Bidder IDs) are preassigned but only if the event is linked to the auction page. If the event is NOT linked to the auction page, the bidder numbers must be manually assigned.
2. Paddles (Bidder IDs) are only assigned to unique constituents. A unique name and email is required for a unique Bidder ID.

H. 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.

Event Attendance

Search Actions Annual Raise The Bid Auction Check-in at 11:38 ... Undo check-in Check-out at 11:38 ... Undo check-out

	Last Name/Const...	First Name	Attendee Last Name	Attendee First Name	In	In Time	Out	Out Time	Table Name	Ticket #
	Bradley	Maureen	Bradley	Maureen	<input type="checkbox"/>		<input type="checkbox"/>		VIP 2	EVT-00009
	Bowes	Kurt	Bowes	Kurt	<input checked="" type="checkbox"/>	02/26/19 09:27 AM	<input type="checkbox"/>		GEN 1	EVT-00017
	Bradley	Maureen	Brothers	Frank	<input checked="" type="checkbox"/>	02/23/19 12:48 PM	<input type="checkbox"/>		VIP 2	EVT-00010
	Bradley	Maureen	Brothers	Steve	<input checked="" type="checkbox"/>	12/27/18 02:27 PM	<input type="checkbox"/>			EVT-00011
	Jones	Brad	Jones	Brad	<input checked="" type="checkbox"/>	08/15/18 08:15 AM	<input type="checkbox"/>			EVT-00026
	Jones	Brad	Jones	Brad	<input type="checkbox"/>		<input type="checkbox"/>			EVT-01127
	Bradley	Maureen	Bradley	Jessa	<input checked="" type="checkbox"/>	01/29/19 02:26 PM	<input type="checkbox"/>			EVT-00013
	Bailey	George	Bailey	George	<input checked="" type="checkbox"/>	06/18/19 02:28 PM	<input type="checkbox"/>		GIFT VIP	EVT-00020
	Stouffer	Daniel	Stouffer	Daniel	<input checked="" type="checkbox"/>	10/07/19 11:11 AM	<input type="checkbox"/>			EVT-00031
	Stouffer	Daniel	Stouffer	Daniel	<input type="checkbox"/>		<input type="checkbox"/>			EVT-00032
	Stouffer	Daniel	Stouffer	Daniel	<input checked="" type="checkbox"/>	10/07/19 07:11 AM	<input type="checkbox"/>			EVT-00025

Sliderbar 1 - 25 of 32 items

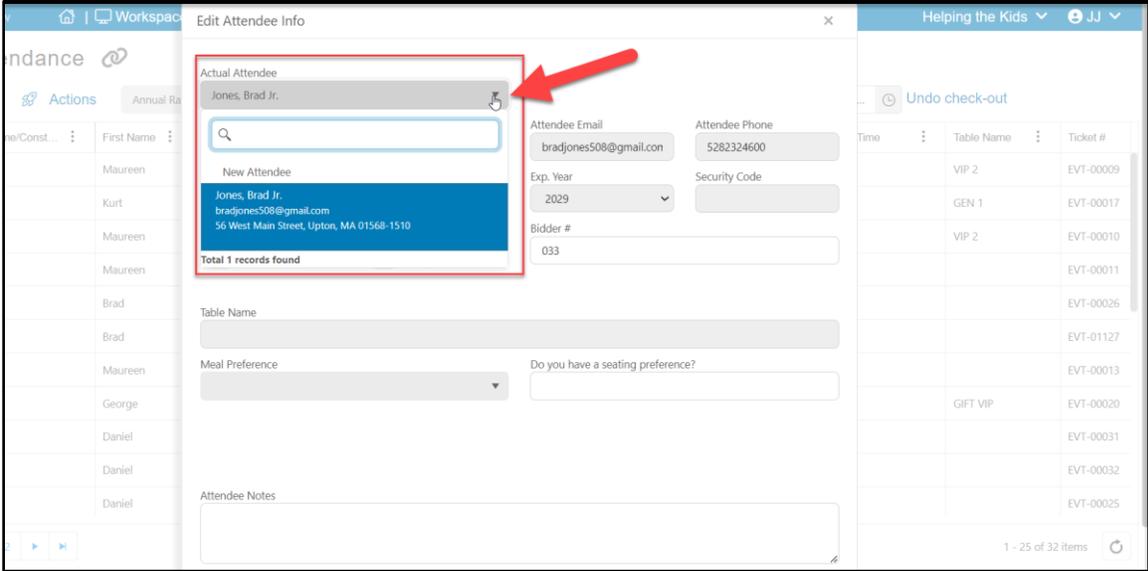
I. How can I assign or reassign a guest to a table?

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/743079044> (Password: AS2021)
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/735872886> (Password: AS2021)

J. 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 grid.
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.

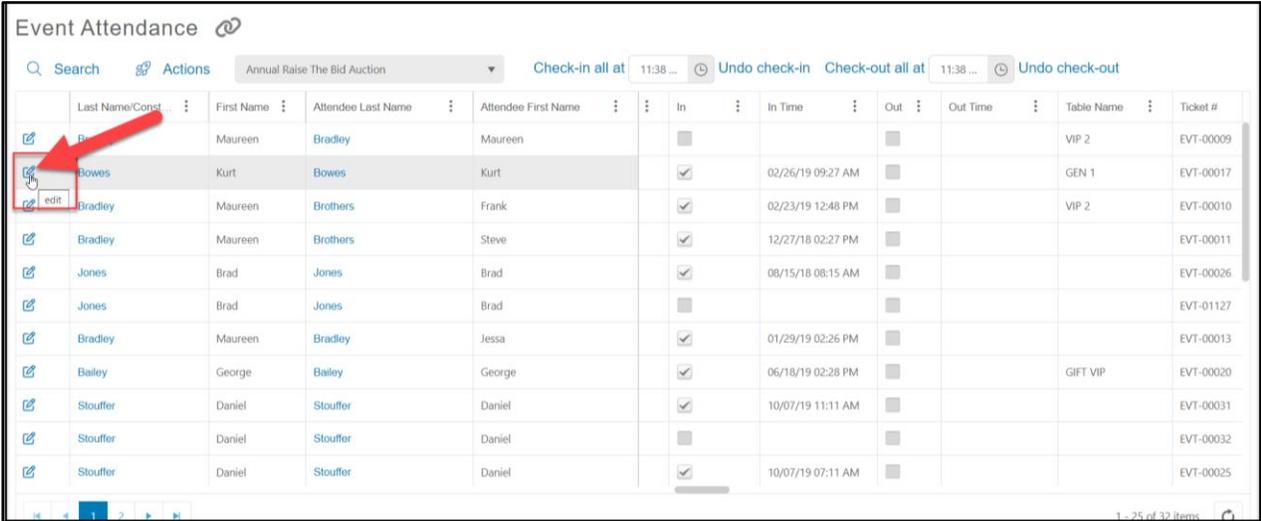
- 7. If no matching constituent is found, click on **New Attendee** to enter the name and email address to create a new constituent record. Other fields can be updated with credit card information, check in, and answers to custom questions.



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

K. 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.



L. 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.

	Last Name/Const...	First Name	Attendee Last Name	Attendee First Name	In	In Time	Out	Out Time	Table Name	Ticket #
	Bradley	Maureen	Bradley	Maureen	<input type="checkbox"/>		<input type="checkbox"/>		VIP 2	EVT-00009
	Bowes	Kurt	Bowes	Kurt	<input checked="" type="checkbox"/>	02/26/19 09:27 AM	<input type="checkbox"/>		GEN 1	EVT-00017
	Bradley	Maureen	Brothers	Frank	<input checked="" type="checkbox"/>	02/23/19 12:48 PM	<input type="checkbox"/>		VIP 2	EVT-00010
	Bradley	Maureen	Brothers	Steve	<input checked="" type="checkbox"/>	12/27/18 02:27 PM	<input type="checkbox"/>			EVT-00011
	Jones	Brad	Jones	Brad	<input checked="" type="checkbox"/>	08/15/18 08:15 AM	<input type="checkbox"/>			EVT-00026
	Jones	Brad	Jones	Brad	<input type="checkbox"/>		<input type="checkbox"/>			EVT-01127
	Bradley	Maureen	Bradley	Jessa	<input checked="" type="checkbox"/>	01/29/19 02:26 PM	<input type="checkbox"/>			EVT-00013
	Bailey	George	Bailey	George	<input checked="" type="checkbox"/>	06/18/19 02:28 PM	<input type="checkbox"/>		GIFT VIP	EVT-00020
	Stouffer	Daniel	Stouffer	Daniel	<input checked="" type="checkbox"/>	10/07/19 11:11 AM	<input type="checkbox"/>			EVT-00031
	Stouffer	Daniel	Stouffer	Daniel	<input type="checkbox"/>		<input type="checkbox"/>			EVT-00032
	Stouffer	Daniel	Stouffer	Daniel	<input checked="" type="checkbox"/>	10/07/19 07:11 AM	<input type="checkbox"/>			EVT-00025

M. 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.

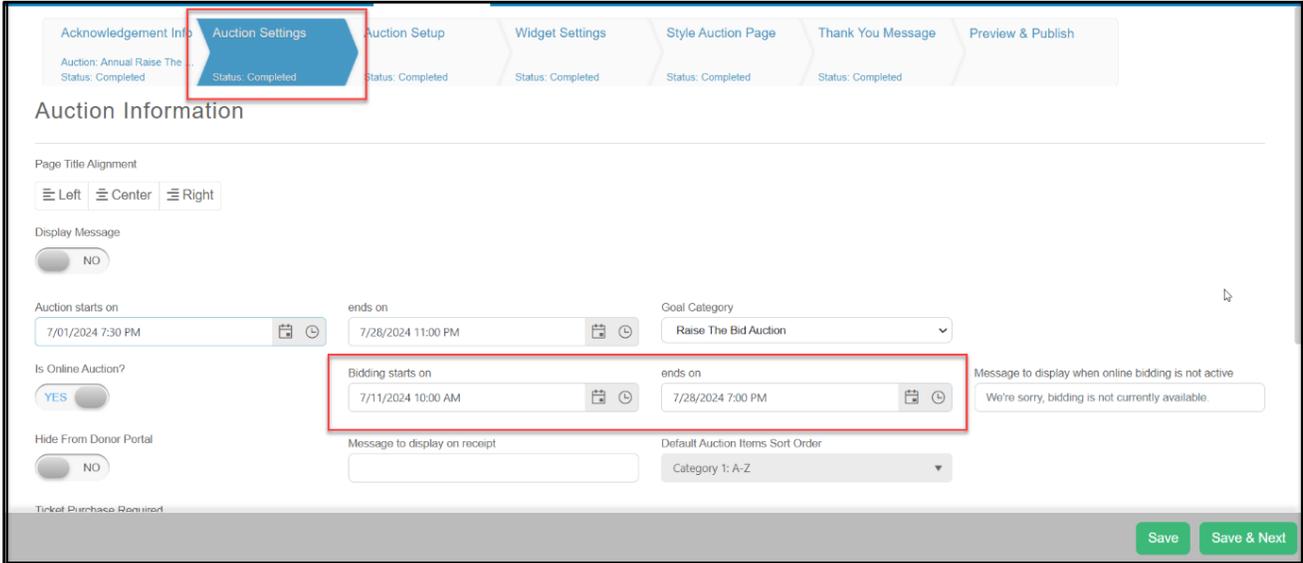
N. Are cell numbers and emails required?

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.

VIII. Online Silent Auction:

A. 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.

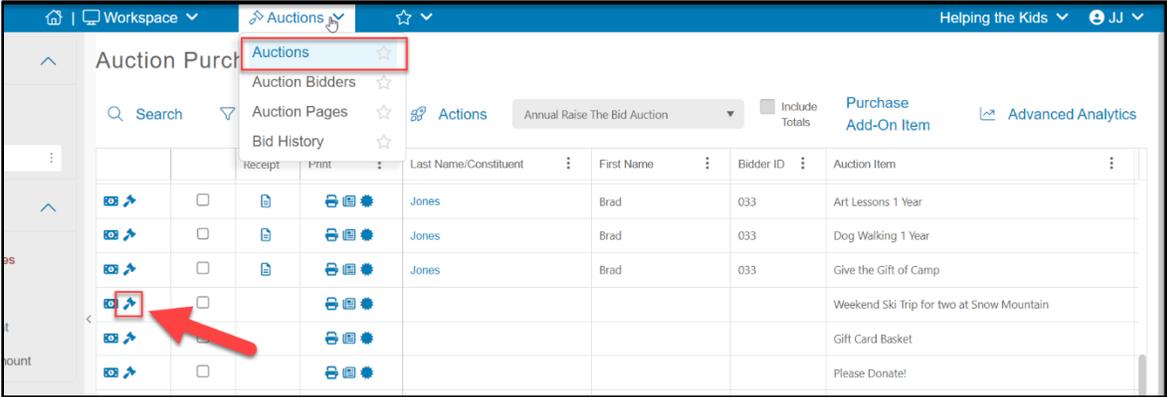


B. Are credit cards required to bid and can I change that?

- 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.

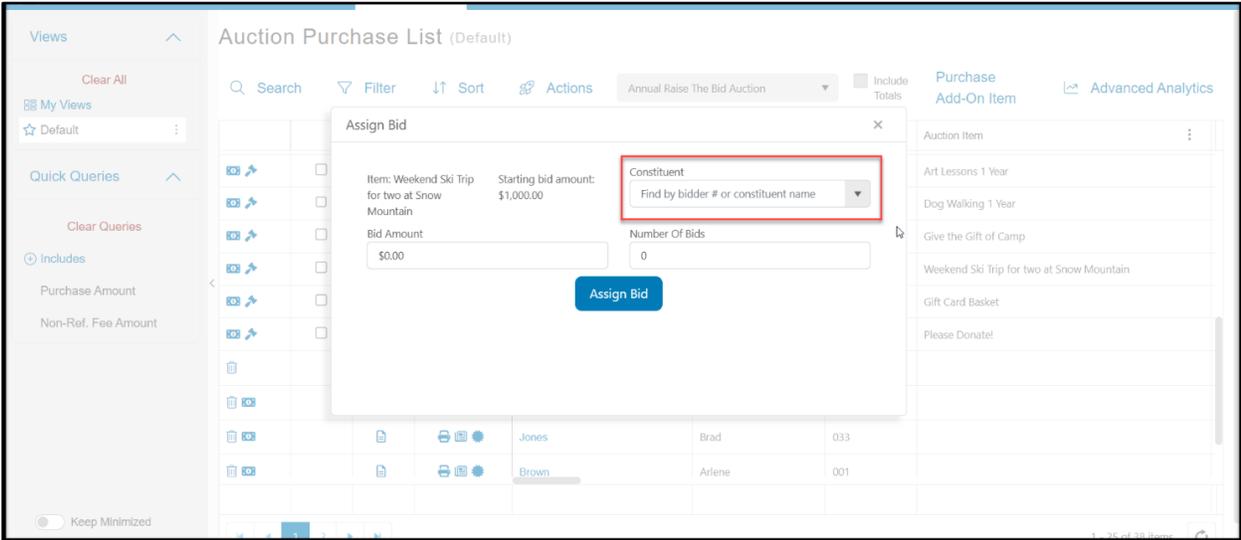
C. How do I place a bid for a guest?

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



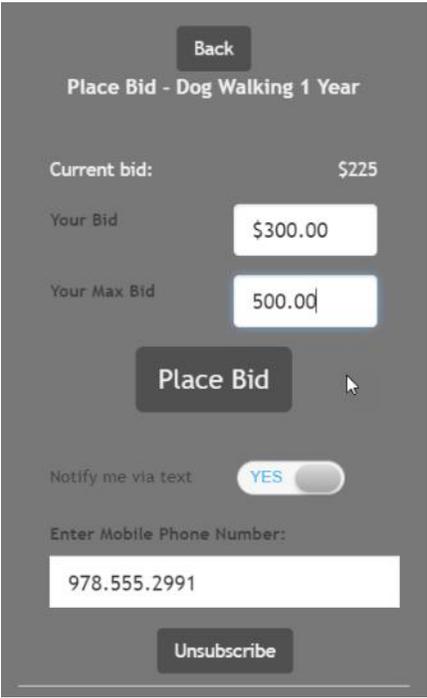
- 2. Search by bidder number or attendee last name to identify the bidder.
- 3. Enter the bid amount.
- 4. Entering the number of bids is optional.

5. Click the blue **Assign Bid** button to record the bid.



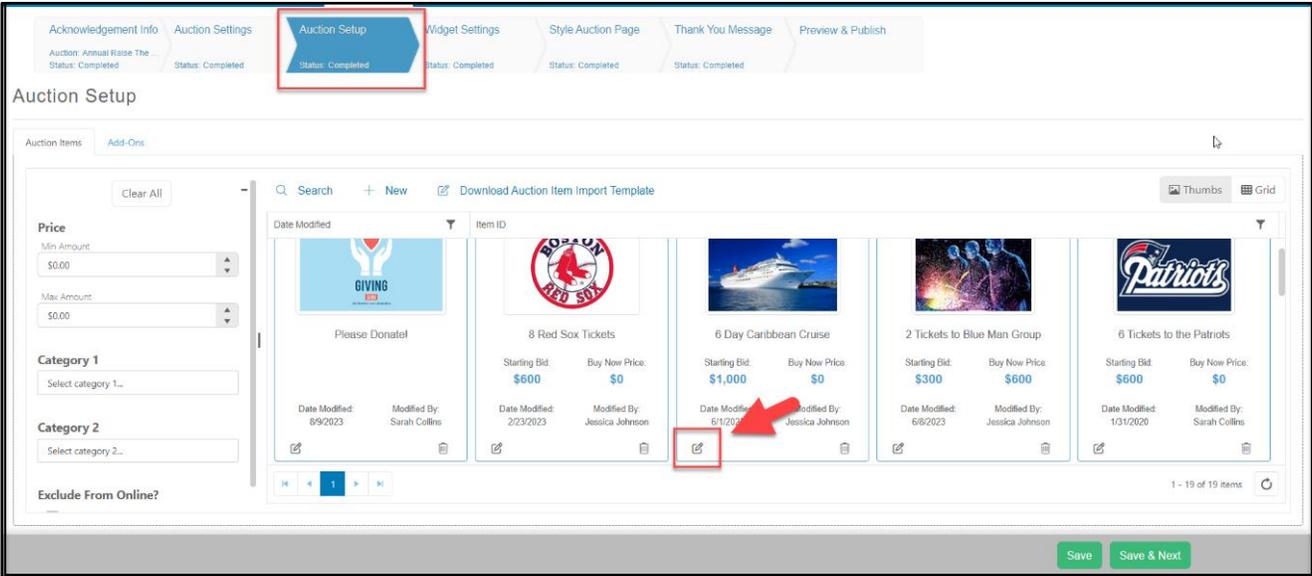
D. Is max bid an option?

- 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.

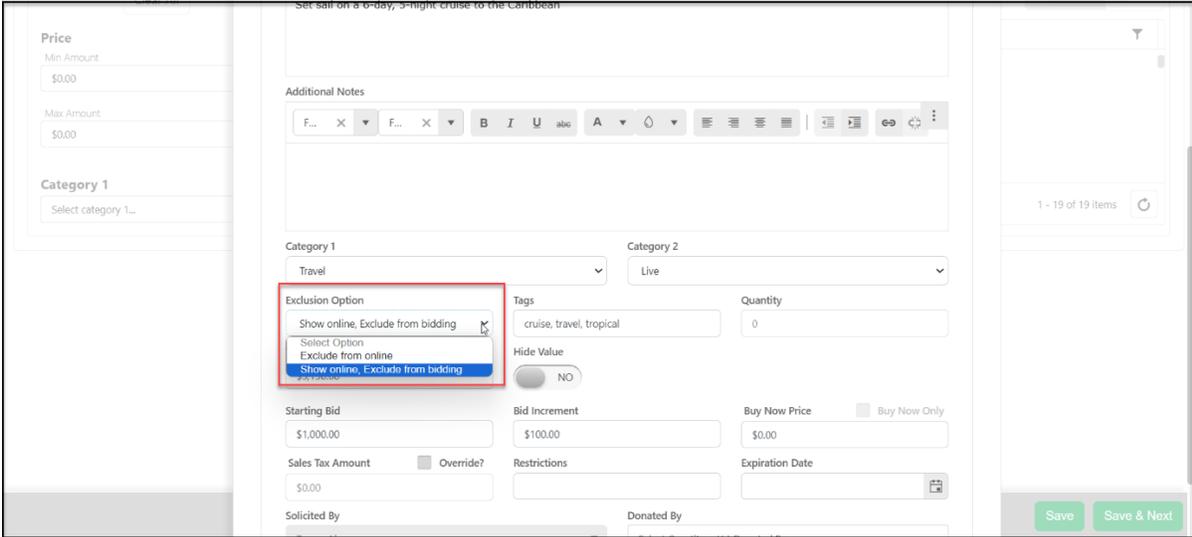


E. How do you hide/unhide an auction item?

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. From the auction page editor, click on the Auction Setup tab.
4. On the item to hide/unhide, click on the edit icon in the bottom right corner of the item window.

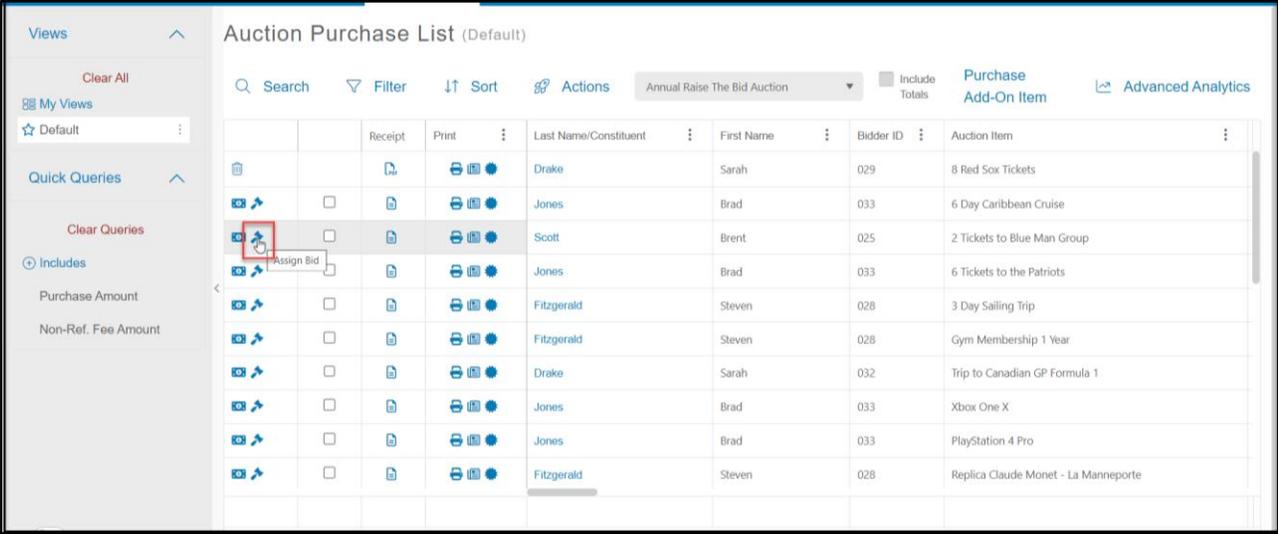


5. Under **Exclusion Option**, select **Exclude from online** if the item is included for internal bid assignment and checkout.
6. Select **Show online, Exclude from bidding** to show the item to bidders, but keep bid assignment internal only from the Auctions grid.
7. To open bidding to all bidders,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

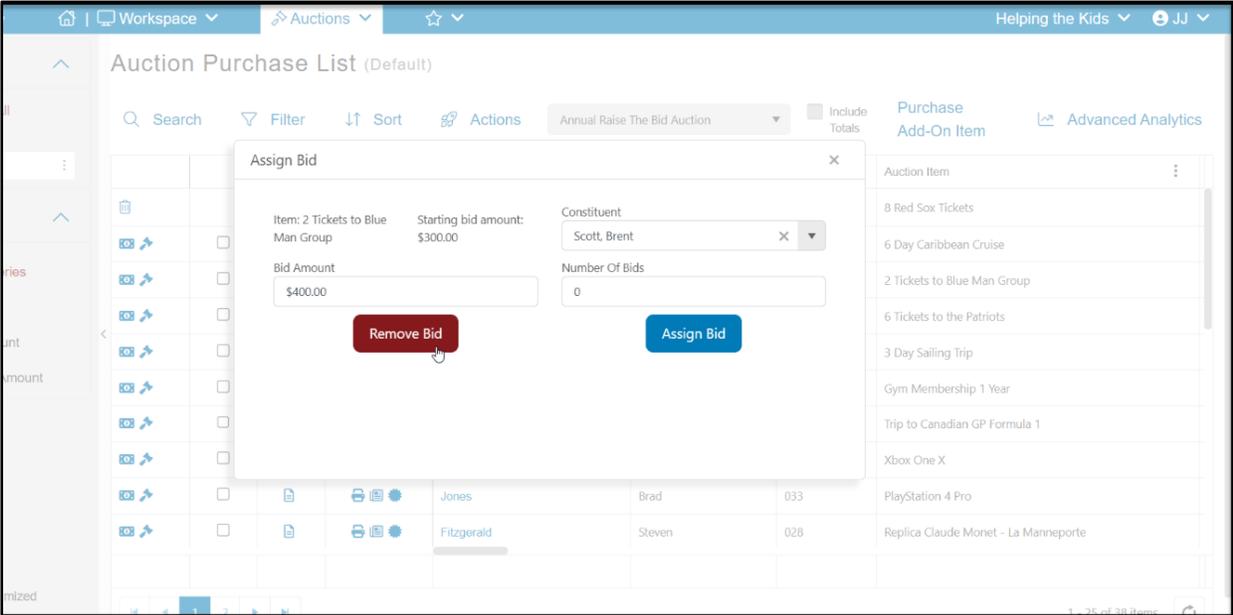


F. How can I remove or edit a bid?

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

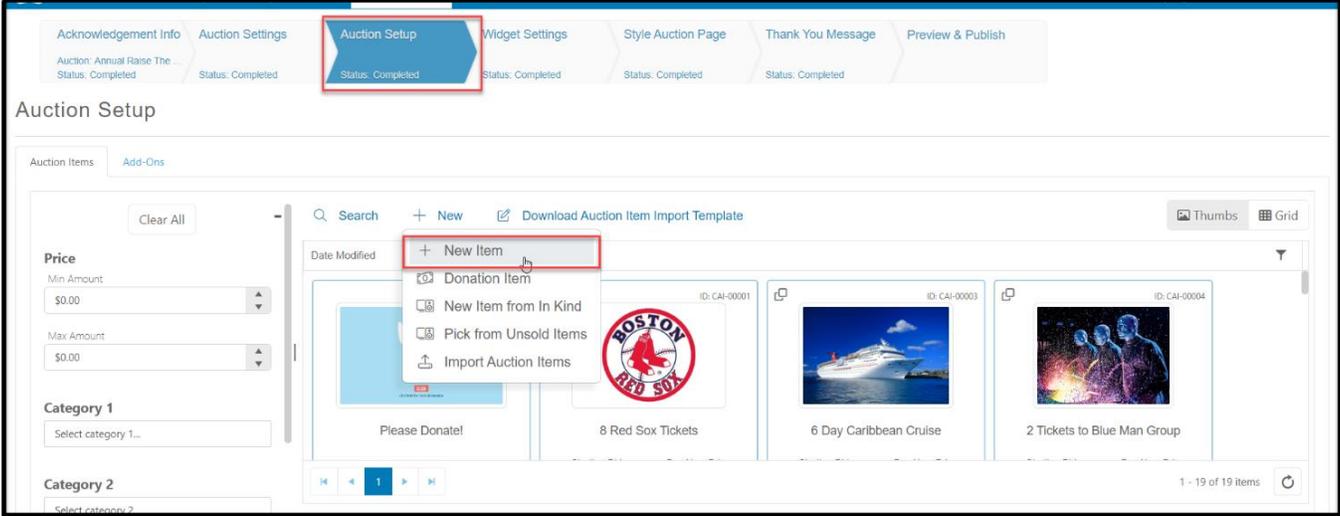


2. Click the red **Remove Bid** button to remove the bid and allow the next highest bidder to be shown as the current winning bid.
3. The bidder and/or bid amount can also be edited and saved by clicking on the blue **Assign Bid** button.



G. 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.AssociationSphere.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.

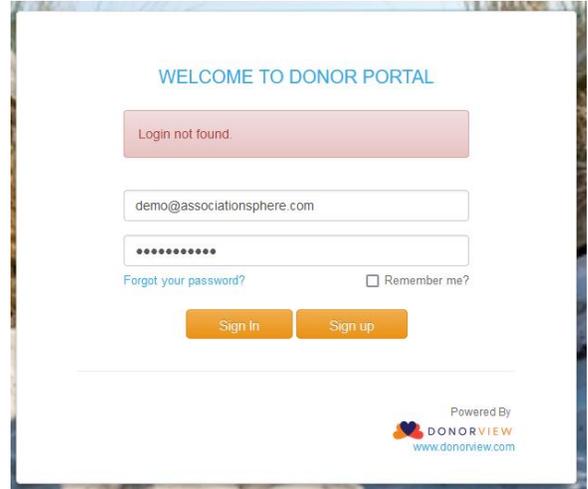
A screenshot of the 'Add/Update Auction Item' form. The form is titled 'Add/Update Auction Item' and has a close button (X) in the top right corner. It is divided into several sections: 'Item Info' with fields for 'Caption' (Auction Item Name), 'Auction Item ID' (Leave this field blank to get it assigned...), and 'Link In-Kind Gift(s)?' (NO); 'Description' with a rich text editor; 'Detailed description' and 'Additional Notes' with text areas; 'Category 1' and 'Category 2' dropdowns; 'Exclusion Option' dropdown; 'Tags' and 'Quantity' input fields; 'Value' input field with a 'Priceless' checkbox; 'Starting Bid' input field; 'Bid Increment' input field; 'Buy Now Price' input field with a 'Buy Now Only' checkbox; 'Sales Tax Amount' input field with an 'Override?' checkbox; 'Restrictions' and 'Expiration Date' input fields; 'Solicited By' dropdown; and 'Donated By' dropdown. At the bottom right, there are 'Next' and 'Cancel' buttons.

H. What if a bidder has trouble logging in to 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.

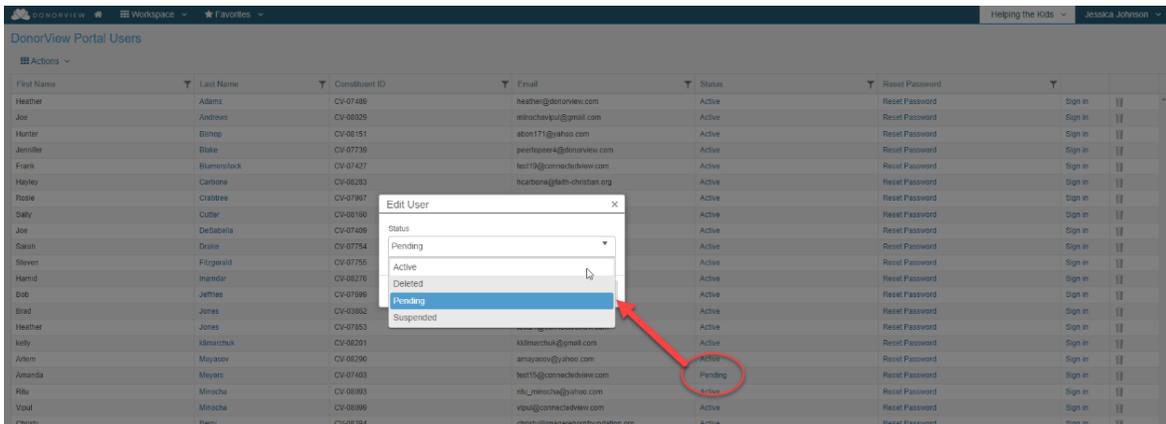
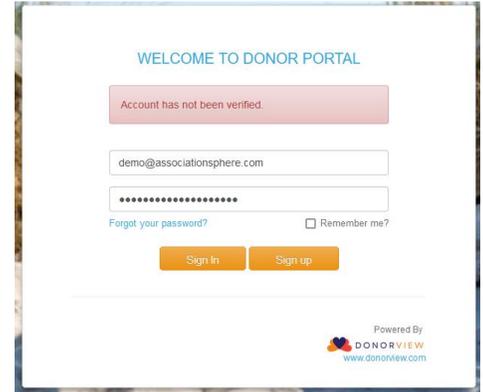


First Name	Last Name	Constituent ID	Email	Status	Re	Re	Re	Re
Heather	Adams	CV-07489	heather@donorview.com	Active	Re			
Joe	Andrews	CV-08029	mnochavipul@gmail.com	Active	Re			
Hunter	Bishop	CV-08151	abon171@yahoo.com	Active	Re			
Jennifer	Blake	CV-07739	peertopeer4@donorview.com	Active	Re			
Frank	Blumenstock	CV-07427	test19@connectedview.com	Active	Re			
Hayley	Carbone	CV-08283	hcarbone@faith-christian.org	Active	Re			
Rosie	Crabtree	CV-07967	test4@connectedview.com	Active	Re			
Sally	Cutter	CV-08160	test94038@connectedview.com	Active	Re			
Joe	DeSabella	CV-07409	test16@connectedview.com	Active	Re			
Sarah	Drake	CV-07754	peertopeer5@donorview.com	Active	Re			
Steven	Fitzgerald	CV-07755	peertopeer6@donorview.com	Active	Re			
Hamid	Inamdar	CV-08276	hamidinamdar@gmail.com	Active	Re			
Bob	Jeffries	CV-07699	peertopeer3@donorview.com	Active	Re			
Brad	Jones	CV-03862	bradjones508@gmail.com	Active	Re			
Heather	Jones	CV-07853	test21@connectedview.com	Active	Re			

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, Member Portal Auction Registration.

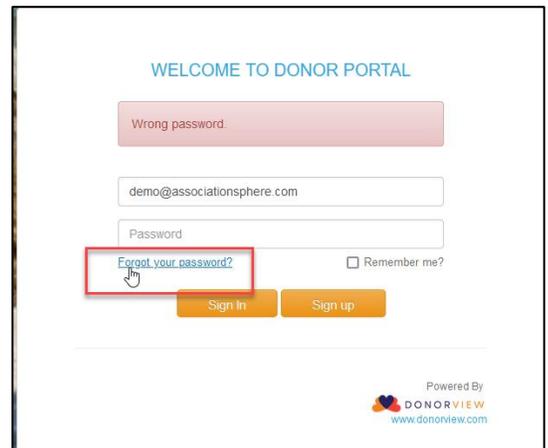
C. Error Message: Account Has Not Been Verified

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 login 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 Forget your Password link.

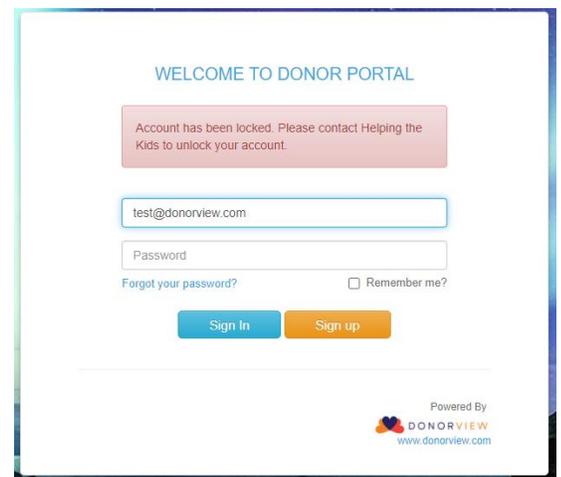


4. If they reset on their own, they will see a message that the reset instructions are sent to their inbox.
5. If the member enters their email address after requesting a password reset and instead receives a message "Login not found," they do not have a portal created yet or they are using the wrong 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.

First Name	Last Name	Constituent ID	Email	Status	Reset Password	Sign in
Heather	Adams	CV-07489	heather@donorview.com	Active	Reset Password	Sign in
Joe	Andrews	CV-08029	minochoy@gmail.com	Active	Reset Password	Sign in
Hunter	Bishop	CV-08151	abon171@yahoo.com	Active	Reset Password	Sign in
Jennifer	Blake	CV-07739	peertopeer4@donorview.com	Active	Reset Password	Sign in
Frank	Blumenstock	CV-07427	test19@connectedview.com	Active	Reset Password	Sign in
Hayley	Carbone	CV-08283	hcarbone@faith-christian.org	Active	Reset Password	Sign in
Rosie	Craibtree	CV-07967	test4@connectedview.com	Active	Reset Password	Sign in
Sally	Cutter	CV-08160	test5403@connectedview.com	Active	Reset Password	Sign in
Joe	DeSabella	CV-07409	test16@connectedview.com	Active	Reset Password	Sign in
Sarah	Drake	CV-07754	peertopeer5@donorview.com	Active	Reset Password	Sign in
Steven	Fitzgerald	CV-07755	peertopeer6@donorview.com	Active	Reset Password	Sign in
Hamid	Inamdar	CV-08276	hamidinamdar@gmail.com	Active	Reset Password	Sign in
Bob	Jeffres	CV-07699	peertopeer3@donorview.com	Active	Reset Password	Sign in
Brad	Jones	CV-03862	bradjones508@gmail.com	Active	Reset Password	Sign in
Heather	Jones	CV-07853	test21@connectedview.com	Active	Reset Password	Sign in
Kelly	Klimarchuk	CV-08201	kklimarchuk@gmail.com	Active	Reset Password	Sign in
Artem	Mavrov	CV-08290	amavrov@yahoo.com	Active	Reset Password	Sign in
Amanda	Meyers	CV-07403	test15@connectedview.com	Active	Reset Password	Sign in
Ritu	Minocha	CV-08093	ritu_minocha@yahoo.com	Active	Reset Password	Sign in
Vipul	Minocha	CV-08099	vipul@connectedview.com	Active	Reset Password	Sign in
Christy	Perry	CV-08294	christy@magerebornfoundation.org	Active	Reset Password	Sign in
Roland	Scheller	CV-07414	test17@connectedview.com	Active	Reset Password	Sign in
Brent	Scott	CV-07567	peertopeer2@donorview.com	Active	Reset Password	Sign in
Coleen	Scott	CV-02889	test12@connectedview.com	Active	Reset Password	Sign in
Teddy	Simpson	CV-08145	testing123@donorview.com	Active	Reset Password	Sign 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.



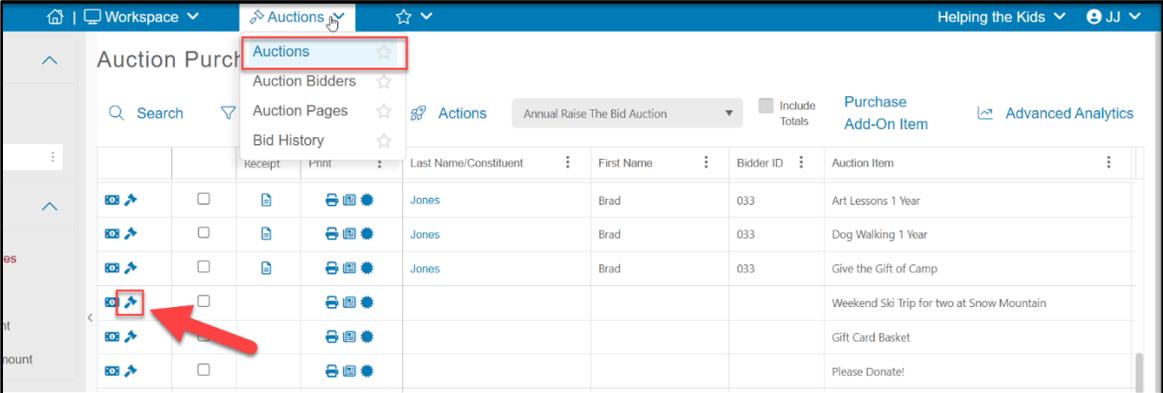
IX. Traditional Silent Auction

A. Can the software create paper bid sheets?

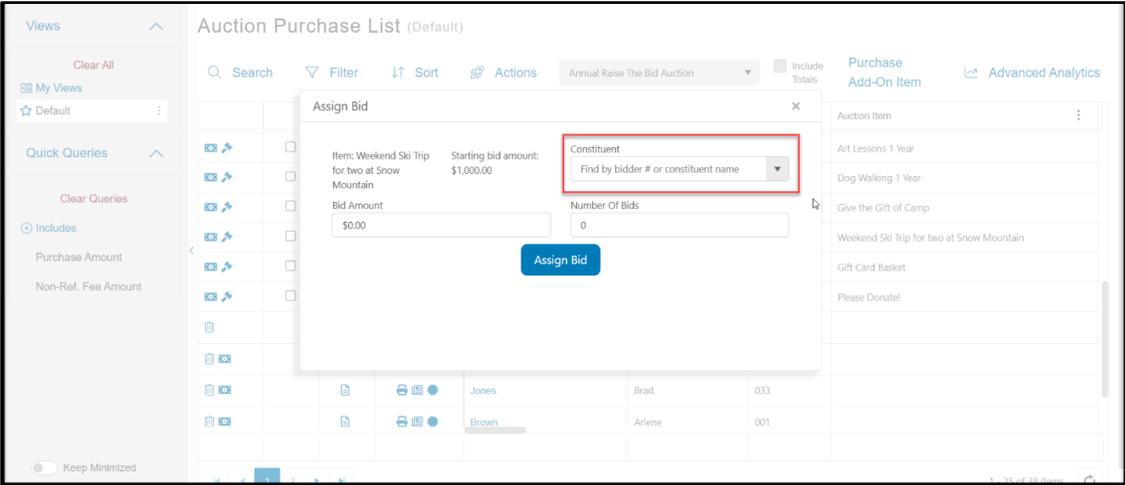
- 1. Yes, from the Auctions grid you can print individual bid sheets or use the actions menu to print all the bid sheets.
- 2. You can also choose the format for the bid sheet and if you export it to Word, you can edit the bid sheets.

B. 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.



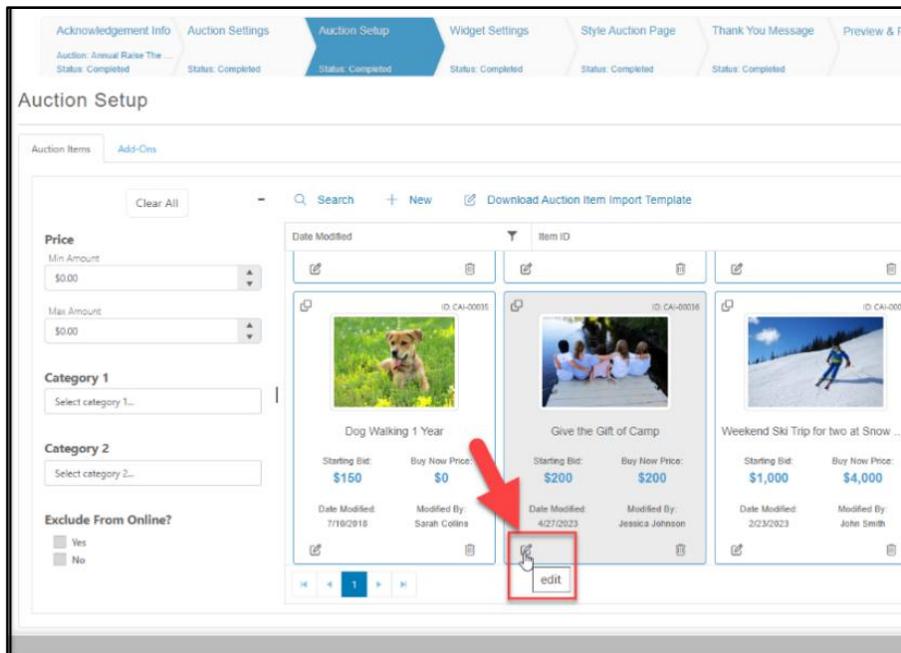
X. Buy It Now

A. How does the Buy It Now feature work?

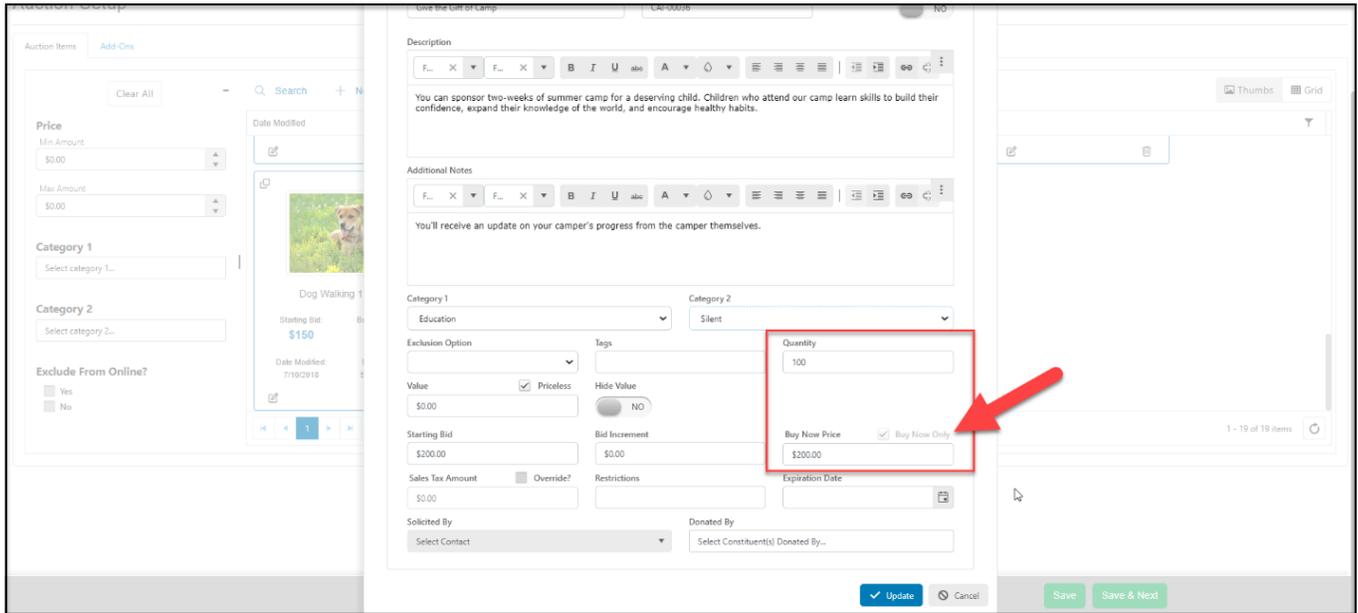
1. If you want an item to be bought (not bid on) in an auction, then it is identified as **Buy Now Only** with a set price and quantity available for purchase.
2. Multiple bidders can purchase the **Buy Now Only** item, based on the quantity available.
3. **Buy Now Only** items cannot be assigned/purchased 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.

B. 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. Click on the edit icon on the specific item to change the quantity.
4. The quantity available and price can be edited as needed.



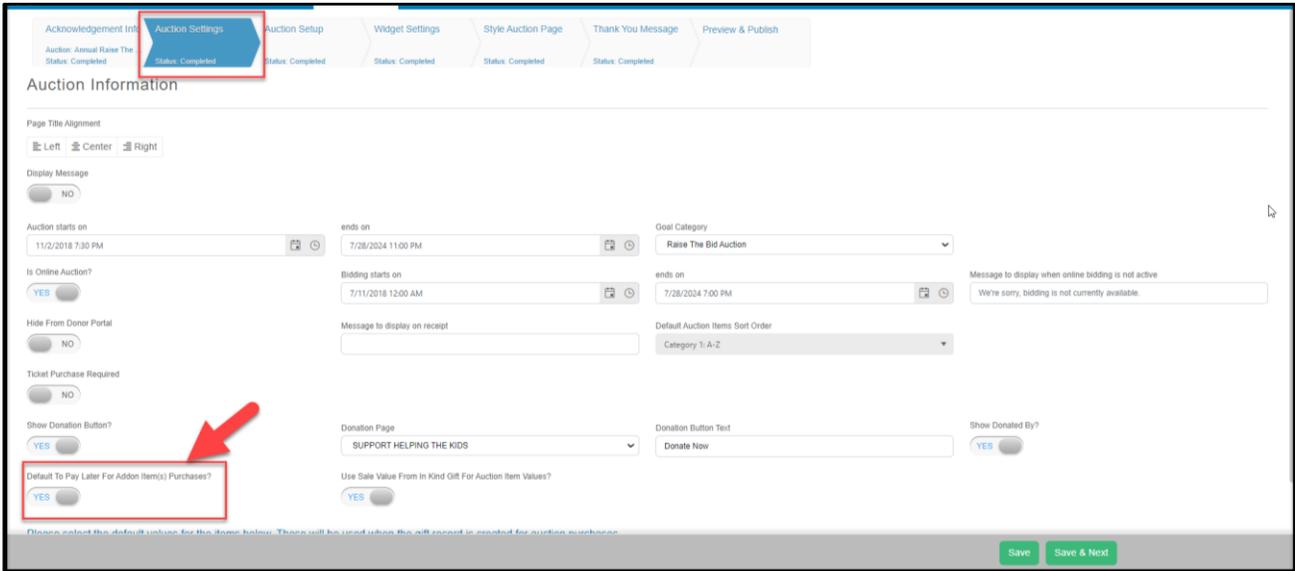
5. Click the blue **Update** button to save the changes.



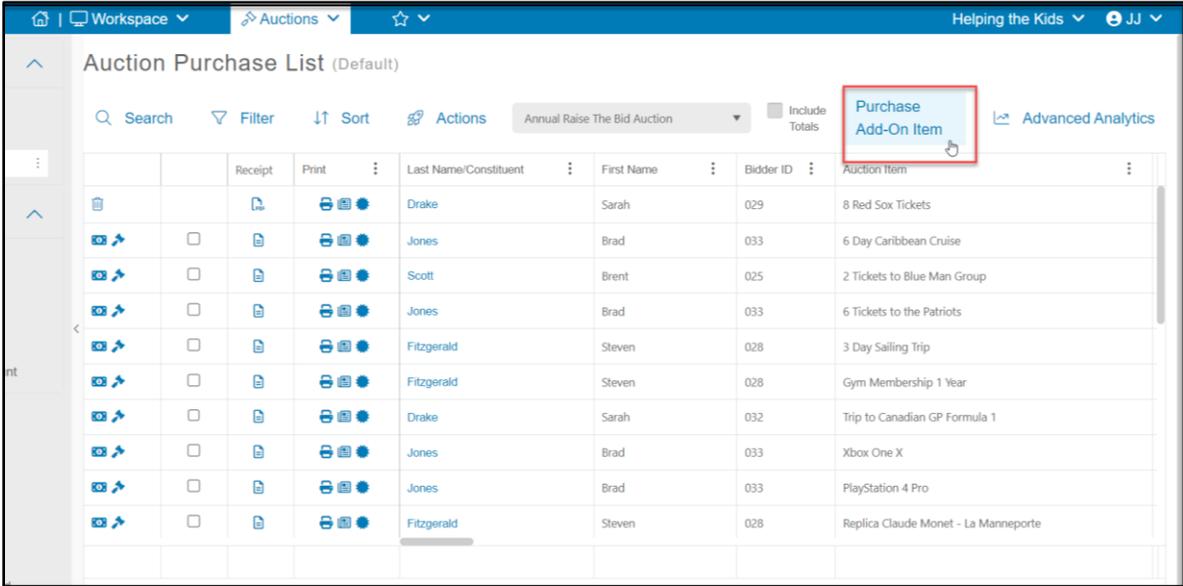
XI. Add-Ons

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

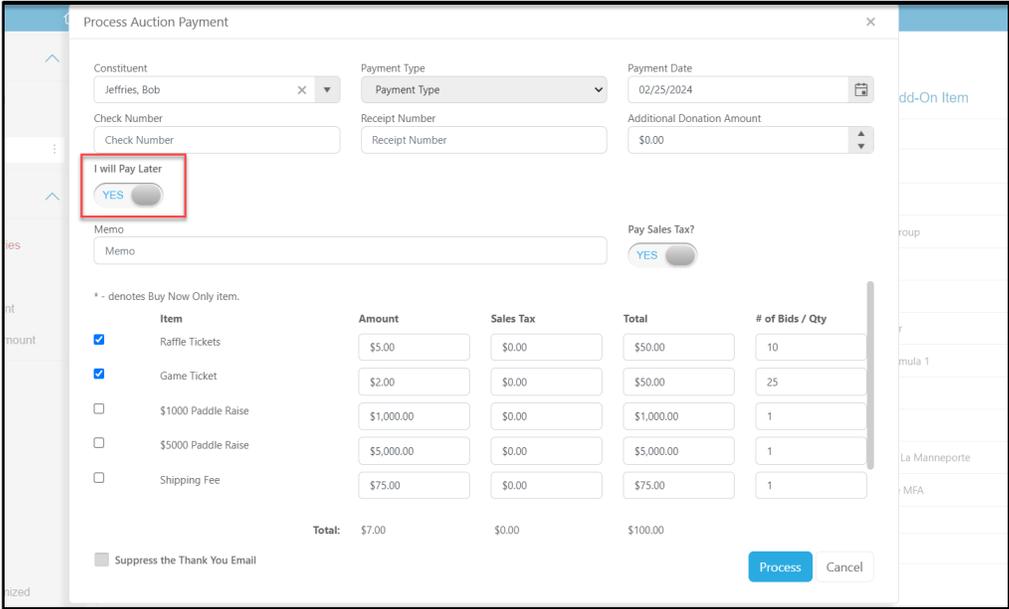
1. **Add-ons** include things like raffle, game, and pull tickets as well as donations for paddle raises, fund-a-need, or call-to-heart.
2. **Add-ons** can only be viewed and recorded in the back end of the software using the Auctions grid. They are not visible on the auction page.
3. **Add-ons** can 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. Click on **Purchase Add-on Item**.

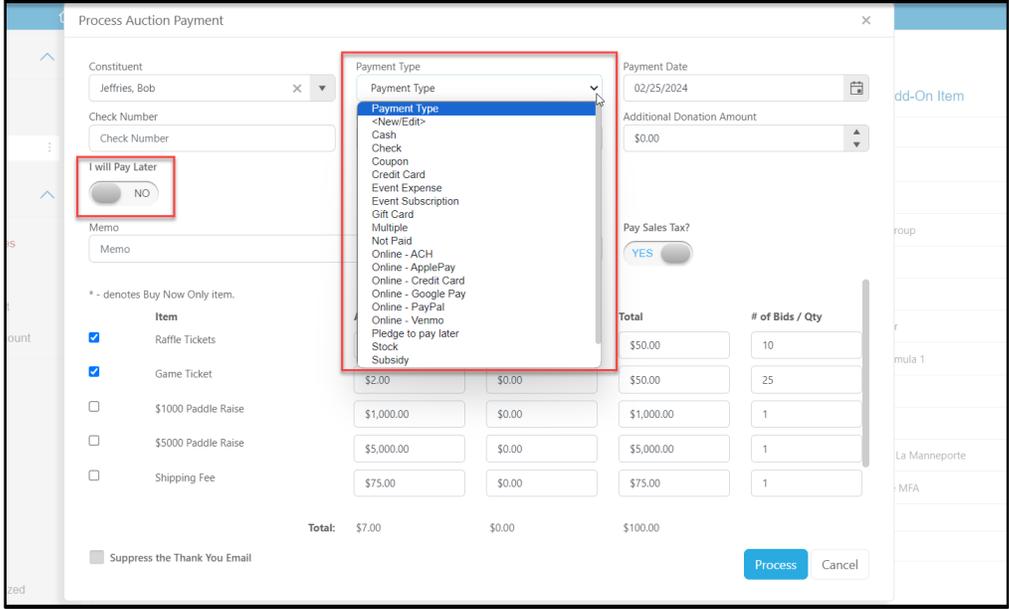


9. Select the appropriate event attendee/bidder under Constituent.
10. If add-ons are marked for **I will Pay Later**, there is no need to select a payment method.
11. Check the box next to the items being recorded and enter the quantity on the right columns under **# of Bids/Qty**.
12. Click the blue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



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

14. Record the payment type.



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

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

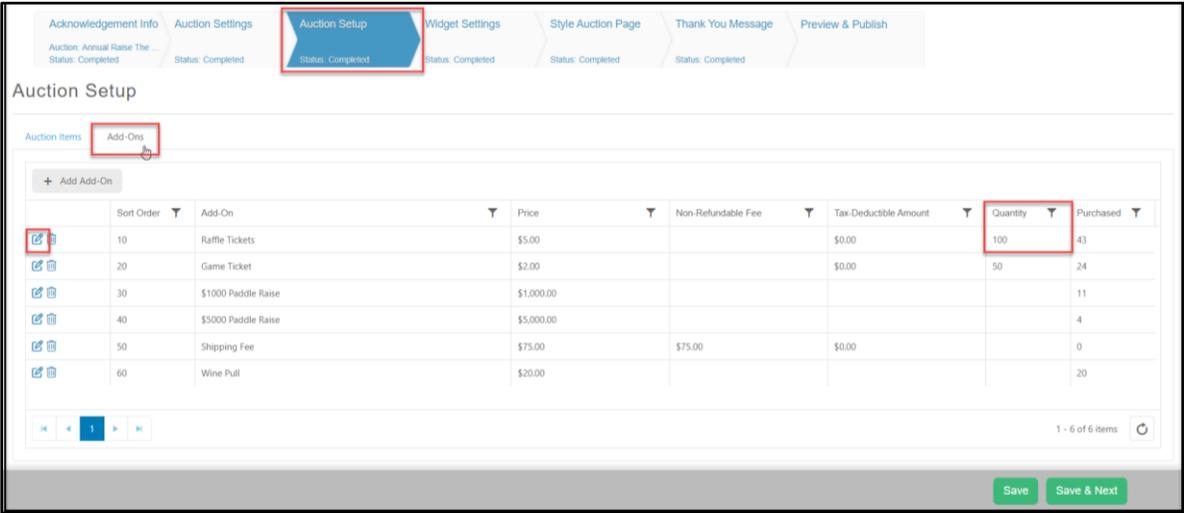
17. A thank you email will automatically be generated and sent to the constituent.

B. Are credit cards required for Add-on items?

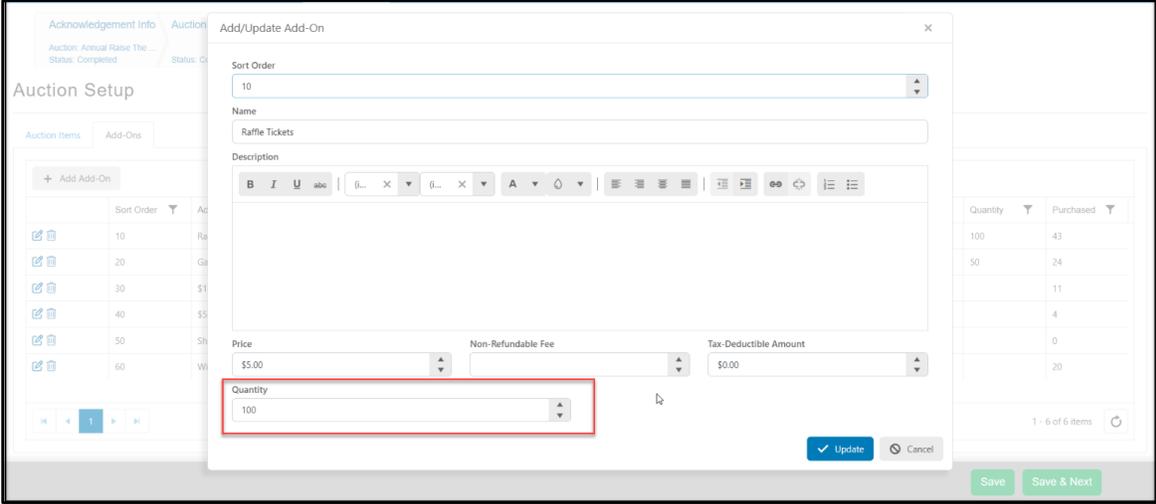
- 1. Credit cards are not required for recording purchases or checking out add-on items.
- 2. Credit cards are only required by the bidders when they are placing their bids online.

C. 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.



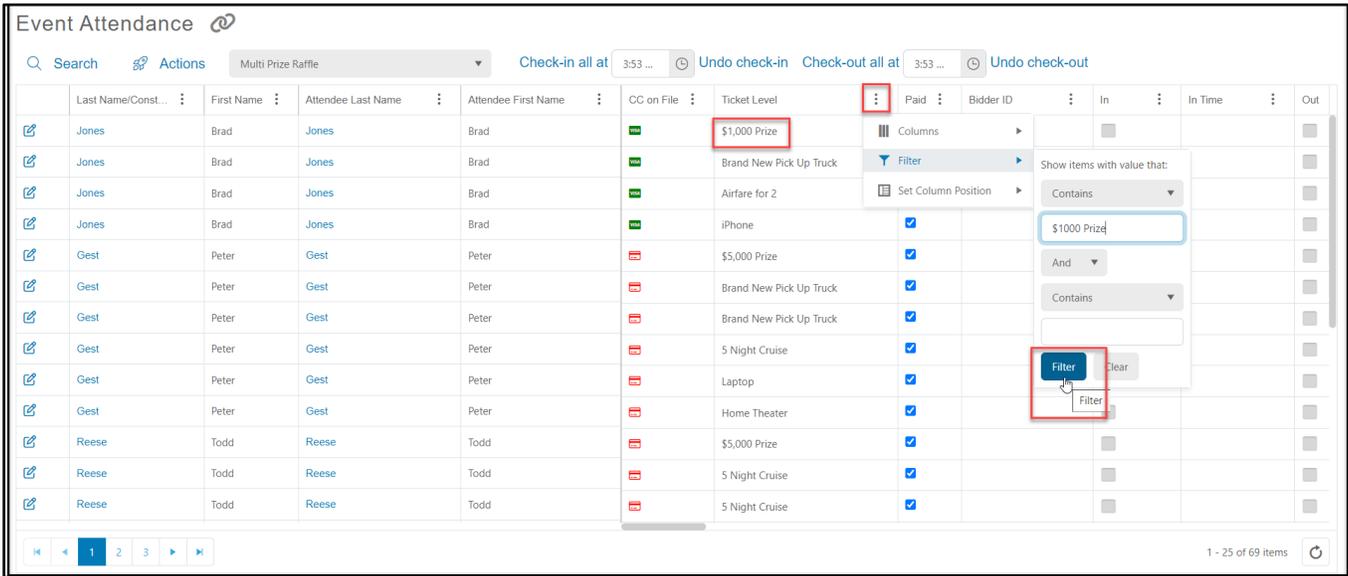
- 6. Edit the quantity as desired and click on the blue **Update** button to save the changes.



XII. Raffles

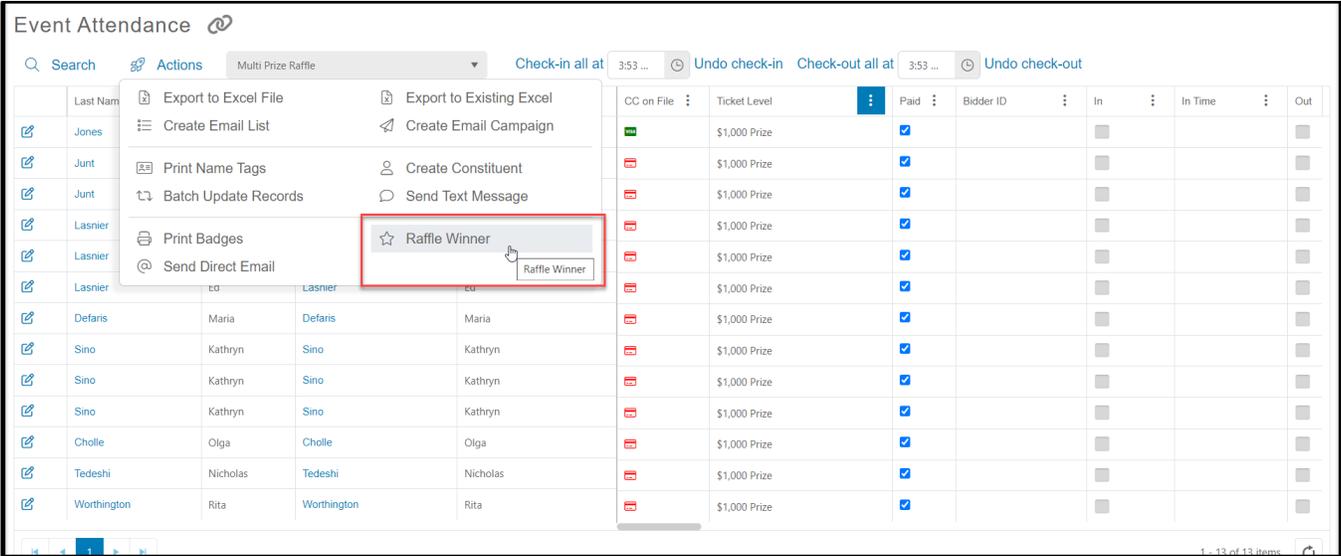
How do I pull a raffle winner?

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.
 1. For example, one ticket = 1 attendee
 2. 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.



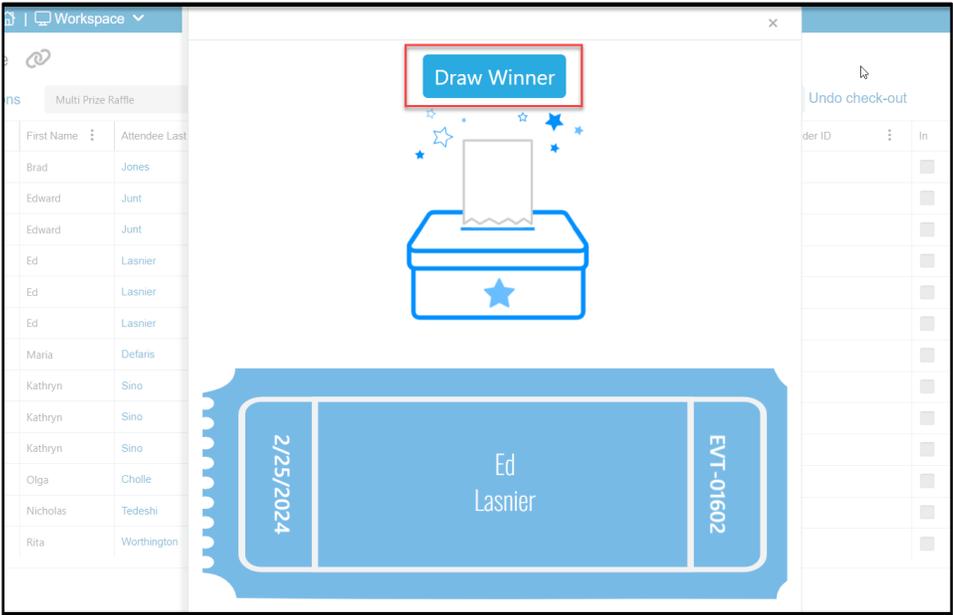
12. With the filtered list showing just the desired raffle ticket holders, click on the **Actions** menu.

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.

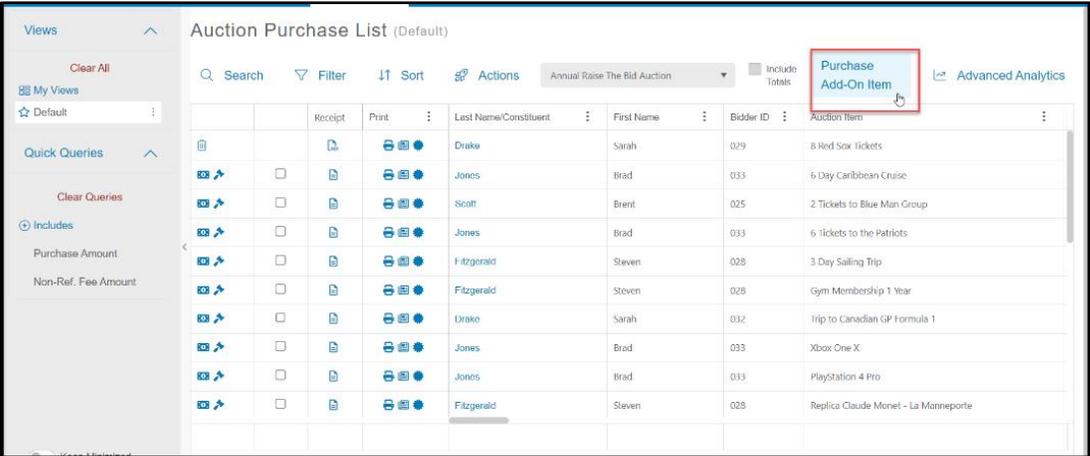
15. This feature can also be used for drawing random door prizes for all attendees if no filter is applied to the grid.



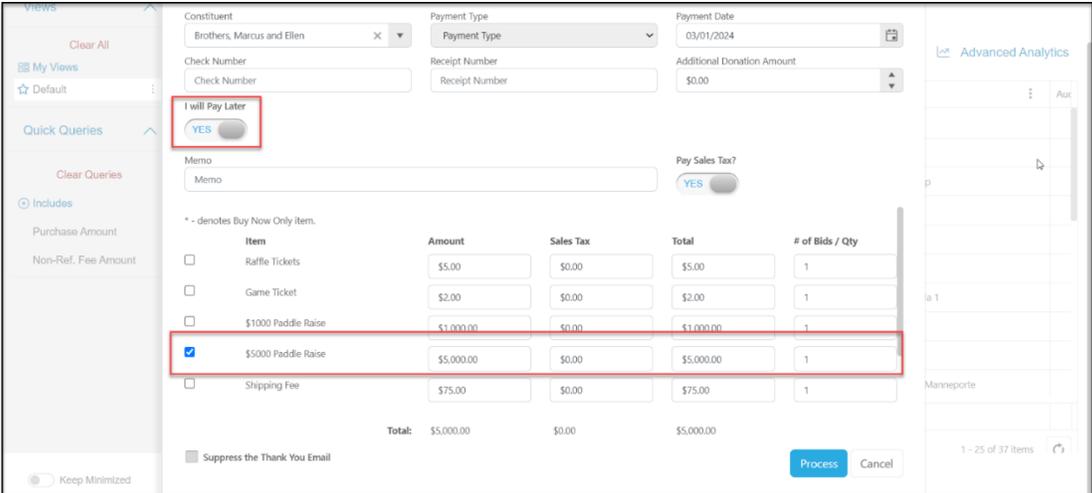
XIII. Paddle Raise (a.k.a Fund-A-Need or Call to Heart):

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

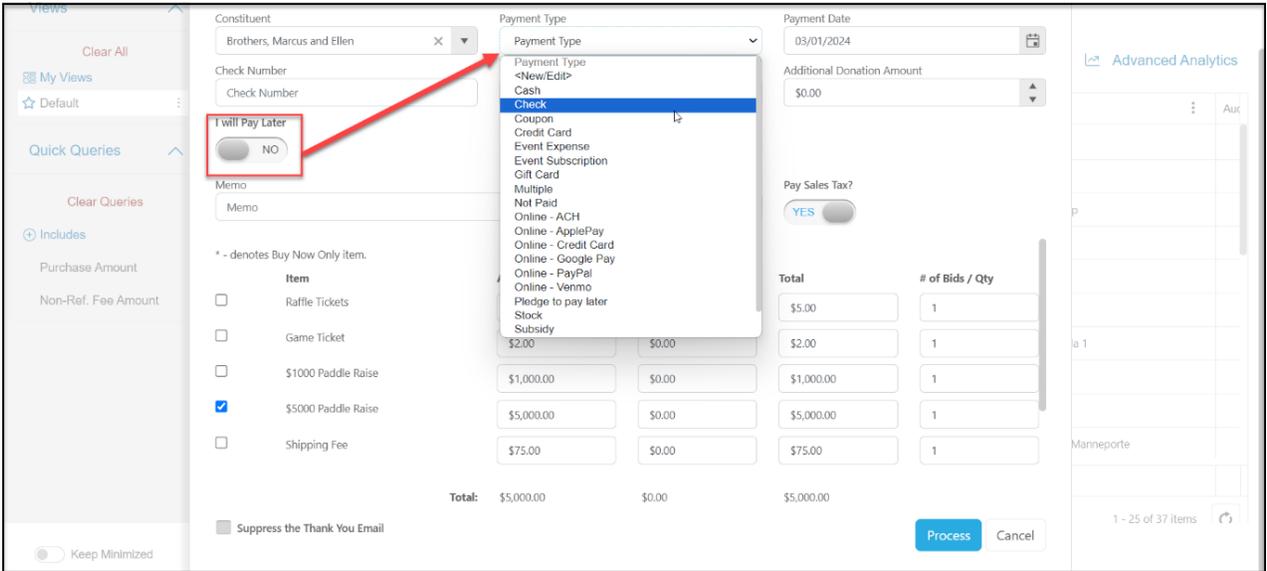
1. Donations pledged at the event using a paddle raise, fund-a-need, or call-to-heart can be recorded as **Add-on** items with the auction.
2. If the organization has elected not to use the auction add-on feature, donations can also be recorded as a donation using a donation page or the mobile app's payment feature.
3. To record **Add-on** items, go to the Auctions grid.
4. Click on **Purchase Add-on Item**.



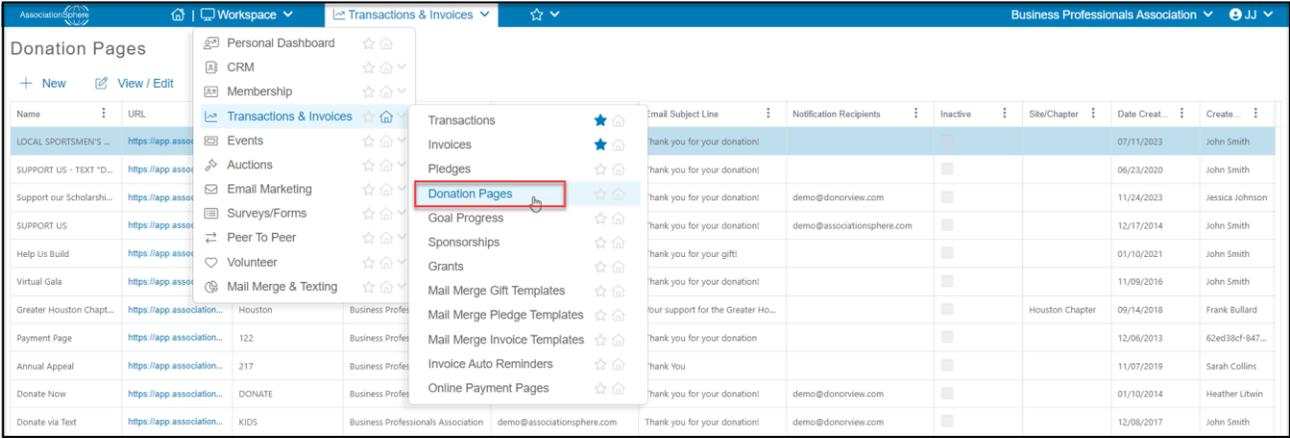
5. Select the appropriate event attendee/bidder under Constituent.
6. If add-ons are marked for **I will Pay Later**, there is no need to select a payment method.
7. Check the box next to the paddle raise amount being recorded. The amount can be edited in the **Amount** field if necessary.
8. Click the blue **Process** button at the bottom of the window to record the order.



9. If the items are not being recorded for payment later, “**I will Pay Later**” is marked **No**.
10. Record the payment type.



11. If a credit card was not previously entered, the card can be manually entered at the bottom of the window.
12. Click the blue **Process** button at the bottom of the window to complete the purchase.
13. A thank you email will automatically be generated and sent to the constituent.
14. For processing paddle raise donations without using the auction, go to the donation page set up to record the event donations.
 - i. Log in to the AssociationSphere desktop software.
 - ii. Go to the Fundraising module, then click on the Donations Pages link.



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

Donation Pages

+ New View / Edit Actions

Name	URL	Text Messaging	Email Display Name	Email From Address	Email Subject Line	Notification Recipients
SUPPORT HELPING THE KIDS	https://app.donorview.com/jrm6	284	Helping the Kids	demo@donorview.com	Thank you for your gift!	
Adopt-A-Classroom STEAM Project Donation Page	https://app.donorview.com/7erlvh	Classroom	Helping the Kids	demo@donorview.com	Thank you for supporting the Ad...	
GIVE SUPPORT TO OUR PEER-2-PEER FUND RAISERS	https://app.donorview.com/bkXwQ	234	Helping the Kids	demo@donorview.com	Thank you for your donation!	
Island Pet Rescue	https://app.donorview.com/Ezgt6	Rescue	Helping the Animals	demo@donorview.com	Thank you for your donation!	demo@donorview.com
Split your gift multiple ways	https://app.donorview.com/XyYAJ	Helping	Helping the Kids	demo@donorview.com	Thank you for your donation!	
Payment Page		122	Helping the Kids	demo@donorview.com	Thank you for your payment!	demo@donorview.com
Virtual Gala	https://app.donorview.com/EbrJ	Help	Helping the Kids	demo@donorview.com	Thank you for your donation!	
Adopt-a-Bench Program	https://app.donorview.com/5y7Ge	BRICK	Helping the Kids	kelly.klimarchuk@donorview.com	Thank you for your donation!	
Annual Appeal		217	School	demo@donorview.com	Thank You	
Greater Houston Chapter Donation Page	https://app.donorview.com/bQP7	Houston	Helping the Kids - Greater Houst...	demo2@donorview.com	Your support for the Greater Ho...	
Give towards our Annual Gala	https://app.donorview.com/wngl	give	Helping the Kids	demo@donorview.com	Thank you for your gift!	
Helping the Kids - Northern California Donation Page	https://app.donorview.com/nQVZ	California	Helping the Kids - Northern Calif...	demo3@donorview.com	Your support for the Northern C...	

- iv. At the top of the donation page, use the search bar under Constituent to find the constituent that is making the donation.
- v. If the constituent cannot be found, their information can be recorded at the bottom of the page.

Help rescue stray animals!

Your gift will help us rescue abandoned and stray dogs and cats from Caribbean Islands. The dogs are known as Potcakes. They get their nickname from the leftovers the locals would feed them - namely the crusty rice and bean cake left at the bottom of a pot after cooking all day. Potcakes, and their feral friends, Potcats, are rescued by local island-based organizations and then flown to the US for adoption. Potcakes and Potcats are so prolific there are far too many to be adopted by local residents. These animals are known for being great companions and their sweet and quirky personalities.

* Denotes required field

Constituent

Search Contact

abbott

Search Contact

Abbott, Bob
 test5@connectedview.com
 100 Main St., Shrewsbury, MA 01581

Abbott, Julie

Total 3 records found

YOUR AMOUNT

- vi. Selecting a constituent will auto-populate all the existing information in the payment area.
- vii. Enter the amount of the donation.
- viii. If activated, pledges can be recorded with a pay later option.
- ix. If payment is being made immediately and there is a credit card already on file, it will be defaulted to charge that card.

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

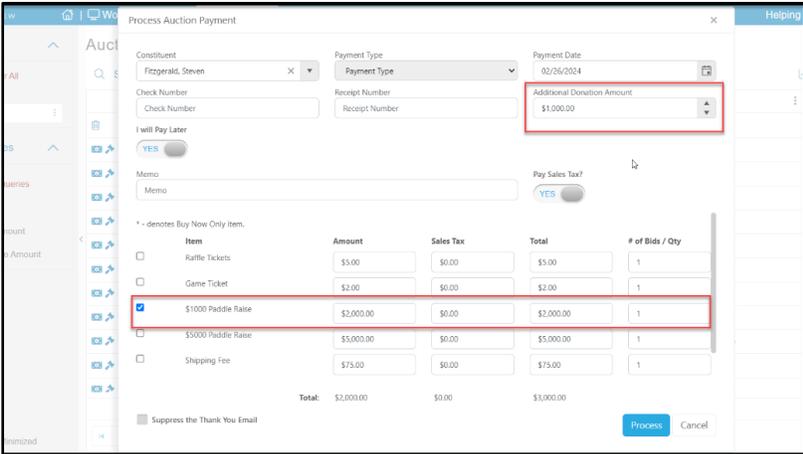
- 15. Pledges made via check or cash can be recorded via the Add Transaction feature. See this video for information on adding a donation. <https://vimeo.com/532301313> (Password: AS2021)

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

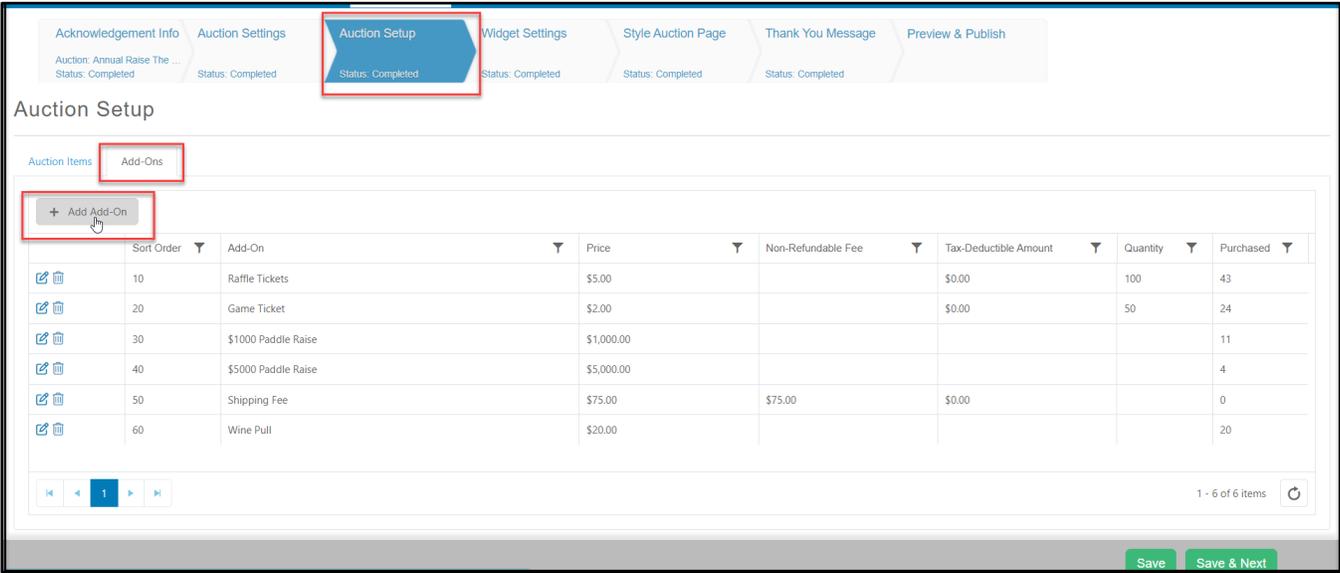
1. It is recommended that all bidder numbers be assigned prior to the event.
2. If bidder ID numbers are assigned at the event, each number must be manually assigned as outlined on page 20, [How to add a bidder number](#).
3. Entering paddle raise donations must be made individually, there is no bulk add.
4. Instructions for entering paddle raise donations is the same for any add-on. See the instructions outlined on page 34 above for [how to record an add-on](#).

C. How do I add a new paddle raise level?

1. The auction add-on feature allows amounts to be edited or new donations to be added.

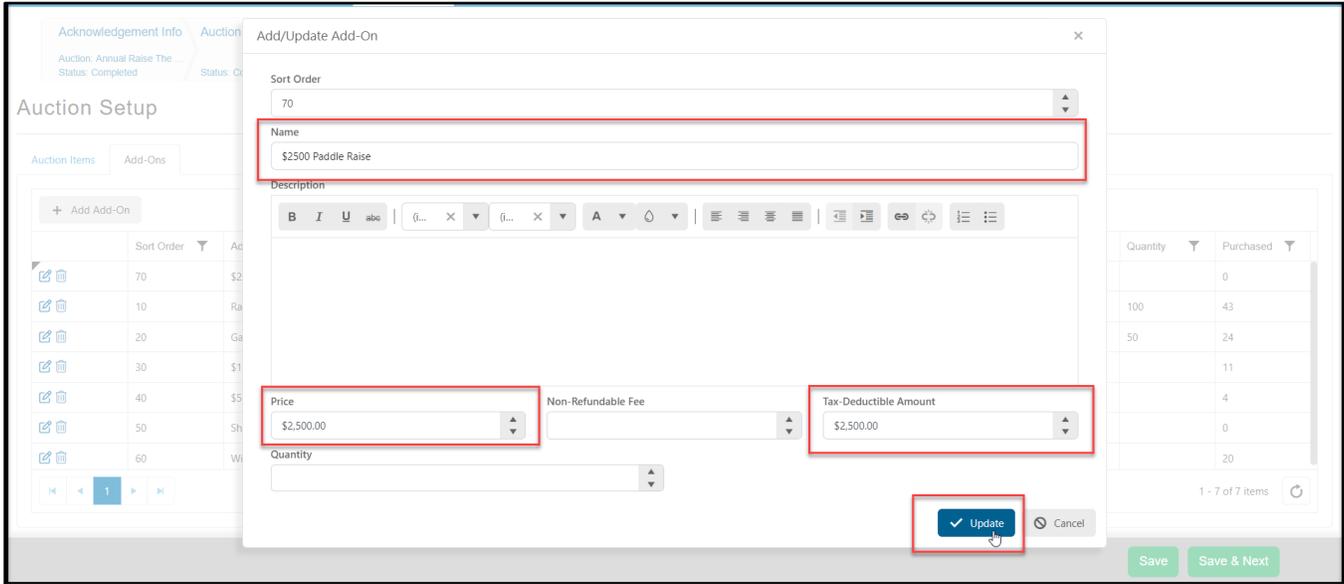


2. New member levels can also be added by editing the add-ons list in the auction page editor.
3. Go to the Auction Setup tab and click on **Add-ons**.
4. Click on **+ Add Add-ons**.



5. Enter the **Name**, **Price**, and **Tax Deductible Amount**.
6. Leave the quantity blank for unlimited quantities.

7. Click on the blue **Update** button to save the new add-on.
8. Once saved, the item will be available to select from the Auctions grid.



XIV. Live Auctions

A. 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](#) on page 26.

B. 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](#) above on page 24.

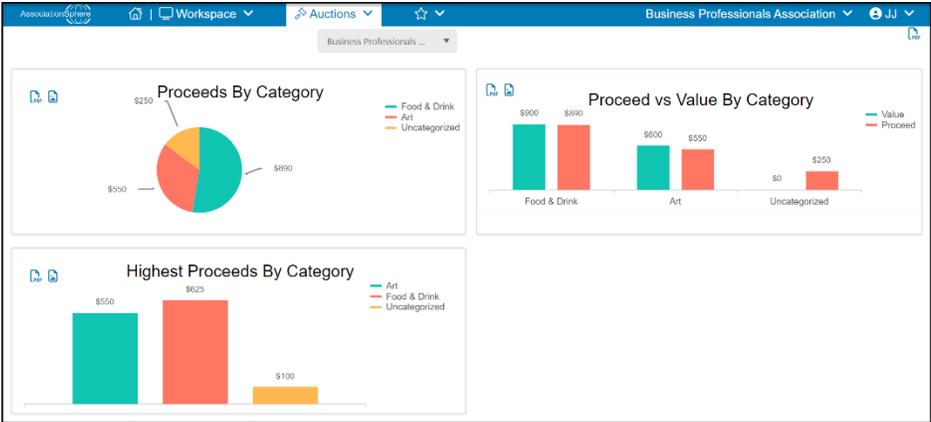
C. Can a live auction item be sold multiple times?

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.

XV. Displays and Reporting:

A. 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 Transactions Grid and filtering by the transaction type "Auction."



B. Can I look at total raised and by item/member level?

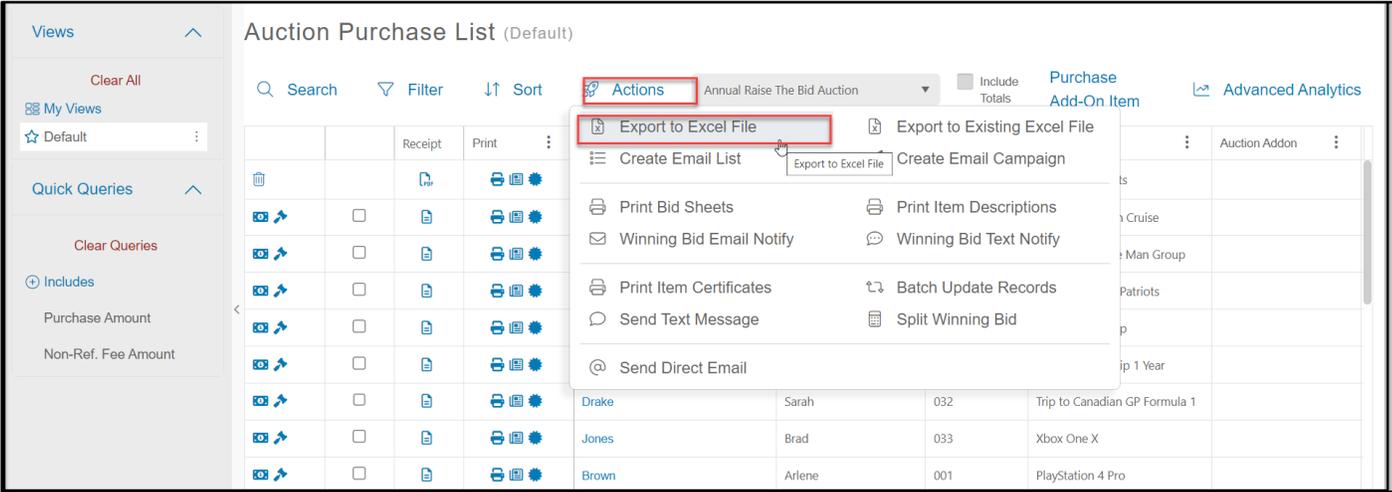
1. The total for auction items can be viewed in the Bid History grid under the **Bid Amount** column. This does not include add-ons.
2. If enabled, the goal progress widget on the auction page will also show the total amount raised per the settings. See the information below on page 48.

The screenshot shows the Auction Bid History grid for the Annual Raise The Bid Auction. The grid is filtered by the 'LastName/Constituent' field. The 'Bid Amount' column is highlighted with a red box, and the total amount raised is shown as \$22,125.00 at the bottom right, also highlighted with a red box.

	Date	Last Name/Constituent	First Name	Bidder ID	Auction Item	Bid Amount	Art
	04/19/2022	Scott	Brent	025	2 Tickets to Blue Man Group	\$400.00	\$0.
	07/11/2018	Fitzgerald	Steven	028	3 Day Sailing Trip	\$850.00	\$0.
	02/16/2023	Jones	Brad	033	6 Day Caribbean Cruise	\$5,000.00	\$0.
	08/10/2018	Jones	Brad	033	6 Tickets to the Patriots	\$750.00	\$0.
	11/28/2018	Drake	Sarah	032	8 Red Sox Tickets	\$950.00	\$9.
	02/26/2024	Jones	Brad	033	Art Lessons 1 Year	\$625.00	\$0.
	02/26/2024	Jones	Brad	033	Dog Walking 1 Year	\$300.00	\$0.
	05/20/2023	Jones	Brad	033	Give the Gift of Camp	\$200.00	\$0.
	03/09/2022	Jones	Brad	033	Glass Art	\$180.00	\$0.
	07/11/2018	Fitzgerald	Steven	028	Gym Membership 1 Year	\$650.00	\$0.
						Total: \$22,125.00	

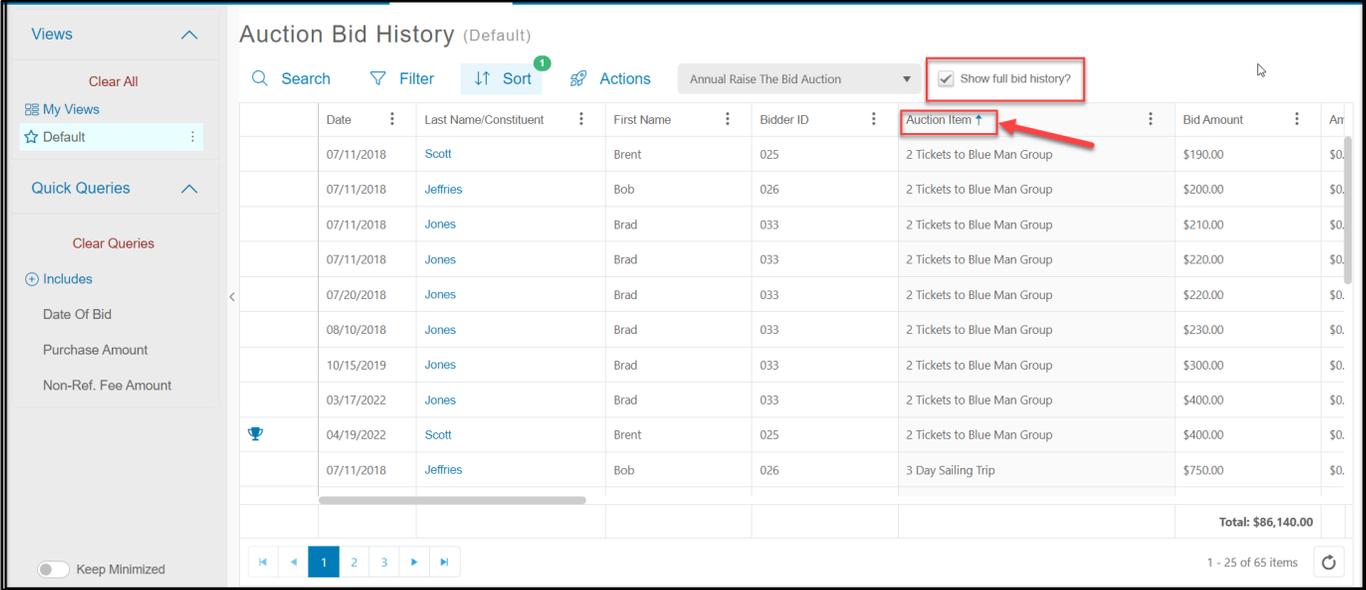
3. The list can be filtered by the **LastName/Constituent** field for a specific member.

- 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.



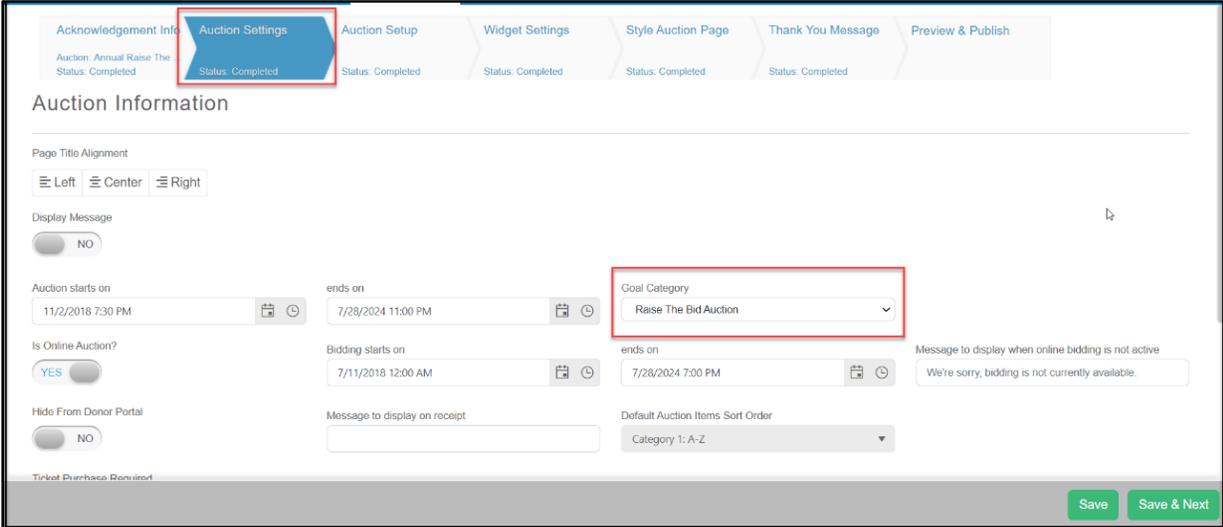
C. How can I see who is winning an item?

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

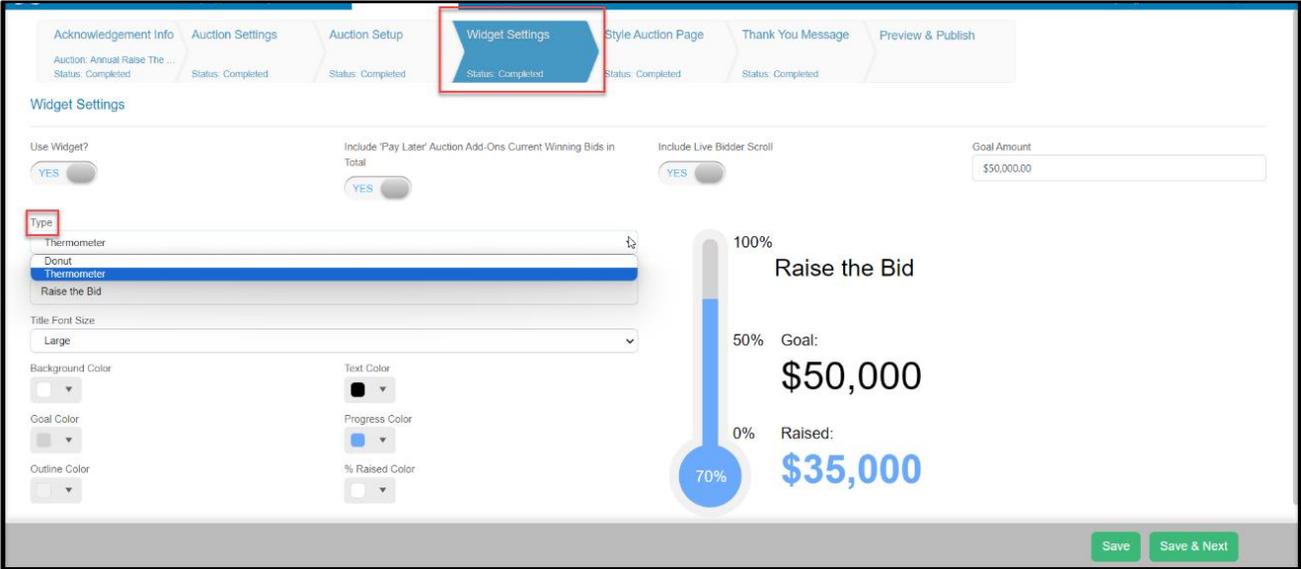


D. Are there ways to display goal progress?

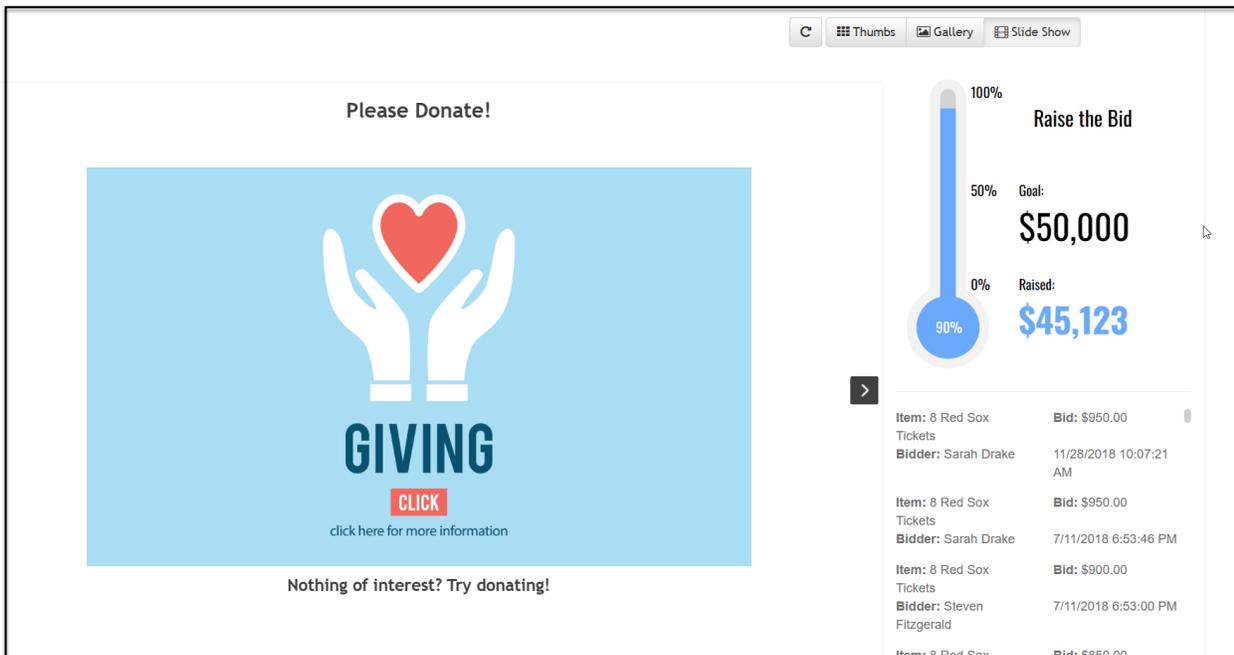
- 3. Yes, the auction page can be set up to include a thermometer or donut progress and live bidders scroll.
- 4. From the auction page editor, on the Auction Settings tab the **Goal Category** identifies all the revenue that will be included in the goal widget.
- 5. This **Goal Category** can also include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



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



10. With the widget enabled, the widget can be best viewed (and projected) on the auction page from the **Gallery** or **Slide Show** views.
11. You can read more about the auction goal progress widget in this support article. <https://support.AssociationSphere.com/support/solutions/articles/9000230952-auction-widget-settings>
12. 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/773462639> (Password: AS2021)



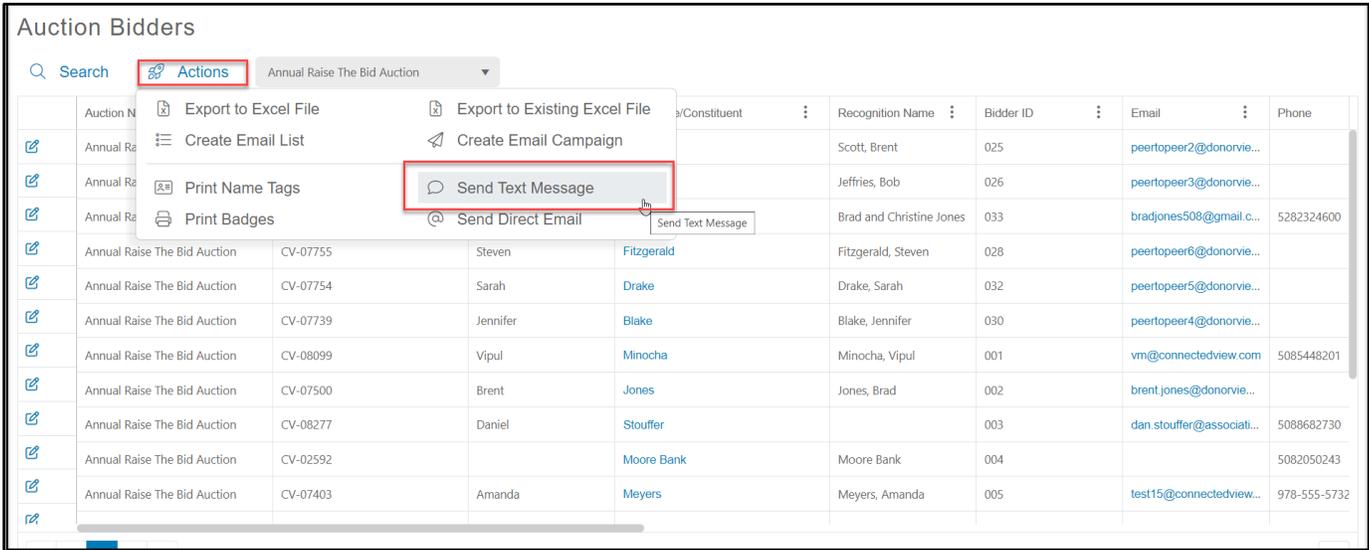
The screenshot displays an auction widget interface. On the left, a light blue banner features the text "Please Donate!" at the top, a graphic of two hands holding a red heart, the word "GIVING" in large blue letters, a red "CLICK" button, and the text "click here for more information" below it. At the bottom of the banner, it says "Nothing of interest? Try donating!". On the right, a "Raise the Bid" progress meter shows a goal of \$50,000 and a current amount raised of \$45,123, with a 90% progress indicator. Below the meter is a table of recent bids:

Item: 8 Red Sox Tickets	Bid: \$950.00
Bidder: Sarah Drake	11/28/2018 10:07:21 AM
Item: 8 Red Sox Tickets	Bid: \$950.00
Bidder: Sarah Drake	7/11/2018 6:53:46 PM
Item: 8 Red Sox Tickets	Bid: \$900.00
Bidder: Steven Fitzgerald	7/11/2018 6:53:00 PM
Item: 8 Red Sox Tickets	Bid: \$950.00

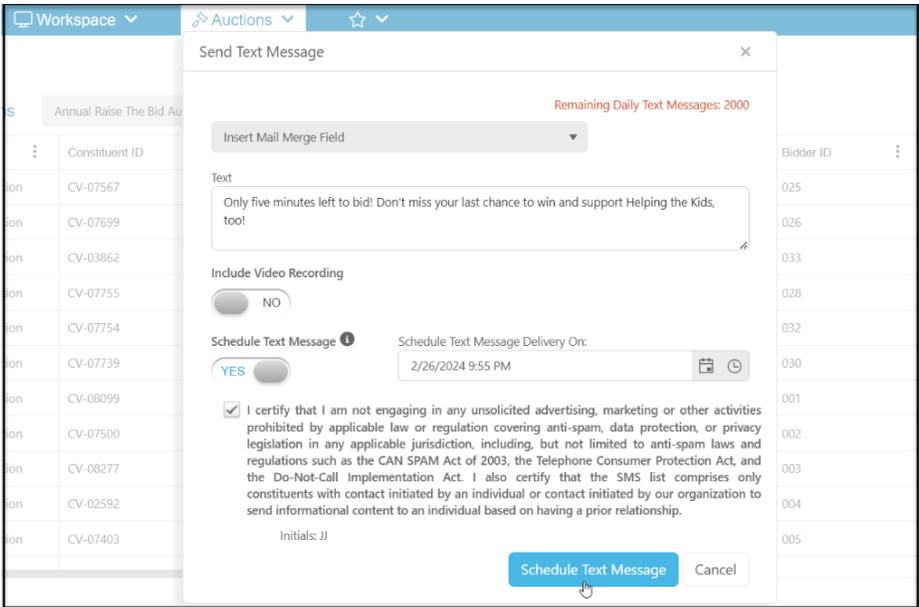
XVI. Communications

A. 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**.

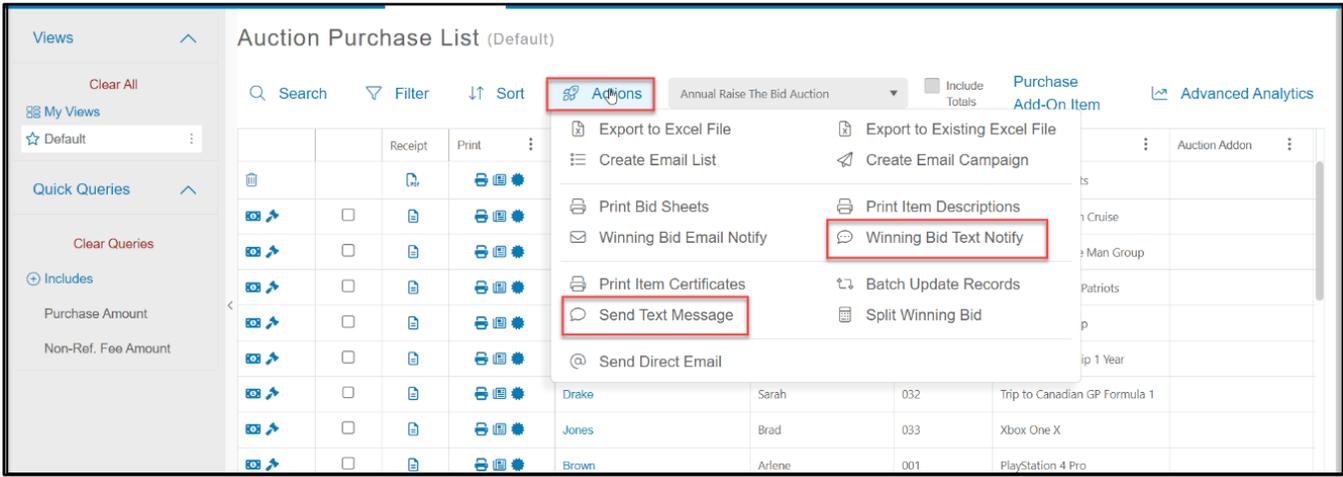


4. Enter the text message info and choose to send the message immediately or prepare texts and schedule them to go at specific times.



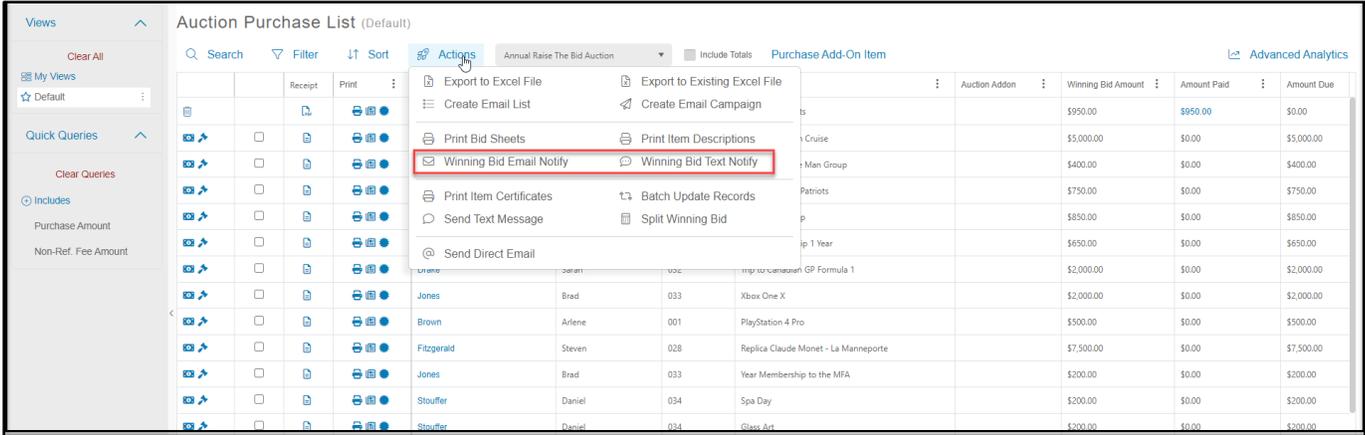
5. Note that there is a maximum of 2000 direct text messages per day. The automatic messages sent via the auction process do not count towards the 2000 total. Only those messages generated manually count toward the total.
6. To send messages to winning bidders, use the Auctions grid.
7. Click on the Actions menu, then either **Winning Bid Text Notify** or **Send Text Message**.
8. **Winning Bid Text Notify** will send an automated 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.



B. 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 **Winning 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.



XVII. Checkout:

A. 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.AssociationSphere.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.

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

- 1. To manually check out a guest, go to the Auction grid.
- 2. The easiest way to see all the items a constituent has purchased is to sort the **Last Name/Constituent** column.
- 3. 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.
- 4. 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.

Receipt	Print	Last Name/Constituent	First Name	Bidder ID	Auction Item	Auction Addon	Winning Bid Amount	Amount
<input type="checkbox"/>					Weekend Ski Trip for two at Snow Mountain		\$0.00	\$0.00
<input type="checkbox"/>					Gift Card Basket		\$0.00	\$0.00
<input type="checkbox"/>					Please Donate!		\$0.00	\$0.00
<input type="checkbox"/>		Brown	Mark	008		Raffle Tickets		\$30.00
<input type="checkbox"/>		Brown	Arlene	001		\$1000 Paddle Raise		\$0.00
<input type="checkbox"/>		Drake	Sarah	032	Trip to Canadian GP Formula 1		\$2,000.00	\$0.00
<input type="checkbox"/>		Drake	Sarah	029	8 Red Sox Tickets		\$950.00	\$950.00
<input type="checkbox"/>		Drake	Sarah	032		Wine Pull		\$0.00
<input type="checkbox"/>		Fitzgerald	Steven	028	3 Day Sailing Trip		\$850.00	\$0.00
<input type="checkbox"/>		Fitzgerald	Steven	028	Gym Membership 1 Year		\$650.00	\$0.00
<input type="checkbox"/>		Fitzgerald	Steven	028	Replica Claude Monet - La Manneporte		\$7,500.00	\$0.00
<input type="checkbox"/>		Jeffries	Bob	026		\$5000 Paddle Raise		\$0.00
<input type="checkbox"/>		Jones	Brad	033	6 Day Caribbean Cruise		\$5,000.00	\$0.00
<input type="checkbox"/>		Jones	Brad	033	6 Tickets to the Patriots		\$750.00	\$0.00
<input type="checkbox"/>		Jones	Brad	033	Xbox One X		\$2,000.00	\$0.00

- 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.

Auction Purchase List (Default)

Search Filter Sort Actions Annual Raise The Bid Auction Include Totals Purchase Add-On Item Advanced Analytics

	Receipt	Print	Last Name/Constituent ↑	First Name	Bidder ID	Auction Item	Auction Addon	Winning Bid A
			Jones	Brent	002		\$1000 Paddle Raise	
			Jones	Brent	002		Raffle Tickets	
			Meyers	Amanda	005		\$5000 Paddle Raise	
			Moore Bank		004		\$1000 Paddle Raise	
			Moore Bank		004		\$1000 Paddle Raise	

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

Workspace Auctions

Auction Purchase List (Default)

Process Auction Payment

Constituent: 14747 Payment Type: Payment Type Payment Date: 02/26/2024

Check Number: Check Number Receipt Number: Receipt Number Additional Donation Amount: \$0.00

I will Pay Later YES

Memo: Memo Pay Sales Tax? YES

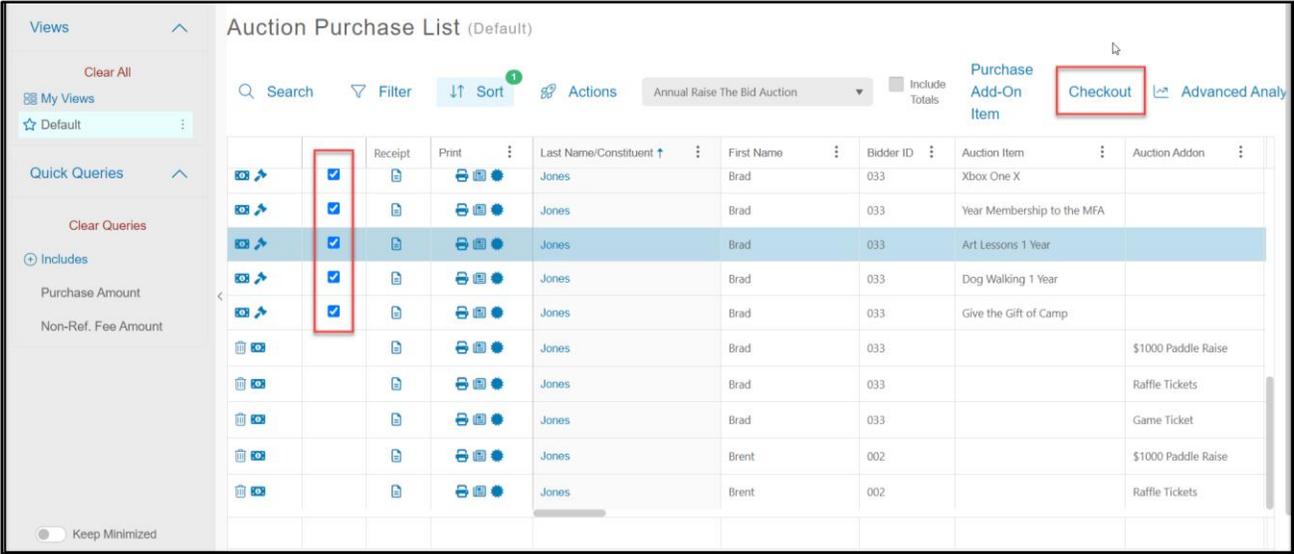
* - denotes Buy Now Only item.

Item	Amount	Sales Tax	Total	# of Bids / Qty
<input type="checkbox"/> Raffle Tickets	\$5.00	\$0.00	\$5.00	1
<input type="checkbox"/> Game Ticket	\$2.00	\$0.00	\$2.00	1
<input checked="" type="checkbox"/> \$1000 Paddle Raise	\$1,000.00	\$0.00	\$1,000.00	1
<input type="checkbox"/> \$5000 Paddle Raise	\$5,000.00	\$0.00	\$5,000.00	1
<input type="checkbox"/> Shipping Fee	\$75.00	\$0.00	\$75.00	1
Total:	\$1,000.00	\$0.00	\$1,000.00	

Suppress the Thank You Email

Process Cancel

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

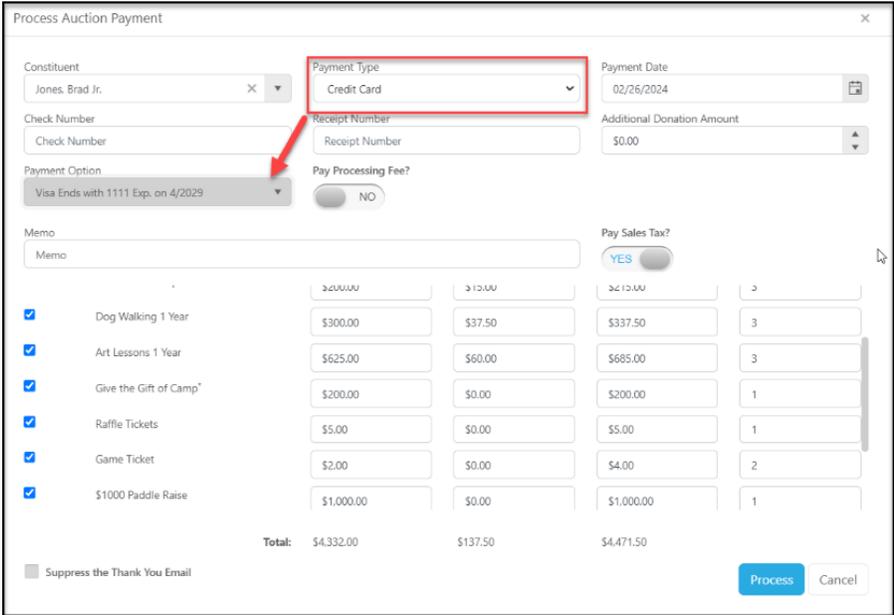


15. The checkout window will include all the items included in the transaction.

16. Choose the **Payment Type**.

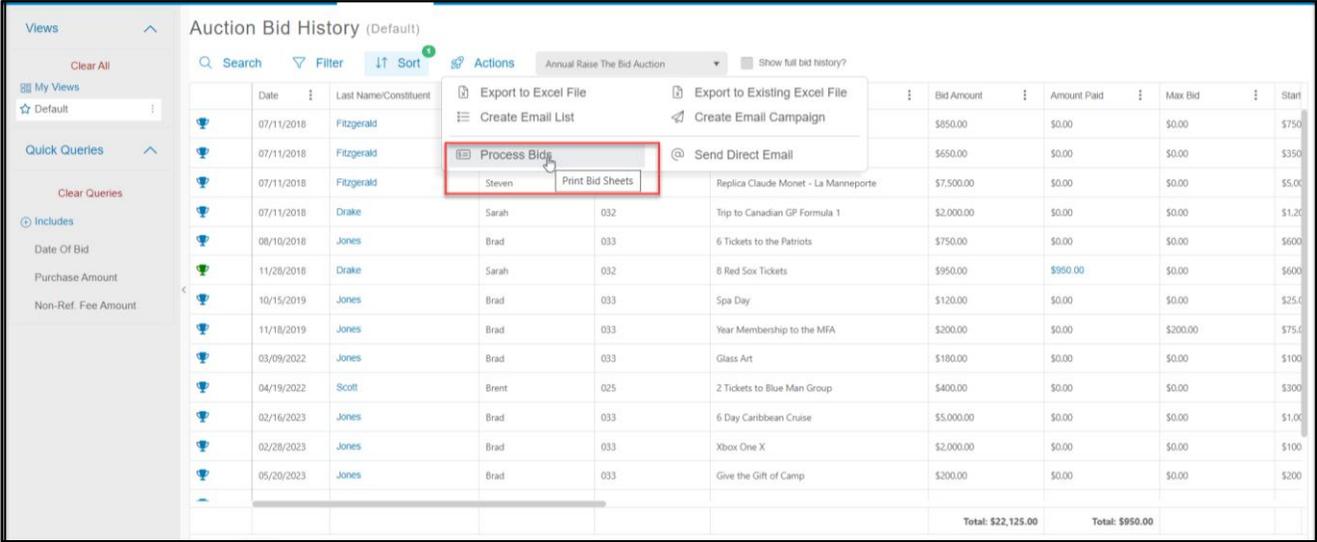
17. If Credit Card is selected, either choose the card or file, or if there is no card, enter the credit card information at the bottom of the page.

18. Click the blue Process button to complete the transaction. The constituent will receive an automatic thank you email.

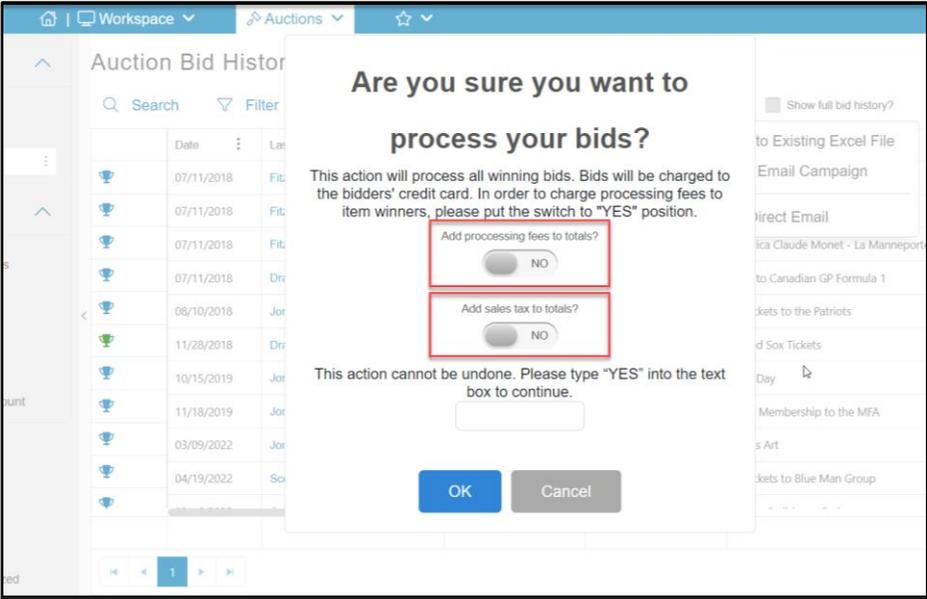


C. Can you bulk charge credit cards?

- 1. Yes, by using the Bid History grid.
- 2. **This will only process bids for auction items, it does not include add-on items.**
- 3. All bidders must have a credit card on file.
- 4. Click on the **Actions** menu and select **Process Bids**.

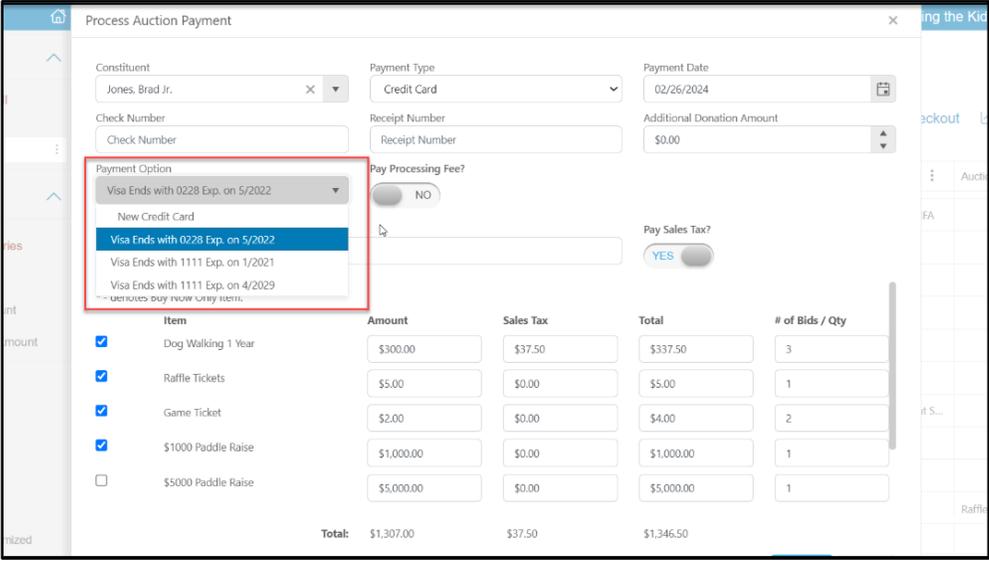


- 5. A new window will open.
- 6. If processing fees will be included, toggle **Add processing fees to totals** to **Yes**.
- 7. To include the pre-determined sales tax, toggle **Add sales tax to totals** to **Yes**.
- 8. Type **YES** in the box and click **OK** to process all the bids.



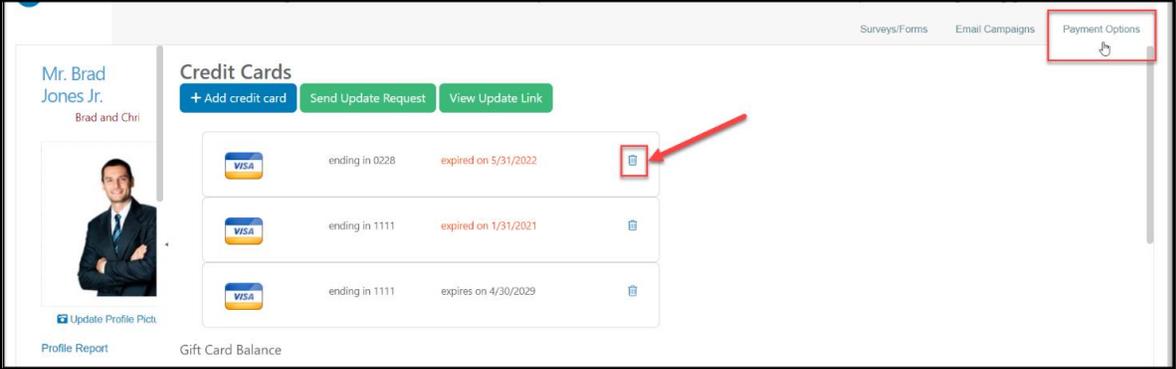
D. Can you choose which credit cards to use?

- 1. Yes, the credit card used can be selected with individual checkout, but not in the bulk charges.
- 2. For bulk 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.



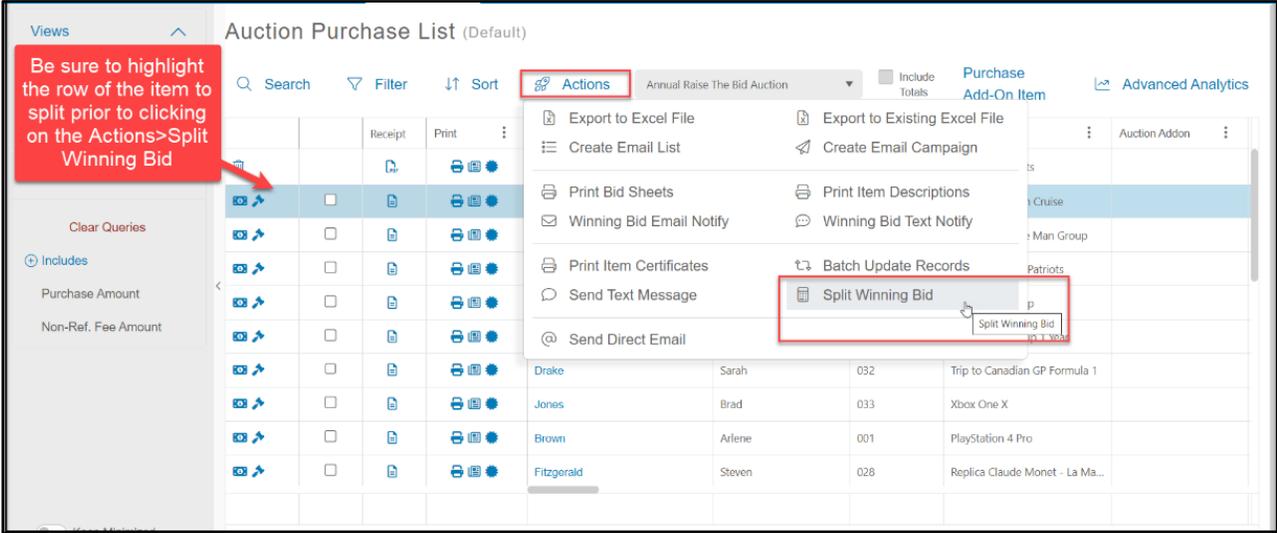
E. How do I remove a credit card from a profile?

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

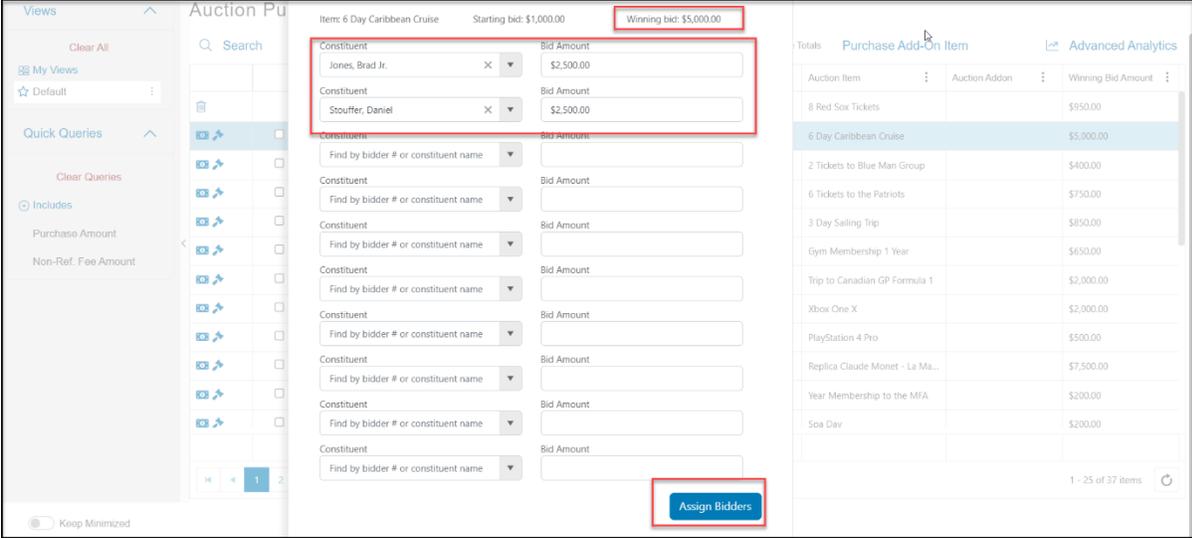


F. Can you split the payment for an auction bid?

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**.

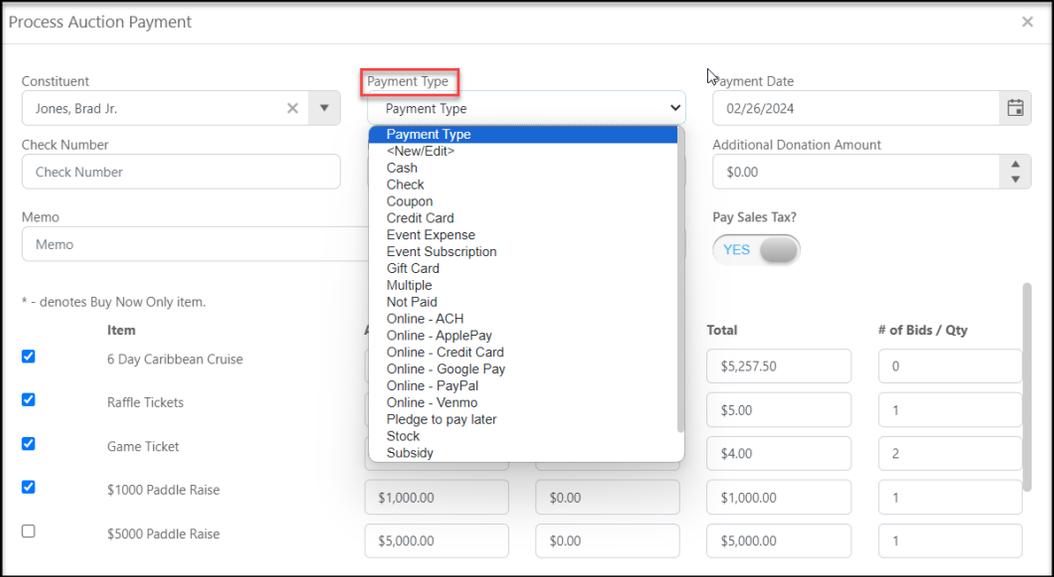


- a. In the new window, the winning bid amount is listed in the top right corner.
- b. Select the constituent name in the right column, then enter the amount each constituent will contribute to the total.
- c. Click the blue **Assign Bidders** button at the bottom to split the bid.
- d. After the split, the constituents can be checked out with their appropriate split.



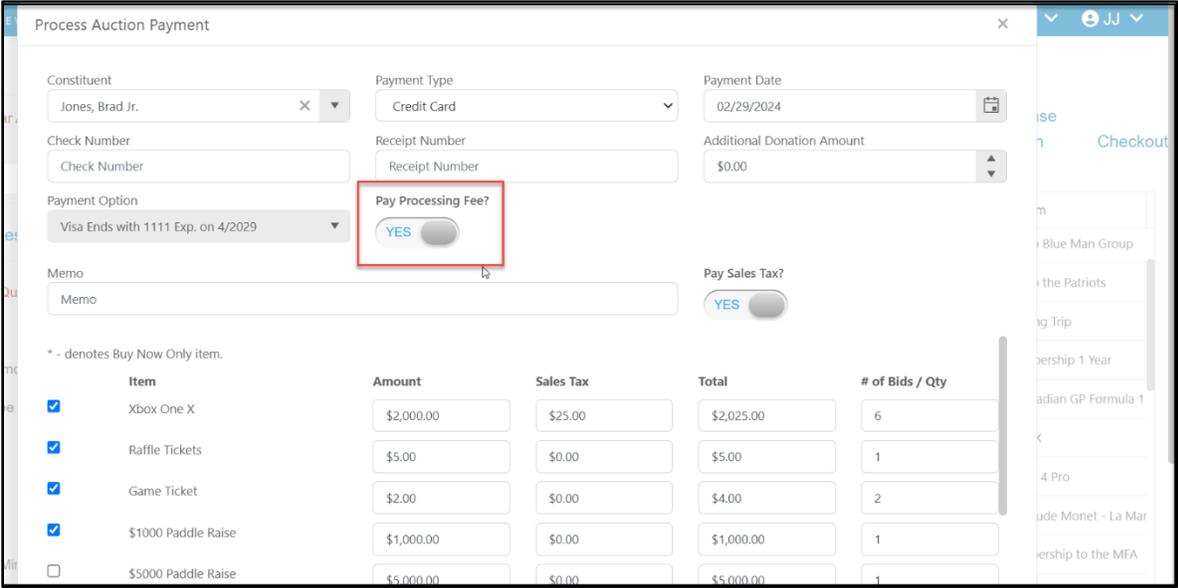
G. How do I use an alternate payment source?

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.



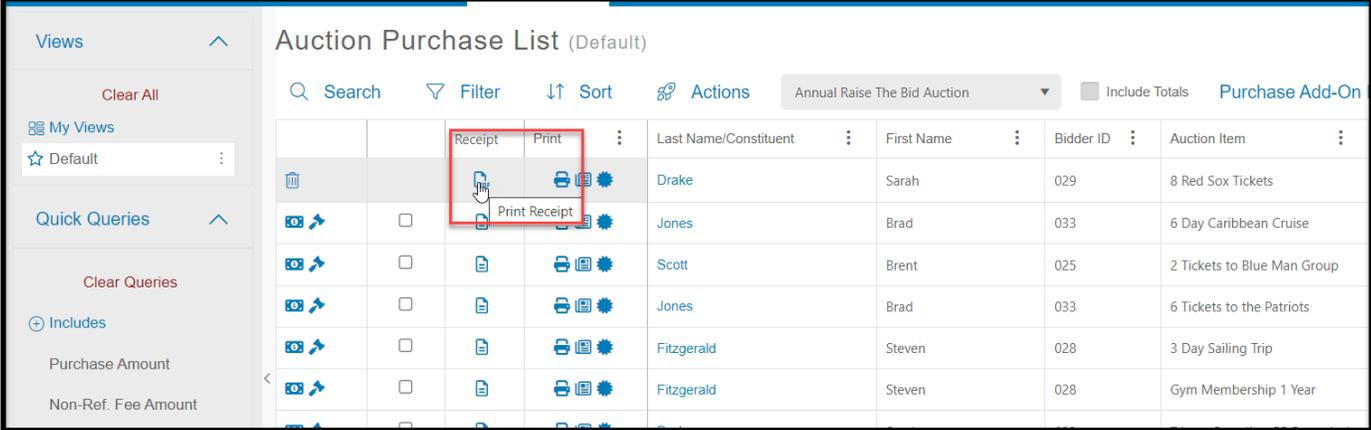
H. Who pays the credit card fee, and can that be changed?

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.

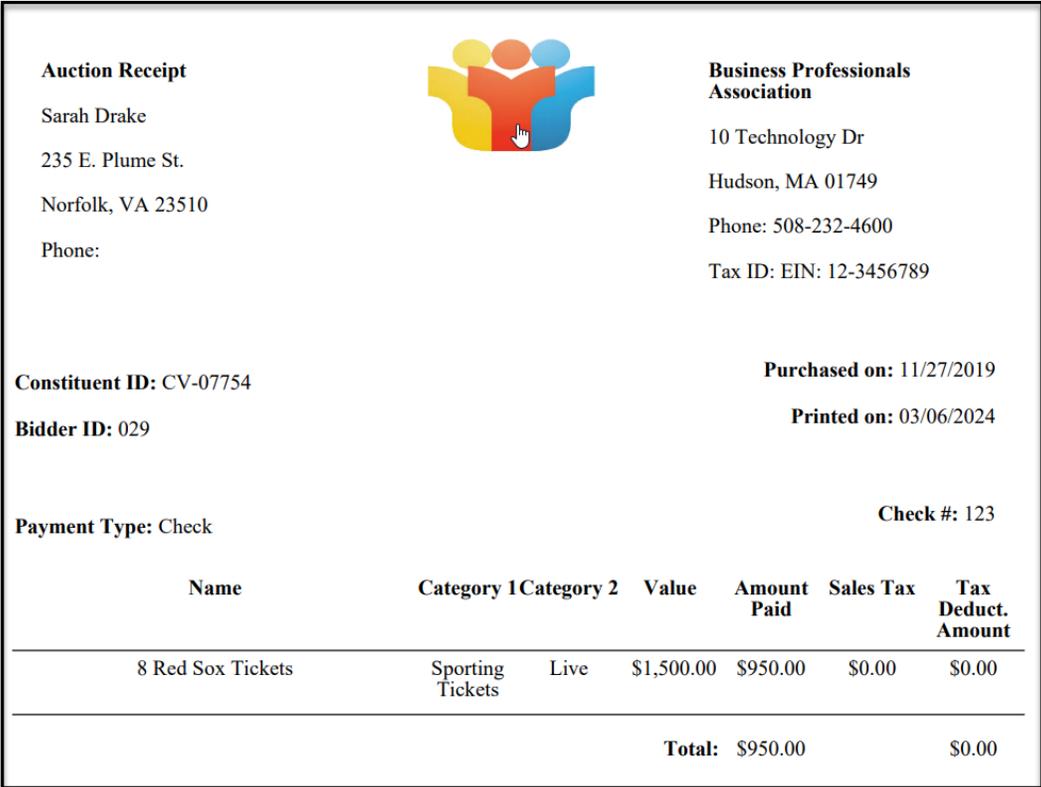


I. How do I send a receipt?

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 member 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.



F. What if I need help with event or auction?

- a. Support is provided via email during regular business hours weekdays 8 AM to 8 PM Eastern Time, not including holidays.
- b. 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.
- c. If the event takes place outside normal business hours, the organization can arrange after-hours, weekend, or holiday virtual support by contacting support@AssociationSphere.com prior to the event.
- d. If on-site support is desired, contact support@AssociationSphere.com for a list of available vendors who provide on-site support for AssociationSphere.