



Auctions for Salesforce

Auctions for Salesforce

User's Guide Version 4.1

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Auctions for Salesforce is developed by David Habib of DJH Consulting,
<http://djhconsulting.com>

1. OVERVIEW

Auctions for Salesforce is an AppExchange package that can be installed into any Enterprise Salesforce instance, including those with the Non Profit Starter Pack. Auctions for Salesforce is used to manage all aspects of your auction event, from the tracking of donated items, the selling of tickets, the bundling of items to sell. It can also be used during your Auction to handle guest check in, the tracking the purchases, guest check out, the charging of credit cards, and the creation of receipts.

Objects

Auctions are managed in Salesforce using Campaigns, Opportunities, and several custom objects.

Auctions are a custom object, with a set of campaigns used to track information about the auction. The campaigns are:

1. **Attendees** – a campaign to hold the list of invitees and attendees, including their event specific information (stored on their Campaign Member record) such as Bid Number, Meal, and Table Captain. All purchase Opportunities made during the Auction are associated with this campaign.
2. **Tickets** – a campaign to hold the list of Ticket Purchaser's and the ticket Opportunity.
3. **Sponsors** – a campaign you can use to track any sponsorships associated with Auctions. The package itself does not make any use of this campaign.
4. **Item Donors** – a campaign to hold the list of Donated Item Opportunities, and the contacts who made those donations.

Each campaign has Campaign Record Type of **GW Auction Campaign**, and a Type of Auction Attendees, Auction Sponsors, Auction Item Donors, or Auction Tickets. All of the people you want to invite to an Auction are members of the Attendees Campaign. Once you know that a specific contact is going to attend the Auction, you set their Campaign Member Status to RSVP Yes.

The Tickets, Donated Items, and Purchases related to an auction are stored as Opportunities. The following Opportunity Record Types are specific to auctions: **GW Auction Donated Item**, **GW Auction Purchased Item**, and **GW Auction Ticket**. The Auction Items that you sell are a custom object.

Auctions for Salesforce is designed to handle both the donated items that come in (e.g., airline tickets, a painting, a case of wine, etc.), as well as the actual auction items that will be sold (e.g., a vacation package, a painting, a wine and cheese basket, etc.). Sometimes the donated auction item is the exact thing you want to auction off. Other times the donated auction item will be split apart and part of several different

auction items that will be sold. Thus it is very important to understand that this system deals with both Donated Items (the items that come in), and Auction Items (the items to be sold at the event).

Training

Organizing and running an auction is no trivial task. Our goal with Auctions for Salesforce is to help make that process easier, by providing the tools you need for both managing and running your auction. But no software will do its best job if the users are not sure how to use it. **We strongly encourage all people who are involved in managing the auction to read this guide and practice with it before starting to enter real data for your auction.**

Even more complicated is the fact that many auctions are supported by volunteers during the actual event, and most of these volunteers will have never seen Salesforce. **It is critical that the volunteers who will be using Auctions for Salesforce during the event have good training and practice so they are comfortable using the Check In and Check Out tabs.**

Successful organizations that use Auctions for Salesforce make sure they understand how to use it before managing their auction, and more importantly, provide dedicated training and practice time to their volunteers before the auction event actually occurs!

Check out the great resource [Practicing with Auctions](#) from one of our users about how to go about practicing with Auctions for Salesforce before the event.

<http://djhconsulting.com/auctions-for-salesforce/auctions-for-salesforce-documentation/>

Also, we strongly encourage you to have all staff and volunteers who will be helping at your auction to watch our **Auctions for Salesforce Event Training** video at:

<http://djhconsulting.com/auctions-for-salesforce/auctions-for-salesforce-videos/>

2. CREATE AN AUCTION

Auctions are a custom object, with several Campaigns in them; one for Attendees, one for Tickets, one for Donations, and one for Sponsors. The first three are special, and are used by Auctions package for tracking its information. The Sponsors campaign is provided just for your use, if you would like to be able to keep track of the sponsorships before the auction.

Create an Auction

1. Click on the **Auctions** tab.
2. Click on the **New** button to bring up the Auction Edit page.
3. Fill out the appropriate Name and Date, and Ticket Non-Deductible Amount.
4. Click **Save** to commit the new record to the database.
5. The Auction detail page will then be displayed. Notice that it has several campaigns under it that were automatically created: Attendees, Tickets, Sponsors, and Item Donors.

NOTES

- The Attendees Campaign has custom status values of Invited, RSVP Yes, RSVP No, and Attended. The other campaigns just use standard statuses. If you decide to use any custom Campaign Member Status values, you must create them using the **Advanced Setup** button on the appropriate campaign's detail page.
- You cannot delete the Auction's four Campaigns, because the custom pages depend on their existence. You are able to delete them after you delete the Auction they belong to.
- You are able to specify the default **Ticket Non-Deductible Amount** to use. If your Auction is going to have different levels of tickets with different deductible amounts, you can add your own custom field to the Ticket Opportunity to identify what level the Ticket is, and when using the New Ticket Wizard you are able to override the ticket's Non-Deductible Amount.

 Auction
Test Auction

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[Campaigns \[4\]](#) | [Auction Items \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

Auction Detail [Edit](#) [Delete](#) [Clone](#)

Auction Name	Test Auction	Owner	 David Habib [Change]
Auction Date	1/1/2000		
Ticket Non-Deductible Amount 	\$25.00		
Created By	David Habib , 3/27/2012 2:54 PM	Last Modified By	David Habib , 3/27/2012 2:54 PM

[Edit](#) [Delete](#) [Clone](#)

 **Campaigns** [New Campaign](#) [Campaigns Help](#) 

Action	Campaign Name	Status	Start Date	Campaign Record Type	Auction Campaign Type
Edit Del	Test Auction Attendees	In Progress	3/27/2012	GW Auction Campaign	Auction Attendees
Edit Del	Test Auction Tickets	In Progress	3/27/2012	GW Auction Campaign	Auction Tickets
Edit Del	Test Auction Sponsors	In Progress	3/27/2012	GW Auction Campaign	Auction Sponsors
Edit Del	Test Auction Item Donors	In Progress	3/27/2012	GW Auction Campaign	Auction Item Donors

3. AUCTION SPONSORS

You can manage auction sponsors just like you manage potential gifts and grants.

Rather than creating a new type of Opportunity for Auction sponsorship, we have opted to just use the standard Gift and Grant functionality we have in Opportunities.

By setting the **Primary Campaign Source** field to the Auction's Sponsors Campaign, you are able to track the Organizations and Contacts who are helping to sponsor the auction event. By using the same sale process you are used to using for Grants, you can track your sponsorship cultivation.

NOTES

- You can create the new Opportunity from either a Contact's record, an Organization's record, or the Auction Campaign's record. Just make sure to set the Primary Campaign Source field appropriately.

4. DONATED ITEMS

Donated Items are used to construct your Auction Items to sell.

We track Donated Items as Opportunities, which have their record type set to *GW Auction Donated Item*. By using Opportunities, just like we do for Gifts and Grants, you can follow your normal processes for tracking the status of a potential donation, recognizing the donation, and accounting for the donation.

Creating a new Donated Item

1. Click on the **Donated Items** tab. The tab will display showing you the most recent auction, in the auction dropdown, and all Donated Items that have currently come in for the auction.
2. Click on the **New** button to create a new Donated Item.
3. On the Donated Item Edit page, fill out all appropriate information for the Donated Item.
4. Note that if the donation is from an Organization, you must still provide a contact, since we track the donors by using Campaigns, which only work on Contacts, not Organizations.
5. If the Donated Item is exactly what you want to auction off, then check the **Create Auction Item** checkbox, which will then display the fields of information needed to create an Auction Item.
6. Fill out the appropriate additional information.
7. Click **Save** to commit the edits to the database.
8. This will create the Donated Item, and if the Create Auction Item checkbox was checked, it will also create an Auction Item, and the Auction Item Piece that maps the donation to what is being sold.

NOTES

- The **Amount** should be the Donated Item's Fair Market Value.
- The **Stage** field allows you to track both prospective as well as confirmed auction donations.
- Hovering your mouse over the '?' circles, next to field names, will tell you what each field is specifically for.
- Look in the **Auction Management** reports folder, for several reports that will help you track donated items, as well as prepare auction materials for the event.
- If you are also creating the Auction Item, for Auction Item ID, choose an ID that is fairly short and easy to type, such as "ART101" or "Food102" to make it easy to quickly enter Auction Purchases, which are entered by typing the ID. You may

want to start the ID with some abbreviation of the Category the Auction Item is in.

- You are able to customize the fields that are displayed on the New Donated Item page. Please see the [Auctions for Salesforce Installation & Configuration Guide](#) for details.
- If you decide to not create Auction Items when you enter your Donated Items, you can later use the **Donated Item Converter** to help automate the process.
- You can modify the Donated Item fields that display on the Donated Items tab. Please see the [Auctions for Salesforce Installation & Configuration Guide](#) for details.

Donated Item Edit

Save Cancel

Show Help ?

Donated Item Information | = Required Information

Contact	Terra Habib	Account Name	
Auction Donated Item Name	Soccer Tickets	Stage	Closed Won - Not Thanked
Amount	150.00	Number of Items	1
Close Date	6/3/2013 [6/3/2013]	Primary Campaign Source	TWTTest Item Donors
Procured By	Freddy Habib	Delivery Status	Will be sent
Description	2 tickets to a Seattle Sounders FC game	Auction Donated Item Restrictions	choice of 6/3, 6/21, or 7/12 game dates.

Create An Auction Item

In order for Auction Donated Items to be available for purchase, they must be associated with an Auction Item. Would you like to create a single Auction Item for this donation right now?

Create Auction Item

Auction	TWTTest	Category	Sporting
Auction Item ID	S300	Auction Group	Silent round 1
Auction Item Name	Soccer Tickets	Minimum Bid	100
Restrictions	choice of 6/3, 6/21, or 7/12 game dates.	Guaranteed Bid	300
Description	2 tickets to a Seattle Sounders FC game	Donor Recognition	Thanks to Freddy & Julie Habib for offering up these great tickets!

5. AUCTION ITEMS

Auction Items are the items that you will actually sell at the auction.

You create Auction Items to describe what you are selling at the auction. An Auction Item can be made up of just a single Donated Item, or it can be a collection of Donated Items, as in the case of a gift basket. You create Auction Item Pieces to track which Donated Items go into which Auction Items.

Creating a New Auction Item

There are several ways to create Auction Items. You can create them automatically when you create a Donated Item, as described in the previous section. You can also use the **Donated Item Converter** to help you, or you can create your Auction Items directly.

1. Click on the **Auction Items** tab. The tab will display showing you the most recent auction, in the auction dropdown, and all Auction Items that have been created for the auction.
2. Click on the **New** button to create a new Auction Item.
3. Fill out the appropriate fields of information about the Auction Item.
4. Click **Save** to commit the edits to the database.
5. From the Auction Item's detail page, there is a related list of Auction Item Pieces that map Donated Items to this Auction Item.
6. To assign a Donated Item to this Auction Item, click on the **New Auction Item Piece** button.
7. Fill out the appropriate fields in the New Item Piece page.
8. Click **Save** to commit the edits to the database.

NOTES

- To create an Auction Item made up of multiple Donated Items, you create multiple **Auction Item Pieces**, as described above.
- For Auction Item ID, choose an ID that is fairly short and easy to type, such as "ART101" or "Food102" to make it easy to quickly enter Auction Purchases, which are entered by typing the ID. You may want to start the ID with some abbreviation of the Category the Auction Item is in.
- The Auction Item's Fair Market Value field is automatically calculated based off the sum of all Actual FMV's of all Auction Item Pieces. You can override this by setting the Auction Item's FMV Override field.

- The Description, Donor Recognition, and Restriction fields are intended to be used for the text that you want to use in the marketing of the item (auction booklet, auction item placards, etc.)
- Your System Administrator can go into Setup and change the values in the Category and Auction Group dropdowns, to make the values appropriate for your current auction. Old Auction Items will not be affected by this; they will retain their current field value.
- If the Auction Item is for a pure donation, not a purchase, such as a “Raise Your Paddle” item, check the **Treat Purchase as Gift** checkbox. This will tell Auctions for Salesforce to create purchase Opportunities of record type *Gift* rather than *GW Auction Purchase*, for this item, and will thus be consistent with normal gifts and donations Opportunities you track in Salesforce. *Note that there is a Custom Setting in Auctions that allows you to specify what is the actual record type to use for these Gifts. See the [Auctions for Salesforce Installation & Configuration Guide](#) for details.*
- Most Auction Items can only be sold once, and the Purchases page will enforce this. But if you have Auction Items that can be sold multiple times, you should check **Allow Multiple Purchases**. Examples of when you might do this are for any Raise The Paddle type items, raffle tickets, drink tickets, or any items being offered where you have a large supply, and are not tracking each individually.
- For non-deductible expenses at the auction that you want to track per guest, like drink tickets, you can model them as an Auction Item with a very large Fair Market Value Override specified on them. This way you can enter a single Auction Item Purchase per guest for how much the guest spent, and the system will never treat this amount as deductible.
- You can modify the Auction Item fields that display on the Auction Items tab. Please see the [Auctions for Salesforce Installation & Configuration Guide](#) for details.

Auction Item
FB101

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[Auction Item Pieces \[3\]](#) | [Opportunities - Purchases \[3\]](#) | [Notes & Attachments \[0\]](#)

Auction Item Detail [Edit](#) [Delete](#) [Clone](#)

Auction Item ID: FB101 Owner: [David Habib \[Change\]](#)

Auction ?	2011 Auction	Minimum Bid ?	\$150
Auction Item Name ?	Wine & Cheese Basket	Guaranteed Bid ?	\$250
Category	Food and Beverage	FMV Rollup ?	\$85.00
Auction Group ?	Silent round 1	FMV Override ?	
Fair Market Value ?	\$85.00	Display Board ?	
Description ?	3 bottles of fancy wine and lots of cheese		
Restrictions ?	must be 21 or over to purchase!		
Donor Recognition ?			
Treat Purchase as Gift ?	<input type="checkbox"/>		
Allow Multiple Purchases ?	<input type="checkbox"/>		
Created By	David Habib , 2/8/2010 8:54 AM		Last Modified By David Habib , 3/25/2013 8:14 AM

[Edit](#) [Delete](#) [Clone](#)

Auction Item Pieces [New Auction Item Piece](#) [Auction Item Pieces Help](#)

Action	Auction Donated Item Name	Description	Quantity	Actual FMV	Opportunity Name
Edit Del	case of wine		3	\$25.00	Test Test 2011 Auction Donated Item
Edit Del	blocks of cheese		2	\$40.00	Test Test 2011 Auction Donated Item
Edit Del	blocks of cheese		1	\$20.00	Test Test 2011 Auction Donated Item

6. DONATED ITEM CONVERTER

The Donated Item Converter is a new wizard in version 4.0 that helps automate the process of creating Auction Items from Donated Items. You open the wizard by clicking on the **Donated Item Converter** button found on both the Donated Items tab and Auction Items tab.

 Donated Item Converter

Create Auction Items from Available Donated Items

[Show Help ?](#)

Fair Market Value	Quantity	Auction Item ID	Auction Item Name	Category	Auction Group	Minimum Bid	Guaranteed Bid	Restrictions	Description
<input checked="" type="checkbox"/> \$1,000	<input type="text" value="1"/>	<input type="text" value="100"/>	<input type="text" value="2 cases of wine"/>	--None--	--None--	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="we will serve this"/>
<input checked="" type="checkbox"/> \$70	<input type="text" value="7"/>	<input type="text" value="101"/>	<input type="text" value="Case of wine"/>	--None--	--None--	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="12 bottles of fine"/>
<input checked="" type="checkbox"/> \$57	<input type="text" value="19"/>	<input type="text" value="102"/>	<input type="text" value="Cases of Beer"/>	--None--	--None--	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> \$100	<input type="text" value="1"/>	<input type="text" value="103"/>	<input type="text" value="Coffee and Mugs"/>	--None--	--None--	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="a set of Starbuck"/>
<input checked="" type="checkbox"/> \$14	<input type="text" value="1"/>	<input type="text" value="106"/>	<input type="text" value="rounds of cheese"/>	--None--	--None--	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="7 rounds of"/>

- The Donated Item Converter lists all Donated Items that are remaining, and creates a single Auction Item for each.
- You still need to fill in appropriate values for Category, Group, Minimum Bid, etc.
- The **Quantity** field shows you how many of the Donated Items remain, and the **Fair Market Value** field shows you the value of those items.
- You can change the **Quantity** field to the number of items you want to assign to the Auction Item that is going to be created.
- You can uncheck any Donated Item that you do not want to use at this time.
- The **Auction Item ID** field is pre-filled with suggested unique values, but you can change them to whatever ID scheme you want to use.
- After clicking **Create**, the page will redisplay with any remaining items.
- The Donated Item Converter shows items in batches. You can control the batch size by setting the **Donated Item Converter Batch Size** custom setting.

7. TICKETS

Auction Tickets are an Opportunity of record type *GW Auction Ticket*, and track the purchase of tickets by Table Captains and Attendees.

Under an Auction, there is a Ticket Campaign that is used to track all of the Auction Ticket purchases. Note that there isn't a one-to-one correspondence of Auction Ticket purchases to Attendees, since a Table Captain may be buying tickets for a whole table of people.

Create a New Ticket Purchase

1. Click on the **Tickets** tab.
2. Select the appropriate Auction from the dropdown.
3. Click on the **New** button, to bring up the New Auction Ticket page.
4. Enter the appropriate information about the purchase.
5. Once all the fields have been filled out, and the Number of Tickets field is filled in, the system will display a grid where you can specify the Attendees for the number of tickets purchased.
6. Clicking on the **Credit Card** payment option will open a new panel or window if you have set up a payment processor to work with Auctions.
7. In the **Add Auction Attendees** section, fill in the names and preferences of the attendees that you have information for. You do not have to fill out all rows displayed if you don't have information on everyone.
8. Click the **Save** button to save edits to the database.

NOTES

- Tickets may be purchased by Organizations (Accounts), rather than requiring all ticket purchases to be done by Contacts. This allows an organization to purchase a set of tickets, and using the new Check In tab, handle people the night of the event showing up to sit at the organization's table.
- The system assumes the ticket purchaser (if they are a contact) is a table captain and that they are attending (RSVP Yes).
- The **Per Ticket Non-Deductible Amount** field is pre-filled with the amount specified in the Auction. You can change this value if this Ticket being purchased is for a different ticket level with a different non-deductible amount.
- If you have specified custom settings for a payment processor, clicking on the Credit Card option will display the payment processor's panel or window to charge a credit card.
- Your System Administrator can change the choices in the Meal Preference dropdown.
- The system is smart enough to ensure that any Bid Number you enter is unique for this Auction. Thus in the case of partners attending together, you should enter Attendee information for both contacts, but only give a Bid Number to one of them, or give them each their own Bid Number.
- In version 3.0 and later, there is a custom setting to turn off the requirement that Bid Numbers are unique. Please see the *[Auctions for Salesforce Installation & Configuration Guide](#)* for details.

- You can defer entering Bid Numbers until you are very close to the Auction date, and then use the **Assign Bid Numbers** button on the Auction Tickets tab. This will take you to a wizard to assign sequential bid numbers to all attendees, sorted alphabetically.
- You can later add additional Auction Attendees when editing an existing Auction Ticket from the Tickets tab.
- You can customize the fields that are presented on the New Ticket page. Please see the *[Auctions for Salesforce Installation & Configuration Guide](#)* for details.
- You can modify the Ticket fields that display on the Tickets tab. Please see the *[Auctions for Salesforce Installation & Configuration Guide](#)* for details.

Auction Tickets

Edit Auction Ticket

[Show Help ?](#)

Ticketing Information ! = Required Information

Opportunity Name <input style="border: 1px solid red;" type="text" value="Luna Habib TWTest Aucti"/>	Contact <input type="text" value="Luna Habib"/>
Account Name <input type="text"/>	Close Date <input style="border: 1px solid red;" type="text" value="4/22/2013"/> [6/3/2013]
Primary Campaign Source <input style="border: 1px solid red;" type="text" value="TWTest Tickets"/>	Amount <input style="border: 1px solid red;" type="text" value="15.00"/>
Stage <input style="border: 1px solid red;" type="text" value="Closed Won"/>	Description <input type="text"/>
Number of Tickets <input style="border: 1px solid red;" type="text" value="2"/>	Per Ticket Non-Deductible Amount <input type="text" value="15.0"/>

Payment Method

Cash
 Check
 Credit Card

Add Auction Attendees

Please list each individual that is attending with the purchase of these tickets.

Action	Contact ID	Status	Bid Number	Meal Preference	Paid	Is Table Captain	Table Captain	Table Name/Number
Del	Terra Habib	Checked In	<input type="text" value="508"/>	Fish	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Luna Habib	<input type="text"/>
Del	Zip Zippy	Checked In	<input type="text" value="512"/>	--None--	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Luna Habib	<input type="text"/>

8. ASSIGN BID NUMBERS

The Assign Bid Numbers is a wizard that helps automate the process of assigning unique Bid Numbers to all attendees of the auction. You open the wizard by clicking on the **Assign Bid Numbers** button found on both the **Tickets** tab.

The wizard shows you the current bid number for each attendee whose status is not **RSVP No**, and a new unique bid number, starting at 100. You can change the **Starting Bid Number** to whatever value you would like, and the page will refresh with the new values.

If you are running the Non Profit Starter Pack, or you have filled out the custom settings to specify that Contacts use Households, you are given the checkbox **Assign on bid number per household**.

We recommend that only one member of a household be given a Bid Number, and that you save credit card information at Check In on the same person. This will ensure that all purchases get recorded against the person who will pay for them at Check Out.

Attendee	Household	Current Bid Number	New Bid Number
<script>alert(1);</script>, Ducky	<script>alert(1);</script> Household	200	<input type="text" value="100"/>
Black, Arlo	Black Household	201	<input type="text" value="101"/>
Blow, Joe	Blow Household	202	<input type="text" value="102"/>
Bond, John	Bond Household	203	<input type="text" value="103"/>
bunny, bugs	bunny Household	204	<input type="text" value="104"/>
Duck, Daffy	Duck Household	205	<input type="text" value="105"/>
Gray, Arlo	Gray Household	206	<input type="text" value="106"/>

9. PURCHASES

Auction Purchases are recorded as Opportunities of record type *Auction Purchased Item*.

When a contact or organization purchases an item from your auction, you record it as an Opportunity.

Creating an Auction Purchase

The Purchases tab has been provided to allow viewing of existing purchases and to do quick data entry of multiple purchases at one time.

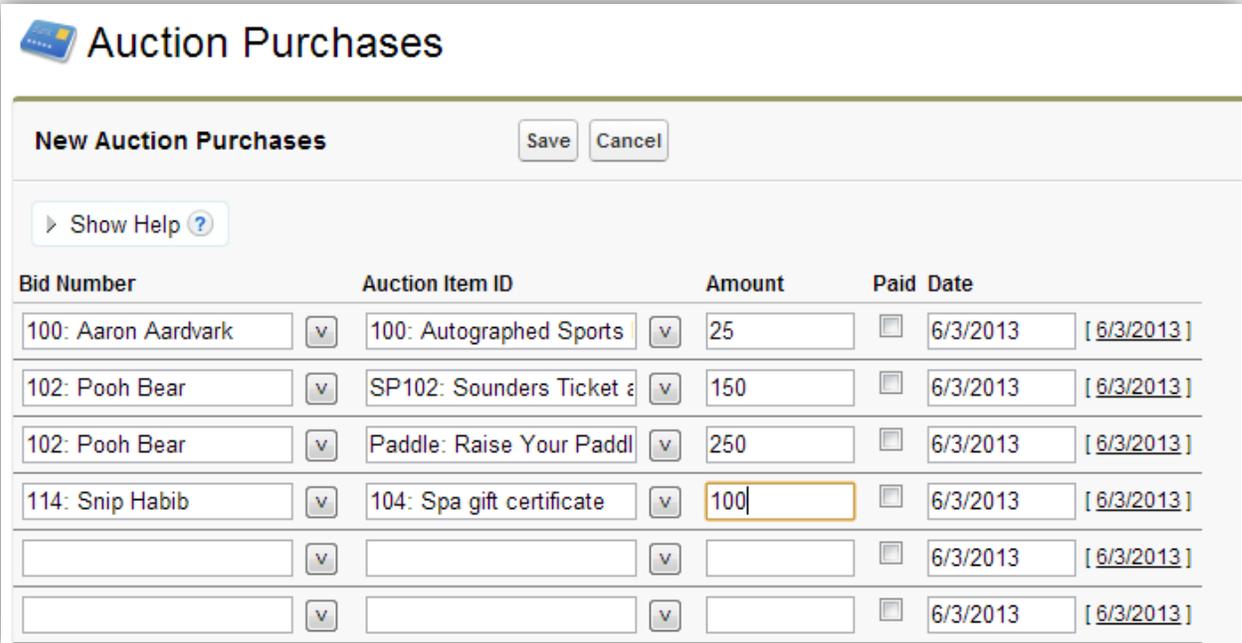
1. Click on the **Purchases** tab.
2. Select the appropriate Auction from the dropdown.
3. Click on the **New** button, to bring up the New Auction Purchases page.
4. You can now enter 1 or more auction purchases at one time.
5. Enter the person's bid number in the bid number field, and tab out of the field, and the system will lookup the contact's name and display it in the field. If you type an invalid bid number, the system will display "invalid bid number".
6. Enter the Auction Item's ID in the appropriate field and tab out of the field, and the system will lookup the auction item and display it in the field. If you type an invalid ID, the system will display "invalid Auction Item ID".
7. Enter the amount in the appropriate field, and check the Paid checkbox if you have received payment for the item. If you don't check the Paid checkbox, the opportunity will be saved with the Stage set to "Pledged". **If you are entering Purchases during the Auction, and will be using the Check Out page at the end of the event, leave Paid unchecked, so the Check Out page can find which purchases to charge for.**
8. Click **Save** to save the record(s) to the database. The page will display a message saying how many purchases were saved.

NOTES

- The purchaser's **Bid Number** is saved on the Purchase Opportunity during Save. Note that this is just a copy of the Bid Number, so if you later change a person's Bid Number, any past purchases will not get updated to the new Bid Number.
- There are several reports in the **Auction Management** reports folder to view auction purchases.
- You can also view the auction purchased items by looking at the detail page for the Auction's Attendees Campaign.
- The system prevents you from entering duplicate purchases of the same item. Each time you open the wizard, only Auction Items that have not yet been purchased are filled in the Auction Item dropdown.
- For Auction Items that should allow multiple purchases, there is a check box field on the Auction Item called **Allow Multiple Purchases** that must be checked.

If during the event, an Auction Item gets offered up a second time, you will need to edit the Auction Item's detail page to set this checkbox, and then reopen the New Auction Purchases wizard.

- There are custom settings for Auctions that control the actual Stage values to use for purchase Opportunities. Please see the [Auctions for Salesforce Installation & Configuration Guide](#) for details.
- You can customize the fields that are presented on the New Purchases page. Please see the [Auctions for Salesforce Installation & Configuration Guide](#) for details.
- You can modify the Purchase fields that display on the Purchases tab. Please see the [Auctions for Salesforce Installation & Configuration Guide](#) for details.



The screenshot shows the 'Auction Purchases' interface. At the top, there is a 'New Auction Purchases' section with 'Save' and 'Cancel' buttons. Below this is a 'Show Help' link. The main part of the interface is a table with the following columns: Bid Number, Auction Item ID, Amount, and Paid Date. The table contains several rows of data, with the fourth row highlighted. The 'Amount' field in the fourth row is currently set to '100'.

Bid Number	Auction Item ID	Amount	Paid	Date
100: Aaron Aardvark	100: Autographed Sports	25	<input type="checkbox"/>	6/3/2013 [6/3/2013]
102: Pooh Bear	SP102: Sounders Ticket	150	<input type="checkbox"/>	6/3/2013 [6/3/2013]
102: Pooh Bear	Paddle: Raise Your Paddl	250	<input type="checkbox"/>	6/3/2013 [6/3/2013]
114: Snip Habib	104: Spa gift certificate	100	<input type="checkbox"/>	6/3/2013 [6/3/2013]
			<input type="checkbox"/>	6/3/2013 [6/3/2013]
			<input type="checkbox"/>	6/3/2013 [6/3/2013]

10. CHECK IN

The Check In tab provides a way to quickly check in guests the night of the auction. This page allows you to both check in existing contacts in your database, as well as create new contacts. The workflow of using this page is as follows:

1. Click on the **Check In** tab.
2. Enter the name of the guest.
3. If their contact record is found, their information is displayed so that you can update any fields as appropriate.

4. If their contact record is not found, the page will display a message, and you can enter their new contact information in the form.
5. If they already have an Auction Ticket, the page will display their Table Captain, and also show all the guests of that Table Captain.
6. If they aren't assigned to a Table Captain, you can pick a new Table Captain from the picklist.
7. If they need to pay for tickets, click the "Add Ticket Purchase" checkbox, and fill out the information in the New Ticket Purchase section. This ticket purchase will be added to their list of purchases to be paid at the end of the auction.
8. After you've update all appropriate information, click the **Save & Check In Contact**. This will save all of their information to the database, and mark their campaign member Status as "Checked In".
9. If you have a payment processor and are requesting credit card information at check in, click on the **Save Credit Card** button. This will bring up a payment processor window, or display a payment processor panel on the page. Please see the [*Auctions for Salesforce Installation & Configuration Guide*](#) for details on configuring payment processors.
10. When you are done with this guest, you can Close the window, or click **Next Guest** to start over with a new guest.

NOTES

- When displaying the list of guests for a Table Captain, you can click anywhere on a guest's row in the table, to select them and display their contact information so you can update it as appropriate.
- If a Table Captain has paid for more tickets that aren't yet assigned to guests, they are displayed as "(available ticket)" in the guest table, and you can select the last one to assign it to a guest.
- **We recommend only assigning one Bid Number per household, and making sure it is assigned to the person whose credit card information you are saving.** This ensures that all purchases that get recorded will be associated with the person who is going to pay for them at Check Out.
- You can customize the fields that are presented on the Check In page. Please see the [*Auctions for Salesforce Installation & Configuration Guide*](#) for details.

Auction Check In

Search by Guest or Captain

Auction: TWTest
Guest: Snip Habib
Table Captain (or organization): Luna Habib

i Update the guest's information and click **Save & Check In Contact**. Save their credit card by clicking **Save Credit Card**. If the guest needs to buy tickets, click on the **Add Ticket Purchase** checkbox.
It is **recommended** that only one person per household provide credit card information and have a bid number.

Snip Habib

First Name: Snip
Last Name: Habib
Email: terra@gmail.com
Mailing Street:
Mailing City: Seattle
Mailing State/Province: wa
Mailing Zip/Postal Code: 98101

Table Captain: Luna Habib
Table Name/Number:
Bid Number: 506
Meal Preference: Beef
Paid:
Add Ticket Purchase:

Guests

Contact	Status	Bid Number	Table Name/Number	Meal Preference	Paid
<input type="radio"/> Aaron Johnson	Checked In	510			<input checked="" type="checkbox"/>
<input type="radio"/> Adam Davids	Checked In	502			<input type="checkbox"/>
<input type="radio"/> Frank Habib	Checked In				<input checked="" type="checkbox"/>
<input type="radio"/> Luna Habib	Checked In	505		Vegetarian	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> Snip Habib	Checked In	506		Beef	<input checked="" type="checkbox"/>
<input type="radio"/> Terra Habib	Checked In	508		Fish	<input checked="" type="checkbox"/>
<input type="radio"/> Zip Zippy	Checked In	512			<input checked="" type="checkbox"/>

11. CHECK OUT

The Check Out tab provides a way to quickly check out guests at the end of the auction. This page also allows you to see what a guest has purchased, before the auction is over. The workflow of using this page is as follows:

1. Click on the **Check Out** tab.
2. Enter the name or bid number of a guest.
3. The page will display a table of all their Auction Item Purchases, and Auction Tickets.
4. For any items whose stage is not closed, the Pay Now checkbox will be checked, and the item's price will be included in the total for all Pay Now items.

5. You can still manually check and uncheck any item to add or remove it from the Pay Now total.
6. In the Payment Method section, click on the appropriate radio button.
7. If you have a payment processor and are charging credit cards at check out, choose the **Credit Card** radio button in payment method. This will bring up a payment processor window, or display a payment processor panel on the page. Please see the [*Auctions for Salesforce Installation & Configuration Guide*](#) for details on configuring payment processors.
8. After you have charged the credit card, or the guest has paid by other means, you still need to update all of the Pay Now opportunities by click on **Update Opportunities**.
9. You can click on **View Receipt** to open a new window with a PDF of the guest's purchases.
10. When you are done with this guest, you can Close the window, or click **Next Guest** to start over with a new guest.

NOTES

- The Guest dropdown will search and list all Contacts on the Attendees campaign whose Status is not **RSVP No**. **If you have thousands of potential attendees on your Attendees campaign, and have not marked them RSVP No, you will significantly slow down the performance of this page. Before your auction, make sure you either remove contacts from this campaign who are not attending, or change their status to RSVP No.**
- You can customize the fields that are presented on the Check Out page. Please see the [*Auctions for Salesforce Installation & Configuration Guide*](#) for details.

Auction Check Out

Search by Name or Bidder
Number

Auction
Guest
(name or bid number)

- i** 1. Check **Pay Now** for the purchases you wish to process.
2. Choose the Payment Method. **Credit Card** will open a new panel to process the charge.
3. Click **Update Opportunities** to complete processing.
4. Continue with next steps.

Opportunity	Auction Item	Amount	1. Pay Now
Luna Habib TWTest Auction Ticket	Auction Tickets	\$100	<i>paid</i>
Luna Habib 2013 Auction Purchased Item	Cheese Balls	\$15	<input checked="" type="checkbox"/>
Luna Habib 2013 Auction Purchased Item	Wine Basket	\$25	<input checked="" type="checkbox"/>
Luna Habib TWTest Auction Ticket	Auction Tickets	\$15	<i>paid</i>
		\$155	\$40

2. Payment Method

Cash Check Credit Card

3. Complete Processing

4. Continue

12. AUCTION RECEIPTS

There is a tab installed with the Auctions package that is used to create PDF files of receipts for purchases at the Auction.

1. Click on the **Auction Receipts** tab.
2. Select the appropriate Auction from the dropdown list.
3. Enter the guest's name or bid number, or select the guest from the dropdown, or check the **Include All Guests checkbox**.
4. Set the checkbox accordingly to specify whether you want Auction Ticket purchases included on the receipt.

5. Click on the **Open PDF** button.
6. This will create and open a PDF file in a new browser window or tab. A new page in the PDF will be started for each person who has purchases. The page displays all of their purchases, optionally including ticket purchases. The amount they paid, as well as the Fair Market Value and Deductible Amount, is displayed for each purchase and are totaled at the bottom of the list.
7. You can either **Print** your PDF from the PDF view, or **Save** it to disk, for later printing or emailing to your attendees.

NOTES

- The Guest dropdown will search and list all Contacts on the Attendees campaign whose Status is not **RSVP No**. **If you have thousands of potential attendees on your Attendees campaign, and have not marked them RSVP No, you will significantly slow down the performance of this page. Before your auction, make sure you either remove contacts from this campaign who are not attending, or change their status to RSVP No.**
- There are two Salesforce Custom Settings that you can modify, to override the introductory text and footer text in the receipts. These can be found under Setup, App Setup, Develop, Custom Settings, Auction Receipts Footer 1 & 2 and Auction Receipts Intro 1 & 2. Please see the *[Auctions for Salesforce Installation & Configuration Guide](#)* for details.
- You can add additional fields from the purchase Opportunities in the table on the receipt. Please see the *[Auctions for Salesforce Installation & Configuration Guide](#)* for details on customizing this page.
- Some users of Auctions for Salesforce have created their own Auction Receipts report using **Conga Composer**. There is a report and sample Word document template provided as a starting point.
- In the picture below you will see that the Receipts can include an image. Please see the *[Auctions for Salesforce Installation & Configuration Guide](#)* for details on customizing this page.

DJH Consulting (Auctions) receipt for Luna Habib

April 22, 2013

Luna Habib
123 456th
Bellevue, WA 98005
bid number: 505

Dear Luna,

Thank you for attending our auction! Here is an itemized list of the items you purchased, and their potential tax deduction.

Your Purchases

Item	Amount	Fair Market Value	Deductible Amount	Auction Item Purchased
Tickets	\$100	\$60	\$40	
Cheese Balls	\$15	\$10	\$5	100
Tickets	\$15	\$30	\$0	
Wine Basket	\$25	\$20	\$5	FB100
Totals	\$155	\$120	\$50	

Thank you!



**Auctions
for Salesforce**

13. REPORTS

There are a set of useful Auction related reports installed with the Auctions package, and they are located in the **Auction Management** report folder. A few specific reports are worth mentioning.

- **Auction Checked In Status** – this report can be used during the auction to see who is not checked in, and thus may not have registered a credit card or other payment method with you.

- **Auction Items, Full Info** – this report can be used for exporting all the information on auction items that you will need to create an auction booklet, and placards for silent auction items.
- **Auction Reconciliation** – this report can be used after the auction to review all of the purchases that were entered by guest. When using this report, if you find any mistakes (common, if you are using volunteers during the event to do data entry), you can click on the appropriate opportunity to go to its record to modify it as appropriate. We like using Ctrl+click so the Opportunity opens in a new browser tab, so we don't lose our place in the report!
- **Conga Auction Receipts** – this report can be used as the data source for creating auction receipts using *Conga Composer*. In the Auction Management folder from the Documents tab, you will find a Word Mail Merge document called “**Conga Auction Receipt vxx**”. You can use this document with Conga to produce receipts. Feel free to modify this template to suite your needs; it will not be overwritten if you upgrade Auctions in the future.

Note that all of the Auctions reports can be modified by you, to work for your situation. They will not be overwritten if you upgrade Auctions in the future.

14. FREQUENTLY ASKED QUESTIONS

We actively manage a list of frequently asked questions on the support website at:

<http://djhconsulting.com/auctions-for-salesforce/auctions-for-salesforce-faq/>

You can easily access this web site by clicking on the **Actions Help** tab.

Here are some of the topics covered:

- How to handle Raffle tickets
- How to handle large quantities of the same donated item
- How to handle Bid Numbers for Couples
- How to handle Bid Numbers for people you don't know about before the auction
- Why can't some of my Users create Auctions and Auction Items?