Practicing with Auctions for Salesforce

People often ask about the easiest way to run a practice auction for their volunteers. I think that there are three ways you could set this up, depending on how much time you have and how close the rehearsal is to the actual event. One way is to use a Salesforce Sandbox, the other is to set up a "fake" or "test" Auction, and a third is to create test transactions with your actual Auction data. Since spring 2010, I've run seven events for three organizations with the *Auctions for Salesforce* package, and having tried all these ways, I'm now a fan of the third. There are more details on each option below, but first here are some general comments about the rehearsal.

Do arrange a rehearsal for your volunteers, particularly those handling Check In and Check Out, even if they are staff or they have helped at an event before. Something will be different to last year. Indeed, there have been new features added to *Auctions for Salesforce* every year, so that'll be the first change!

I've found that the **best time to hold the rehearsal** is a week to 10 days before the event. Too early and your volunteers will forget what you tell them. The day before the event you will have too many other things to worry about. At a week-ish out, you should have the complete list of items, the majority of your RSVPs and other information to help your volunteers know what to expect.

Always, always, **practice with the computers that you will be using on the night** - desktops, laptops, iPads or whatever. Log each volunteer into Salesforce on each machine as they will be at the event, and then label which one is which. That way, you can check passwords and activation links at the rehearsal, and it will save you time and worry on the day. (Also, I find that more people are comfortable with using Windows on a laptop that isn't their own, and it helps to provide a mouse - Salesforce involves a lot of scrolling and link-clicking, and not everyone is comfortable with touchpads and buttons on an unfamiliar machine.)

If you can't be at the event location for your rehearsal, at least **get outside your organization's firewall**. A key piece of your success on the night will be a reliable internet connection for multiple machines to run Salesforce, particularly if you are also going to validate and/or charge credit cards. So take any opportunity to double check that your team will be able to get online successfully at the event venue outside of your office.

Come to the rehearsal prepared to listen as well as talk, and **leave yourself time for the conversation**. The most complex process at the Auction will be registration (or Check In) so spend most of your time on that. Not only is this your volunteers' introduction to using *Auctions for Salesforce*, it will also be your guests' introduction to the event, and how efficiently they are welcomed and registered will set the tone for their whole experience.

When you are deep in the weeds of entering tickets and table captains, it can be easy to forget how your guests will feel when they arrive, and the opinions of your volunteers will help here. We've always ended up modifying and improving our Check In process after talking it through with the people who will be handling it on the night. If you have chosen your volunteers well, they will have been guests or helpers at other auctions, or they will know people who are coming to your event, and their reaction to your plans will hopefully be similar to your guests. For example, I often end up rewriting my troubleshooting tips, because the volunteers ask lots of "what if" questions - what do we do if someone comes with a different guest? what do we do if they don't want to give us a credit card?, etc. At our last rehearsal, we had spent the day deciding how to deal with unpaid tickets, and then changed our minds (for the best) when we talked it over with the volunteers.

Don't spend too long at your rehearsal on **data entry for purchases**. It is easier to just give people a quick refresher at the event and then get them working through the bid sheets. This is the hardest part to create test data for (who wants to complete test bids?), but in my experience people pick up the process really quickly when they have to do it.

Just make sure that your bid sheets are going to be easy to read, and make sure that you mark each sheet as entered when it's done. Occasionally you can lose a page of entered purchases before you save them, so checking on each sheet as you go is good practice - plus you are bound to get interrupted by something! I recommend your volunteers working in pairs, if you have a lot of items - one person to read and mark the sheet, and one to type. Also make a quick "cheatsheet" for each machine with the Item numbers for raffle tickets, Raise-the-Paddle, and anything else the volunteers will need to enter frequently.

I've also found that everyone worries a lot about how the technology will work beforehand and, on the night, using Salesforce is always the easiest part, and there is something else that causes problems. Even my most "computer-challenged" volunteers have got the hang of data entry quickly (*it is so well designed, thank you, David*) – but then there is always the unexpected guests, the snafus in the packing room, the missing raffle ticket sheet, or something that can throw off your well-rehearsed routine!!

Finally, always try to have one or two more experienced Salesforce users (preferably staff) who are **available as floaters / troubleshooters**, and train them separately from the rest of the volunteers. They will take on the customer service role, dealing with any issues that would otherwise hold up the Check In or Check Out line. They might need to remind a volunteer what to do next, they might be looking up information for someone else, they might be reprinting a name badge or dealing with changes to a Campaign Member record, or they might be looking up the bid sheet and the Purchase Opportunity record to change who won an item. Or they will just need the patience to go carefully over a receipt with a guest who's had a little too much to drink and can't remember what they bid on....

OK, so now back to how to set up the test data. Here are three different approaches.

In a Sandbox: the main challenge you'll face in testing in a developer sandbox is adding enough data to make it a valid experience. In addition, you will need to recreate all of your custom settings, including for your payment processor, and I've not been able to get everything working correctly, even when I had imported data. (If you have the luxury of a full-data sandbox, you won't have this problem, but this kind of sandbox is expensive since you have to pay based on your total user licenses for a whole year.)

With a test Auction in your production instance: create the test Auction record first - clearly labelled as a test - and note the IDs of the Auction record and the Campaigns associated with it. Decide which records you need for your rehearsal: I wouldn't worry too much about creating donated items opportunities, for example, but you will at a minimum need contacts with bid numbers and ticket opportunities, and auction items with item numbers. You could always duplicate your "real" Items and "real" Tickets for the test auction, so export those records via your data tool of choice (you'll need data from the Auction Items object and Opportunities of Record Type "Auction Ticket").

For the Auction Items, I'd add Test somewhere in the Item Name, so that you can spot them easily for deleting later, and then you need to change the Auction ID to your test auction. For the ticket opportunities, you need to change the Primary Campaign Source to the Tickets Campaign for your test auction (and maybe add Test Auction to the names). Then remove the original Salesforce IDs and import your new records.

Finally you'll need to add the Campaign Members (with their Bid Numbers) to the Attendees Campaign for your test auction: export the Contact IDs with the Bid Numbers, table allocations and other information from your existing Attendees Campaign and import duplicates into the Test Attendees Campaign.

Although setting up a test auction takes a lot of time, it is easy to delete the records once you have finished your practice (or even to ignore them if you don't have time to clean up until after the main event). Delete any Opportunities (Ticket or Purchase) associated with the test first, then delete the Auction, and finally delete the four Campaigns from the Auction.

Adding test records to the "real" Auction data: this option takes the least amount of time to set up, and you just have to be prepared to clean up afterwards. But if you are careful, I think this is the most effective way to practice. I doubt that your volunteers are going to want to create more than a couple of records each, so it isn't a lot of entries to find and delete, and instead, you get the benefits of them seeing exactly what to expect on the night.

These will be the real names and table allocations of the people they will be face-to-face with in a few days' time. These will be the actual items they are going to be entering. Bring your credit card, and get them to swipe the numbers. You can always click Cancel before you process the card, and even if you do run a card validation, you can delete it later.

After you have practiced, you'll need to look for the following to set everything straight again for your event:

- In the Attendees Campaign, look for any Member Status that has been changed to "Checked In" and set that back to "RSVP Yes", which is the default for a ticket buyer pre-event.

- Go to the Auctions Tickets tab and look for any Ticket Opportunities created during your rehearsal and delete them. Use Creation Date to help identify them.

- Go the Auction Purchases tab, and delete all the Purchase Opportunities created during the rehearsal (which may be all of them!). You can also do this from your regular Opportunities/Donations tab by using a Recently Created or New This Week view.
- Go to the Contacts tab and find any test contacts who were created to represent new people showing up at the Auction. You will want to delete them, along with any Account or Household that was created for them.
- Finally, if you used IATS or Click & Pledge to create any credit card validations (IATS calls these Customer Codes) you can also delete those. (Don't delete any test charges you might have made to a card, as this will confuse your reconciliations, but there should not have been any need to charge anything, unless you are setting up the payment processor for the very first time!)

Hope this helps and good luck with your events.

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