



Auctions for Salesforce

Auctions for Salesforce Installation & Configuration Guide Version 4.14

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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 Salesforce Enterprise instance, and used to manage all aspects of your auction event.

Auctions are managed in Salesforce using Campaigns and Opportunities.

Auctions are a custom object, with a set of campaigns used to track information about the auction. The campaigns are for Donated Items, Sponsors, Ticket Purchases, Attendees and their Auction Purchases. 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 Attendee 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, donations, 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.

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 Auction Donated Items (the items that come in), and Auction Items (the items to be sold at the event).

2. INSTALLATION INSTRUCTIONS

The Auctions for Salesforce package is available as a managed package and source code. Visit the AppExchange for the managed project at <https://sites.secure.force.com/appexchange/listingDetail?listingId=a0N30000003ILD7EAK>, or the GitHub project at <https://github.com/davidhabib/Auctions-for-Salesforce> to find the source code.

Note About Salesforce Setup



THIS DOCUMENT OUTLINES THE STEPS ONE TAKES TO CONFIGURE THE APPLICATION WHEN USING SALESFORCE'S SETUP MENU IN 'CLASSIC' MODE, I.E., NOT IN LIGHTNING EXPERIENCE. WHILE AUCTIONS FOR SALESFORCE DOES COMPLETELY SUPPORT LIGHTNING EXPERIENCE, THE LOCATION OF ITEMS IN SETUP ARE DIFFERENT UNDER LIGHTNING EXPERIENCE, AND EVEN DEPENDING ON SETTINGS IN CLASSIC SETUP. IF YOU CANNOT FIND A SETUP ITEM THAT THIS GUIDE REFERS TO, TRY USING THE SETUP SEARCH BOX IN THE UPPER LEFT CORNER OF THE SETUP PAGE.

2.1 Upgrading an Existing Installation of Auctions

If you are upgrading your Salesforce database to a newer version of the Auctions for Salesforce package, please still review this full installation guide, as it will cover new custom settings and configuration steps. Also review the Release Notes <http://djhconsulting.com/auctions-for-salesforce/> and the Upgrade Appendix at the end of this guide, which will contain some additional steps you must follow.

To upgrade, please follow the Installation Steps below.

2.2 Installing Auctions for the First Time

If you are installing Auctions for Salesforce for the first time into your Salesforce database, please carefully follow the instructions below.

2.3 Requirements Before Installing

PERMISSIONS

In order to successfully install the package and to have the tests run without any errors, you must ensure that the login used to install the package has permissions to create Campaigns (they must have Marketing User checked in their user account), as well as permissions to install packages. We encourage having a user who is a System Administrator do the installation to avoid these types of permission issues.

CREATING A DEFAULT CAMPAIGN RECORD TYPE

Since the Auctions package will create a new Campaign Record Type, you should first create a default Campaign Record Type, if you don't have one.

1. Go to Setup > App Setup > Customize > Campaigns > Record Types.
2. Click on the **New** button.
3. Use **—Master—** in the Existing Record Type picklist.
4. Fill in Record Type Label. We suggest **Default**
5. Use the Record Type Name that Salesforce fills in, when you fill out the Record Type Label.
6. For description, put in **“The default campaign record type to use for new campaigns.”**
7. Check **Active**.
8. Check the **Enable For Profile** checkbox in the header, so that all profiles can use this new record type.
9. Check the **Make Default** checkbox in the header, so that all profiles will default to using this new record type.
10. Click **Next**.
11. On the Assign Page Layouts page, choose Apply one layout to all profiles, and select **Campaign layout**, or whatever your default page layout should be.
12. Click **Save**.

CREATING A DEFAULT CAMPAIGN MEMBER RECORD TYPE

The Auctions package will also create a new Campaign Member Record Type. You should first create a default Campaign Member Record Type, if you don't have one.

1. Go to Setup > App Setup > Customize > Campaigns > Campaign Members > Record Types.
2. Follow the same set of steps as outlined above for Campaign Record Types.

CREATING A DEFAULT OPPORTUNITY RECORD TYPE

The Auctions package will also create three new Opportunity Record Types. You should first create a default Opportunity Record Type, if you don't have one.

1. Go to Setup > App Setup > Customize > Opportunities > Record Types.
2. Follow the same set of steps as outlined above for Campaign Record Types.

2.4 Installation Steps

Note that the AppExchange has evolved its user interface over time, so the following directions may not exactly match what you experience today.

1. Go to the Auctions for Salesforce listing on salesforce.com's AppExchange <https://sites.secure.force.com/appexchange/listingDetail?listingId=a0N300000003ILD7EAK>
2. Click **Get It Now**
3. Provide your contact information and click on **Submit**
4. Enter your Salesforce Username, Password and select whether you're a Salesforce Administrator, Salesforce User or a Free 30 Day Trial User. When finished, click **Continue**.
5. Designate if you would like to install the app in your Production (including Developer Edition) or if applicable, in to your Sandbox.
6. Once you've read through Salesforce.com's Terms of Service, click **Continue**.
7. Before installing you will have the option to review all the components of Auctions for Salesforce. The package name, version, description will also be noted. Simply click **Continue** to proceed.
8. Auctions for Salesforce requires access to your salesforce.com objects through the API. Please review and approve the required access by clicking on **Next**.
9. Choose security levels to determine which user profiles can access Auctions for Salesforce. **We recommend specifying Grant Access to all Users**. Click **Next** to continue.

10. Now you're ready to install the application! Just click the **Install** button and Auctions for Salesforce will be added into your salesforce.com account.
11. You will receive an email from Salesforce when the package has successfully been installed.
12. Almost done! You've now completed the initial installation of Auctions for Salesforce and you will see a summary screen that displays the application details. In addition **Auctions** now appears in the AppExchange drop-down menu in the upper right-hand corner of your salesforce.com account.
13. Follow the remaining notes in the *Requirements After Installation* section of this document.

2.5 Requirements After Installing

PICKLIST VALUES FOR NEW RECORD TYPES

Since Auctions for Salesforce adds several new record types (Campaigns, Campaign Members, Opportunities), you need to make sure that any custom picklist fields you have created, have their appropriate choices and default value specified for the new record types.

1. Go to Setup > App Setup > Customize > Campaigns > Record Types.
2. Click on the label for **GW Auction Campaign**
3. In the Picklists Available for Editing section, click on the **Edit** link for each picklist, and make sure you have appropriate Values and Defaults.
4. Do the same steps for Campaign Members new record type, **GW Auction Attendee**.
5. Do the same steps for Opportunities three new record types, **GW Auction Donated Item**, **GW Auction Purchased Item**, and **GW Auction Ticket**.

SALES PROCESS

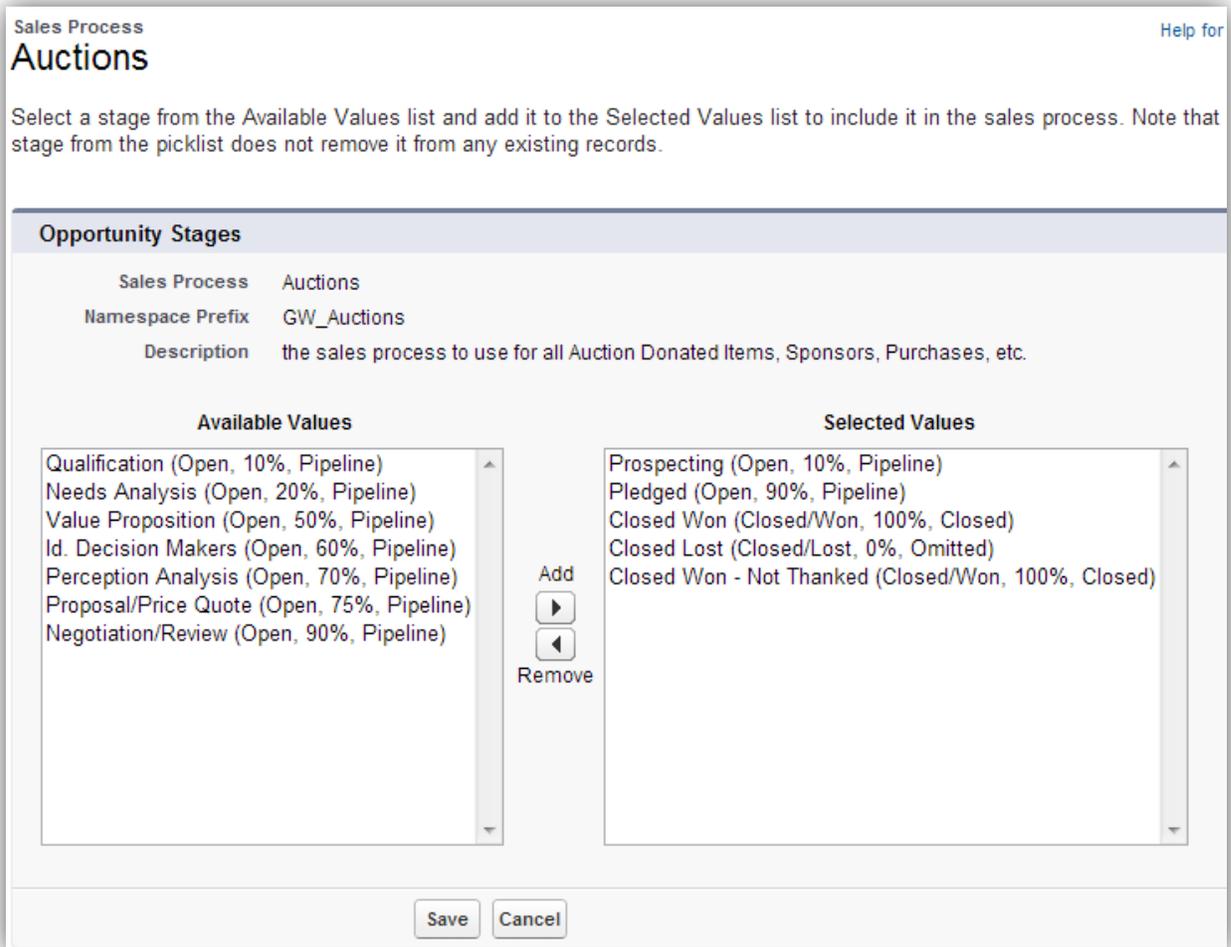
All Auction related Opportunities use the Auctions Sales Process that is installed with the Auctions package. The package was designed using the following stages, of which only the two bold stages are used by the Auctions package code.

- Prospecting (Open, 10%, Pipeline)
- **Pledged (Open, 90%, Pipeline)**
- Closed Won (Closed/Won, 100%, Closed)
- Closed Lost (Closed/Lost, 0%, Omitted)

- **Closed Won – Not Thanked (Closed/Won, 100%, Closed)**

Only those Stages that exist in your Salesforce instance are included in the Auction Sales Process when it gets installed. You need to manually review the Auction Sales Process, and add any Stages that you use in your instance that make sense for the various Auction Opportunities. In addition, you need to specify in Custom Settings (described below), what Stages to use for “Pledged” and “Closed Won – Not Thanked”.

 **WE HAVE ENCOUNTERED A SCENARIO WHERE “CLOSED WON – NOT THANKED” WAS INSTALLED BY THE PACKAGE, BUT IT WAS MARKED “INACTIVE” AND HAD THE WRONG ATTRIBUTES SAVED WITH IT. IF YOU RUN INTO THIS, GO AHEAD AND DELETE THIS STAGE, AND THEN RECREATE IT WITH THE ATTRIBUTES AS ABOVE.**



The screenshot shows the 'Sales Process' configuration page for 'Auctions'. At the top, it says 'Sales Process Auctions' with a 'Help for' link. Below this is a note: 'Select a stage from the Available Values list and add it to the Selected Values list to include it in the sales process. Note that stage from the picklist does not remove it from any existing records.'

The main section is titled 'Opportunity Stages' and contains the following details:

- Sales Process:** Auctions
- Namespace Prefix:** GW_Auctions
- Description:** the sales process to use for all Auction Donated Items, Sponsors, Purchases, etc.

Below this are two lists of stages:

- Available Values:**
 - Qualification (Open, 10%, Pipeline)
 - Needs Analysis (Open, 20%, Pipeline)
 - Value Proposition (Open, 50%, Pipeline)
 - Id. Decision Makers (Open, 60%, Pipeline)
 - Perception Analysis (Open, 70%, Pipeline)
 - Proposal/Price Quote (Open, 75%, Pipeline)
 - Negotiation/Review (Open, 90%, Pipeline)
- Selected Values:**
 - Prospecting (Open, 10%, Pipeline)
 - Pledged (Open, 90%, Pipeline)
 - Closed Won (Closed/Won, 100%, Closed)
 - Closed Lost (Closed/Lost, 0%, Omitted)
 - Closed Won - Not Thanked (Closed/Won, 100%, Closed)

Between the two lists are 'Add' and 'Remove' buttons. At the bottom of the form are 'Save' and 'Cancel' buttons.

MODIFY AUCTION STAGES

1. Go to Setup > App Setup > Customize > Opportunities > Sales Processes

2. Click on Edit for the **Auctions** Sales Process
3. The right list shows you what is currently allowed for Auction's sales process.
4. Select and add any additional stages from the left list to enable them for Auction's sales process.
5. Click **Save**.

If you don't have stages for Pledged or Closed Won - Not Thanked, and you want to create those:

6. Go to Setup > App Setup > Customize > Opportunities > Fields
7. Click on **Stage** from the standard fields at the top
8. Click on **New** for the Opportunity Stages Picklist Values
9. Enter the appropriate values to create the new stage.
10. Make sure to add it to the **Auctions** Sales Process.
11. Click **Save**

BUTTON OVERRIDES

Auctions for Salesforce makes use of Opportunities for tracking Auction Donated Items, Auction Tickets, and Auction Purchases. We have provided a custom page for editing Auction Tickets. From the Tickets tab, Auction's page will always be used. But if you also want editing of a Ticket Opportunity to use Auction's page from the Opportunities tab, you must override Salesforce's default Opportunity Edit button. Follow these steps:

1. Go to Setup > App Setup > Customize > Opportunities > Buttons and Links
2. Click the Edit link for the **Edit** button.
3. In the Override Properties page, click on the **Visualforce Page** radio button, and choose **AuctionEditOpportunity [GW_Auctions__AuctionEditOpportunity]** from the picklist.
4. Click **Save**

ADDING NEW TABS TO THE APPLICATION

If you upgrade an existing installation of Auctions for Salesforce, you may need to add several of our new tabs to the Auctions application.

1. Go to Setup > App Setup > Create > Apps

2. Click the **Edit** link for the Auctions application.
3. Modify the Selected Tabs list to include:
 - Home
 - Contacts
 - **Auctions Help**
 - **Donated Items**
 - **Auction Items**
 - **Tickets**
 - **Purchases**
 - **Check In**
 - **Check Out**
 - **Auction Receipts**
 - Reports
4. Update the App Logo by clicking on **Insert an Image**
5. In the File Location picklist, choose **Auction Management**
6. Click on **Auctions Logo V3**
7. Check on the Overwrite users' personal custom app customizations checkbox.
8. Make sure all appropriate Profiles in the **Assign To Profiles** section are marked Visible.
9. Click **Save**

UPDATING OPPORTUNITY PAGE LAYOUTS

Auctions for Salesforce adds multiple custom fields to Opportunities for Donated Items, Tickets, and Purchases. Page layouts are provided for each of these unique record types, but any new fields added to the package since your original installation will not be automatically added to the page layouts. The following instructions will step you through the process of modifying your page layouts. These instructions assume you have permissions to do this.

1. Go to Setup > App Setup > Customize > Opportunities > Page Layouts.
2. Click on the **Edit** link for the **Auction Donated Item Layout**.
3. Make sure your layout includes the following fields:

Donated Item Details			
Auction Donated Item Name	Sample Auction Donated Item Name	Number of Items	3,573
Amount	\$123.45	Number Used	90,752
Procurred By	Sample Contact	Number Available	91,940
Auction Donated Item Restrictions	Sample Auction Donated Item Restrictions	Delivery Status	Sample Delivery Status

4. Drag/Drop any of the missing Donated Item fields into your layout..
5. Click on the **Save** button.
6. Follow these same steps for the **Auction Purchased Item Layout**.

Auction Purchased Item Details			
Auction Item Purchased	Sample Auction Item	Amount	\$123.45
Auction Item Name	Sample Auction Item Name	Auction Non-Deductible Amount	\$123.45
Bid Number	9,454	Auction Deductible Amount	\$123.45

7. Follow these same steps for the **Auction Ticket Layout**.

Auction Ticket Details			
Amount	\$123.45	Auction Non-Deductible Amount	\$123.45
Number of Tickets	288	Auction Deductible Amount	\$123.45

UPDATING AUCTION ITEM PAGE LAYOUT

If you are updating from a previous version of the package, you may need to add new fields to the Auction Item's page layout.

1. Go to Setup > App Setup > Create > Objects
2. Click on the Label for **Auction Item**
3. Scroll down to the Page Layouts section, and click on the **Edit** link for **Auction Item Layout**

4. Drag/Drop any of the missing Donated Item fields into your layout.
5. Click on the **Save** button.

Information (Header visible on edit only)

* Auction Item ID	Sample Auction Item ID	Owner	Sample User
* Auction	Sample Auction	Minimum Bid	\$123.45
* Auction Item Name	Sample Auction Item Name	Guaranteed Bid	\$123.45
Category	Sample Category	FMV Rollup	\$123.45
Auction Group	Sample Auction Group	FMV Override	\$123.45
Fair Market Value	\$123.45	Display Board	Sample Display Board
Description	Sample Description	Restrictions	Sample Restrictions
Donor Recognition	Sample Donor Recognition		
Treat Purchase as Gift	<input checked="" type="checkbox"/>		
Allow Multiple Purchases	<input checked="" type="checkbox"/>		



THIS COMPLETES THE INSTALLATION STEPS THAT MUST BE FOLLOWED. WE STRONGLY ENCOURAGE YOU TO CONTINUE THROUGH THE NEXT SECTION, *FEATURE CONFIGURATION*, IN ORDER TO GET ALL THE FEATURES OF AUCTIONS FOR SALESFORCE WORKING CORRECTLY IN YOUR SALESFORCE INSTANCE.

3. FEATURE CONFIGURATION

3.1 Custom Settings

The Auctions package includes a set of custom settings named AuctionSettings. It includes various fields that you can modify to customize the Auctions package to work with your Salesforce instance. Here are the settings and their default values:

Setting Name	Default Value	Description
Name		Any string you want to label this group of settings. E.g., My Auction Settings.
Number of Purchase Grid Rows	15	The number of empty rows to display in the New Auction Purchases Wizard.
Opportunity Stage Won	'Closed Won -	The Opportunity Status for auction purchases that are

Not Thanked	Not Thanked'	paid, but haven't yet had a thank you sent.
Opportunity Stage Pledged	'Pledged'	The Opportunity Status for auction purchases that are pledged, but not yet paid.
Opportunity Gift Donor Role	'Donor'	The OpportunityContactRole to use for donations by individuals. . Note that Nonprofit Success Pack users should make sure this value is 'Donor' to be consistent with NPSP.
Opportunity Gift Org Donor Role	'Organizational Donor'	The OpportunityContactRole to use for donations from Organizations.
Campaign Status Default	'In Progress'	The Campaign Status value to set for the Auction's auto-created campaigns.
Opportunity Record Type Gift	'GW Auction Purchased Item'	The Opportunity record type to use for straight cash gifts/donations. Note that Nonprofit Success Pack users should change this value to 'Donation' to be consistent with NPSP.
Auction Receipts Intro Text 1 (and 2)		Introductory text to include in the Auction Receipts PDF. This allows you to customize the receipt to better reflect your organization. Auction Receipts Intro Text 1 and Auction Receipts Intro Text 2 are appended together, to give you a maximum of 510 characters. Note that you can include simple HTML tags in the text for formatting.
Auction Receipts Footer Text 1 (and 2)		Text to include in the Auction Receipts PDF, after the table of purchases. This allows you to customize the receipt to better reflect your organization. Auction Receipts Footer Text 1 and Auction Receipts Footer Text 2 are appended together, to give you a maximum of 510 characters. Note that you can include simple HTML tags in the text for formatting. You can even include an image from your Salesforce instance or your website, using the HTML tag.
Credit Card Validate URL Formula		A URL that invokes the virtual terminal of a credit card processor to capture and validate their credit card info. The guest's contactId will be substituted into the URL wherever you have {0}. The auctionId will be substituted into the URL wherever you have {1}. See the <i>Integrating with a Payment Processor</i> section for details.

Credit Card Charge URL Formula		A URL that invokes the virtual terminal of a credit card processor to charge their credit card. The guest's contactId will be substituted into the URL wherever you have {0}. The auctionId will be substituted into the URL wherever you have {1}. The amount to charge will be substituted wherever you have {2}. See the <i>Integrating with a Payment Processor</i> section for details.
Allow Duplicate Bid Numbers	Unchecked	Whether to disable the trigger that enforces unique Bid Numbers for each attendee per Auction. We encourage user's to keep this unchecked, and avoid having multiple people with the same bid number. When dealing with couples, we recommend only assigning a single bid number to the person whose credit card will be used for any purchases.
Number of Records Per Page	25	Specifies how many records to display per page on the Auction related tabs.
Payment Processor Window Parameters	"menubar=0, status=0, toolbar=0, width=700, height=600".	A string of comma separated parameter values to the javascript window.open() method, that is used when displaying the Payment Processor Virtual Terminal in the Check In, Check Out, and New Ticket Wizard pages. This parameter is only used if "Show Payment Processor On Page" is not checked.
Show Payment Processor On Page	Unchecked	If checked, the payment processor's terminal will be shown within the Auction page. If not checked, the terminal will display in a new browser window or tab.
Payment Processor Page Height	300px	If "Show Payment Processor On Page" is checked, this field is used for the height of the area to display the payment processor's terminal. It should be a number followed by either px or % to represent pixels or percentage of total page height.
Opportunity Payment Method Field		The full developer name of a Payment Method field on Opportunity, that the Check Out page and New Ticket Wizard should save the Payment Method into. If using the Nonprofit Success Pack and Payments, this data will automatically be saved in the Payment.
Opportunity Check		The full developer name of a Check Number field on Opportunity, that the Check Out page and New Ticket

Number Field	Wizard should save the Check Number into. If using the Nonprofit Success Pack and Payments, this data will automatically be saved in the Payment.
Donated Item Converter Batch Size 25	The batch size of new Auction Item rows to display in the Donated Item Converter page at a time.
Set Account On New Opportunities	If set, then Auctions will set the Account field on newly created Auction related Opportunities (Donated Items, Tickets, and Purchases). If you are using the Nonprofit Success Pack and the 1-to-1 Account model or Household Account model, Auctions will automatically do this.
Contact Household Field	The developer name of a lookup field to households on Contacts. If using the Nonprofit Success Pack, Auctions will automatically use np002__Household__c for the 1-to-1 Account model and AccountId for the Household Account model. This setting is used by the Auction Receipts page, and the Assign Bid Numbers page.
Contact Household Name Field	The developer path name to the name field on households from Contact. If using the Nonprofit Success Pack, Auctions will automatically use np002__Household__r.Name for the 1-to-1 Account model and Account.Name for the Household Account model. This setting is used by the Auction Receipts page, and the Assign Bid Numbers page.
Contact Household Greeting Field	The developer path name to the informal greeting field on households from Contact. If using the Nonprofit Success Pack, Auctions will automatically use np002__Household__r.np002__Informal_Greeting__c for the 1-to-1 Account model and Account.np002__Informal_Greeting__c for the Household Account model. This setting is used by the Auction Receipts page.

In order to modify any of these settings, do the following:

6. Go to Setup > App Setup > Develop > Custom Settings
7. Click on the **Manage** link for AuctionSettings
8. If there is already an AuctionSettings record listed, click on the **Edit** link.

9. If there is no AuctionSettings record listed, click on the **New** button, and fill out the AuctionSettings Information.
10. You can specify anything for the Name field.
11. Click **Save**

Custom Setting Definition Help for this Page ?

AuctionSettings

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail Edit Delete Manage ←

Label	AuctionSettings	Object Name	AuctionSettings
API Name	GW_Auctions__AuctionSettings__c	Setting Type	List
Visibility	Public	Description	Holds all settings used in Auctions that the user is able to modify for their organization.
Namespace Prefix	GW_Auctions	Created Date	1/25/2010 12:45 PM
Last Modified Date	5/7/2013 4:31 PM	Record Size	4,465

Custom Fields New

Action	Field Label	API Name	Data Type	Modified By
Edit	Allow Duplicate Bid Numbers	GW_Auctions__Allow_Duplicate_Bid_Numbers__c	Checkbox	David Habib, 4/26/2013 8:11 AM
Edit	Auction Receipts Footer 1	GW_Auctions__Auction_Receipts_Footer_1__c	Text Area(255)	David Habib, 4/29/2013

People frequently get confused and end up on this detail page (shown above). This is the page that shows the definition of the Auction Settings. You must click on the **Manage** button in order to specify the values you want for the settings.

3.2 Nonprofit Success Pack Considerations

We have attempted to ensure that the Auctions package is compatible with Salesforce.org's Nonprofit Success Pack. We are aware of the following issues that one needs to take into consideration when using Auctions with the Nonprofit Success Pack.

One-to-One Users

If you are using the One-to-One Contact/Account model, the rollup summary fields on the Account that are displayed on the Contact, such as Last Transaction Date and Lifetime Transaction Total, include the Amounts of all Auction opportunities (donations, tickets, and purchases). This can be misleading. If a contact attends your auction and purchases a vacation package for \$1000, do you really want to treat that as a \$1000 donation to your organization? All of the auction opportunities do include the fields Auction Deductible Amount and Auction Non-Deductible Amount, which allow you to track the true value of each opportunity. You should go to the Household Settings tab, and modify the Opportunity Rollups Record Type section to specify which Auction Opportunity record types you wish to exclude.

OTHER ISSUES

We have encountered a scenario where the “All Auction Opportunities” view was incorrectly installed with the package. This view is available on the standard Opportunities tab. If you select it, and it is not showing the auction related opportunities, then edit the view, and in the filter on Opportunity Record Type, remove whatever text is in the Value field, and use the lookup button to select the three appropriate auction record types (GW Auction Donated Item, GW Auction Purchased Item, GW Auction Ticket).

3.3 Periodic Auction Setting Adjustments

The Auctions package is designed to be used in an ongoing fashion, for each auction your organization hosts. There are some field picklists that are used in the Auction Item object that you will want to possibly modify for each new auction. Note that modifying these picklists will not affect any information already saved in Salesforce, so changing the values won't affect your old auction history.

- Auction Group (default values are Live round 1, Live round 2, Silent round 1, and Silent round 2)
- Category (default values are Children, Excursions, Food and Beverage, Home and Garden, and Sporting)

In order to modify any of these settings, do the following:

1. Go to Setup > App Setup > Create > Objects
2. Click on link for **Auction Item** (the label, not the Edit link)
3. Scroll down to the Custom Fields & Relationships section

4. Click on the label (not Edit link) for the appropriate picklist field (Auction Group, Category)
5. Scroll down to the Picklist Values section
6. From here you can click **New** to add additional picklist values, click **Delete** links to remove picklist values, and click **Reorder** to sort the picklist values.
7. Any of these changes are saved immediately to the database.

Similarly, there are the following picklists on Campaign Members that you can modify:

- Meal Preference (default values are Beef, Poultry, Fish, Vegetarian)

In order to modify any of these settings, do the following:

1. Go to Setup > App Setup > Customize > Campaigns > Campaign Members > Fields
2. Scroll down to the Custom Fields & Relationships section
3. Click on the label (not Edit link) for the appropriate picklist field (Meal Preference)
4. Scroll down to the Picklist Values section
8. From here you can click **New** to add additional picklist values, click **Delete** links to remove picklist values, and click **Reorder** to sort the picklist values.
5. Any of these changes are saved immediately to the database.

4. CUSTOMIZING AUCTION PAGES

With version 3.0, Auctions now allows you to specify the fields you want displayed on Auctions' pages, using the Salesforce Field Set functionality. This allows you to include custom fields and standard fields that you want the user to fill out. Here are the general steps to customize a Field Set.

1. Go to Setup > App Setup > Customize > Opportunities > Field Sets
2. You will see 9 Field Sets from the Auctions package.
3. Click on the **Edit** link for one of the Field Sets.
4. This will display a page that is very similar to the Page Layout Editor.

5. To add fields to the Field Set, just drag them from the top section into the **In the Field Set** box.
6. To remove fields from the Field Set, mouse over the field, and click the **X** icon.
7. To reorder fields in the Field Set, just use drag and drop.
8. When you are done, click **Save**.



EVEN THOUGH THE EDITOR ALLOWS YOU TO DRAG RELATED FIELDS FROM VARIOUS LOOKUP FIELDS, THE AUCTION PAGES ONLY SUPPORT FIELDS DIRECTLY ON OPPORTUNITIES.

Similarly, there are field sets you can modify on the custom object **Auction Item**.

1. Go to Setup > Create > Objects
2. Click on the label for Auction Item
3. Scroll down to the Field Sets section
4. You will find 3 separate field sets you can edit.

4.1 Tabs that can be customized

DONATED ITEMS TAB

The list of fields displayed on this tab is controlled by the Opportunity Field Set **AuctionDonatedItemsTabFS**.

AUCTION ITEMS TAB

The list of fields displayed on this tab is controlled by the Auction Item Field Set **AuctionItemsTabFS**.

TICKETS TAB

The list of fields displayed on this tab is controlled by the Opportunity Field Set **AuctionTicketsTabFS**.

PURCHASES TAB

The list of fields displayed on this tab is controlled by the Opportunity Field Set **AuctionPurchasesTabFS**.

4.2 Pages that can be customized

AUCTION NEW DONATED ITEM WIZARD

The New Donated Item Wizard is the page you see when you click on the New button from the Donated Items tab. In the top section of this wizard, you can customize the Opportunity fields with the Field Set **AuctionNewDonatedItemWizardFS**. In the bottom section (which starts out hidden), you can customize the Auction Item fields with the Auction Item Field Set **AuctionNewDonatedItemWizardFS**. Since Auction Item is a custom object, you access its Field Sets from its detail page under Setup, App Setup, Create Objects.

AUCTION NEW TICKET WIZARD

The New Ticket Wizard is the page you see when you click on the New button from the Tickets tab. This wizard is also displayed when you edit an existing Ticket Opportunity, if you follow the installation instructions to override the Opportunity Edit button. In the top section of this wizard, you can customize the Opportunity fields with the Field Set **AuctionNewTicketWizardFS**. In the bottom section (which starts out hidden), you can customize the Campaign Member fields with the Campaign Member Field Set **AuctionNewTicketWizardFS**.

AUCTION NEW PURCHASE WIZARD

The New Purchase Wizard is the page you see when you click on the New button from the Purchases tab. In this wizard, you can customize the Opportunity fields with the Field Set **AuctionNewPurchaseWizardFS**.

AUCTION CHECK IN

The Auction Check In page is displayed when you click on the Check In tab, or the Check In button on the Auction Tickets tab. This page supports four field sets from different objects! In the left section of this page, you can customize the Contact fields with the Contact Field Set **AuctionCheckInFS**. Similarly, you can customize the Campaign Member fields on the left side with the Campaign Member Field Set **AuctionsCheckInCMFS**. You can also customize the Campaign Member fields displayed in the Guest table, using the Campaign Member Field Set **AuctionsCheckInGuestsCMFS**. Finally, you can customize the fields that get displayed in the New Ticket section by modifying the Opportunity Field Set **AuctionCheckInFS**.

AUCTION CHECK OUT

The Auction Check Out page is displayed when you click on the Check Out tab. You can add additional fields to be displayed in the Opportunity table by customizing the Opportunity Field Set **AuctionCheckOutFS**.

AUCTION RECEIPTS

The Auction Receipts PDF is displayed when you click on Open PDF from the Auction Receipts tab, or the Check Out tab. You can customize the Opportunity fields with the Field Set **AuctionReceiptsFS**.

AUCTION DONATED ITEM CONVERTER

The Donated Item Converter is displayed when you click on the Donated Item Converter button from either the Donated Items tab or the Auction Items tab. You can customize which fields are displayed in the Auction Items grid by modifying the Auction Item Field Set **AuctionDonatedItemConverterFS**.

5. INTEGRATING WITH A PAYMENT PROCESSOR

If you are using a payment processor that provides integration with Salesforce, such as **Brickwork by IATS Payments** or **Click & Pledge**, Auctions for Salesforce provides three integration points that can be configured. These integration points are on the Check In tab, Check Out tab, and New Ticket Wizard.

5.1 Check In

If you provide a string for the **Credit Card Validate URL Formula** custom setting, the Check In page will then use this property to open a new browser window (or panel) on the provided URL. You will need to provide a URL that invokes the virtual terminal of a credit card processor to capture and validate their credit card info. Various parameters can be specified in the URL Formula, and will be replaced at runtime by data from the page. Here is the list of supported parameters. Note that not all parameters are needed by all providers. Please see the examples and check with your payment processor.

Parameter	Runtime Value
{0}	ID of the Contact
{1}	ID of the Auction
{2}	Amount
{3}	ID of the current Session
{4}	Partner Server URL
{5}	ID of the Salesforce Organization
{6}	A comma separated list of Opportunity ID's, for either Ticket Purchase Opportunities or Auction Item Purchase Opportunities

For example, the guest's contactId will be substituted into the URL wherever you have {0}, and the auctionId will be substituted into the URL wherever you have {1}.

The following is a sample string you might use for **Brickwork by IATS Payments**:

```
https://iatspayment.na11.visual.force.com/apex/IATSPayments
Contact?id={0}&objectType=contact&aid={1}&gwa=s
```

You would modify this URL to use the correct server instance for your database in the place of na11 above.

The following is a sample string you might use for **Click & Pledge**:

```
https://evt.salesforce.cloud.clickandpledge.com?SFOrgID={5}
&SFeVTID=<you-must-fill-in>&CnPAID=<you-must-fill-in>
&SFContactID={0}&b1=Auction%20Validation%20Only&up1=0&PreAuth=1&subtxt=Save%20Payment%20Info
```

You will need to fill in the correct Click & Pledge eVT ID (SFeVTID in the URL) and Account ID (CnPAID in the URL).

Please refer to the documentation for your payment processor to find out what the URL for their virtual terminal is.

5.2 Check Out

If you provide a string for the **Credit Card Charge URL Formula** custom setting, the Check Out page will then use this property to open a new browser window (or panel) on the provided URL. You will need to provide a URL that invokes the virtual terminal of a credit card processor to charge their credit card. Please refer to the table for Check In to see what the supported URL Formula parameters are.

The following is a sample string you might use for **Brickwork by IATS Payments**:

```
https://iatspayment.na11.visual.force.com/apex/IATSPayments  
Contact?id={0}&objectType=contact&aid={1}&amt={2}&gwa=c
```

The following is a sample string you might use for **Click & Pledge**:

```
https://evt.salesforce.cloud.clickandpledge.com?SFOrgID={5}  
&SFEventID=<you-must-fill-in>&CnPAID=<you-must-fill-in>  
&SFContactID={0}&b1=Auction%20Purchases&up1={2}&showTotal=1  
&SessionId={3}&ServerURL={4}&OppIDs={6}
```

5.3 New Ticket Wizard

The same **Credit Card Charge URL Formula** custom setting is used in the New Ticket Wizard to open a new browser window (or panel) on the provided URL.

5.4 Controlling the Window Display

The Check In tab, Check Out tab, and New Ticket Wizard will also use either the **Payment Processor Window Parameters** custom setting to control the display of the new browser window that is opened, or the **Payment Processor Page Height** custom setting to control the height of the panel on the page, depending on the custom setting **Show Payment Processor On Page**. These settings allow you to specify a reasonable size for the window or panel that looks best for their virtual terminal.

For **Payment Processor Window Parameters**, the default value is “menubar=0,status=0,toolbar=0,width=700,height=700”, but you can modify this for any parameters that are supported by your browser’s window.open() method. For **Payment Processor Page Height**, the default value is 250px.

5.5 Payment Processor Considerations

VERSION

We recommend that you use the latest version of your payment processor's package that integrates with Salesforce. Packages from **Brickwork by IATS Payments** and **Click & Pledge** from before April 2012 do not have Auctions for Salesforce integration. This would be *IATSPayments* version 2.3 and later, and *Click & Pledge Payment as a Server* version 4.32 and later.

SETTINGS

It is beyond the scope of Auctions for Salesforce to go through the steps for installing and configuring the Payment Processor's package. Please refer to their documentation to ensure you have their package correctly integrated into your Salesforce instance.

OPPORTUNITY CREATION

It is very important to understand that all of the Opportunities for Auction Donated Items, Tickets, and Purchases will be created by Auctions for Salesforce. Therefore we recommend that you set your payment processor to **NOT** create Opportunities for credit card charges related to your auction, to avoid duplication of data.

For **Click & Pledge**, this can be set in the Embedded Virtual Terminal (eVT) that you set up for Auctions to use.

For **Brickwork by IATS Payments** the URL parameter **gwa=c** tells their virtual terminal to not create an Opportunity for the charge.

6. INTEGRATION WITH EVENT TICKETING SYSTEMS

If you use an online event ticketing system that can write information to Salesforce you must consider what information is written when also using Auctions for Salesforce. We recommend you specify the Auction Attendee Campaign to add imported contacts or leads to. This will not create an associated Opportunity reflecting the ticket purchase, but it will get the contacts imported in a way that works for Auctions. If you need the ticket purchase information in Salesforce you will have to manually add the Opportunities.

This integration information is based on testing with **Click & Pledge Events** and **Eventbrite Sync**.

APPENDIX: UPGRADE NOTES

Please follow all upgrade instructions from your current installed version to the new version you are installing. I.e., if you have version 2.14, please follow the instructions for 2.15, 2.18, and 3.0.

Upgrading to 4.0

1. Add the new Opportunity field **Auction Donated Item Restrictions** to the Opportunity page layout **Auction Donated Item Layout**.
2. Add the new Auction Item field **Allow Multiple Purchases** to the page layout **Auction Item Layout**.

Upgrading to 3.0

Version 3.0 adds the **Check In** and **Check Out** tabs that must be manually added to the Auctions application. Review the ADDING NEW TABS TO THE APPLICATION in section 2.5 of this document.

Version 3.0 adds a custom page override for editing Ticket Opportunities. Review the BUTTON OVERRIDES in section 2.5 of this document.

Upgrading to 2.18

Version 2.18 contains a much nicer application logo, and a new tab. In order to replace the current logo, and add the tab, please follow these steps:

3. Go to Setup > App Setup > Create > Apps.
4. Click on the **Edit** link for the Auctions application.
5. Click on the **Insert an Image** button that appears over the logo.
6. In the dialog that displays, choose Auction Management from the File Location dropdown.
7. Click on the link for **Auctions-SF-Header3.gif**. This should close the dialog and update the logo.
8. In the Available Tabs listbox, select the **About Auctions** tab.
9. Click on the **Add** button, to move **About Auctions** over to the Selected Tabs listbox.
10. Click **Save**

Upgrading to 2.15

Version 2.15 added a new Campaign custom field, Auction Campaign Type, which is now used instead of the standard Type field. We had to do this, because Salesforce does not add picklist values to existing fields when a package is installed or upgraded. If you are upgrading from an older version, you must perform the following steps.

1. Customize all Auction reports to filter on 'Auction Campaign Type' rather than 'Type'
2. Modify the page layout for Auction Campaigns, adding the field 'Auction Campaign Type' and removing the field 'Type'
3. Modify all of your existing auction campaign records to set the 'Auction Campaign Type' field to the correct value.