



Live Event Frequently Asked Questions - Rev 0

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Pre-Event

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

1. For events linked to an auction, we recommend a different guide and FAQs. Find the guide here: <https://support.donorview.com/en/support/solutions/articles/9000236081-auction-event-guide-and-checklist> And the auction-event FAQs here: <https://support.donorview.com/en/support/solutions/articles/9000236625-faqs-for-an-auction-event>
2. An outline and checklists are available for creating and managing an event here: <https://support.donorview.com/en/support/solutions/articles/9000236150-event-management-outline-checklist>
3. General database overview - <https://vimeo.com/912569881> (Password: DV2017)
4. Event Training Videos (all use password: DV0217)
 - a. Event Management (Old User Interface) - <https://vimeo.com/196866673>
 - b. Single Day Event Setup - <https://vimeo.com/736154790>
 - c. Event & Attendee Questions - <https://vimeo.com/732471168>
 - d. Event Calendar - <https://vimeo.com/741949248>
 - e. Event Summary Grid - <https://vimeo.com/735773292>
 - f. Events Detail Grid - <https://vimeo.com/736213633>
 - g. Event Attendance Grid - <https://vimeo.com/728826049>
 - h. Event Table Assignments - <https://vimeo.com/741142781>
 - i. Event Assignments - <https://vimeo.com/735850438>
 - j. Event Auto Reminders - <https://vimeo.com/722260141>
5. Event Support Articles - <https://support.donorview.com/support/solutions/9000074823>
6. Mobile App - <https://vimeo.com/738265241> (Password: DV2017)
7. Donor Portal - <https://vimeo.com/197283655> (Password: DV2017)
 - a. Some donors may encounter issues logging in to their donor portal account. You can see all the most common issues and how to address them in this support article: <https://support.donorview.com/support/solutions/articles/9000218757-how-can-i-help-a-donor-who-has-trouble-logging-in-to-the-portal->

Software, Mobile App & Portal

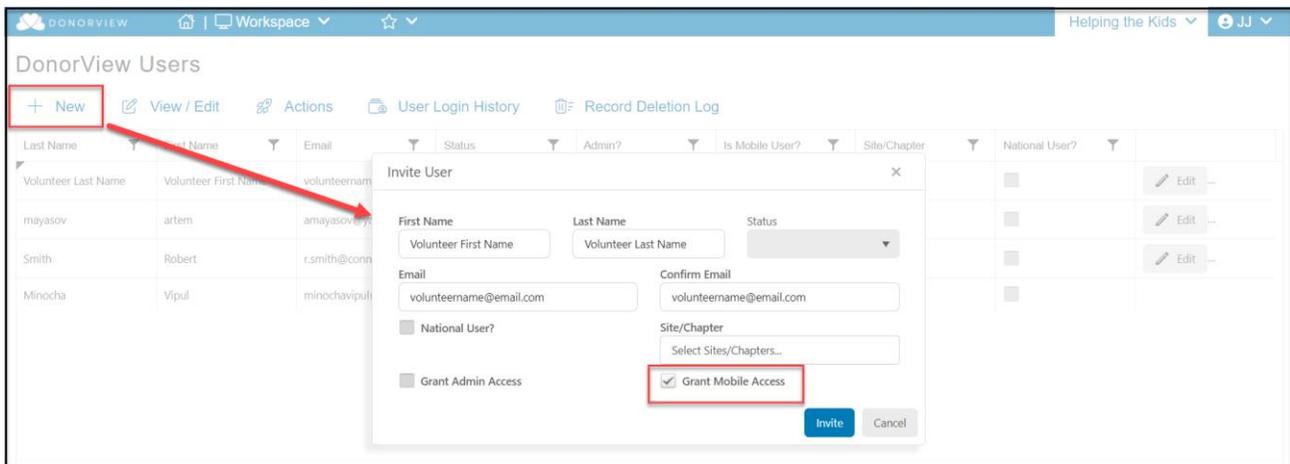
What are the differences between the cloud-based version of the DonorView software platform, the mobile app, and the donor portal?

1. The cloud-based version of DonorView software is accessed via a browser like Chrome or Firefox typically using a laptop or desktop computer.

- a. The software platform allows access to all of the back end features of the software like building and managing the event registration, auction and donation pages.
 - b. It is also where you can update guest information, record auction add-ons, and manually check-in and check-out guests.
 - c. Some activities performed during an event can only be done using the software platform.
2. There is also a mobile app version of the software called **DV Connect** available from iTunes.
- a. The mobile app is a pared down version of the software platform and has limited functionality compared to the desktop/laptop software.
 - b. The same user email and password is required to login to desktop version and the mobile app.
 - c. The mobile app is not currently available for Android devices.
 - d. The mobile app can be used at events to check-in guests, sell tickets and other items, and swipe credit cards to store in a constituent's account.
 - e. See more about the features of the mobile app in this video.
<https://vimeo.com/738265241> (Password: DV2017)
3. The Donor Portal allows the donors to access their own information and manage their own accounts.
- a. With the advanced portal feature activated, donors can access the event calendar and event pages to purchase tickets and manage their own guest list.
 - b. You can learn more about the advanced portal features in this video Donor Portal - <https://vimeo.com/197283655> (Password: DV2017)
 - c. Without the advanced portal features activated, donor portal activities are limited to just updating contact information or accessing active auction or peer-to-peer campaigns.

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

1. An admin user will need to send new user invitations to the personnel supporting the event that will need access to the back end of the software or use the mobile app.
2. An overview of Donor View User Management can be found in this video <https://vimeo.com/855057481> (password: DV2017).
3. Support personnel should be assigned as "Mobile User" so that they can access all the necessary features in the software and mobile app for managing the event.



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

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

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

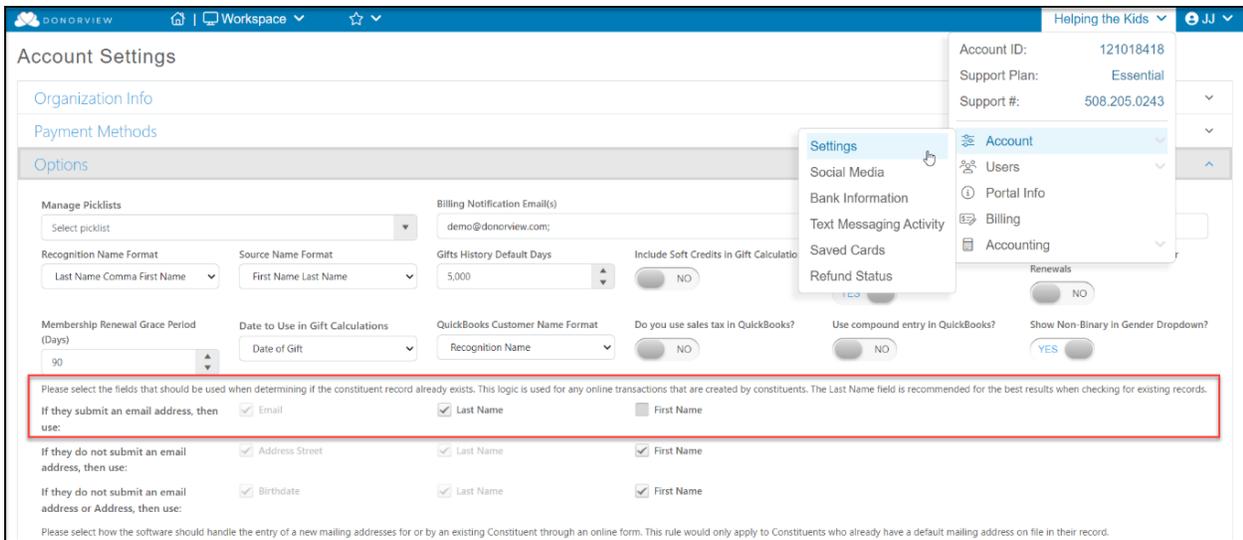
1. Technically, yes, however a different browser must be used.
2. If you use the same email address to login to the software platform and the portal and are using the same browser, you will be locked out of the backend of the software platform and will need the DonorView support team to unlock your account.
3. **To prevent issues with login, it is strongly recommended that a different email address be used to login to the software platform and the portal.**
4. Using two different emails – one for managing the back end of the software and one for logging into the portal as a donor – will allow you to use the same browser, however as soon as you log in to the portal, you will be logged out (but not locked out) of the software platform.
5. For best performance, use one email address to login to the back end of the software platform, then open a new browser (not just new browser tab) or incognito tab and access the portal using a different email address.

Constituent Records

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

1. Duplicate records are formed when the constituent uses a different name or email address than the one that is already on file in the database.
2. To manage attendees, it is helpful to understand how duplicate constituent records are created and the importance of the primary email address for constituents.

3. By default, the software will create a new constituent if the combination of First Name, Last Name, and Email is unique.
4. With the default settings all three fields must match exactly in order to link a transaction to an existing constituent record.
5. Some organizations will elect to create new constituents on Last Name and Email fields only, or the Email field alone.
6. The benefit of removing First Name from the duplicate check is that spouses can share the same record or someone with a name like Robert can enter their name as Rob, Robert, Bob, Bobbie, or any other nickname and still be linked to their constituent record with just their Last Name and Email.
7. The options set up for the organization can be found in the menu under the organization name, under the **Account** menu, then the **Settings** menu.



Can a company constituent and an individual constituent record share an email address?

1. Yes, a company and an individual (contact) record can share the same primary email address.
2. Two individuals or two company records should not share the same email address.
 - a. When attempting to save or update a constituent record where another record has the same primary email address, an error message will appear, and you won't be able to save the record.
 - b. If you would like to save the information in both records, choose which one you would like to be the primary contact and enter the email address in the spot at the top of the constituent's profile page under their name.
 - c. For the secondary constituent, you can save the email addresses farther down the constituent's profile record under **Emails**.

Do I have to merge duplicate records at the event?

1. No, duplicate records can be merged after the event, there is no urgency to merge them at the event.
2. If you decide to merge them at the event, be sure to keep the constituent record that has the portal account as the master record.

Pre-Event

Should sponsorships be an event level?

1. Including event sponsorships as an event level depends on whether the sponsorship includes tickets to the event.
2. Sponsorships that are event levels will allow all the sponsor's guests to be included on the same event attendance grid as other attendees.
3. If sponsorships do not include tickets, they can be add-ons or be collected using a donation page.

Can I take a deposit for an event purchase?

1. Yes, to turn on the deposit feature, set the **Collect Level Deposits** toggle to **YES** under the Financial Information section of the Event Settings Tab.

The screenshot shows the 'Financial Information' settings page in DonorView. The page is titled 'Financial Information' and contains various toggle switches and input fields. The 'Collect Level Deposits' toggle is highlighted with a red box and is currently set to 'YES'. Other visible settings include 'Free Event' (NO), 'Address Information NOT Required' (NO), 'Phone Number Required' (NO), 'Goal Category' (Annual Gala), 'Enable Captcha' (YES), 'Allow transactions in foreign currencies' (NO), 'Auto Acknowledge' (NO), 'Use Member Pricing' (NO), 'Save Credit Card Information' (YES), 'Allow to pay processing fee' (YES), 'Require to Pay Processing Fee' (NO), 'Processing Fee Comment' (Please add the processing fee of (\$ amount of processing fee) to my total so that the full amount goes towards (Yr)), 'Default to Pay Processing Fee' (NO), 'Accept General Donations' (YES), 'Message to display for general donation' (Can't Attend? You can still support us by making a donation!), 'Allow Everyone To Pay Later' (YES), 'Allow Members To Pay Later' (NO), 'Allow Internal Only To Pay Later' (NO), 'Pay Later Comment' (I will mail check.), 'Registration Info Label' (Please provide your billing information), and 'Require Level Purchase for Add-on Selection' (NO). The 'Save' and 'Save & Next' buttons are visible at the bottom right.

2. You can establish the deposit in the individual levels as needed.
 - a. Enter the amount of the deposit required in the **Deposit Amount** field.
 - b. When the transaction is made, the deposit amount will be shown in the Events Grid under the Amount Paid column and the remaining balance will be shown in the Amount Due column.

c. Leave the **Deposit Amount** field blank when the full purchase price is required.

The screenshot shows a form for a 'Premiere Sponsor' with the following fields and values:

- Sort Order: 10
- Name: Premiere Sponsor
- Description: **Premiere Sponsor Benefits:**
Preferred Seating for 10 guests
Logo on the cover of program and double page spread in program
Logo on website
5 minute speaking opportunity at event
- Thank You Note: (empty)
- Price: \$25,000.00
- Deposit Amount: \$1,000.00 (highlighted with a red box)
- Non-Refundable Fee: \$1,000.00
- Tax-Deductible Amount: \$24,000.00
- Qty. Avail. (blank for unlimited): 1
- Level Purch. Limit (blank for unlimited): (empty)
- # of Attendees Per Purchase: 10
- Start Time: (empty)
- End Time: (empty)
- Days Available: (empty)

Can you create or assign complimentary tickets?

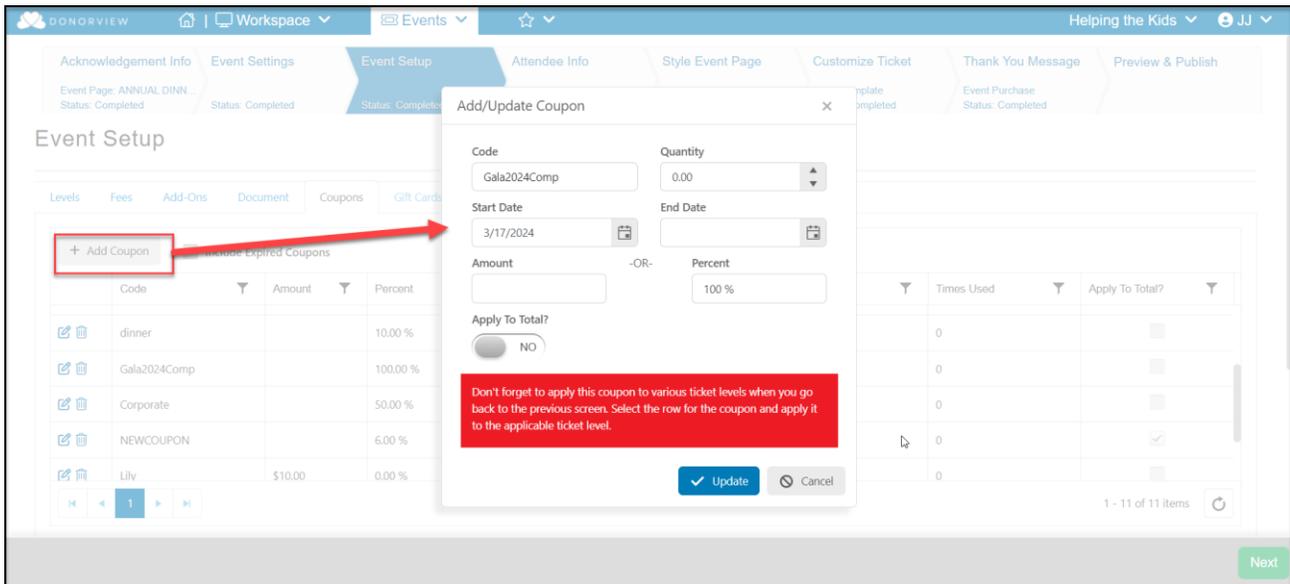
1. Yes, in the event set up tab, complimentary tickets can be created two ways, by creating an Offline Level or by creating a 100% off coupon.
2. From the event level, toggle the **Offline Level** to **YES**.

The screenshot shows a form for an 'Offline Level' with the following fields and values:

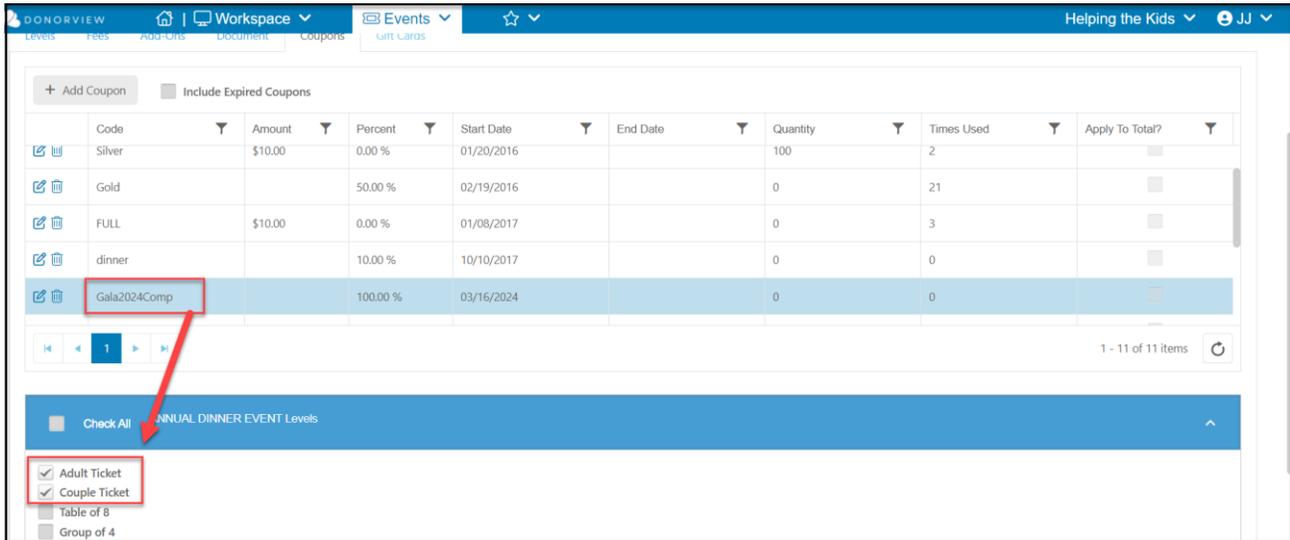
- Default For: Annual Campaign
- Default Fund: General
- Default Event: Annual Dinner
- Default Appeal: (empty)
- Subscribe to Email List: Annual Dinner Thank you
- Inactive: NO
- Offline Level: YES (highlighted with a red box)
- Set Level Active Dates: NO
- Use Access Code: (empty)

3. Any ticket levels identified as Offline Level will only be visible when logged into DonorView and using the same browser to view the page. They are not visible to the public.

- You also have the option to create a 100% off coupon using the coupon tab under Event Setup.



- After creating the coupon, ensure that the coupon is turned on for the appropriate ticket levels.



Can I hide free tickets or other ticket levels from the event page?

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

I have a golf tournament - can I assign event attendees into teams with a team leader?

- Yes, attendees can be assigned into teams or groups using the Event Assignments feature.

2. This feature is especially useful if you allow individual golfers to sign up for the event that need to be grouped into teams.
3. You must activate the Attendee Info section and request the names and emails of guests and set the **Use Event Assignments** toggle to **YES** at the bottom of the page.

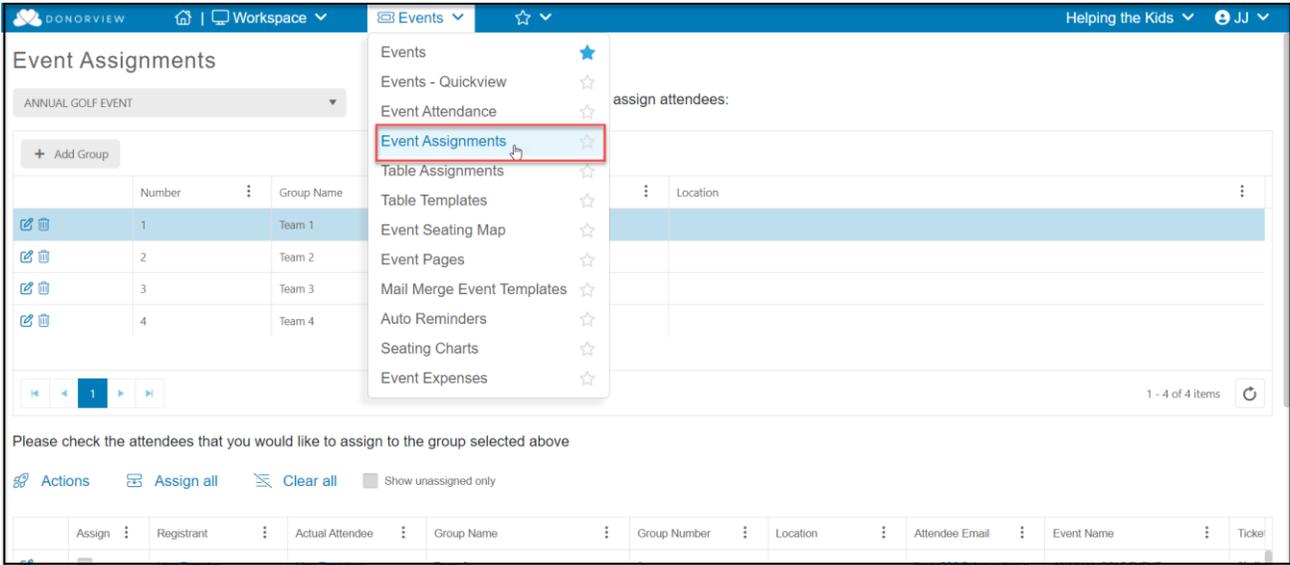
The screenshot shows the DonorView event configuration interface. At the bottom, the 'Use Event Assignment' toggle is highlighted with a red box and set to 'YES'. Other visible elements include 'Picklist Values' (Steak, Fish, Chicken, Other), 'Attach to Event Level(s)' (Birdie Package, Hole in One (Ace) Package, Double Eagle Package), and 'Custom Field 5 Label' (What is your team name?).

4. With Event Assignments activated, a new tab will appear in the event page editor for Event Groups.
5. Under the Event Groups tab, you can start creating your team names or numbers, but you do not need to enter all the information yet. Only one group designation is required to move forward.

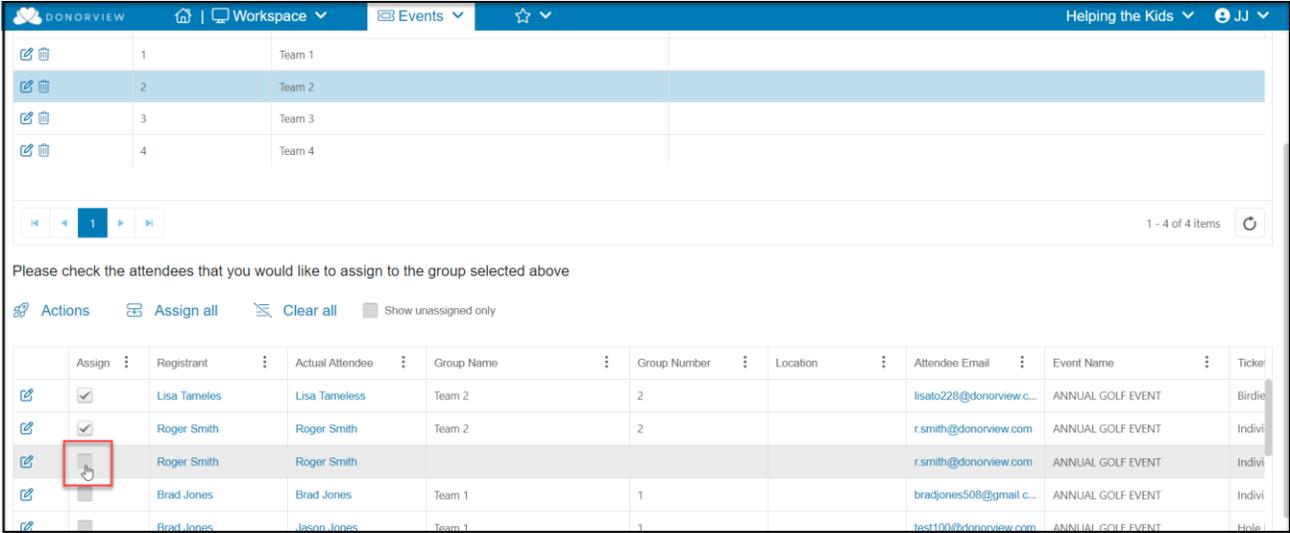
The screenshot shows the DonorView event page editor with the 'Event Groups' tab highlighted in a red box. The 'Event Groups' section contains a table with the following data:

	Number	Group Name	Location
	1	Team 1	
	2	Team 2	
	3	Team 3	
	4	Team 4	

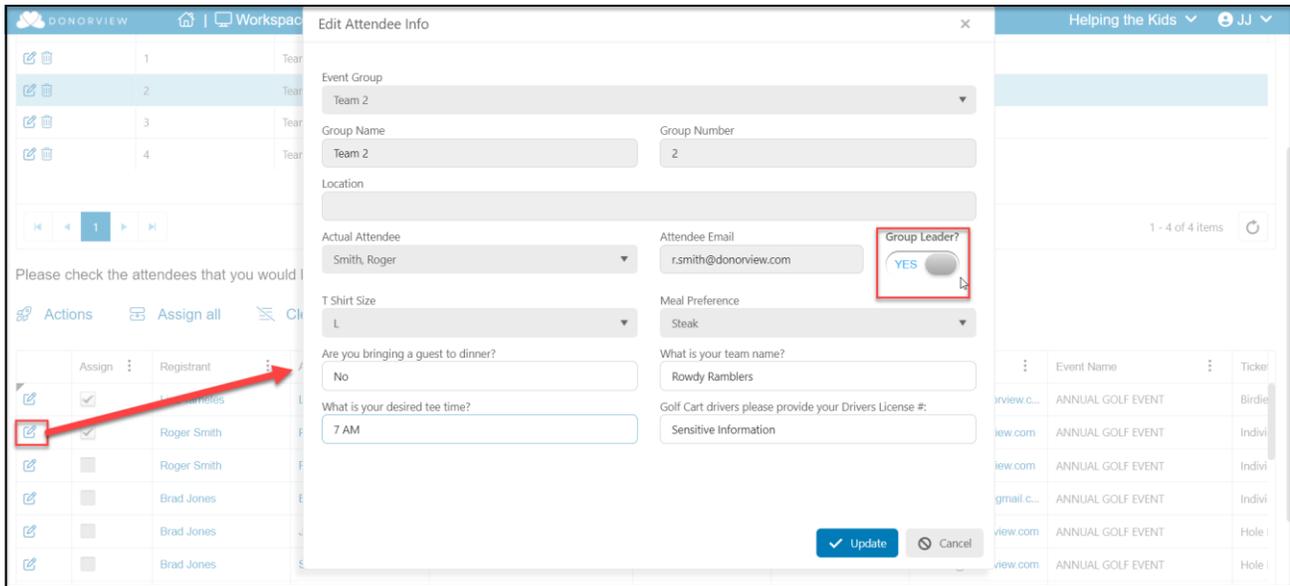
6. Once the page is saved and when the first ticket level has been sold, you can open the Event Assignments feature under the Events menu to begin assigning attendees to their groups (teams) and assign a team leader.



7. With the row selected for the team (group) you can check the box next to the attendee's name to add them to that team or group.



- 8. You can assign the team leader by clicking on the edit icon on the right side of the grid to open a new window.
- 9. Mark the **Group Leader** as **YES**.
- 10. Note that if you do not have all the attendee's name information yet, you can see which record is marked as the Group Leader on the Event Attendance grid.



11. Group information can be exported to Excel with the Action menu.
12. You can learn more about the Event Assignments feature in this video <https://vimeo.com/735850438> (Password: DV2017)

Do I need to have all the guest names (not just purchaser name) to use Table Assignments?

No, you can assign all the attendees to their tables and update the names later.

What if the ticket purchaser doesn't know the names of all their guests when they buy the tickets?

1. The software will use the purchaser's name as a placeholder so you will see the purchaser's name listed in both the Last Name/Constituent column and the actual attendee columns on the Event Attendance grid.
2. You can update the information using the edit icon on the event attendance grid. See the [information below on updating guest information](#).

How can I get the guest names prior to an event?

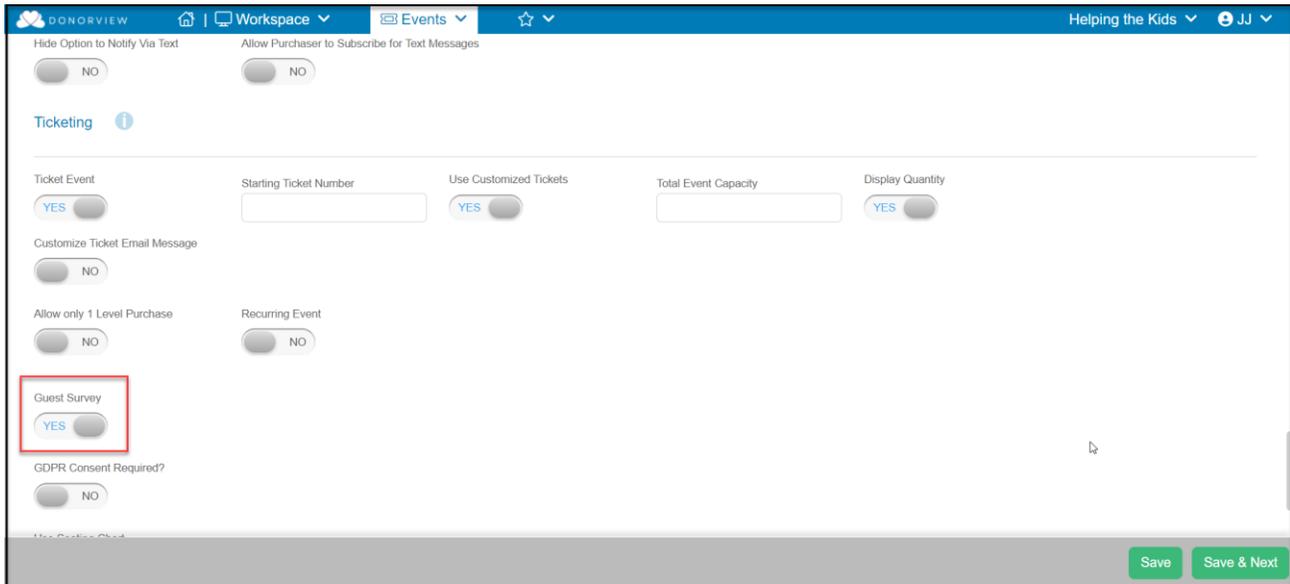
You can reach out to the purchasers as needed using the direct email and text features from the Actions menu.

Does the information collected in the Attendee Info tab populate into the constituent's profile record?

Only the name and email address are saved in a new constituent's record. Other answers or information is only saved in the Event Attendance Grid, not the attendee's constituent record.

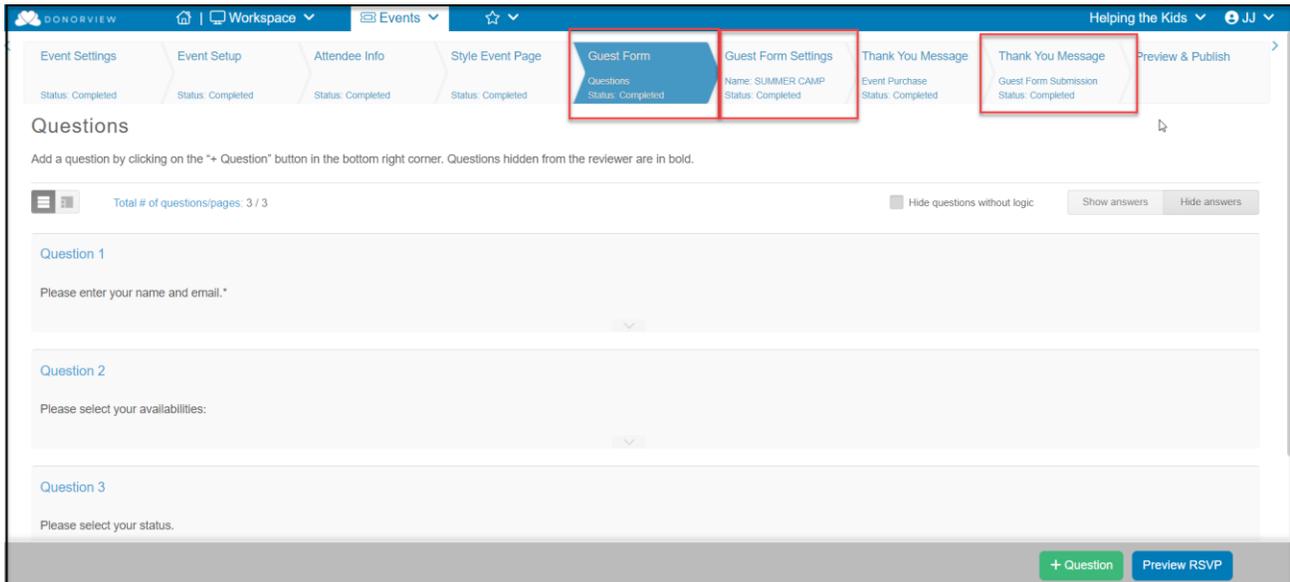
What if I need to collect more information about the purchaser and save it in their constituent profile record?

1. You can use the guest survey feature to collect information that will populate into a constituent's record.
2. To activate this feature, toggle **Guest Survey** to **YES** on the Event Setting tab under the Ticketing section.



The screenshot shows the DonorView interface for event settings. The top navigation bar includes 'DONORVIEW', 'Workspace', 'Events', and 'Helping the Kids'. Below the navigation, there are several toggle switches for 'Hide Option to Notify Via Text' and 'Allow Purchaser to Subscribe for Text Messages', both set to 'NO'. The 'Ticketing' section is highlighted with a blue header and an information icon. It contains several settings: 'Ticket Event' (YES), 'Starting Ticket Number' (input field), 'Use Customized Tickets' (YES), 'Total Event Capacity' (input field), 'Display Quantity' (YES), 'Customize Ticket Email Message' (NO), 'Allow only 1 Level Purchase' (NO), 'Recurring Event' (NO), 'Guest Survey' (YES, highlighted with a red box), and 'GDPR Consent Required?' (NO). At the bottom right, there are 'Save' and 'Save & Next' buttons.

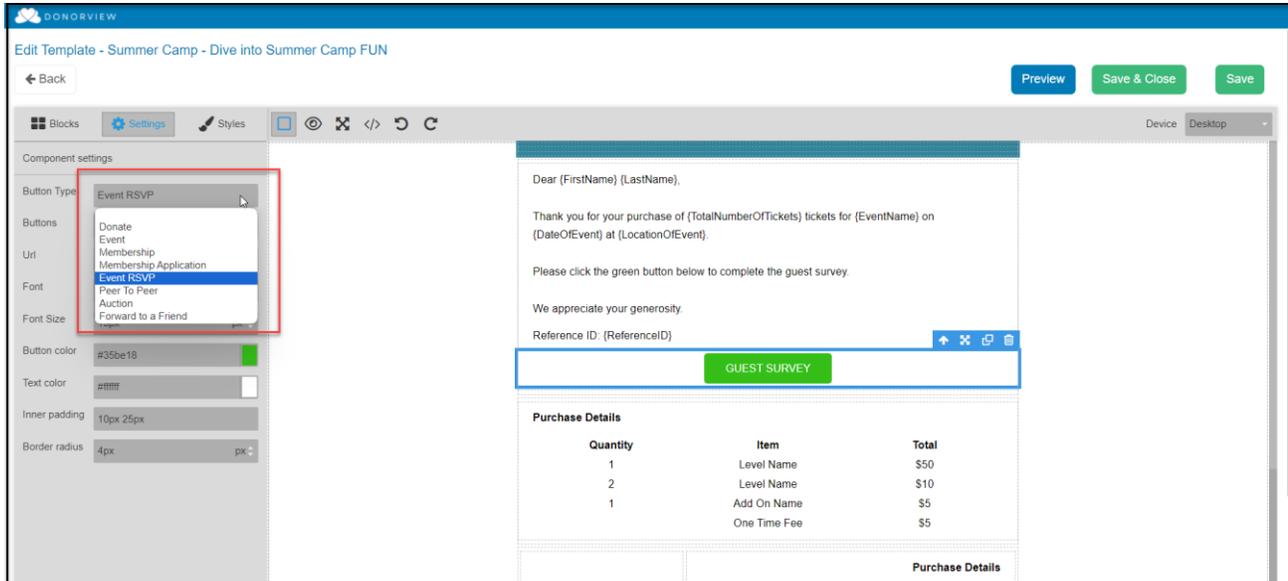
3. Once the Event Settings tab is saved, three new tabs will open, Guest Form, Guest Form Settings and a second Thank You Message.



The screenshot shows the DonorView interface for event settings. The top navigation bar includes 'DONORVIEW', 'Workspace', 'Events', and 'Helping the Kids'. Below the navigation, there are several tabs: 'Event Settings', 'Event Setup', 'Attendee Info', 'Style Event Page', 'Guest Form', 'Guest Form Settings', 'Thank You Message', 'Thank You Message', and 'Preview & Publish'. The 'Guest Form', 'Guest Form Settings', and 'Thank You Message' tabs are highlighted with red boxes. The 'Guest Form' tab is active and shows a 'Questions' section with three questions: 'Please enter your name and email.*', 'Please select your availabilities:', and 'Please select your status.'. At the bottom right, there are '+ Question' and 'Preview RSVP' buttons.

4. The Guest Survey works like a standard survey. You can learn more about guest surveys and surveys in general in this video <https://vimeo.com/197185273> (Password: DV2017)

5. After setting up your guest survey, you will need to insert the link into the first thank you message, the one that confirms the purchase.
6. Create a button and select **Event RSVP** as the **Button Type**.



7. Note that this feature only collects information about the purchaser, not all of the guests.
8. There is no way to require the Guest Survey (Event RSVP) to be completed.
9. The thank you email can be resent using the
10. Use the Constituent Field question type to add information to a constituent's profile page.
11. If you need custom fields for the profile page, contact support@donorview.com to have custom fields created.
12. To collect information from all guests (purchasers and attendees), we recommend using a survey and sending the link to complete the survey using the direct email or text feature from the Event Attendance grid.

Do guests get counted as constituents?

Yes, each guest (actual attendee) name either links to an existing constituent record or creates a new constituent record.

Can I offer early bird or late registration pricing?

1. Yes, using the **Set Active Level Dates** feature in the Event Setup.
2. Switch the Set Active Level Dates toggle to Yes and enter the date ranges you wish that level to be visible on the page.
3. This level will not be visible on your event page outside of these date ranges.

- 4. If you are doing an early bird and/or late registration tickets, be sure to create a level for standard pricing for the dates outside of those special prices.

The screenshot shows a form for setting level active dates. A red box highlights the 'Set Level Active Dates' section, which includes a 'YES' toggle, a 'Start Date' field with a calendar icon (set to 10/3/2023), and an 'End Date' field with a calendar icon (set to 12/29/2023). Other visible options include 'Subscribe to Email List', 'Inactive' (NO), 'Offline Level' (NO), 'Use Access Code' (NO), 'Member Only Level' (NO), and a checkbox for 'Notify when level is sold out'. 'Update' and 'Cancel' buttons are at the bottom right.

When should I use an event add-on versus a ticket level?

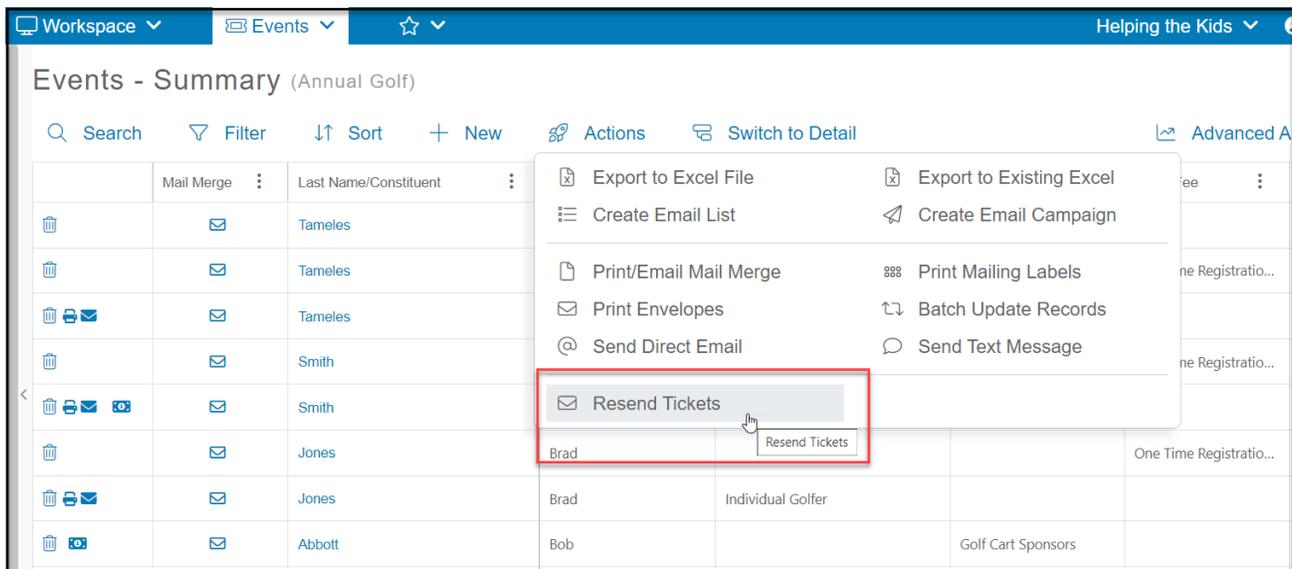
- 1. Event add-ons are specifically designed for purchases that do not include admission to the event.
- 2. Add-ons can be things that are purchased after a ticket level purchase has been selected or independent of ticket levels by selecting **Require Level Purchase for Add-on Selection** to **YES**.

The screenshot shows the 'Financial Information' section of the DonorView interface. A red box highlights the 'Require Level Purchase for Add-on Selection' toggle, which is set to 'YES'. Other visible options include 'Free Event' (NO), 'Address Information NOT Required' (NO), 'Phone Number Required' (NO), 'Goal Category' (5k Race), 'Enable Captcha' (NO), 'Allow transactions in foreign currencies' (NO), 'Auto Acknowledge' (NO), 'Use Member Pricing' (NO), 'Save Credit Card Information' (NO), 'Allow to pay processing fee' (YES), 'Require to Pay Processing Fee' (NO), 'Processing Fee Comment' (Please add the processing fee of (\$ amount of processing fee) to my total so that the full amount goes towards (Your Organization Name)), 'Default to Pay Processing Fee' (NO), 'Collect Level Deposits' (NO), 'Accept General Donations' (YES), 'Message to display for general donation' (If you would like to make an additional donation, please enter your amount below), 'Allow Everyone To Pay Later' (NO), 'Allow Members To Pay Later' (NO), 'Allow Internal Only To Pay Later' (NO), 'Registration Info Label' (Registration Information), 'Accepting Gift Card' (NO), and 'Accepting Subscription' (NO). 'Save' and 'Save & Next' buttons are at the bottom right.

3. Add-ons are generally things like raffle tickets, t-shirts, advertising, and sponsorships that do not include tickets.
4. You can also create event levels with zero attendees if desired.
5. Add-ons and event levels with zero attendees will not appear on the Event Attendance grid, only the Events and Gifts grid will include the transactions.

Can I resend tickets?

1. Yes, but tickets are only sent to the purchaser, not to each of their guests.
2. Click on the solid blue envelope icon on the far left side of the Events grid to resend tickets to a specific purchaser or used the Actions menu to resend all the tickets.



How should spouses be listed as attendees – each with their own record or together in one record?

1. This is a decision your organization needs to make about how you intend to manage couples and spouses.
2. You can have both people share one constituent record if they interact with your organization together and there is no need to track their time, donations, purchases, or communication separately.
3. Each spouse should have their own record if you need to track their time, donations, purchases, or communications independently OR if each spouse wishes to bid in an auction independently.
4. If you keep the couple in one record, you can assign them to two seats and show both of their names in the actual attendee column.
5. If you prefer to have couples share are record and want to prevent duplicates, see the [information about preventing duplicates above](#).

Do purchasers and their guests get their tickets email to them?

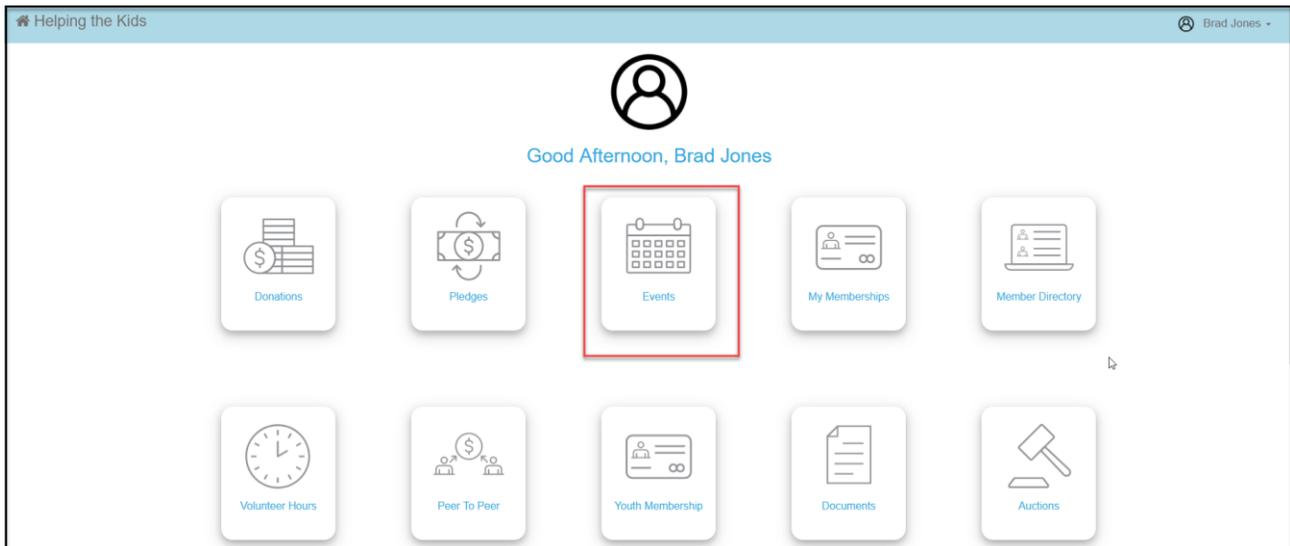
1. No, only the purchaser will receive a copy of all the tickets via an email with a pdf attachment.
2. Guests do not receive a copy of the ticket unless the purchaser sends it to them.

How can I send invoices to someone who made a deposit or chose to Pay Later?

1. Yes, you can create an invoice using the Mail Merge Event Templates.
2. See this video about creating Mail Merge Event Templates <https://vimeo.com/728823692> (Password: DV2017)
3. The Events grid includes the Amount Due column to be able to filter the grid to identify constituents who still have payments due.
4. When you receive the payment, you can record it using the dollar \$ icon on the Events grid.

Can a ticket purchaser update their own guest information?

1. Ticket purchasers can only update their guest information if you activate the Advanced Portal.
2. The purchaser will create a portal account using the same email and name they used to purchase the tickets and login.
3. Clicking on the Event module they can see all their ticket purchases.



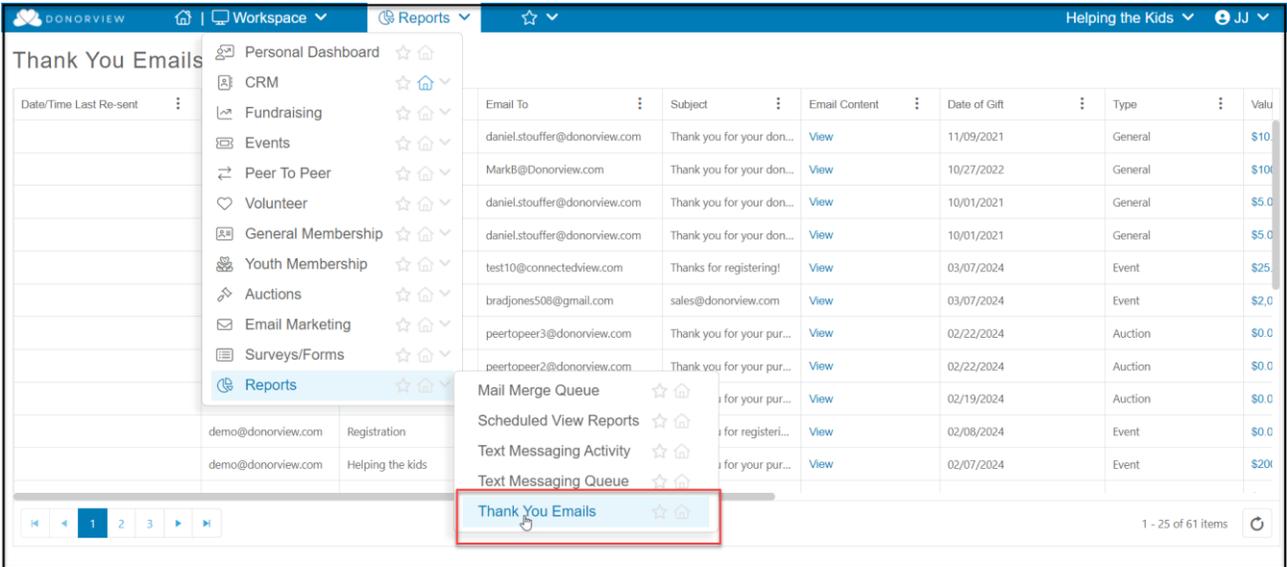
4. The purchaser can select the event and then click on the blue ticket icon on the right side of the grid to update their guest's information.

The screenshot shows the 'Events' section of the DonorView interface. At the top left, there is a summary box for 'Total Amount In Events' showing \$70,091.50. Below this is a grid of event tickets. The first row is highlighted, and a red arrow points to a blue ticket icon in the 'Guest?' column. A dropdown menu is open for the 'ANNUAL GOLF EVENT' row, listing various event options. The grid columns include Start, End, Purch, Event, Guest?, Ticket Level, Quantity, and Ticket Numbers.

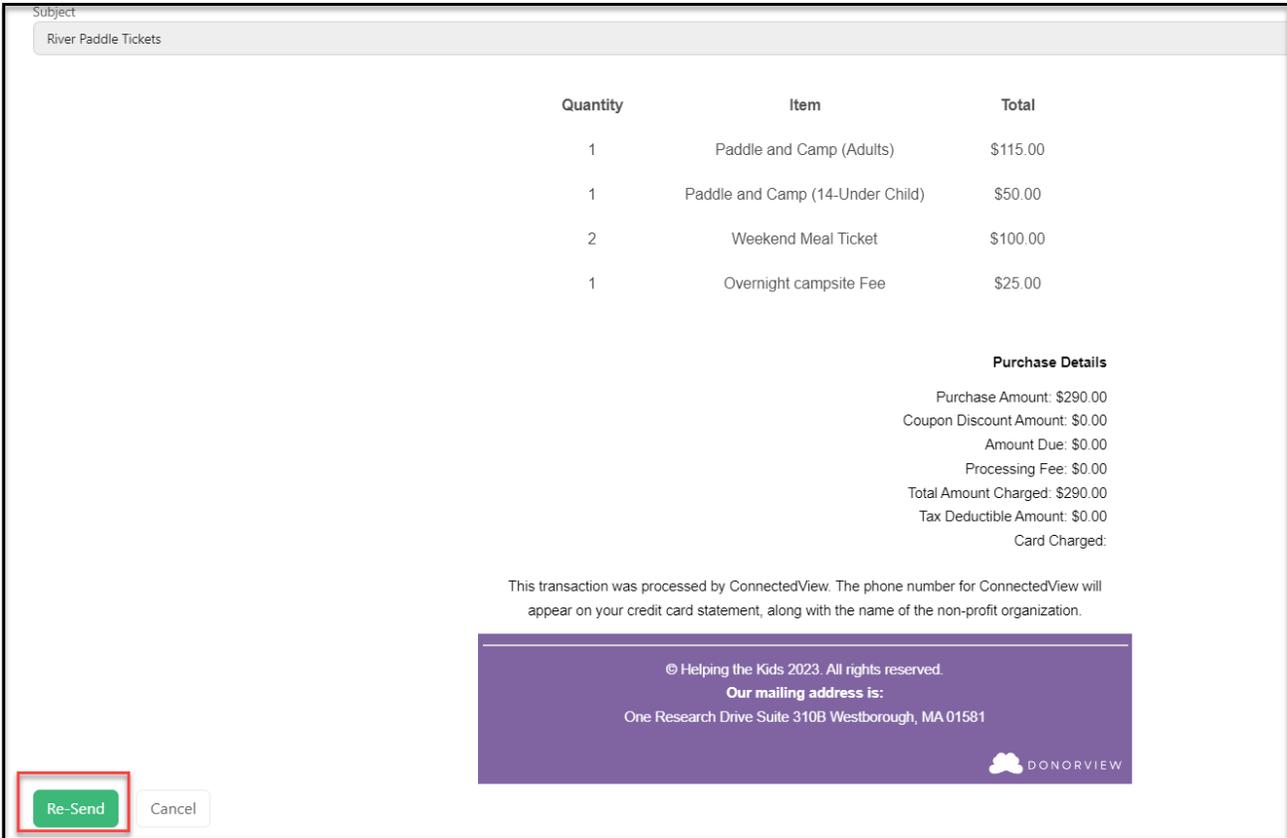
The screenshot shows the 'Ticket Assignments' page. It features two forms for assigning tickets. The first form is for 'Ticket 1 Hole in One (Ace) Package' and the second is for 'Ticket 2 Hole in One (Ace) Package'. Each form includes fields for First Name, Last Name, Email, T Shirt Size, Golf Cart drivers please provide your Drivers License #, Meal Preference, Are you bringing a guest to dinner?, What is your team name?, and What is your desired tee time?.

Can I resent the thank you email?

1. Yes, all thank you emails sent from the system can be found under the Workspace>Reports>Thank You Emails.
2. Click on View next to the email you'd like to resend.



3. Scroll to the bottom of the email to click on the green **Resend** button to send the email again.



Equipment

What equipment will I need for the event?

2. Laptops & power cords – laptops are needed to make changes to event pages if needed and edit guest names using the Event Attendance grid.
3. iPads/iPhones – if you will be using the DV Connect app to check in guests, scan tickets, swipe credit cards , or sell tickets at the door.
4. Credit Cards swipers & charging cables – If you would like to swipe credit cards into attendee's profiles or if you would like to process payments and donations using a credit card for payment. **The swipers can only be used with the DV Connect app.**
5. Optional items
 - i. Printer – for printing receipts if desired. Note that purchases and donations will be automatically acknowledged with an email.
 - ii. Extension cords – Helpful for charging laptops, iPads, swipers, etc.
 - iii. Mobile hotspot (usually a feature within a smartphone) – if Wi-Fi is poor at the venue, a cellular hotspot can be helpful to maintain access to the platform.

Do the swipers work with the desktop/laptop version of DonorView?

No, the swipers only work with the mobile DV Connect app.

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

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

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

1. Swipers need to be ordered from DonorView prior to the event by sending the request to support@donorview.com.
2. There is a deposit required for renting the first swiper and that swiper can be kept for as long as you like.
3. When the swiper is returned, the deposit will be refunded.
4. Additional swipers will require a monthly rental fee and the current pricing will be provided by the support team.

Do the swipers work automatically?

1. No, the swipers need to be paired via the Bluetooth settings on the device.
2. Note that swipers should be synced with just one device.

- The swipers have about a four hour battery life, so be sure they are fully charged and bring a charging cable for longer events.

Check-In

How do I check a guest in for an event?

- Guests can be checked in by scanning their ticket or searching for their names using the mobile app OR the guests can be checked in using a check box on the Event Attendee grid.
- If the mobile app is not used, simply check the box under the **In** column on the Event Attendance grid.
- Be sure the applicable event is selected to reveal the list of attendees.
- The grid can be sorted by clicking on any column. (One click sorts in descending order, two clicks sorts in ascending order, and three clicks returns to unsorted.)

The screenshot shows the DonorView Event Attendance grid for the event 'Annual Raise The Bid Auction'. The grid has columns for Last Name/Const..., First Name, Attendee Last Name, Attendee First Name, CC on File, Ticket Level, Paid, Bidder ID, In, and In Time. A red arrow points to the checkbox in the 'In' column for the first row (Bradley, Maureen).

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

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

1. Manually Via the Event Attendance Grid

- The fastest way to enter a credit card manually is to click on the edit icon on the row for the attendee.

The screenshot shows the DonorView Event Attendance grid for the event 'Annual Raise The Bid Auction'. A red arrow points to the edit icon (pencil) in the first row of the grid.

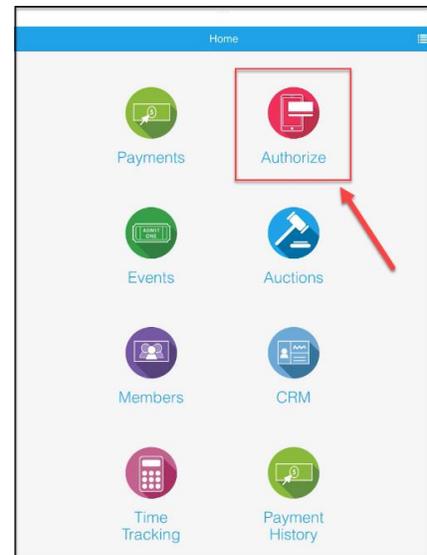
Last Name/Const...	First Name	Attendee Last Name	Attendee First Name	CC on File	Ticket Level	Paid	Bidder ID	In	In Time
Bradley	Maureen	Bradley	Maureen		VIP Table	✓		<input type="checkbox"/>	
Bowes	Kurt	Bowes	Kurt		General Admission	✓		<input checked="" type="checkbox"/>	02/26/19 09:27
Bradley	Maureen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

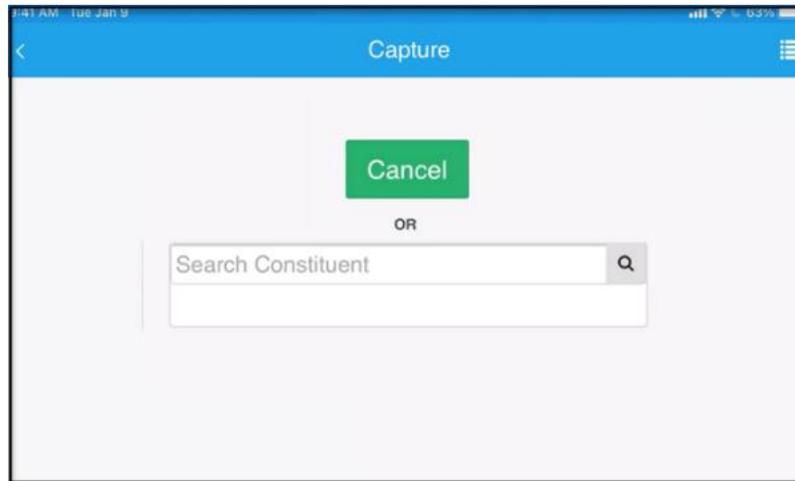
- b. Enter the credit card number, expiration date and security code.

ID	In	In Time
	<input checked="" type="checkbox"/>	02/26/19 09:27
	<input checked="" type="checkbox"/>	02/23/19 12:48
	<input checked="" type="checkbox"/>	12/27/18 02:27
	<input checked="" type="checkbox"/>	08/15/18 08:15
	<input checked="" type="checkbox"/>	01/29/19 02:26
	<input checked="" type="checkbox"/>	06/18/19 02:28
	<input checked="" type="checkbox"/>	10/07/19 11:11
	<input checked="" type="checkbox"/>	10/07/19 07:11

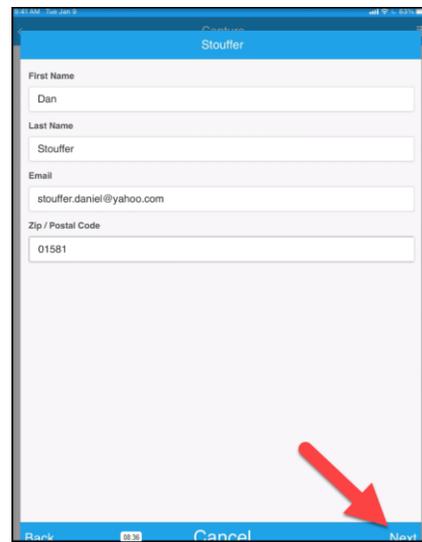
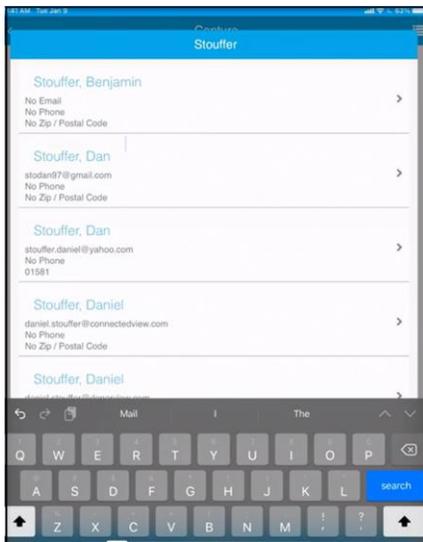
2. Swiping a credit card using the DV Connect App

- It is strongly recommended that this activity be practiced by all those using the app prior to the event.
- Log into the DV Connect App.
- Click on the Authorize icon.
- Swiping the credit card is demonstrated in this video <https://vimeo.com/738265241> (password: DV2017).
- The swiper needs to be synced with the device first (example starting at minute 4:45 in above video)
- You can choose to swipe the card, then select the matching name in the database, or search for the constituent then swipe to pair it to that specific constituent.
- Note that if you see a blue **Swipe** button instead of a green **Cancel** button, you need to power on or re-pair the swiper. Click on the **Swipe** button and push the power button on the side of the swiper to reconnect.
- To search for a constituent, type in their last name and click **Search** from the keyboard.





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



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

Can I save the columns arrangements or views in the Event Attendance grid?

No, the column arrangements, filters, and views cannot be saved in the Event Attendance grid.

How can I sell tickets at the door?

1. Tickets can be sold at the door using a credit card and the mobile app.
2. Selecting the Events module in app, then selecting the appropriate event.
3. The number of tickets and/or add-ons can be selected, then the credit card swiped to record the payment.
4. If the constituent is already in the database, you can select the appropriate constituent, if they are new you can enter their name and contact information including email address and billing zip code.
5. Tickets can also be sold in the back end of the software via a laptop by opening the event page URL found on the Events Pages grid.

Name	Email Display Name	Email From Address	Event Category	URL	Email Subject Line	Notificatio
PLEDGE PER LAP OR PER MILE	sales@donorview.com	sales@donorview.com		https://app.donorview.com/E4vJg	sales@donorview.com	
5th ANNUAL HOPE FOR KIDS SK	Helping the Kids	demo@donorview.com		https://app.donorview.com/AVLP	Thanks for registering!	
SPRITUAL GROWTH CENTER RETREATS	sales@donorview.com	sales@donorview.com		https://app.donorview.com/w5jz	sales@donorview.com	
VOLUNTEER WITH US	demo@donorview.com	demo@donorview.com		https://app.donorview.com/Lr6kV	Volunteer Opportunity Sign Up	
ANNUAL DINNER EVENT	Helping the Kids	heather@donorview.com		https://app.donorview.com/zip9	Your Annual Gala Purchase	
ANNUAL GOLF EVENT	Helping the Kids	demo@donorview.com	Golf Event	https://app.donorview.com/YO5	Thank you for purchasing tickets...	demo@dr

6. Select the appropriate ticket levels, add-ons, and enter the contact information.
7. Below the contact information, you can record the type of payment including checks and cash if applicable.
8. Choose credit card to manually enter the card number instead of using the swiper.

* Denotes required field

This event purchase is being made on behalf of a company/organization.

I will mail check.

Prefix: Prefix (dropdown) | First Name: Stacy | Last Name: Zeaman | Suffix: Suffix (dropdown)

Email: stacy_lee80@donorview.com | Confirm Email: stacy_lee80@donorview.com | Phone: | Phone Type: Phone Type (dropdown)

Street Address: 4564 White Plains Road | Apt, Suite, Bldg.:

Zip Code/Postal Code: 10470-1609 | Country: United States (dropdown)

Payment Type (dropdown menu): Cash, Check, Coupon, Credit Card, Event Expense, Event Subscription, **Payment Type** (highlighted)

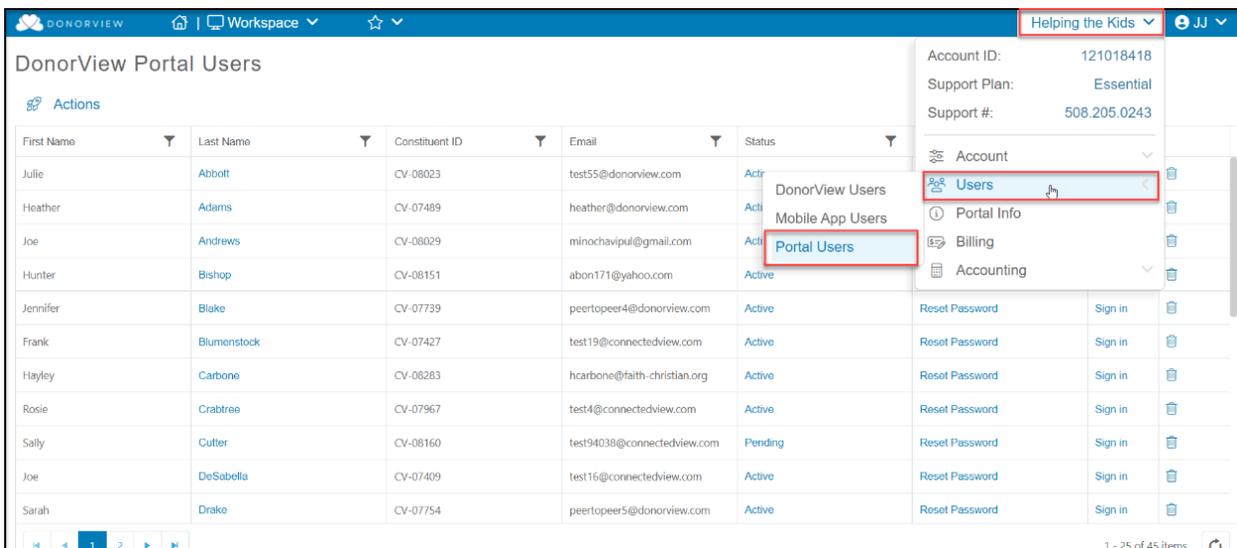
Check Number (Field Not Visible Externally):

Can I add a guest directly to the Event Attendance grid?

No, attendees either need to purchase a ticket level (not an add-on) or be a guest of someone who did purchase tickets.

Can guests be merged/linked?

1. Guests can be linked by creating a relationship from the constituent's record, but it does not affect check-in, checkout, or attendance.
2. Two constituents can also be merged if necessary, but it is unlikely that this would be required during an event.
3. Merging constituents must be evaluated to determine which record should be maintained as the master.
 - a. Constituents are merged using the Constituent grid.
 - b. It is recommended that the constituent record linked to the donor portal be maintained as the master record.



- c. A list of donor portal accounts can be found in the menu under the organization's name, clicking on **Users**, then **Portal Users**. Use this list to validate if the constituent has a portal account created.
- d. See this support article for instructions for merging constituents.
<https://support.donorview.com/support/solutions/articles/9000027444-can-i-merge-two-constituent-records-together->

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

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

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

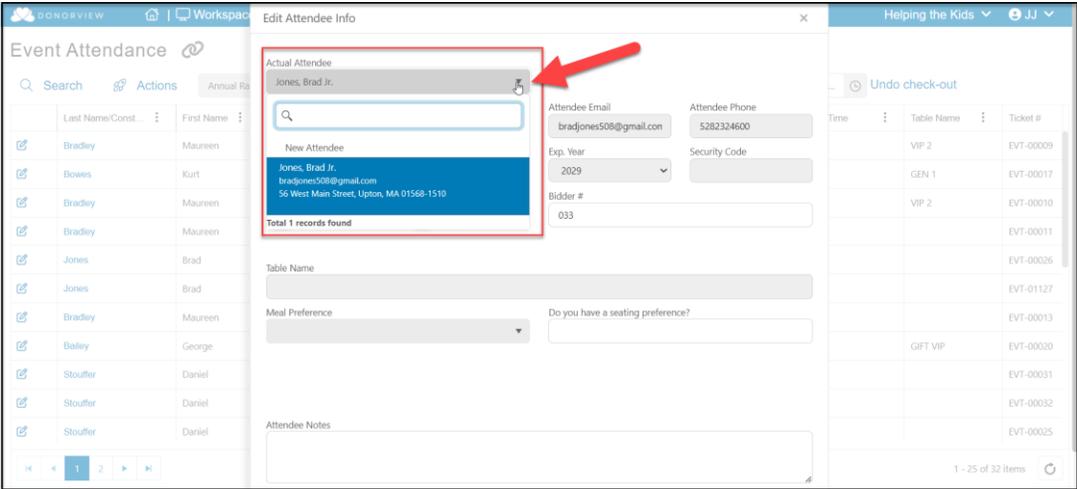
How can I assign or reassign a guest to a table?

1. If guests need to be assigned to a table, use the Table Assignments feature. See more about it from this video <https://vimeo.com/741142781> (Password: DV2017)
2. Some organizations may opt to use the Event Assignments feature instead. This would assign guests to a group instead of a table. To see more about the event assignments feature, see this video <https://vimeo.com/735850438> (Password: DV2017)

How do I update guest/attendee name information?

1. Ticket purchasers are identified under the Last Name/Constituent column.
2. All attendees are shown in the Actual Attendee columns.
3. To enter a new guest name (attendee) for a ticket that has already been purchased, click on the edit icon on the left side of the grid.
4. Click on the arrow on the right side of the name under **Actual Attendee**.
5. Use the search bar in the top of the window to see if the constituent already exists in the database.
6. If the constituent already exists in the database, click on their name to identify them as the attendee.

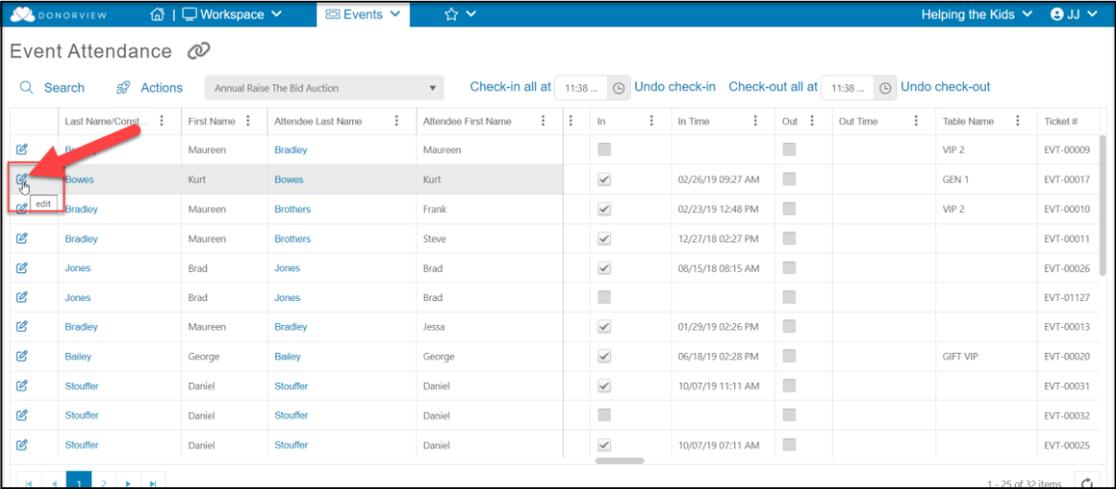
- 7. If no matching constituent is found, click on **New Attendee** to enter the name and email address to create a new constituent record. Other fields can be updated with credit card information, check in, and answers to custom questions.



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

How do I edit a guest's (attendee's) info?

Clicking on the edit icon on the left side of the grid will edit the guest's (actual attendee) info.



How do I see who has checked in?

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

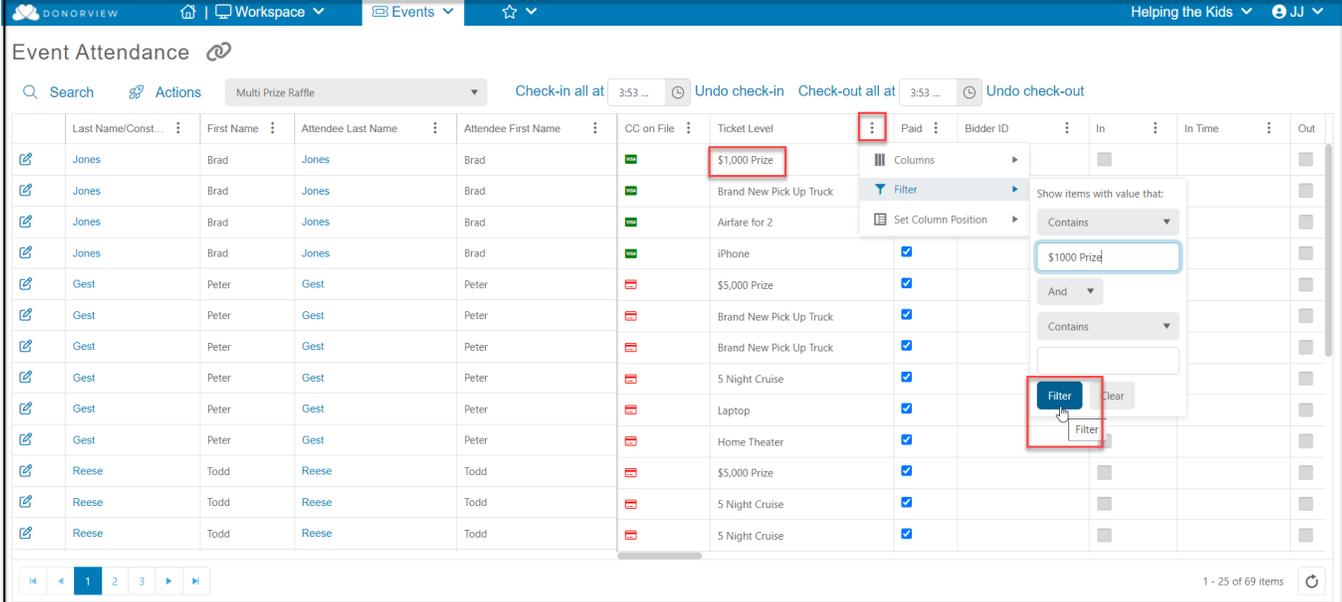
	Last Name/Const...	First Name	Attendee Last Name	Attendee First Name	In	In Time	Out	Out Time	Table Name	Ticket #
	Bradley	Maureen	Bradley	Maureen	<input type="checkbox"/>		<input type="checkbox"/>		VIP 2	EVT-00009
	Bowes	Kurt	Bowes	Kurt	<input checked="" type="checkbox"/>	02/26/19 09:27 AM	<input type="checkbox"/>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

Raffles

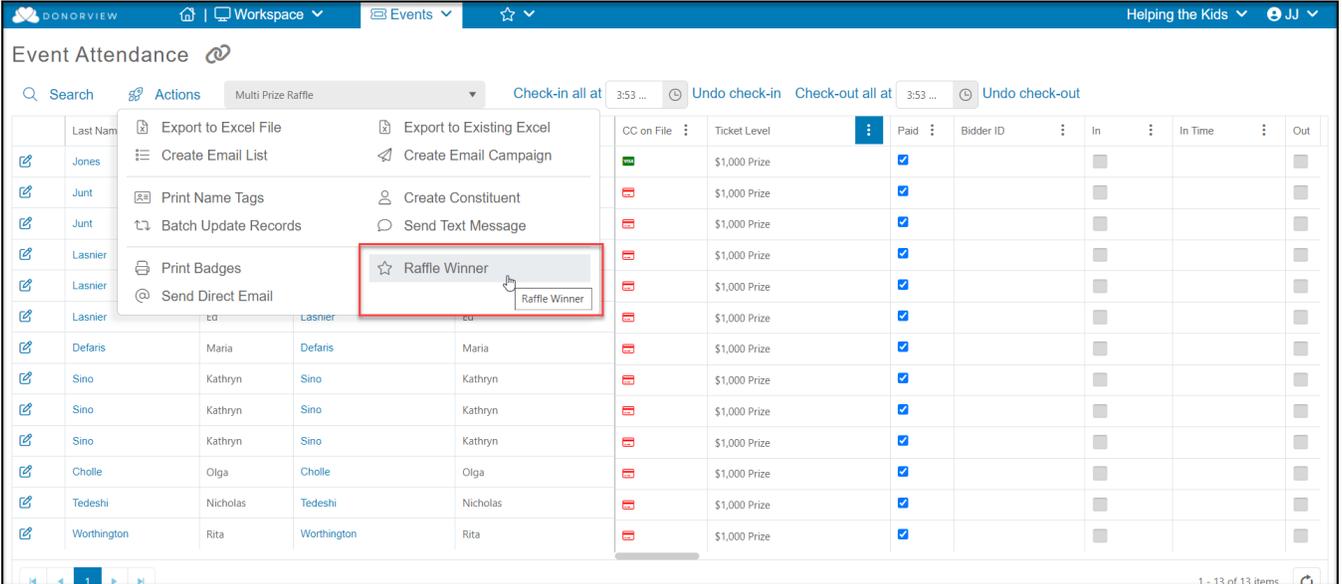
How do I pull a raffle winner?

1. Raffles can be managed multiple ways within the software.
2. Selling raffle tickets as event add-ons items will require a traditional raffle experience with printed tickets and manually pulling the winner.
3. The software does offer an option to sell raffle tickets as an event level.
4. Raffle tickets sold as an event level can be pre-sold or sold at the event by using the mobile app or by manually recording the purchase via the event page.
5. If the raffle tickets are sold as an event level, those purchasers are shown as a raffle ticket level on the Event Attendance grid.
6. The grid can be filtered to just show raffle ticket purchasers.
7. Note that raffle tickets sold as event levels need to show how many “attendees” are included with each purchase.
 - a. For example, one ticket = 1 attendee
 - b. An event level that includes multiple tickets, like 5 tickets for \$100 would be set up for 5 attendees so that all five of their purchases will be included in the raffle chances.

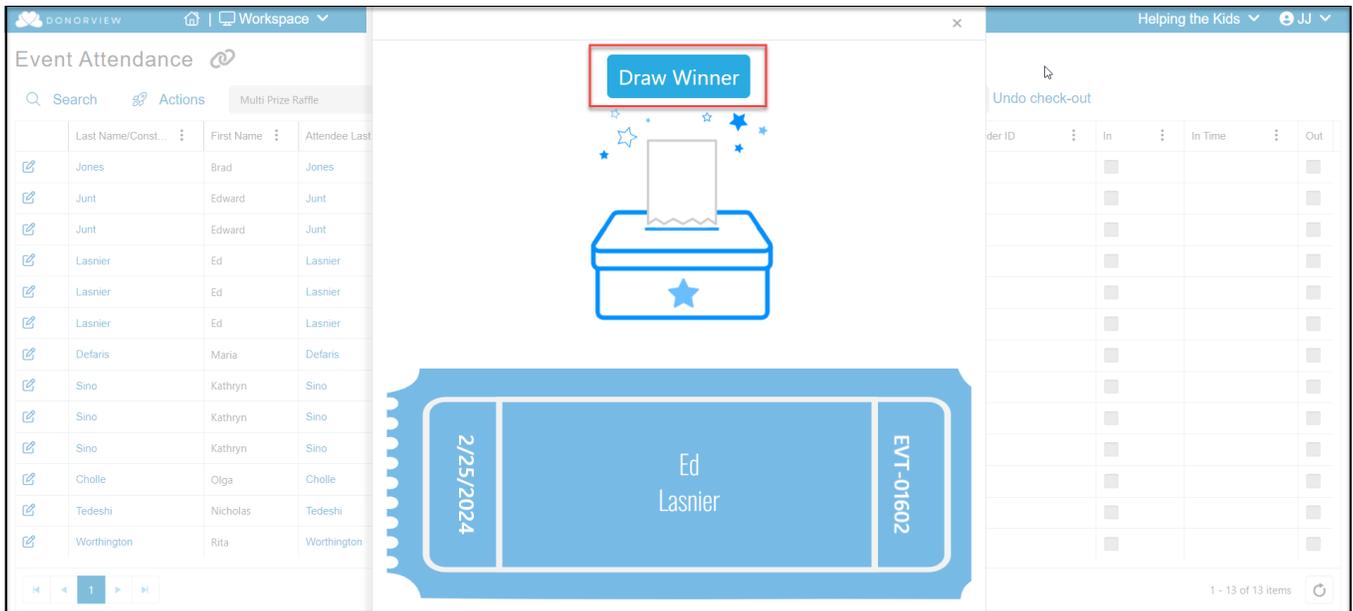
- 8. Click on the three dots next to the **Ticket Level** column header.
- 9. Enter the name of the raffle ticket level under **Contains** to identify all the purchasers.
- 10. Click **Filter** to filter the list.



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



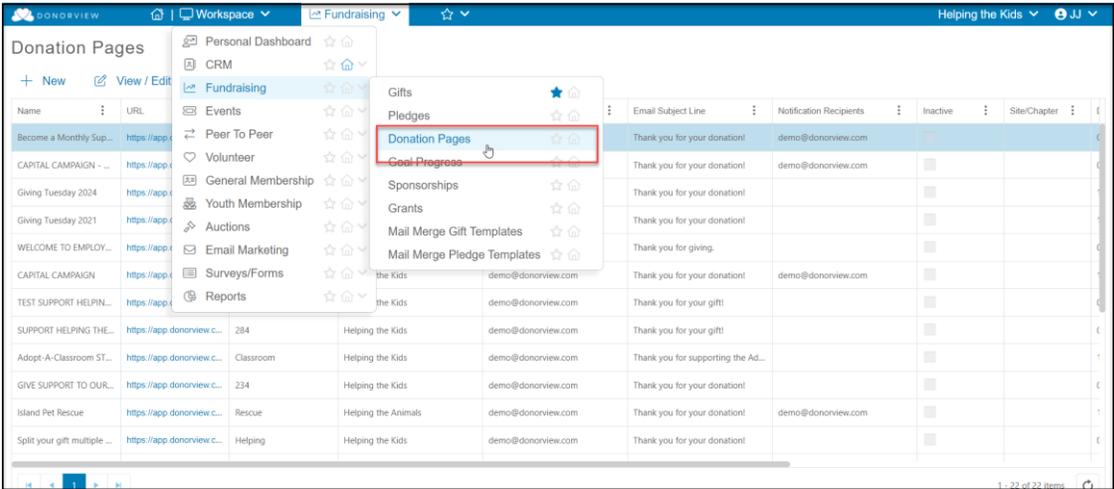
13. The software will randomly choose the winner from the list of attendees on the grid.
14. This feature can also be used for drawing random door prizes for all attendees if no filter is applied to the grid.



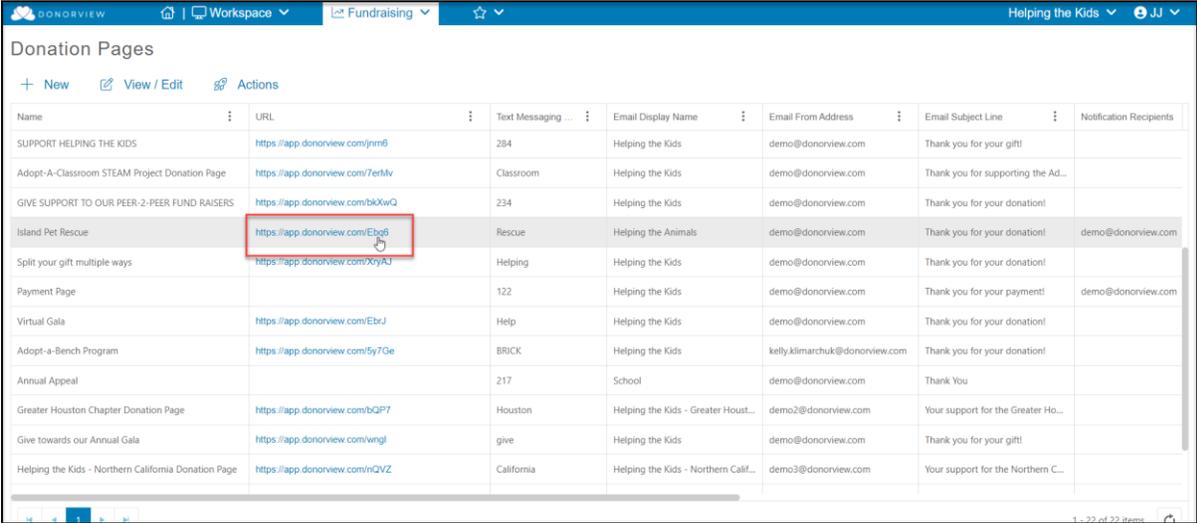
Paddle Raise (a.k.a Fund-A-Need or Call-to-Heart):

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

1. Each donation page has a unique URL, Text, and QR code that can be shared with guests to make their donations using their phones.
2. From the mobile app, you can use the Payments feature the swipe credit cards and record donations.
3. You can also write the names down and manually record the donations using a donation page.
 - a. Log in to the DonorView desktop software.
 - b. Go to the Fundraising module, then click on the Donations Pages link.
 - c. This video provides an example of entering a gift via a donation page.
<https://vimeo.com/846388257> (Password: DV2017)



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



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

Help rescue stray animals!

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

* Denotes required field

Constituent

Search Contact

Search Contact

Search Contact

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

Abbott, Julie

Total 3 records found

YOUR AMOUNT

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

Your Amount

\$1,000.00

Your Total Donation Amount \$1,000.00

Payment

This donation is being made on behalf of a company/organization.

I will mail a check

Security is of paramount importance to us. Your payment information is processed securely via Level 1 PCI DSS Compliant Service Provider.

 ending in 1111 expires on 4/30/2029

Use another card

I would like to get a text notification

Check the pay later option for pledges not paid the night of the event.

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

The screenshot shows a payment form with a red box highlighting the credit card information fields. The fields include:

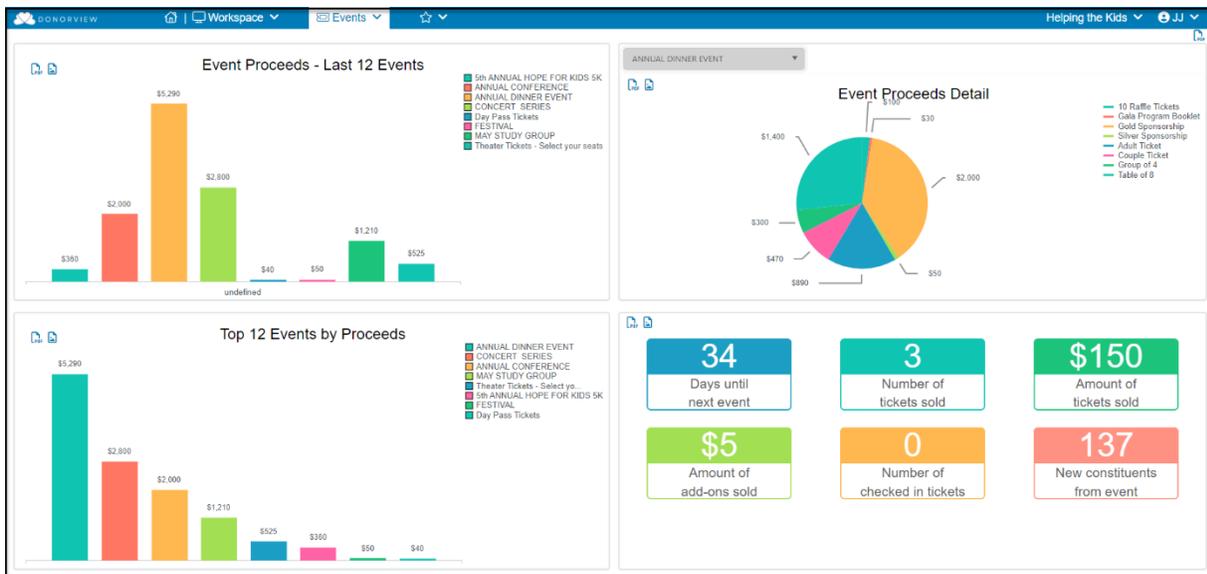
- VISA ending in 1111 expires on 4/30/2029
- Use another card
- Credit Card Number:
- Exp. Month: Month
- Exp. Year: Year
- CVV Number:
- Prefix:
- First Name: Brad
- Last Name: Jones
- Suffix:
- Email: bradjones508@gmail.com
- Confirm Email: bradjones508@gmail.com
- Phone: 5282324600
- Phone Type: Business
- Street Address: 56 West Main Street
- Apt, Suite, Bldg.:
- City: Upton
- State/Province/Region: MA
- Zip Code/Postal Code: 01568-1510
- Country: United States
- I would like to get a text notification

4. Pledges made via check or cash can be recorded via the Add Gift feature. See this video for information on adding a donation. <https://vimeo.com/770830070> (Password: DV2017)

Displays and Reporting:

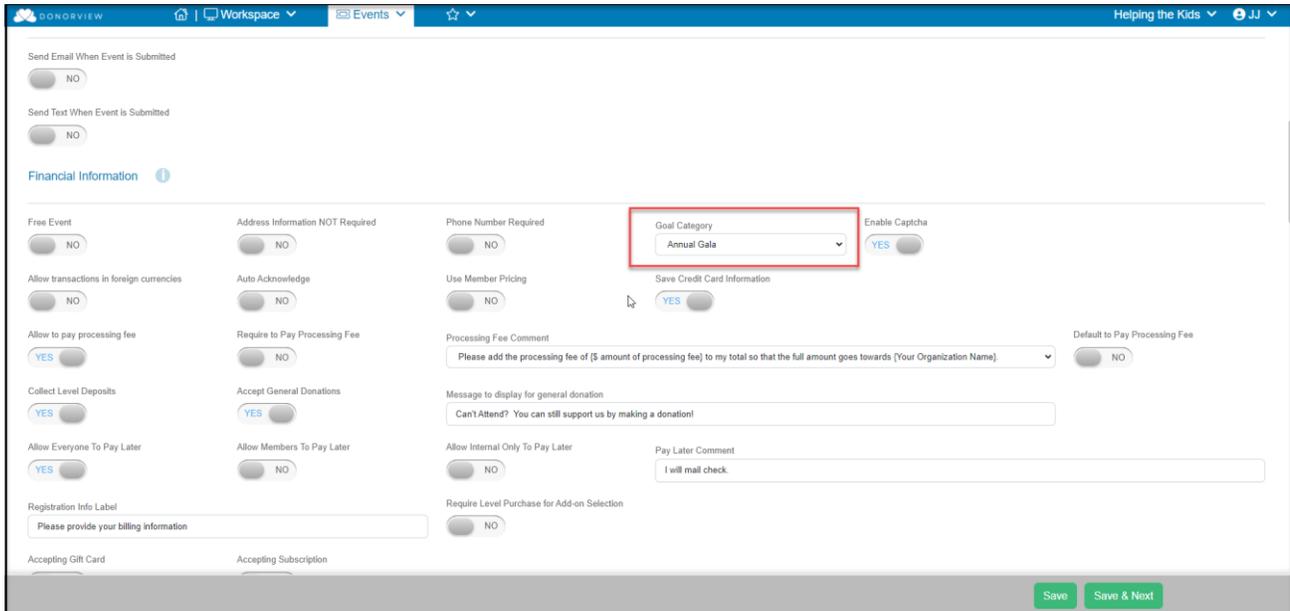
Are there built in reports for events?

1. No, there are no standard event reports, however you can see graphics from under the Workspace>Events Dashboard, which can be downloaded.
2. You also can export the data from the Events grid or using the Gifts Grid and filtering by the appropriate For-Fund-Event-Appeal or date range.



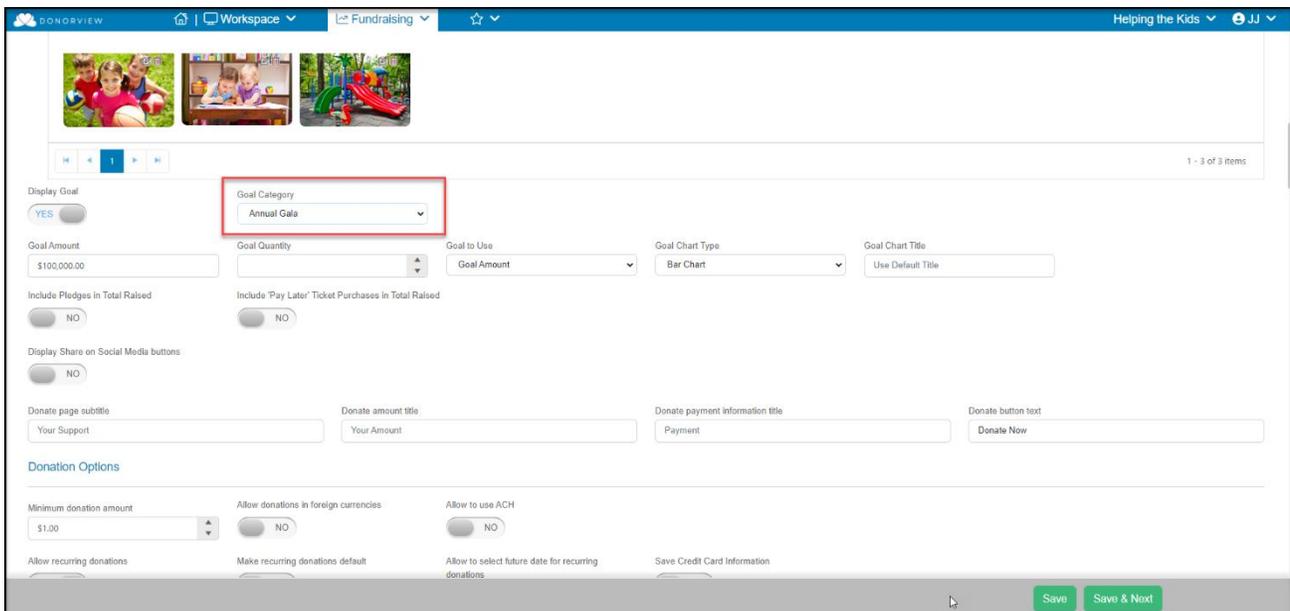
Are there ways to display goal progress?

1. Yes, you can create a widget to share on your website.
2. You can see instructions for creating a goal progress widget with this video: <https://vimeo.com/764158934> (Password: DV2017)
3. From the event page editor, on the Event Settings tab under Financial Information the **Goal Category** identifies all the revenue that will be included in the goal widget.



The screenshot shows the 'Financial Information' settings for an event. The 'Goal Category' dropdown menu is highlighted with a red box and is set to 'Annual Gala'. Other settings include 'Free Event' (NO), 'Address Information NOT Required' (NO), 'Phone Number Required' (NO), 'Enable Captcha' (YES), 'Allow transactions in foreign currencies' (NO), 'Auto Acknowledge' (NO), 'Use Member Pricing' (NO), 'Save Credit Card Information' (YES), 'Allow to pay processing fee' (YES), 'Require to Pay Processing Fee' (NO), 'Processing Fee Comment' (Please add the processing fee of (\$ amount of processing fee) to my total so that the full amount goes towards (Your Organization Name)), 'Default to Pay Processing Fee' (NO), 'Collect Level Deposits' (YES), 'Accept General Donations' (YES), 'Message to display for general donation' (Can't Attend? You can still support us by making a donation!), 'Allow Everyone To Pay Later' (YES), 'Allow Members To Pay Later' (NO), 'Allow Internal Only To Pay Later' (NO), 'Pay Later Comment' (I will mail check), 'Registration Info Label' (Please provide your billing information), 'Require Level Purchase for Add-on Selection' (NO), 'Accepting Gift Card' (NO), and 'Accepting Subscription' (NO). 'Save' and 'Save & Next' buttons are at the bottom right.

4. If you are also collecting donations or sponsorships via a donation page, the **Goal Category** is found under the Page Content section.



The screenshot shows the 'Page Content' settings for a fundraising page. The 'Goal Category' dropdown menu is highlighted with a red box and is set to 'Annual Gala'. Other settings include 'Display Goal' (YES), 'Goal Amount' (\$100,000.00), 'Goal Quantity' (dropdown), 'Goal to Use' (Goal Amount), 'Goal Chart Type' (Bar Chart), 'Goal Chart Title' (Use Default Title), 'Include Pledges in Total Raised' (NO), 'Include 'Pay Later' Ticket Purchases in Total Raised' (NO), 'Display Share on Social Media buttons' (NO), 'Donate page subtitle' (Your Support), 'Donate amount title' (Your Amount), 'Donate payment information title' (Payment), 'Donate button text' (Donate Now), 'Minimum donation amount' (\$1.00), 'Allow donations in foreign currencies' (NO), 'Allow to use ACH' (NO), 'Allow recurring donations' (NO), 'Make recurring donations default' (NO), 'Allow to select future date for recurring donations' (NO), and 'Save Credit Card Information' (NO). 'Save' and 'Save & Next' buttons are at the bottom right.

5. Click **Save & Next** to save the changes.

Communications

How do I send out emails to all guests?

1. You can create an email list from the Event Attendance grid's Actions menu if you'd like to use the Email Marketing campaigns feature to send colorful emails and track the response rates.
2. You also can use the Direct Email option to send emails and attachments to all attendees.

How do I send text messages to guests?

1. Text messages can be sent with custom messages from the Event Attendance grid.
2. Click on the **Actions** menu, then **Send Text Message**.
3. Enter the text message info and choose to send the message immediately or prepare texts and schedule them to go at specific times.

The screenshot shows the 'Send Text Message' dialog box. At the top right, it says 'Remaining Daily Text Messages: 2000'. Below that is a dropdown for 'Insert Mail Merge Field'. The 'Text' field contains: 'Only five minutes left to bid! Don't miss your last chance to win and support Helping the Kids, too!'. There is a toggle for 'Include Video Recording' set to 'NO'. Below that is a 'Schedule Text Message' toggle set to 'YES'. To the right of this toggle is a 'Schedule Text Message Delivery On:' field with a date and time picker set to '2/26/2024 9:55 PM'. A disclaimer is checked: 'I certify that I am not engaging in any unsolicited advertising, marketing or other activities prohibited by applicable law or regulation covering anti-spam, data protection, or privacy legislation in any applicable jurisdiction, including, but not limited to anti-spam laws and regulations such as the CAN SPAM Act of 2003, the Telephone Consumer Protection Act, and the Do-Not-Call Implementation Act. I also certify that the SMS list comprises only constituents with contact initiated by an individual or contact initiated by our organization to send informational content to an individual based on having a prior relationship.' Below the disclaimer is a field for 'Initials: JJ'. At the bottom right are two buttons: 'Schedule Text Message' and 'Cancel'.

4. Note that there is a maximum of 2000 direct text messages per day. The automatic messages sent via the auction process do not count towards the 2000 total. Only those messages generated manually count toward the total.

Checkout:

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

1. For most events without an auction, check out involves collecting payments for paddle raises, raffle tickets or other add-ons that were purchased during the event.
2. You can utilize the mobile app or record the purchases as described above in the [paddle raise](#) or [ticket sales](#) descriptions above.

Can you choose which credit cards to use?

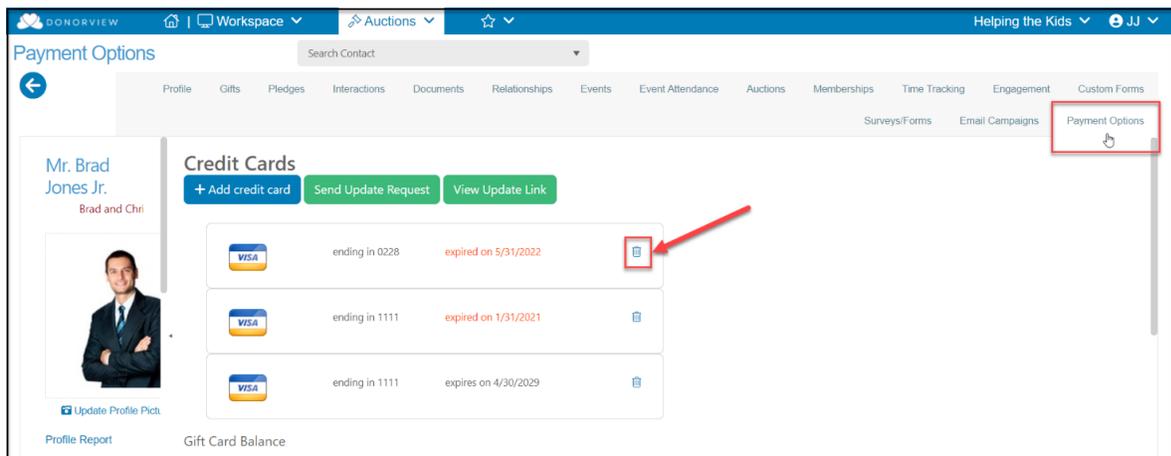
1. Yes, the credit card used can be selected with individual checkout from a donation or event page.
2. With the mobile app, a credit card must be swiped to process a payment.

What if the donor wants to pay with a check?

You will need to use a laptop and record the payment using a page or entering a manual donation to record a check or cash payment.

How do I remove a credit card from a profile?

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



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

1. Payment of credit card fees needs to be established on the event or donation page on the Settings Tab.
2. If the fees are optional, you can check the box to include the fees with the payment.
3. If the fees are required, you would need to edit the Event Page Settings to change this requirement.

How do I send a receipt?

Thank you emails are automatically sent that includes a list of their purchases and donations.

Can receipts be printed?

1. Receipts can only be printed with a screen print feature when viewing the auto email that is sent.
2. You could also generate a mail merge acknowledgement letter from the Gifts or Events grid if desired.

Do I have to check the Check-out box on the Event Attendance grid?

1. No, there is no requirement to check out guests on the Event Attendance grid.
2. If your event is a volunteer event and you are recording the time tracking via the event level, but don't have Use level start & end time activated, you will want to mark the check out box to record the time.

The screenshot shows the 'Add/Update Level' form with the 'Time Tracking Defaults' tab selected. A red box highlights the 'Create time tracking on check in' toggle switch, which is currently set to 'YES'. Below this, there are four dropdown menus for 'Constituent Service Category' (1-4). At the bottom, there are input fields for 'Use level start & end time' (set to 'NO'), 'Hours' (72), 'Minutes' (0), and 'Dollar Value' (\$0.00). The form has 'Update' and 'Cancel' buttons at the bottom right.

What if I need help with event?

1. Support is provided via email during regular business hours weekdays 8 AM to 8 PM Eastern Time, not including holidays.
2. For organizations with Essential or Essential plus support plans, phone support is also available during regular business hours by calling 508-205-0243 and leaving a message with the name of the organization, contact person's name and phone number, the best time to call back, and a brief description of the issue. A support specialist will return the call during business hours.
3. If the event takes place outside normal business hours, the organization can arrange after-hours, weekend, or holiday virtual support by contacting support@donorview.com prior to the event.
4. If on-site support is desired, contact support@donorview.com for a list of available vendors who provide on-site support for DonorView.