

Training Hub User Guide

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Table of Contents

[Training Hub User Guide](#)

[Table of Contents](#)

[Welcome to ClickBid](#)

[Organizational Administration](#)

[Starting a New Event](#)

[General Admin Features](#)

[Opening Your Auction](#)

[Training/Support](#)

[Getting Help](#)

[Dashboard](#)

[Readiness](#)

[In Event](#)

[Post- Event](#)

[Software Settings](#)

[Users](#)

[Auction Settings](#)

[Landing Page Content](#)

[Landing Page Shortcodes](#)

[Bidders](#)

[Manage Bidders](#)

[Bidder Tags](#)

[Bidder Details](#)

[Bidder Login Code](#)

[Email & Text Bidders](#)

[Chat Bidders](#)

[Items](#)

[Manage Items](#)

[Manage Item Images](#)

[Manage Item Donors](#)

[Categories and Ordering](#)

[Item Display Cards](#)



[Donor Thank You Letters](#)

[Printable Bid Sheets](#)

[Tickets](#)

[View Ticket Sales](#)

[Ticket Page Settings](#)

[Modify Tickets](#)

[Manage Guests](#)

[Sales Summary](#)

[Refund a Ticket Sale](#)

[Enter RSVP Ticket](#)

[Event Central](#)

[Butler Tools](#)

[Check In](#)

[Check Out](#)

[In Person Displays](#)

[Manage Unbid Items](#)

[Concierge Bidding](#)

[Event Day](#)

[Pre-Check In](#)

[Post Event](#)

[Batch Processing](#)

[Refunding A Transaction](#)

[Second Chance Auction](#)

[Text-to-Give](#)



Welcome to ClickBid



▶ ClickBid Training Hub: Welcome to ClickBid

Welcome to our walkthrough training. Let's get right at it. First, let's log into your admin.

If you are just starting with ClickBid, you will be logged directly into your first event's welcome page. To return to this page at any time, click the Home button located at the top left corner of your admin screen. On this page you can see important event information including your Landing Page link, keyword, important dates, and event totals.

If you have more than one event in your account and you have Organization permissions, you will be able to view a higher level of administrative features. To learn more about these features, view our Training Hub session titled Organization Administration.

An important feature to point out is your **landing page link**. This is what you send out to your guests to register and get details about your upcoming event. It is the home of your virtual venue and the starting point for any function related to your event.

Your **keyword** is linked to your landing page URL and is also used for text to give which is available year round with your license purchase. Simply ask your donors to text your keyword to 56651 to donate. If you're one of our wonderful Canadian organizations, donors can text your keyword to 855-800-4975.

The **important dates** section shows you the **Auction Start**, **Auction Event Closing Date** and **Phone Support** dates for your event. These can be updated by an Account Manager which you can reach by clicking the hyperlink within the **important dates** box or the chat button.

A quick note about event closing times. Your **Auction Event Closing Date** is the ending point of your auction. However, each auction item can have its own closing time before this date. Make sure all your items are set to close at the correct time. The good news is that phone support is something we offer to all of our clients on the day of their event. We will give you a contact name and phone number 24 hours before your phone support date that you can call or text in case any questions come up.



Organizational Administration



<https://youtu.be/SEICNxdbIFl>

This is an optional video session for those users who have Organization admin. If you can see a link in your admin navigation titled **Organization**, then you will be able to edit Organization features. Tap on that link to load the Organization admin. You'll know you are editing the Organization when the top banner is green. Along the side of the page is a new navigation that allows you to edit your organization account, users, recurring donors and select events that you have created. By default, we will show you active events that you have created in the large area to the right of the navigation. Simply choose the **Go To Event Admin** button to jump into that event's admin.

You can view any older events that have event dates in the past by choosing **Show Inactive Events** from the **Event Status** dropdown. You can also filter by event **date range**.

To create a new event, press the **Add Event** button. This will pop open a three step wizard to let you make your new event. When choosing your event keyword, keep in mind that you can re-use an existing keyword from a previous deactivated event (in the past). We'll handle the renaming of the old event and give you access to the existing keyword. From there, simply choose an **Event Name, Start Date, End Date, Phone Support Date** and press **Next**. Keep in mind that your **Phone Support Date** is your one delegated day during your event that our staff will make a dedicated representative available to you to answer any questions you have. If you wish to change this, please submit a support request.

Next, choose an **Administrator** who will manage this new event. It can be a new administrator or you can choose an existing administrator. Press **Next** to continue.

The next great feature is the ability to clone your **Event Content** from a previous event to your new event. This includes bidders, items, photos, landing page content, credit processing and more. Simply choose the event and select the features you'd like to copy into your new event. Press **Next**.

Lastly, review your settings and make any changes before pressing **Save Event**. When complete, your new event will be listed with your previous events.



The **Users** tab in the Organization admin functions just like it does in each event admin. When using this feature as an Organization, you can create new users that have access to your Organization account as well as individual event access. If you'd prefer to create a user for just a specific event, we recommend that you go into that event's admin and choose **Software Settings** and then **Users**. This will limit your user to that specific event.

Lastly, you can now view **Recurring Donors** throughout all your events from this Organization admin menu. You can adjust each donor just like you can within each event admin. The difference here is that as your account grows and you increase events in ClickBid, this admin page will bring all your recurring donors into a single page.

We're excited to open up new possibilities for you and your organization with this new feature!

Starting a New Event

Your Organization comes with unlimited events throughout the 12 months of your license. To create a new event, simply click on the **Add Event** button in the **Events** menu item. If you do not see this button, be sure to speak with your Organization administrator to grant you access.

You will see a pop up window appear with three steps to complete. The first step is to establish an event keyword, name and important dates. You have the option of re-using an old keyword if the previous event has passed. You can choose that keyword from the drop down menu or you can enter a new one. We will tell you if the keyword is available.

From there, you can create an event name, starting date, ending date, phone support date (typically the day of your event) and time zone. When satisfied, press the **Next** button.

The second step of the process is to identify your primary contact for this event. We use this contact when our account managers reach out with important information. You have the option of re-using an existing contact or creating a new one. When complete, press the **Next** button.

The third step allows you to set up your new event with data copied from a previous event or with sample data. If you choose to copy data from an existing event, check the boxes next to the content you wish to copy and choose **Next**.



The final page will summarize your new event. This gives you a chance to make any changes before completing the process. When ready, press **Save Event**. This will create your new event and list it for you.

A quick note about second chance auctions. While you can create as many events as you like, we recommend that you use your existing event and extend the closing date. This will require a support request to our account management team if the end date is before your planned second chance auction. Why do we recommend this? Because your bid histories, checkout information, payment information and more are already established on your existing event and a second chance auction is an extension of the existing event. If you create a new event, you will have new reports that won't be shared with your previous event data.

General Admin Features

 ClickBid Training Hub: General Admin



When using our admin I want to point out a few common elements that can help you.

First, when looking at our admin pages, we do our best to group important elements. Those groups are viewable using the header. Just tap on the header or down arrow to show that section. Tap on it again to close it.

In addition, you'll see little info buttons that you can mouse over to show important information. These tips are helpful when using a feature.

Lastly, you can always find help with our support articles. Articles are located in the bottom right corner in the chat bubble. They are also available under **Training/Support - Training Hub/Best Practices**

Opening Your Auction

<https://youtu.be/YbKCBVt8ihs>



When you created your event within ClickBid, you chose a start date and time. These dates and times can be confirmed on your homepage under **Important Dates**. If you would like to change the dates or



times for your auction start, you can submit a support request by going to **Training/Support - Request Support** or click on the underlined hyperlink.


You can also open your auction earlier than your scheduled start time if you feel you are ready to go. You can do this under the **Software Settings - Landing Page Content - Login/Register** tab and the **Open Auction Early** option. Switch this setting to yes.

To be considered “open”, your auction closing date must be in the future and your auction start must be in the past, or **Open Auction Early** switched to yes, and you must have active or closed auction items with closing times in the future.

When your event is open, your bidders can begin to login and bid on any active items within your auction. Pro tip: make sure to verify this before sending announcement messages!

Training/Support

Getting Help

 [ClickBid Training Hub: Getting Help](#)



We have worked very hard to make ClickBid as simple to use as possible. That said, we understand that you may have questions for us. Knowing where to get help is a big step in learning ClickBid.

If you are using ClickBid during our business hours of 9am to 5pm EST, you can open a chat with our Account Managers. Just tap the **chat button** tab at the bottom right corner of your admin.

If you need help outside of business hours, tapping on the bottom right corner tab will give you access to our library of help articles that cover our entire platform. This is always a great place to find answers quickly with single word search!

You can also send our Account Managers a support request by tapping on the **Training/Support** tab and then choosing **Request Support**. Our dedicated team will respond quickly and get you on the right path.



Dashboard

Our dashboard is broken down in three different sections. **Readiness**, **In Event**, and **Post- Event**.

Readiness

[ClickBid Training Hub: Readiness Dashboard](#)



Make sure you're ready for your Event! Use this dashboard to view important information about your event. If you see something that looks off, tap a link in the descriptions or open a chat with our team.

The dashboard will check the following: is your auction open, do you have low starting and/or raise amounts for your items. We also check your bidder information. Specifically: Can bidders register themselves, Are you Requiring Address, Credit Card, Allowing Checkout from Phone. We also show important dates which include: Timezone, Current Time, Auction Start date and time, Auction event closing Date and Phone Support Date. Next, we give you your Payment Details, Credit Card Processor and whether you have a credit card fee set.

Moving on, we have a quick view of your item closing times. You usually want one date and time set for your closing times. You're looking for what I call "stragglers" or items that have a unique closing time that you might want to change.

Next, we show you the different statuses you have set for your items: Active, Closed, or Invisible, along with Item Types: Silent, Live, Donation, Quantity, Blind, Credit, Info. Keep in mind that the only item types you see are those that you have created in your catalog.

In Event

[ClickBid Training Hub: In Event Dashboard](#)



This is a great page to look at during your Event! Your totals will be organized by item type and how much they are making. This page will fetch new data automatically.



A few things to point out. **Text-to-Give/Online Donations**. Incomplete means someone started a donation but did not complete the purchase. The total indicates a total based on paid donations.

When using this page during an event, keep an eye on the **Unbid Items by Type**. You can use this to determine if you should consider lowering any starting bids. There's a convenient link you can use to lower starting bids.

Lastly, you can also quickly see who in your account has a registered payment method under the **Bidder Quick View**.

Post- Event

https://youtu.be/U7Lv_Uj-fg8



This is a great way to get a quick view of how your event did! A few pointers here. The **Item Quick View** shows every item by type with no bids. The **Bidder Quick View** can show you revenue that has a credit card on file. The **Total Winners Not Checked Out** line item will tell you how much still needs to come in.

When you have “closed out” your event meaning you have received all payments, you can deactivate the event in your Organization admin. Simply click on **Organization** in your event menu. If you don't see the **Organization** link, you will need a system administrator to assist you. Locate the event listed in the **Events** area and choose the **three dot menu**. From there, choose **Deactivate Event** and confirm. This will allow you to filter out old events. It's important to note that this does not delete your event. If you ever need to go back into a deactivated event, simply choose **Show Inactive Events** from the **Event Status** dropdown and then **Go to Event Admin**. All your data will be available to view.

Software Settings

Users

<https://youtu.be/XPNGCjtORLU>



Admin owners can create separate user login profiles that have access to features within an individual event admin as well as the entire organization account. This means that, as the owner of the organization, you can establish multiple organization users and give them access to features within events. For example, you may wish to hand over control of the organization account to a new board member. You can also set up a user to have control of just a specific event in your organization account for the purpose of using Butler to check guests into and out of an event.

A quick note: Our best practice recommends having one main contact that is in charge of each event admin. This is the person who would be in contact with ClickBid.

The **Software Settings - Users** page within an event allows you to create login details and unique user permissions for the admin. To create a new user, tap on **Create New User**. Enter the first and last name along with email. Once you create the profile, the email you entered will receive a confirmation with instructions on how to finish setting up the account.

You can then add specific permissions for this user. The default user permissions are the training/support tab. Anything additional you would like to share with the user you will be able to manually select. You will always have the ability to remove a user or copy their permission settings to another user.

When editing permissions for an organization user, choose the **Organization** menu item and then choose **Users**. You will then be able to add, remove and edit users that can control the organization account as well as specific events.

Auction Settings

 [ClickBid Training Hub: Auction Settings](#)



The auction settings tab has several different sections. In the **General Event Details** tab, you can view time zone information, event start date, daylight savings time and max bidding - which allows you to set the highest amount you are willing to pay and allow the system to bid for you on your behalf.

Under the **Butler Settings** tab, you can customize the welcome text which is sent automatically after registration (be sure to scroll down past the instructions). ClickBid has different shortcode options for



your welcome text. We highly recommend using the bracket U bracket shortcode “[u]” which is the personal bidder link to the bidding site.

Under the **Payment** tab, you can set up your merchant account, adjust your credit card fees and allow your bidders to opt out of the fees. ClickBid recommends charging 3.63% to your bidders so your organization receives the full purchase price or donation amount.


In addition, you can control how a user experiences checkout. We have several features available at checkout such as Double the Donation, a donation form to include additional gifts and more.

Under the **Fair Market Value** settings tab, you can customize your fair market value settings for the auction preview, bidding site and bidder statements. We recommend showing fair market value on receipts for tax reporting purposes.

Under the **Custom Content** tab, you can add a statement footer to your bidder receipts. Add a thank you message, and your Tax ID information for tax and write off purposes. Anything you add here will show up at the bottom of your bidder’s receipts. You can also add terms which appear to anyone who begins using your bid site.

Lastly, you can establish a silent and live auction goal. This is only used inside the admin to help you see your progress.

Landing Page Content

 ClickBid Training Hub: Landing Page Content



One of the areas you are going to want to spend some time on is the landing page or “virtual venue”. You can modify colors, content, backgrounds and add links to ticket pages or your organization page.

First things first, I always recommend opening a second tab in your browser with the landing page that you can refresh to see changes you make on this admin page.

You can begin editing your landing page under **Software Settings - Landing Page Content**. From here, you will see several tabs at the top of the page. These tabs include page settings, login/register area, and content sections A-D (if you have purchased the enhanced giving page).



Under **Page Settings**, you start by changing the top navigation bar. You can include your auction preview, ticket page link, and donation link.

In the main banner area, you can set your background image and logo which floats over the top of the background.

In the **Banner Area Colors/Title/Subtitle**, you can adjust the title of your landing page, background color, and font color.

Further down, you can modify the details button and where it points to in your landing page, whether we should include social media tools and some final links to your social media and Google/Facebook tracking.

Moving on to the **Login/Register** tab, it is here that you have the option to open your auction earlier than the given start time. This allows your guests to log into the landing page to access the bidding site. If your event is set to open, and you have items set to active, your guests will be able to bid on items. An important note. If you plan on opening your auction early, be aware of your item's statuses to avoid any early unplanned bidding.

This is also where you can set your registration settings. You have the option to hide the register now button, enable text to register, require addresses and credit cards, and allow your guests to check out from their phone.

In addition, you can customize the welcome email sent to bidders when they complete registration in this area as well as the ability to customize information that is presented just below the register to bid button. Quick tip: keep this content brief for maximum impact.

Lastly, you have up to four content areas where you can focus your visitors on key information about your event. In the content area, you can add text, pictures, links, videos, landing page shortcodes, and other customizable content. Pro tips: Over the years we've seen organizations have sections about the fund-a-need, about the event, sponsor logos/links, and YouTube videos. In addition, you can always make changes over time as more information comes in about your event.



Landing Page Shortcodes

[ClickBid Training Hub: Landing Page Shortcodes](#)



Let's talk a bit about shortcodes. These are available to help embed a dynamic feature on your landing page. You can embed a website, youtube video, facebook live. In addition, you can display features directly from ClickBid including an appeal display, activity feed and leaderboard. You can also display the EventStream broadcast and an item donation form.

To use these, make sure you are editing a section of your landing page (A-D) and inside the content area. In the Word style menu there is a **Shortcode Icon** which you can click on to choose the type of feature you want to add to your landing page. This will add a set of brackets around the feature you want to add. For some features, you may need to add more information including a URL or item number for the shortcode to display correctly. Simply remove the all caps values and replace it with the needed information.

Bidders

Manage Bidders

[ClickBid Training Hub: Manage Bidders](#)



The Manage Bidders page is helpful in maintaining bidders to your event.

I'd like to talk briefly about how you plan to get your bidder's information into ClickBid. There are several ways to do this. First, you can upload your bidders from the **Software Settings - Manage Bidders** page using our template. Second, you can let bidders register themselves from the landing page. Third, you can use our ticket page to capture guests and then have them converted to bidders. It's important to note that we do not recommend using more than one method. This can cause overlap in how bidders are added to your account. While nothing will break, it can add some confusion.

If you are uploading bidders, scroll down to the bottom of the **Software Settings - Manage Bidders** page and click Download to download our excel template. While the bidder's name is the only requirement to upload the template, it is very important to have more information including phone



and email. If you are not using a column, simply leave it blank. Be sure not to remove or rename any columns.

If you are allowing self registration from the landing page, copy your **Landing Page URL** found under the **Important Links** section of your home page and send this out to your guests by email, social media or other messaging platform. Let your donors sign themselves up and start bidding.

If you are selling tickets through ClickBid, your bidders are essentially self registering and they do not need to register again on the landing page. We recommend turning off the **Register Now** button when selling tickets so you do not end up with duplicate bidders.

NOTE: If you are selling tickets outside of clickbid, you may want to use our template to quickly upload all of your bidder information at one time right before you open your auction.


By default, we list bidders in a grid layout that you can search. Searching can be done globally or within a specific column and even sorted ascending or descending.

Bidders are automatically assigned bid numbers starting at 100. Every time a bidder registers or is added by an admin, they will be automatically assigned the next available bidder number.

Tables are used to group bidders together. Typically this is for in person seated events. A table assignment can be included in the welcome text message that goes to each bidder who is checked in. This is really helpful for letting bidders know where they are seated as they arrive.

The tags column will show you if bidders have logged into the bidding site, if they have been checked into the event either virtually or in person using the butler, if they have placed bids, or checked out with the ability to print or re-email their statement to them.

Bidder Tags

 [ClickBid Training Hub: Bidder Tags](#)



With our bidder tags, we allow you to create one or more “tags” that let you group your bidders in customized ways. To create your first tag, go to **Bidders - Manage Bidders** and choose



Custom Tags and type a new tag name (shorter is better). This will create the tag and link it to that bidder.

You can edit a tag, unlink it from a bidder and remove the tag. When you edit any other bidders, all of your created tags will be available.

Bidder Details



[ClickBid Training Hub: Bidder Details](#)

One area in the **Edit Bidder** form that I wanted to call out is the **Details** area. In this section, you turn on or off text/push notifications, edit a table name and most importantly, resend a welcome text or email.

Bidder Login Code



[ClickBid Training Hub: Bidder Login Code](#)

When your bidders log into the landing page to bid, they will be sent a one time login code to finish logging in. The login code will be sent via email or text based on how they logged in. Enter the code and click **Next** and **Continue** to access the bidding site. If this is your first time logging in you may have to enter your credit card or address depending on the organization's requirements.

This new login code feature removes the presence of passwords. It is a more secure way to login and protects any confidential information on the bidder profiles.

Email & Text Bidders



[ClickBid Training Hub: Email & Text Bidders](#)

The **Mass Messaging** feature is an add-on purchase to your ClickBid account and is located under **Bidders - Text or Email Bidders**. It allows you to send multiple emails and text messages to your



bidders throughout your event. To purchase **Mass Messaging**, go to **Software Settings - Account Status - Upgrades** and then choose **Mass Messaging**.


For text messages, head to **Bidders - Text Bidders**. You will see **Pre-composed Texts** and **Compose a Text** sections. You will want to start under **Compose a Text** and add your message under the content area. There are several filters you can choose from and several shortcodes you can use within these messages. The shortcodes to choose from are: bidder number, first name, last name, bidding URL, guest to bidder link, and table assignment. These shortcodes must include the brackets around the designated letter for that shortcode to work properly.

Once your message is ready to send, you can choose to save to **Pre-composed Messages** or send the text now. For a pro tip, we recommend using the **Send a Single Text** section just above the shortcode section to test how the message will appear to your bidders once it is sent. Simply enter your bidder number and click **Send Single Text** to test this. The desired send time field is for your reference only and clickbid will NOT automatically send your message at that given time.

When you save a message to pre-composed, it can be found under the **Pre-composed Texts** tab. For text messages, there is a character limit of 160 characters. You will follow the same directions for emails under **Bidders - Email Bidders**. For email bidders, you will have to compose a subject line and there is no character limit. Please note the **Desired Send Time** setting works the same in email bidders as text bidders.

I recommend composing your messages before your event. That way you can have all your messages ready to send before the hustle and bustle during your event.

Chat Bidders

 [ClickBid Training Hub: Chat Bidders](#)



With the purchase of **Mass Messaging**, your organization has the ability to accept chats from your online visitors. The **Chat Bidders** feature allows your signed in bidders to chat openly while logged in. At the bottom left of the bidding site, there is a blue chat icon. If you click on that icon, you can specify a display name, join the chat and send a message. Others can share thoughts, pictures, emojis and communicate with other bidders regarding your event.




From the admin side, your organization must allow and set up the chat feature before your bidders have the ability to use the function. You can do this under **Bidders - Chat Bidders**. Simply turn on the chat feature. On this same page, there is a unique moderator email and password. Copy and paste into the login area. This will log you into the chat as the moderator to view any incoming chats, any online users and respond to any incoming chats.

Pro tip: during the event, send out questions or challenges to keep your bidders engaged.

Items

Manage Items

 [ClickBid Training Hub: Manage Items](#)



On this page you have the ability to add items individually by clicking the **Add Item** button, or scroll to the bottom of this page to download our Template to bulk upload all of your items. If you are not using a column listed in the template, simply leave it blank. Do not remove or rename any of the existing columns.

When adding items to your admin, be sure to use the correct item type. These include: Silent, Live, Donation, Quantity, Info, Blind, and Credit. Silent items are a competitive item where the highest bidder wins once the item has closed. Live items are previews of an item but are not biddable on the site. Great for advertising the item in advance of your auction, this creates excitement and anticipation for the event. Winning bids for live items must be added in the **Event Central - Butler** tool. Quantity Items are great for raffle tickets sales, wine pulls and any other items you have multiples of or want to sell for a set price. Info items add information to your bidder's receipts. These items cannot be displayed on the bidding site. Blind items are similar to silent items, however, each bidder chooses an amount they want to 'bid' without getting an outbid text. None of the bidders know how much anyone else bid and the highest bidder wins once the item closes. Credit items allow you to add a credit to your bidder's account. The credited amount will be deducted from the bidder's total at the end of the auction.




Once all of your items are loaded into your admin, make sure the status of each item is set appropriately. There are three different item statuses: Active, Closed and Invisible. An Active item can be viewed on the **Auction Preview** of the landing page, on the bidding site once your auction is open and is biddable once signed into the bidding site. A closed item can be viewed in the **Auction Preview** and the bidding site but is not open for bidding. An Invisible item will not appear on either the **Auction Preview** or Bidding Site. A quick note about invisible items. These items will appear on a bidder's checkout if they have a winning bid.

Check to make sure your items are set to close at the correct date and time. Closing times are very important because any item that has an Active Status will change to Closed when the closing time has passed. An easy way to edit multiple items is to select **Show All Entries** at the top of the **Manage Items** page, click the top toggle button next to the **Name** column (or individual line items) and scroll all the way down to the bottom of the page to the **Batch Update Section**. Find the closing time batch update, select it, enter the correct date and time, click **Update**.

Use the arrows at the top of each column on the **Manage Items** page to sort or group together items with similar information. This is helpful when checking for different closing times, low start and raise prices and making sure all items are active.

Manage Item Images

 ClickBid Training Hub: Manage Item Images



This page allows you to bulk upload your item images versus one-at-a-time in each item. When saving images to your computer, save them as the item number; example: 100.jpg. If you have more than one image for an item, you would name it 100-1.jpg and 100-2.jpg. We recommend jpeg or png images. Once all of your images are saved, you can drag and drop a file(s) into the **Drop Files to Upload** box. Once the upload is complete, the page will show you what images go to each item with the ability to remove, or rotate the images. Numbering your image files is the only way ClickBid will know what item you intended the image to be assigned to when using bulk upload.



Manage Item Donors

[ClickBid Training Hub: Manage Item Donors](#)

This page lists all of your item donors. You have the ability to add more than one donated item to an auction item. Therefore, you may have three donated items that make up auction item 100. This is the page that displays all those donated items that have been given to the auction.

To add a new item donor, simply click on **Add Donor** and enter the information. Type in the auction item you wish to link this donation to and choose it from the drop down. Then complete the rest of the information. A note about displaying donors when people bid in the auction. If you would like your donor name to show on the item for your bidders to see, make sure to include the **Donor Display Name** when creating your donor.

Categories and Ordering

[ClickBid Training Hub: Categories & Ordering](#)



Under **Items - Categories and Ordering** you can create new categories, delete old ones, and sort them in the order you want them to appear on the landing page and bidding site.

As a tip, when you organize your categories, think about separating each category into its own set of hundreds. For example, the category Vacation could be items in the 100s. The next category, Accessories, would use the 200s and so on. This organizes your items in both category and number order.

You can also categorize your items and keep them in number order while the categories are not grouped together. To do this, click the dropdown at the top of the **Categories and Ordering** page and select **By Item Number** instead of **By Category First, Then Item Number**.

If you are using the **Sort** column under **Categories and Ordering**, make sure to enter a number for each category. If one is blank, the system will put them in alphabetical order instead of numerical.



Item Display Cards

[ClickBid Training Hub: Item Display Cards](#)



Display cards give you a template to print your in-person displays. If your item cannot be physically present at your event, display cards work great to highlight and give details about the items to your bidders.

Display cards can show fair market value, the image of the item, the item number and the item description for your bidders to view before bidding on the item. To populate display cards you can go to **Items - Display Cards** and make your selections, then click on **Make Display** on the bottom of the page. When launching your displays, they will populate in a new browser tab. From here, you can make any edits to the text or descriptions. Once you have all your displays looking good, you can print.

Donor Thank You Letters

[ClickBid Training Hub: Donor Thank You Letters](#)



We support the ability to generate printable thank you letters to send to your item donors that exist in your account. Due to the wide range of content, you may wish to add personalized information to your thank you letters. To maximize your wide ranging needs, you are initially presented with an editor that controls your entire letter space. This is where you will edit the template and use our shortcodes to help you personalize the message. We do have a starter template that you can use.

With our shortcodes, you can enter in the donor's name, phone number, email, address, city, state, zip code, item name, fair market value of the item and more. Once you have generated a standard template, you can populate your letters and make additional changes to each donor's letter if necessary. To help you get started, we will insert a pre-formatted template if nothing currently exists. When you make changes, we will automatically save your edits so you never have to worry about losing your changes as you tweak your letters. You can navigate to your thank you letters by going to **Items - Thank You Letters**.



Printable Bid Sheets

[ClickBid Training Hub: Printable Bid Sheets](#)



ClickBid is first and foremost a mobile bidding event software platform. However, we do have the ability to print paper bid sheets for in person bidding. This is available in case your organization does not feel comfortable with a completely mobile auction experience. Yet.

Once you have your items loaded under **Manage Items**, go to **Items - Printable Bid Sheets** and make your selections. Then, hit the **Display** button at the bottom. You can select many modifications to your bid sheets including showing images, donors, descriptions, item category, fair market value and starting price. Once you make your selections and press **Display**, this will generate the bid sheets in a new browser for you to print. To print, you can right click on the bid sheets and select print. Item descriptions are limited to approximately 237 characters. If your item description does not fit you will have to shorten the description as we cannot add additional characters to the bid sheets due to limited space.

Tickets

View Ticket Sales

[ClickBid Training Hub: View Ticket Sales](#)



Under **Event Tickets - View Ticket Sales**, you will find your ticket purchasers. Use the up/down arrows to filter by first, last name, ticket type, total, and dates. Use the blue dropdown arrow to the far right of the screen to view more information about the ticket purchase, refund the purchase, a printable copy of the receipt, re-email the receipt, or resend the link email message. A note about the resend email link. This is a link to a page that a ticket purchaser can use to update their guest data (after the purchase).

When you click the “i” icon under the blue dropdown, you will have the ability to update the information for the purchaser as well as view all of their guests under the guest list.



Once your event is over you can remove and archive all of the ticket purchase by clicking the **Show All Entries** at the top of the page, click the top toggle button to select all entries together, scroll to the bottom of the page and click **Delete and Send to Archive** under the **Batch Update** section.

Ticket Page Settings

[ClickBid Training Hub: Ticket Page Settings](#)



There are two additional pages I'd like to touch on. First, the **Ticket Page Settings**. This page, as it sounds, allows you to make changes to the entire ticket page. You can upload a banner image, edit your event details, choose payment types and more. I recommend spending a little time on the General Settings tab to make sure you have your form set up exactly how you want it.

A special note here. Just like editing your event landing page, open your ticket page in a new tab and refresh the ticket page as you make changes to see how things look.

Modify Tickets

[ClickBid Training Hub: Modify Tickets](#)



The second area to focus on is the Modify Tickets page. Here you can add/edit/remove individual tickets, sponsorships and underwriting for your ticket page. Each ticket/sponsorship can have unique settings like price, fair market value, quantity available and more. Underwriting is unique in that it does not come with actual tickets but is rather a purchase item to help you cover costs of your event. Tip: We recommend allowing your donors to underwrite the cost of mobile bidding and other line items of your event.

Manage Guests

[ClickBid Training Hub: Manage Guests](#)




Under **Event Tickets - Manage Guests**, you will see a list of all the guests that have been registered to the event through purchasing online tickets. This is a collection of everybody you anticipate to be at your event. Ticket purchasers automatically turn into guests before becoming bidders. Before your event you will manually convert your guests to bidders. When someone purchases a ticket to your



event they will be listed under **Manage Guests**. When you are ready to convert your guests to bidders, you can select their name or names and scroll down to the **Batch Update** section and make them a bidder using the **Make Bidder** toggle. Once you make them a bidder, they will be automatically assigned a bidder number and will now be able to see this guest under **Bidders - Manage Bidders**.

A note about turning guests into bidders. If you've gathered a majority of your guest information and have a high percentage of phone and/or email addresses, I highly recommend using our mass messaging system to invite your guests to start bidding in the auction. The mass messaging has a filter that will let you include a link that when opened gathers the rest of your required information (address, credit card) and drops you directly into the bid site. This is a huge time saver when you open your event and want to get as many people bidding as possible.

Sales Summary

 [ClickBid Training Hub: Ticket Sales Summary](#)



Under **Event Tickets - Sales Summary** you will find a breakdown of your ticket sales. The first section will show you how many Individual Tickets, Sponsorship Sales, Donation Sales, and Underwriting Sales you had for your event.

Under **Discounts** you will find the number of ticket purchasers that used a discount code and the total amount for those discounts.

The **Guests** area will show you how many guests are listed for each ticket type.

Ticket Sale Details will show you the number of each ticket name you sold and how much you received in sales for those tickets.

Sponsorship Sale Details shows the name of your Sponsorship ticket, how many tickets sold and how much you received in sales.

Guest Selection Breakdown shows you how many guests chose each selection you have created under **Event Tickets - Modify Tickets - Make a Selection**.



Refund a Ticket Sale

https://youtu.be/dgHiBP_JI7w



You may need to perform a refund on a ticket sale during the lead up to your event. To do this, navigate to **Event Tickets - View All Ticket Sales**. This will list every ticket sale you have received to date. Locate the purchase you wish to refund. You can use the filtering tools to quickly locate it.

Once you have the ticket sale found, move your mouse over the down arrow to the right of the Date column and then choose the backwards arrow icon. This will load the refund page.

Each line item that was included in the transaction will be listed on this new page. You have the option to refund a specific line item(s) or, you can refund the entire transaction. Simply click the checkbox on the right most column for each line item you wish to refund. If you wish to refund a partial amount of a specific item, enter the amount in the **\$ to Refund** column.

Below the line items we will summarize the transaction with some key data. First, we will show you the total purchase amount for this transaction. If you have any previous refunds, we will list that amount next. Third, we will show you how much you plan to refund when pressing **Submit**. Lastly, we will indicate the final amount that will remain on the transaction. If you are satisfied with the summary, press **Submit** and we will process your refund.

Enter RSVP Ticket

 ClickBid Training Hub: RSVP Ticket



Under **Event Tickets**, when you click **Enter RSVP Ticket**, a new tab will open that looks exactly like your ticket page. This new tab gives you the chance to enter an RSVP ticket for one of your guests. This function is meant to allow an administrator to submit ticket sales that came in via snail mail, phone, etc. It helps you keep one source of reliable information.

You can process the payment as check, credit, or cash, no matter what your payment settings are for your original ticket page. Enter the purchasers information, and that purchaser will receive a receipt of confirmation to the email put on file.



If you have tickets that you want to sell yourself and not allow guests to see them on the ticket page, mark them as invisible under the **Event Tickets - Modify Tickets**. These tickets will only appear on the **Enter RSVP Ticket** page.

Event Central

Butler Tools

[ClickBid Training Hub: Butler Tools](#)



Think of the butler as your backend way of being the bidder. Butler is a simplified version of the admin that you and your volunteers can use on event day.

Here, you can do several things for your event attendees. You can register new bidders, you can check bidders in and out of your event, you can bid for your attendees, remove a bid, as well as utilize the appeal/raise the paddle feature and rapid fire keypad for your live events. This is also the area in which you can add credit cards to your bidder profiles. A quick note about credit card readers. If you would like to utilize our credit card swipers, these can be purchased in **Software Settings - Auction Settings - Payment**, “to order credit card swipers click here.” However, we recommend that you invite your bidders to register their own payment information when they get your early check-in message.

Check In

[ClickBid Training Hub: Butler Check In](#)



If you have volunteers at your event that will be helping your bidders check-in, you will want to have them login through a unique URL that only gives them permissions to the butler. In **Software Settings - Auction Settings - Butler Settings** you will see a blue box with **Login Details**. This includes the unique url to the butler that you can place on an ipad or a laptop for your volunteers. You will want to do this for security purposes. On the login page, use your event keyword form the Keyword field, Username or Email and password for Password. NOTE: I recommend going to **Software Settings - Users** and creating a volunteer user that only has access to Butler functions. Then, you can give your volunteers that username/password combo during the event.



Once logged into the butler, volunteers have the opportunity to check-in any attendee by going to the top section **Bidder Lookup** and enter the bidder name, and tapping **Look Up**. When you find the name, verify their email and cell phone number is the phone number they have with them. They will receive a welcome text to start bidding and outbid text messages. Click the **Tap to Add a Credit Card** button if you are adding credit cards. Click **Complete** in the top right corner and they will immediately receive the welcome text. Once you press complete, the check in process is complete and your volunteer can repeat this process for the next individual that approaches the check in table.

Check Out

 [ClickBid Training Hub: Butler Check Out](#)



If you have volunteers at your event that will be helping your bidders checkout, you will want to have them login through a unique URL that only gives them permissions to the butler. In **Software Settings - Auction Settings - Butler** you will see a blue box with **Login Details**. This includes the unique url to the butler that you can place on an ipad or a laptop for your volunteers. You will want to do this for security purposes. On the login page, use your event keyword from the Keyword field, Username or Email and password for Password. Again, I recommend creating a special user account for the volunteers.

Once logged into the butler, the volunteers have the opportunity to check-out any attendee by going to the top section Bidder Lookup and entering the bidder name, and tapping look up. When you find the name, click on the red **Checkout!** button. You will view an itemized list of all the items the bidder has won, purchased, or donated. Under **'Choose a Payment Type'** select Credit Card, Cash, Check, or Other. If paying via Credit Card, enter in the details, or if the details are already entered, press submit. If paying via Check, under the field **'Check Number'** you can enter the check number. Once you have selected the correct payment method, click the green **'SUBMIT'** button. This will send the email of the receipt of their purchases. Once you have pressed submit, the check out process is complete and your volunteer can repeat this process for the next individual that would like to check out.

In Person Displays

 [ClickBid Training Hub: In Person Displays](#)



If you are holding an in person event, we have multiple options for you to display to your bidders and donors. First, we have a QR Code for the landing page. You can print this QR Code off and display it on tables or around your venue. This is an easy way for your bidders to access the landing page and login to bid. The QR code is found under **Software Settings - Account Settings - Basic Account Information**.


We also have an appeal display to show donations from your bidders in real time. With the appeal display, you can customize theme, background and add your sponsor logos. The appeal display can show your bidders first and last name and will show your total raised in comparison to a set goal. The appeal display can be found under **Items - Manage Items - [Choose a Donation Item] - Projected Display Settings**.

Another display we have is called the **Activity Ticker**. This display can highlight certain aspects within your event in real time. For example, you can highlight all bidding notices, item notices, registration notices, and donation notes. The activity ticker highlights some key activities throughout your event in the order they occur. To customize this page, you can add specific colors for each element.

Another element you can show at your in-person event is a **Countdown Clock**. The countdown clock is meant to display on a projector to give your bidders the time left in your silent auction or time until your live auction starts. The countdown clock will display a countdown time and can be customized by background and can also show sponsors. You can find the countdown clock from **Event Central - Countdown Clock**, adjusting your settings and pressing launch countdown.

Lastly, we have the **Leaderboard**. The leaderboard is meant to display a current standing of your items and their current bid and/or winning bidder. The leaderboard can be customized by color and smart filter, which decides which items to filter through. To get to the leaderboard, you can go to **Event Central - Leaderboard**, adjust your settings and press launch leaderboard.

Manage Unbid Items

 ClickBid Training Hub: Manage Unbid Items



Under **Event Central**, navigate to **Manage Unbid Items**. This page will have all your unbid items for you to lower the starting price. You can lower by percentage or dollar amount. This page is a good



reference during your event so you can keep track of the items that have not received any bids. Depending on the timeline of your event, you may want to reduce the starting price or bid increment of your items if they have not yet received any bids.

Concierge Bidding

[ClickBid Training Hub: Concierge Bidding](#)



Concierge bidding allows volunteers to bid on behalf of bidders. You will want to have your volunteers login through a unique URL that only gives them permissions to the butler. In **Software Settings - Auction Settings - Butler** you will see a blue box with **Login Details**. This includes the unique url to the butler that you can place on an ipad or a laptop for your volunteers. You will want to do this for security purposes. On the login page, use your event keyword from the Keyword field, Username or Email and password for Password.

Once logged into the butler, the volunteers have the opportunity to bid on behalf of the bidder under the section **Add A Live Bid/Multi-Sale/Silent Bid**. Here, they will enter the bidder number, the item number, and amount, if applicable. Once the volunteer presses the add a bid button, the volunteer will have successfully placed a bid for the bidder. If the bidder is outbid, they will receive an outbid notice via text message.

Event Day

[ClickBid Training Hub: Event Day](#)




Congratulations, you have made it to your event day! The day before your scheduled auction start date, your account manager will perform what is called a Walkthrough. This is a process where the Account Manager will take a complete look at your account to make sure you are ready to go. The account manager will email you with any issues or concerns they might see. You can also complete something similar to this on your own by navigating to the **Dashboard - Readiness** page. Here you can see all important information that your account manager would be taking a look at!



When you set the open and close dates for your auction, you also chose a phone support date. This is one of our account managers that will be on-call for you the full day of your chosen support date. You will be provided with their phone number within a day of your event.

Another important thing to check before your event is your user permission settings for your volunteers that will be using ClickBid. Under **Software Settings - Users**, you can double check all your users and their specific permissions. For example, make sure your entire check-in team has the butler permissions enabled for their account. This step is necessary to make sure all of your event day helpers have the necessary tools they need to run a successful event. Pro tip: Have your volunteers check into the Butler 24 hours before the event to verify that they have the proper information.

Pre-Check In

 [ClickBid Training Hub: Pre-Check In](#)



Some key steps we suggest taking before your event starts and you begin to check in your guests. Make sure all volunteers have access to the butler using the permission settings within their user profile. Ensuring that they have the butler tool permissions will guarantee a smooth check in process. We also suggest training your volunteers on the butler settings before your event starts (usually 1 hour before doors open). This way you can ensure each volunteer understands their duties during the event and feels comfortable using the software. We also have printable documents you can provide to your volunteers on the Butler capabilities if you would like to provide them with physical resources. Those documents can be found in our best practices under volunteer training.

Post Event

Batch Processing

 [ClickBid Training Hub: Batch Processing](#)



After your event is over and you are ready to process credit cards, turn off the setting for bidders to check out from their phones, which could cause a duplicate charge. This feature is located under **Software Settings - Auction Settings - Payment - Guests can Checkout from Phone** (set to NO).



Then, go to **Event Central - Event Payments - Unpaid Checkouts** and select the bidders you want to checkout, or select all bidders using the checkbox at the top left to select all bidders. You will want to select **'Batch Process As: credit card'** and then click the blue **'Batch Process'** button. After batch processing, your bidders will receive an emailed statement of their purchases and will be marked in the system as paid. A quick note: If your settings for credit cards are allowing your bidders to opt out of the credit card fees, the batch process will automatically add the fees to the bidder's purchase.

Refunding A Transaction

<https://youtu.be/IOPYauXpgNQ>



If a purchase needs to be refunded, simply navigate to **Event Central - Event Payments**. Open the **Paid Checkout** section and locate the transaction you wish to refund. When the transaction is found, click on the backwards circle icon to begin the refund process.

Each line item that was included in the transaction will be listed on this new page. You have the option to refund a specific line item(s) or, you can refund the entire transaction. Simply click the checkbox on the right most column for each line item you wish to refund. If you wish to refund a partial amount of a specific item, enter the amount in the **Purchase to Refund** column.

Below the line items we will summarize the transaction with some key data. First, we will show you the total purchase amount for this transaction. If you have any previous refunds, we will list that amount next. Third, we will show you how much you plan to refund when pressing **Submit**. Lastly, we will indicate the final amount that will remain on the transaction. If you are satisfied with the summary, press **Submit** and we will process your refund.

Second Chance Auction

<https://youtu.be/HM6QfnH2glM>



After your event, you may wish to re-list your unbid items and auction them off over a few days. To do this, we recommend that you simply re-open the items that did not sell and set new closing times. This may require you to submit a support request to change your event end date. Simply




go to **Training/Support - Request Support** and ask for a new end date equivalent to the ending of your second chance auction.

When that is complete, navigate to **Items - Manage Items** and use the **Batch Update** tool to update any unbid items to your new closing time. Be sure to also update the item status to “Active”. You can identify any unbid items as those which have an “unbid” tag. You can even filter on this tag. Make sure to leave any items with bids as they are to avoid duplicate winners.

Once complete, send out a mass message to your donors that the second chance auction is underway and bids will be accepted until your closing time.

Text-to-Give

 [ClickBid Training Hub: Text-to-Give](#)



From the main admin page, navigate to **Donations/Text-to-Give - Settings**. There are several settings you can change including the addition of a donation goal that will show a progress bar towards that goal, using suggested amounts to show buttons for donations, showing or hiding social media buttons, and choosing a background image. You can also make adjustments to the message that goes out to your donors when they text your keyword to 56651. The language itself is not customizable, but you can allow guests to register to bid, donate, or both. If you do want your guests to be able to register to bid with the text-to-give feature, go to **Software Settings - Landing Page Content - Login/Register**. You will want to set “**enable text to register**” to “yes”. If you only want your guests to be able to donate and not register then make sure this setting is set to “no.”

Also note, to allow your guests to donate make sure to go to **Software Settings - Landing Page Content - Page Settings**. Make sure that your “Show donate” button is turned on.

