



HAPPY HIGHWAY

To Running a Successful Event



The Most Successful Event Ever.



ClickBid's Happy Highway is your guide to a calm and controlled set-up experience and ultimately, higher levels of giving with your next event.

We have found that our most successful clients follow a similar path. Or highway if you will. This guide explains ClickBid's recommended progression as you plan and set-up your event within our platform.

By jumping on this highway, you'll be much more effective when setting up your event and your time with ClickBid's Support Team will be many times more productive.

First Steps Towards a Successful Event



1. Watch our Welcome Video
2. Training Videos + How-To Articles
3. Get Familiar with ClickBid's Platform
4. Schedule Your Onboarding Meeting
5. Move Forward with Confidence



**Start
Here**

Clients that follow these early steps have the best experience and smoothest set-up.

Get Rolling in Under Ten Minutes

Join ClickBid's founder, Matt Burnell, as he shares a welcome message and walks you through your first steps within the admin platform.

- Welcome Message
- Overview of ClickBid
 - Home Page, Event Page, Navigation Bar, and More
- How to Create Your First Event
- How to Add New Users and Manage Permissions
- How to Connect with ClickBid Support
 - Reach Out to Your Account Manager and Chat

[Click here for the video link.](#)

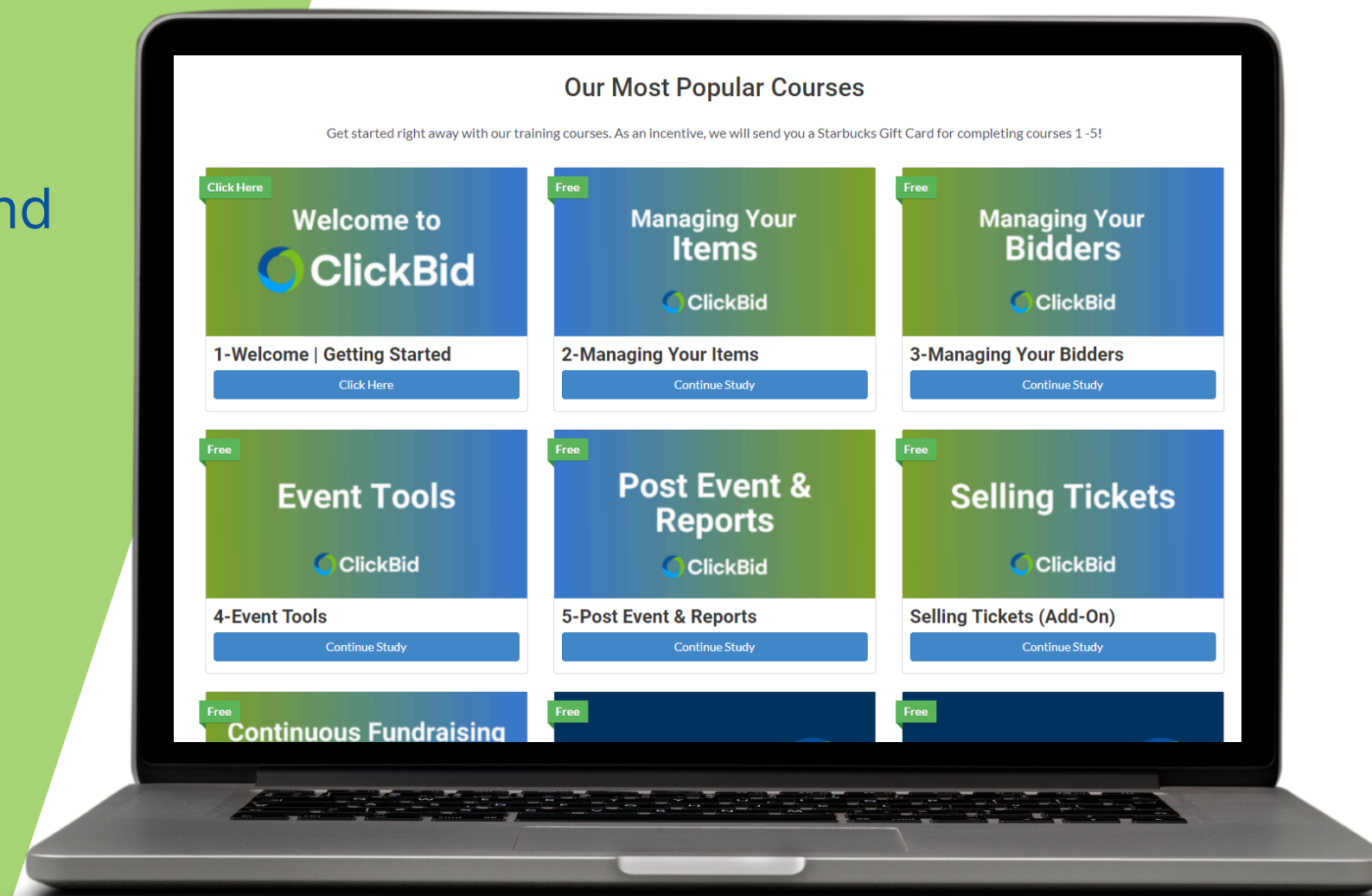


Invest Time in Watching Training Videos

We're all busy and sometimes it just feels better to dive in and learn as we go. You are free to do this, but please know our most successful clients **invest time** up-front watching our training videos. This helps avoid setting the platform up with errors and then having to unwind and start over.

We recommend watching our library of **Training Videos**. You can access them by [clicking here](#), or going to Training/Support > Training Hub/How-To's in your ClickBid Account.

How-To Articles are great step-by-step written instructions. Simply search by topic to find help!



3 Get Familiar with ClickBid's Platform



Spend Time within ClickBid.

When you're ready, your Account Manager will host a one-hour onboarding meeting for you and your team. This is a dedicated time for you to share about your event and goals, ask questions, and learn about different set-up options within the platform.

Your onboarding meeting will be most productive if you've spent some time within the platform. Our recommendation is for you to practice on your own, then schedule your onboarding meeting. Attempt to set up:

- [Add a New User](#)
- [Create a ticket for Your Event](#)
- [Create Your Event Landing Page](#)
- [Add a Couple Bidders](#)
- [Add a Couple Auction Items](#)
- Generally...Play Around in the System

Click the links
for help!



4 Schedule Your Onboarding Meeting



When you're ready, your Account Manager will virtually host a one-hour onboarding meeting for you and your team. Your Account Manager will be in touch with you when a new event is created or when you submit a ticket telling us it's time to connect.

Helpful tips to prepare for your onboarding meeting.

1. When submitting a meeting request, please share a couple of dates and times that work with your schedule.
2. Be prepared to share info about your event and how we need to utilize ClickBid's platform based on your event's profile.
3. Write down specific questions.
4. Let us know what area within the platform we should invest time in showing and discussing.



6 Move Forward with Confidence



Your onboarding meeting will help launch you forward with confidence. As you exit that conversation, we'll make sure you have a plan and know how to access support.

You are not alone. Please lean on your ClickBid Account Manager and our Live Chat team. They are here to help.

Support Hours

Monday - Friday 9:00 AM -5:00 PM EST

How to Connect

From your event page within ClickBid...

- The chat icon is located in the lower right corner
- Request Support Ticket is located on the left under the Training/Support tab.

Get Started Today!



We encourage new users to invest ten minutes here to learn the basics of ClickBid.

Our founder, Matt Burnell, presents

- Welcome message
- Overview of ClickBid's platform and support model
- Creating a new event and copy details from a past event
- Creating a new user and managing user permission settings
- Event QR codes, keywords, and Online Donation Page
- Connecting with your Account Manager and accessing chat support



Welcome Video

Click to watch!

