

Don't Miss a Single Step!

10 Absolutely Essential Steps to Using Greater Giving

Welcome to Greater Giving!

We know you're eager to get started working on your big event and maximizing your fundraising potential. Before you move even one more muscle, please take a moment to review this checklist. As you head towards event night, keeping this checklist handy will ensure you don't miss a single step along the way. Please print a copy for yourself and anyone else who will be working with Greater Giving before, during, or after your event.

Timeline: Right now!

[] **Review the Welcome Email we sent and familiarize yourself with the Greater Giving suite of products.** This letter contains essential information, including:

- o How to order your equipment for event night
- o Your login credentials
- o Ways to raise even more money

Keep your letter close at hand—you'll need it later!

Timeline: As soon as possible

[] **Order credit card processing equipment for your live event.** If you haven't done so already, please get your event on our books! [Order Equipment here](#).

- Greater Giving offers two options for event night: **Auctionpay Terminals** or **Auctionpay Card Readers**. If you don't know which solution is right for you, please read the [Terminal vs. Card Reader Fact Sheet](#).
 - *Print your confirmation email* and keep it close! It contains important information about your event.
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Timeline: Right after ordering

[] **Attend Live or On-Demand Training.** This is step is an absolute *must* for every organization to achieve event night success.

The Greater Giving online software is a powerful tool that requires training to harness. Visit the [Training Center](#) to attend a live training or watch a recorded session. Be sure to take the first two modules of training as soon as possible.

Timeline: >1 week before your event

[] **Prepare your online database for event night.** We know a successful fundraiser when we see one. Follow these steps to ensure all the pieces are in place before your big night: [Preparing for Your Event with Greater Giving Online Software](#)

Timeline: ~1 week before your event

[] **Download Event Software PC version.** You've mastered the online software and your database is ready to go. Now it's time to familiarize yourself with the PC version of the software before your event. Follow these steps to download the software and give it a test drive.

- To download the software, click here: [Download Current Version of ESPC](#)
 - Use the credentials provided in your Welcome Letter
 - The PC version of our software comes with a 'samples' database that allows you to practice with confidence
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Timeline: ~1 week before your event

[] **Using multiple computers at your event?** Greater Giving is not able to provide support for hardware networking. We highly recommend that you consult an IT/Network professional to assist you. Click [here](#) to learn more about setting up the Greater Giving software for networking.

Timeline: The week of your event

[] **Take the Event Night training.** The most important training of all: getting prepared for your big night! This training covers set-up, best practices, and steps you through each stage of your event. View a recorded version of the [Card Reader Training](#) or the [Terminal Training](#), or sign up for a [Live Training](#).

If you are using the Terminals and our Event Software, be sure to watch our [7-minute Sync video](#).

Timeline: 4 days before your event

[] **Set up and test equipment.** As soon as your Greater Giving shipment arrives (4 business days before your event), unpack the box and follow the set-up instructions. You will receive a Quick Start Guide for Auctionpay Card Readers and Terminals, and an additional Sync Guide for Auctionpay Terminals.

- **Terminals:** Please watch the [Sync Training video](#) and test the sync process. For networking help, the [Networking & Sync Guide](#) is a comprehensive resource. If you encounter any problems, contact Greater Giving at 866-269-8151.
 - **Card Readers:** Look for your event's EPCR code on your shipment's packing list and follow [these](#) instructions for configuring and testing your Card Readers.
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Timeline: 2 days before your event

[] **Prepare volunteer training.** Your volunteers are donating their time and dedication to make your event a success. Supply them with the knowledge and training they need to succeed. Download and print the [Volunteer Training - Card Reader](#) or [Volunteer Training - Terminal](#) to get your volunteers up to speed, or take a look at the [Card Reader](#) or [Terminal](#) Support pages for more helpful documents and training videos.

Timeline: Event night

[] **Greater Giving Event Night Support.** Technical support is available to you 24 hours the day of your big event. Just call this toll-free number:

866-269-8151

Choose 'technical support' and we'll be there to answer your questions.

Happy Fundraising!

Greater Giving Client Services Team
Monday - Friday, 6:30am to 5:00pm PST
Email: support@greatergiving.com

Check out our online help! The [Support Center](#) may have the answer you're looking for—schedule your event, get access to product training, and read helpful FAQs.