Go Time Checklist

Top Things to Do - Prior, During, and Post Event

This checklist will help step you through recommended tasks to be completed Pre-Event, Event Day, and Post-Event when using Greater Giving Online software at your event. Please make sure to check out our Online Help for more information on specific steps. If you are unable to find what you're looking for, contact our Greater Giving Support Team at support@greatergiving.com.

All pre-event preparations and post-event tasks should be done in Greater Giving Online Software as not all functions are available in *Go Time*. You will also need Greater Giving Online available for Admin tasks during your event.

> ***PLEASE NOTE*** *– Contact an IT specialist regarding internet connectivity and computer networking. It is vital to ensure proper connectivity* ***prior*** *to your event and a hardwired Internet is recommended as opposed to using Wi-Fi.*
>
> *Greater Giving is* ***not*** *responsible, nor does it support internet connection (hardwired or Wi-Fi) or computer networks.*

PRE-EVENT PREPARATIONS

Equipment, Training, Project Settings

- ❒ Order equipment for your event – Click Here
- ❒ Complete Venue Wireless Assessment – Click Here
- ❒ View and/or sign up for Greater Giving Online software trainings. For available options – Click Here
- ❒ Review our recommended Operating Systems and Browsers – Click Here
- ❒ Log into Greater Giving Online Software to complete the following:
  - ❒ Verify **Card Swipe** has been activated by going to **Project Settings** and looking for credit card images. This activates the ability to store credit card information during your event. Contact Greater Giving for needed assistance
  - ❒ Setup **Event Receipt** under **Project Settings, Edit Receipt Settings**
  - ❒ Create Volunteer logins with limited credentials. This login can be shared amongst all Volunteers

Item, Packages, and Supporters

- ❒ Enter Items and Packages and verify the following:
  - ❒ Values are entered, as needed
  - ❒ Appropriate Tax calculations are entered to ensure guests are billed accordingly
  - ❒ Proper Sections are assigned
- ❒ Enter all attending guests and verify the following:
  - ❒ Marked as a Bidder
  - ❒ Seats have been allocated if selling Admissions. If you are not selling admissions, please check out our 'Bookkeeping' option. This will allow you to track who attended your event.
  - ❒ Tables and Groups have been assigned, as needed
- ❒ Assign Bid Numbers to your guests
  - ❒ Recommended option: *"If just one member is marked as a bidder, assign a bid number to the member - if more than one member is marked as a bidder, assign the bid number to the household."*

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EVENT DAY TASKS

Print Recommended Reports for Registration

- ❒ **BID-01**: BID-01: Guest listing and check in *or* **BID-02:** Guest listing (2 column)
- ❒ **UTL-05**: Blank Bidder Registration Forms (Walk-ins, Replacements, Ticket Sales)
- ❒ **TBL-01**: Table Listing
- ❒ **GRP-01**: Group Listing

Prepare Equipment and Software

- ❒ Test internet connectivity and printers
- ❒ Install the latest version of Greater Giving Event Night PC Software on at least one computer. If installing on multiple computers, make sure all computers are networked and mapped correctly. *This will act as a backup in the case your internet connectivity is not accessible.* Click Here
  - ❒ Bring down a copy of your Online project to Greater Giving Event Night PC Software
  - ❒ For Best Practices - occasionally bring down a fresh copy throughout your event. (Recommended intervals: Just before guests arrive to ensure last minute additions/changes are captured, once registration is over, after all sales have been entered, after checkout.)
- ❒ Login into Greater Giving Online Software on each of the computers
  - ❒ Login onto at least one computer using credentials of an Admin. This computer will allow you full access to your project (All supporters, reports, project settings – receipts, ***Go Time*** settings, etc…) Event day tasks that need to be done in Greater Giving Online Software will be marked with **[ADMIN]** go forward.
  - ❒ Login into the remaining computers using the Volunteer credentials
- ❒ On your Project Home page, under Project Tasks, click to open ***Go Time.***
- ❒ Add a new 'test' supporter and check that guest in using the '**Checkin Attendee**' button.

During Registration

- ❒ Check guests in using the '**Checkin Attendee**' button on the ***Go Time*** Dashboard
  - ❒ Register Walk-Ins, Guest-of, or replacement guests not listed in your project
    - ❒ Ask guest to fill out UTL-05 Registration form to obtain contact information
    - ❒ Add the guest - Enter only the information required for your event (e.g. – name, bid#. If having a Mobile Bidding event, you will want to capture the email address and cell phone as well). The remaining information can be entered post event.
    - ❒ Assign an existing admission or sell a new admission

Entering Sales

- ❒ Enter all winning bids and multi-sales using the '**Enter Sales**' button on the ***Go Time*** Dashboard
- ❒ **[ADMIN]** Run the **BID-03**: Sales listing by Bidder and **PKG-03**: Sales listing by Package reports for reference at Checkout and Item Pickup

Checkout

- ❒ For guests checking out and needing to make changes, pay, or obtain a receipt, select the '**Checkout Attendee'** button on the ***Go Time*** Dashboard. Here you can:
  - ❒ Edit, delete, or add sales
  - ❒ Add, change, delete, or edit a credit card already on file
  - ❒ Add any cash or check payments (D*o <u>not</u> enter any credit card payments for cards which you have swiped. The system will automatically log the payment for you when the card is swiped.)*
  - ❒ Print or email receipts

Event Wrap Up

[ADMIN] Print recommended final reports:

- ❒ **BID-03**: Sales listing by supporter
- ❒ **PKG-03**: Sales Listing by Package with Buyers
- ❒ **SUM-07**: Summary - package sales by section, type, class

POST EVENT TASKS

- ❒ Reconcile all sales to ensure proper charging of guest's credit cards
  - ❒ Compare **BID-03**: Sales listing by supporter vs. **BID-18:** Credit cards on file and charges to be submitted
- ❒ Submit charges to the Bank
- ❒ Return equipment to Greater Giving