

GiveSmart Basics

• Setting Up your GiveSmart Account

- GiveSmart is free for Alpha Phi chapters to use. If you need access to your GiveSmart site to begin planning your event fill out the [Submit your Event](#) form and include the **NAME, EMAIL, and PHONE NUMBER** for everyone who needs access.
- Before going live, make sure all of your event site are ready to go! For more details on specific event feature go to the GiveSmart Help Center for step by step guides or contact ChapterGiving@AlphaPhiFoundation.org.
- Dashboard
 - Once you log in to GiveSmart and select your event you will see your Dashboard. This shows you a snapshot of the major areas of your event. On the left side of your Dashboard you will see a Tool Bar. Select each section to begin customizing your site!

Alpha Phi - Oklahoma City University

VIEW CAMPAIGN SITE

Dashboard

Alpha Phifa
7/01/2021 12:00 am - 7/02/2021 12:00 am

\$0.00
TOTAL REVENUE

Live Activity

SITE

A keyword is required for donors to bid and buy items via text message.
[Create Keyword](#)

Website URL
<http://e.givesmart.com/events/mCn>
[Share](#)

Site Status Hidden
Site ID 86947

USERS

TYPE	CHECKED IN	TOTAL
Campaign Assistant	0	0
Campaign Admin	0	1
GiveSmart	0	0
Volunteer	0	0
Donor	0	0

Settings

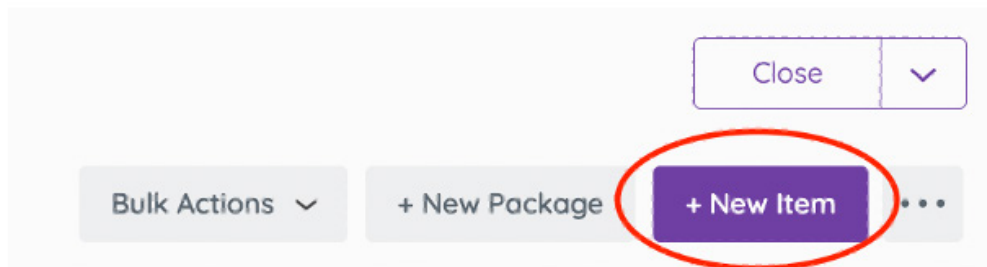
Help

Resources

- Settings
 - **PLEASE NOTE:** Do not alter any tax settings, all Alpha Phi events are preset with the correct settings.
 - Global settings allow you to:
 - Update your site text keyword
 - Keep bidder and purchaser names anonymous
 - Add custom fields to guest registration
 - Toggle site from Hidden to Show

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- Require guests to keep a card on file
 - This is a best practice to ensure you are able to charge guests for their auction items at the end of your event as efficiently as possible
- Require emails and mailing addresses for registration
- Option to pass credit card transaction fees onto purchaser (or make it optional)
- Design Center
 - Customize your site by setting colors, updating your banner and adding photos. Rearrange the layout to fit your event needs
 - Add a Donation Revenue Goal
 - Update Event Details- Date, Time, Location, Dress Code, Parking Information
 - Create Ads
- Donations
 - Show/Hide Donate Page View and Click to Donate buttons
- Auction
 - Toggle on/off item view page- great opportunity to increase excitement for items leading up to your event
 - To add a new auction item you can select the Purple “+ New Item” button at the top right of the auction page



- Virtual Event?
 - Set a “Go Live” and End date and Time
 - Adjust the bid increment and default starting bid percentages
- Items for Purchase
 - Please note these are considered a donation to the foundation. This is not idea for the sale of items the chapter needs to be reimbursed for.
 - TIP: Consider bundling tickets with items like hats or shirts.

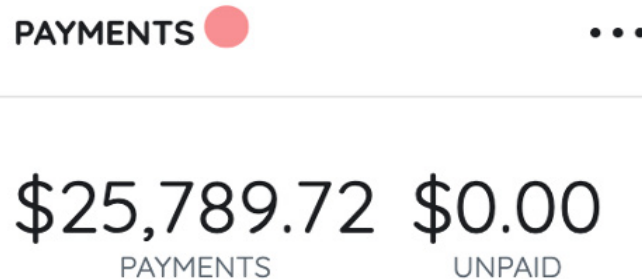
GiveSmart Basics

- Tickets
 - Settings
 - Select “Create New Tickets” to add a new ticket category
 - TIP: A shortcut to ticket management can be found on your dashboard.
 - Customize what information guests are required to fill out
 - Do you need to have them select a dinner preference?
 - Do you need to know the name of each guest they purchased a ticket for?
 - TIP: Make sure you collect emails and phone numbers so you can utilize GiveSmart’s Communication tools
 - Don’t forget to set the venue capacity to ensure you do not sell more tickets than spaces available
 - Seating Management
 - Assign all registered guests to a table right from your campaign site. You can even print the list to assist with planning.
- P2P (Champions)
 - This is a great option if you have competing teams or individuals for an event. Each team or individual can create their own page within your campaign. This allows you to track their personal donations/supporters.
- Communications
 - Make sure you collect guest’s phone numbers and or emails to allow you to send them event reminders and updates.
 - TIP: When hosting a Red Dress Gala auction, schedule to send your guests a notification for the date/time the auction items go live on your site!
- Checkout & Payments
 - Search for Guests in the Checkout to remove items from their cart that they did not purchase.
 - You can also search by status to make taking payments for any guests with a remaining balance more efficient.
 - Send statements and receipts to guests if they don’t receive one automatically.
- Reports
 - Run reports on each area of your event or get the whole picture with the Overview Report
 - Break down which areas were successful and what can be improved on for the next time your chapter hosts the event.

Give Smart Basics

- **What to Do at the End of your Event**

- Make sure all of your guests have paid any remaining balances. You will be able to select “Run All Unpaid Cards” on your Dashboard under Payments. If there are no outstanding balances, you will see a \$0.00 over Unpaid.



- If you have unpaid balances and do not see the button to run unpaid cards go to Users > Checkout > Search By Status > Yet to Pay Including Pledges
 - Once you have the list of unpaid guests you can select “Begin Check” out next to the guest’s name to quickly check them out or send a reminder to the guest to add a card on file.
- **Questions?** Contact ChapterGiving@AlphaPhiFoundation.org.