

Onsite Event Checklist

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Quick Reference Outline for Onsite Events

This outline provides links to GiveSmart Help Center resources to help you plan and execute your in-person fundraising event.

If you need some extra help integrating GiveSmart into your event plan, check out GiveSmart's service offerings at www.givesmart.com/plans.

Download the On-Site Events Guide

[On-Site Events Guide](#)

I. Preparing your team

A. Volunteers and organization team members

- [1. Volunteer Profile](#)
- [2. Add a Campaign Admin](#)
- [3. Volunteer Training](#)

B. Contracting for on-site staff and equipment

- [1. Preferred Partners](#)
- [2. Hardware \(iPads and Credit Card Swipers\)](#)

C. Additional GiveSmart Services

- [1. GiveSmart Services](#)

II. Preparing your GiveSmart Campaign Site

A. All the Settings

- [1. Site Settings](#)
- [2. User Settings](#)
- [3. Auction Settings](#)
- [4. Donation Settings](#)
- [5. Communication Settings](#)
- [6. Fees Settings](#)
- [7. Global Settings](#)

B. Design and Customize

1. [Style and Color](#)
2. [Customize the Home Page](#)
3. [Create Custom Pages or Custom Order Forms](#)
4. [Create Ads and Announcements](#)

C. [Ticketing](#)

1. [Create a Ticket](#)
2. [Send Assignment or Confirmation Reminders](#)
3. [Update Purchaser Order Details](#)
4. [Purchase a Ticket on Behalf of a Supporter](#)
5. [Seating Management](#)

D. [Fundraising Components](#)

1. [Create Items for Purchase - Instant & Vote](#)
2. [Create Auction Items - Live & Silent](#)
3. [Create Raffle Items](#)
4. [Create Donation Items](#)

E. [Displays \(Bids Display & Thermometer\)](#)

1. [Displays Overview](#)

III. [Fundraising Logistics](#)

A. [Promote Your Fundraiser](#)

1. [When and How to Promote](#)

B. [Communications](#)

1. [Draft/Schedule Text Messages](#)
2. [Sample Communication Timeline](#)

C. [Guest Arrival](#)

1. [Check-In a User](#)
2. [Check-In with Ticketing](#)
3. [Purchase a Ticket at Check-In](#)
4. [Self Check-In](#)

D. [Silent Auction](#)

1. [Place a Bid for a User](#)
2. [Delete a Bid or Auto Bid](#)
3. [Print Item Sheets](#)

E. [Games & Raffles](#)

1. [Purchase a Raffle for a Supporter](#)
2. [See Assigned Raffle Entry Numbers](#)

3. Draw a Raffle Winner

F. Live Auction

1. Assign a winner to a Live Item
2. Duplicate an Item

G. Donation Appeal

1. Donation Appeal Methods
2. Add a Donation to a User's Account
3. Return a Monetary Donation

H. Closing the Auction

1. Schedule Auction Auto Close
2. Manually Close and Reconcile the Auction

I. Checkout

1. Checkout a User
2. Self Checkout
3. Checkout Multiple Users Together
4. Settle Remaining Balances
5. Return an Order from a User Account

J. Reporting

1. Ticketing Reports
 2. Registered Users
 3. Revenue Report
 4. Purchaser Details
 5. Batch Report
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