Global Settings

Upload your Organization logo, manage campaign information, capture additional user information, create a keyword, and set the information required for user participation.

Access Global Settings

1. From the **Admin Navigation**, select **Settings** > **Global**.

Organization and Site Information

Also available from the Site Container in the Dashboard. Visit Site Settings.

User Information and Custom Fields

Also available from User Container in the Dashboard. Visit User Settings.

Advanced Settings

Please note...
This section contains controls that greatly impact your event and users. Please be aware that changes to these settings may not be undone.

Site

Also available from Site Container in the Dashboard. Visit Site Settings.

User Information

Also available from User Container in the Dashboard. Visit User Settings.

Payments

Apply a surcharge or tax to all or selected items and or purchases. A surcharge can either be a state-mandated tax or a fee passed to the user. Visit How to Apply a Tax Based on Charity Rules (Lesser of FMV or Selling Price) or How to Apply a Tax Based on Selling Price, Including Donations for more information.

Note: The global setting can be overridden on an individual item. Edit the Items Surcharge (%) field from "User Event Default Surcharge to "Set Custom Surcharge for this Item" and add a

custom value.

Credit Card Payments

Allow Self Checkout: Set to Yes for users to secure payment from their Pay page on their phone. Users must see an admin to pay when Allow Self Checkout is set to No.

Allow Self Checkout ❓

| No |
| ✓ Yes |

Transaction Fees

Visit Passing on Fees to Purchaser prior to editing. The default is Optional for Purchaser.

Transaction Fees

Homepage Order Form ❓

| ✓ Paid by Organization |
| Paid by Purchaser |
| Optional for Purchaser |

All Other Orders ❓

Paid by Organization ▼

The Processing Fee rate applies when transaction fees are passed to the purchaser. Visit Passing on Fees to Purchaser prior to editing. When Paid by Organization is selected, standard rates apply. No additional adjustments are needed.

Processing Fee (%) ❓
required

3.5

Effective Rate: 3.627 %

Effective rate is the percentage your donor pays to cover the cost associated with the purchase AND the processing fees.

Processing fees are deducted and reflected within the batch report Adjustment/Fees column regardless if fees are passed. The additional revenue is intended to cover the credit card transaction costs found in the Batch Report.

To capture the full amount of the fees at a variable rate:

1. Visit View Admin > Settings > Global > Advanced Settings > Transaction Fees > Processing Fee (%).
2. Adjusting the Processing Fee sets the Effective Rate.
   - The default is 3.5%, which sets the Effective Rate to 3.627%.
   - Set the Processing Fee to 3.95%. The Effective Rate adjusts to 4.112% to capture the full amount with a variable rate.
3. Save updates.

Note: Once a transaction is completed on the campaign the Processing Fee percent cannot be edited.

Fee Per Attendee

Add a fee for ticket purchases, which is applied per attendee. On newly created campaign sites, the fee per attendee defaults to $0.00. Fees passed are subject to the Effective Rate and applied to the purchase total.

Note: Once a ticket purchase has been made with the set Fee Per Attendee fee, the fee will no longer be editable.

Visit Pass Fees to Purchasers to learn more.

Messages

Also customized from Site Container within the Dashboard. Visit Site Settings.