



# Event ticket sales tutorial

## Introduction

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As you read this tutorial, you can either use the sample data to follow along or you can enter new events and ticket sales to get 'hands on' experience.

An event is any activity to which tickets are issued. When it comes to fundraising events, CharityMaster is especially good at being able to track not only the sale price of each ticket but also the benefits that are provided to the ticket purchaser. The value of any benefit received must be deducted from the ticket price when computing the amount of the tax deduction that can be claimed by the purchaser.

CharityMaster can assist you with:

- Soliciting ticket sales.
- Recording the sale / issue of tickets to manage total attendance, account for receipts and process payment.
- Issuing tax receipts for the donation portion (if any) of the ticket price.
- Checking in ticket holders at the event.

The following features require the purchase of the optional Event Management module. (*See the 'Event Management' module tutorial.*)

- Managing a seating plan by automatically assigning individual tickets sold to tables in a seating plan and entering sponsored tables.
- Managing the setup of tables at your venue.
- Maintaining additional information about ticket purchasers such as their seat location requests and meal preferences.
- Managing the players in a golf tournament or curling bonspiel and their assignment to foursomes / rinks.

Before you start setting up CharityMaster to handle your event, you should understand the types of events that can be handled.

## “Master” events and “sub-events”

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Event setup can be very complex. CharityMaster allows you to track several types of tickets for an event. Consider a fundraising golf tournament which is followed by a sit down dinner with reserved seating. You could have some or all of the following types of tickets - each of which has a different ticket price:

- The "standard" ticket would include participation in both the golf tournament and the dinner. When you have the optional Event Management module, entry of the sale of this type of ticket into CharityMaster will automatically enter the tickets purchased into both the seating plan and the tournament plan (foursome list.)
- A "golf only" ticket for those who will NOT be sitting down to dinner. When you have the optional Event Management module entry of a sale of this type of ticket into CharityMaster will automatically enter the tickets purchased into the tournament plan but NOT the seating plan.
- A "dinner only" ticket for those who will NOT be playing golf. When you enter a sale of this type of

ticket into CharityMaster, the optional Event Management module can automatically enter the tickets purchased into the seating plan for dinner but NOT the tournament plan.

- A reduced price "youth" or "volunteer" ticket which could include the golf and / or the dinner or neither of these.

To set up CharityMaster up to accommodate each of these ticket types, you would set up the "standard ticket" type as the "master" event and each of the other ticket types as "sub-events." Note that each event or ticket type can have a different:

- Ticket price
- Value of the benefits provided (used in generating tax receipts.)
- Description of the benefit provided. (Appears on the tax receipts.)

## Event types

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CharityMaster allows you to set up three different kinds of event:

- A single date fundraising event where a portion of the ticket price is tax deductible.
- A single date event where no portion of the ticket price is tax deductible.
- A multi date event such as a music appreciation "course." You can have one ticket price for all dates and another for single date tickets.

Of course, for each of these, tickets can be complimentary or have a set ticket price. Even if you specify the standard price for a ticket, when you enter a sale, you can enter any amount you want if the purchaser overpaid or someone was given a discount.

## Events that have already been set up

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Click on 'Event Management' on the menu bar at the top of the screen. The 'Event Management' screen will appear. Scroll down to see all of the events that have been input into the system. The screen indicates which events are "Master" events and which are "sub-events."

Since you will typically be working on only one event at a time, CharityMaster requires that you select one event as the 'default' event. The default event is the one that will show in the 'Sell event tickets' screen when it is first opened.

Once an event has passed, you can make that event inactive by clicking the Inactive check box on this screen. Inactive events will no longer be available for selection on the 'Sell event tickets' screen or in the Report Selector.

## Setting up a new event

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If you wish, have a look at the setup of the *existing* events – especially the 'Golf tournament – incl. dinner' (a "master" event) and 'Golf tournament - dinner only' (a "sub-event"). With the 'Event Management' screen open, click on 'Golf tournament – incl. dinner' to select this event. Then click on the 'Edit event' button to open the 'Edit event' screen.

We'll assume you want to add a new event yourself. Click on the 'Add event' button to add your new event.

Start by entering the name of the event. This name is what distinguishes this event from all others on various screens so you will want it to be as descriptive as possible. The event date will also appear

everywhere the event name appears so you don't need to include the date in the name.

Next select the event type: 'fundraiser single date.' Press the Tab key to move to the next field.

When this screen opens to add a new event or "sub-event", the 'Master event' checkbox is checked by default. Leave this box checked since you must set up a "master" event before you set up a "sub-event."

Now you must input each of the following:

- Event date (click on the calendar button to the right of the date field to get the 'Select date' popup.)
- Complementary ticket policy. Select from the drop down list.
- Ticket price. Note that this is the 'standard' price. When you enter a ticket sale, you can enter a higher or lower amount.
- Prospect communication flag. If the 'Flag required' checkbox is checked, you must specify a flag that will be added to the flags for each name to which you sell a ticket. This is an important feature since the addition of the specified flag will enable you to include each ticket purchaser for this event on the mailing list for the next fundraising event. You may wish to read more about this important CharityMaster feature in the help system. (Press the F1 key.)
- Maximum attendance. (This field may not be visible when you edit the existing events in CharityMaster.) CharityMaster will track the total number of tickets issued for this "master" event and all of its "sub-events." Each time you enter the sale of a ticket you can see the maximum attendance and the tickets already sold. CharityMaster will NOT limit ticket sales to the maximum you set here.
- GL (General Ledger) account name. This is a mandatory field since it allows CharityMaster to 'map' each ticket sale to this general ledger account so that you can compare the receipt of total ticket sales in CharityMaster to the corresponding account in your accounting software. (See 'Accounting' below.)
- Value of the benefit(s) provided to the purchaser. This amount can be \$0 but, if an amount is input, the tax receipt will deduct this amount from the amount of each ticket sale to determine the maximum tax deduction that can be made by the ticket purchaser.
- If the value of the tax benefit is non-zero, then you must input a short description of the benefit provided. Your tax advisor will help you determine the appropriate amount and description to enter.

Now with everything entered, click the 'Save and close' button.

Setting up a "sub-event" is just as easy *after* you have set up the "master" event. On the 'Event Management' screen, click the 'Add Event' button. Proceed as described above but also do the following:

- Uncheck the 'Master event' check box.
- Select the associated "master" event from the 'Master Event' drop down list. CharityMaster will only allow you to select a "master" event and, once it is selected, the system will automatically set the event date to the same date as the "master" event and the event type to be the same as the "master" event. Also the maximum attendance field will not be visible on the "sub-event" screens.

## Soliciting ticket purchasers

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Mailing lists are available in the Bulk Mailing Wizard to help sell tickets to your event. To generate these lists, click on Bulk Mailing Wizard on the menu bar at the top of the screen. Then select the 'Event solicitation, ticket sales' group from the drop down list. The two available mailing lists are as follows:

- Event solicitation - initial mailing. This mailing list depends on having one or more prospect communication flags for each name to which you want to send a letter. You can use up to three flags to generate this list.
- Event solicitation - follow-up. To generate this list, select the applicable “master” event from the drop down list then enter the exact same flags that were used to generate the initial mailing. CharityMaster will generate the same mailing list as for the initial mailing with the exception that any purchasers who have already bought tickets to the “master” event (and/or “sub-event”) are excluded.

Use the Bulk Mailing Wizard to produce:

- the letters
- mailing labels and
- a report listing all of the names to whom the letters were sent. This report is available in various formats including one organized by ‘phone captain.’

If you wish, you can exclude those with e-mail addresses from your mailing and use the e-Mail Wizard to send an e-mail version of your solicitation.

## Recording event sponsorships

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Event sponsorships are recorded as a normal donation.

## Recording the sale of event tickets

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With the Maintain Names screen open, use the Event tickets button on the Maintain names toolbar to record the sale of tickets. When this button is clicked, a new screen will open:

- If this person does not have any event ticket history, the ‘Sell event tickets’ screen will appear. Enter all of the data required and press the ‘Save’ button. The Event ticket history screen will open. Review the data and press the ‘Close’ button.
- If this person has previously purchased tickets for any event, the ‘Event ticket history’ screen for this name will appear. Click the ‘New sale’ button to enter a new sale.

## ‘Sell event tickets’ screen

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### Event

When this screen opens, the event selected will be the default event set on the ‘Event Setup’ screen. You can record the sale of tickets to a different event by selecting the applicable event from the **Event** drop down list.

### Payment method

A sale cannot be recorded unless you select a valid payment method from the drop down list. CharityMaster allows you to record a sale (and update the seating plan and/or tournament plan) without having received payment. Select "Invoice" as the payment method: you can record the receipt of funds later.

If complementary tickets are allowed for the selected event, you can record the issue of complementary tickets on this screen. The amount paid is set to \$0 and no tax receipt can be issued.

### **Date**

You cannot enter the date by typing it in. Click on the calendar button and click on the date you want.

### **Amount**

Once the Payment Method has been entered, the system automatically computes the total amount paid by multiplying the number of tickets time the price of a single ticket entered on the Event setup screen. If the tickets were sold for an amount greater than or lesser than the computed amount, you can change the Amount field appropriately. If the 'Amount paid' does not equal the number of tickets times the standard ticket price, the 'Amount paid' will be highlighted in yellow. Obviously, this will affect the amount of any tax receipt issued to this purchaser.

### **Tickets issued**

This shows you the number of tickets that have already been issued (sold plus complimentary) for the event (including any "sub-events.")

### **Maximum attendance**

This shows you the maximum attendance that was set for the "master" event on the Event setup screen. This field will not show for a multi-date event.

## **Accounting**

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CharityMaster will significantly reduce your workload if you purchase the optional QuickBooks Interface module. When this module is activated, each time you enter the sale of a ticket, CharityMaster will automatically enter a sales receipt for this transaction into QuickBooks. Even if you don't use QuickBooks, CharityMaster will give you all the detail you need to enter transactions into your accounting software. The system also can produce reports that let you compare the transactions in CharityMaster with the transactions in your accounting system.

Open the 'Report Selector,' select the 'Event Ticket Sales' group of reports, and then select the 'Event tickets sold - by date paid.' This report shows details of each ticket sale including the payment method for the selected event.

Under the 'File' menu, select 'Accounting.' This screen produces a similar report except that the reports produced by this screen show all transactions for the selected General Ledger account for the selected date range. The Accounting reports will help if you have more than one event going on and the ticket sales for all events are 'mapped' to the same general ledger account.

## **Tax receipts**

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Tax receipts can be issued for ticket sales only if a portion of the ticket price can be deducted by the purchaser (a fundraising event). After the event, proceed as follows:

- For each of the "master" and "sub-events," once the amount of the tax deduction is determined, enter it into the 'Value of benefit provided' field on the 'Edit event' screen.
- Use the various Accounting reports to ensure that CharityMaster is in balance with the totals in your accounting software. This is an essential step since CharityMaster will not let you modify any ticket sale transaction once a tax receipt number has been assigned. This restriction ensures that you don't get into trouble with the government.
- Under the File menu, click on 'Tax receipts' and then 'Event tickets.' The 'Tax receipts for

fundraising events' screen lists all of the *active* fundraising events for which tickets have been sold. This screen shows if there are any tax receipts that have not yet been generated.

- Click on the 'Generate receipts' button to generate the receipt numbers for the "master" event and all of its "sub-events." Pressing this button will not affect any tax receipts that have already been generated. The amount of the tax deduction allowed is equal to the amount paid by the ticket purchaser minus the value of the tax benefit provided. Receipts are not generated if the allowable deduction is less than or equal to \$0.
- Click on the 'Print receipts' button to display and/or print the receipts. The receipts are designed to fit into a Number 10 window envelope.
- The 'Receipt listing' button produces a listing of all the receipts including receipt numbers.
- Use the Bulk Mailing Wizard to produce a covering or 'thank you' letter for the tax receipts. Select the 'Event solicitation, tax receipts group and then 'Event tickets tax receipt mailing.' This listing will only produce a letter if a tax receipt has already been generated for a purchaser. CharityMaster allows you to create new letter templates so the letter you create for this event can be reused for future events.

*We hope you enjoyed this tutorial. All of this information is also available in the CharityMaster help system. Press the F1 key on any screen to get the information you need.*