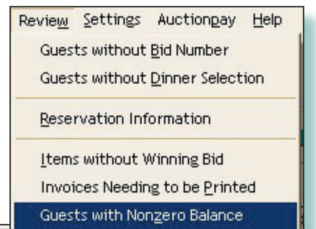
Post Event Wrap Up

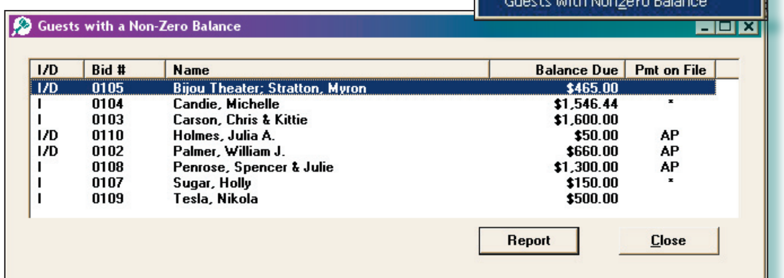
You did it! Your event is over. The decorations looked great, your guests have made their purchases, and everyone had a great time. Now you'll want to do some final wrap-up tasks.

Reviewing Balances

At some events, you'll have volunteers to enter payments as they are received. You may be synchronizing with Auctionpay™ for bank card processing, which records those payments automatically. The next step is to find out if any guests have open balances, and resolve these.



Click **Review**, **Guests with Nonzero Balance** to see a list of bidders with open balances. When all payments are recorded, this list will be empty.


Guests with a Non-Zero Balance

I/D	Bid #	Name	Balance Due	Pmt on File
I/D	0105	Bijou Theater; Stratton, Myron	$465.00	
I	0104	Candie, Michelle	$1,546.44	*
I	0103	Carson, Chris & Kittie	$1,600.00	
I/D	0110	Holmes, Julia A.	$50.00	AP
I/D	0102	Palmer, William J.	$660.00	AP
I	0108	Penrose, Spencer & Julie	$1,300.00	AP
I	0107	Sugar, Holly	$150.00	*
I	0109	Tesla, Nikola	$500.00	

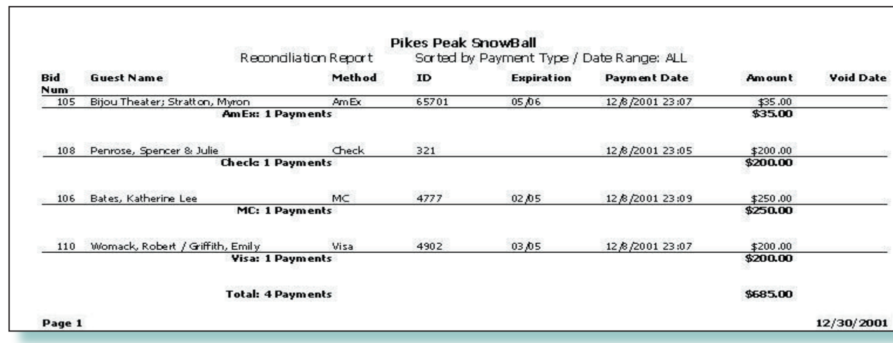
Report Close

For a printed report detailing guests with nonzero balance, and associated details, click Report on this screen.

Reconciling Payments

A reconciliation report, detailing payments by **Payment Type** is very helpful as a reference for bank deposits made or pending. Select a date range to detail payments made prior to the event, or on event day(s), or subsequently.

See ***Reports, Reconciliation Report*** for details on setting up this report.


Pikes Peak SnowBall

Reconciliation Report Sorted by Payment Type / Date Range: ALL

Bid Num	Guest Name	Method	ID	Expiration	Payment Date	Amount	Void Date
105	Bijou Theater; Stratton, Myron	AmEx	65701	05/06	12/8/2001 23:07	$35.00	
	AmEx: 1 Payments					**$35.00**	
108	Penrose, Spencer & Julie	Check	321		12/8/2001 23:05	$200.00	
	Check: 1 Payments					**$200.00**	
106	Bates, Katherine Lee	MC	4777	02/05	12/8/2001 23:09	$250.00	
	MC: 1 Payments					**$250.00**	
110	Womack, Robert / Griffith, Emily	Visa	4902	03/05	12/8/2001 23:07	$200.00	
	Visa: 1 Payments					**$200.00**	
	Total: 4 Payments					**$685.00**	

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Printing Donor Receipts

You can print receipts for donors to include with thank you letters.

1. Click **Documents**, **Donor Receipts**.
2. Optional: Enter a range of names.
3. Optional: Print only Names with Donations.
4. Click Receipt Format to review or edit headers and footers.
5. Click **Print**.

Tip
Select a range of names at a time to keep print preview from taking too much time.

Tracking Expenses

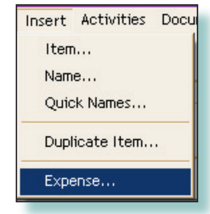
Auction! offers a simple tracking system for event expenses. These expenses may be stored, edited or deleted. You may record as many expenses as you like.

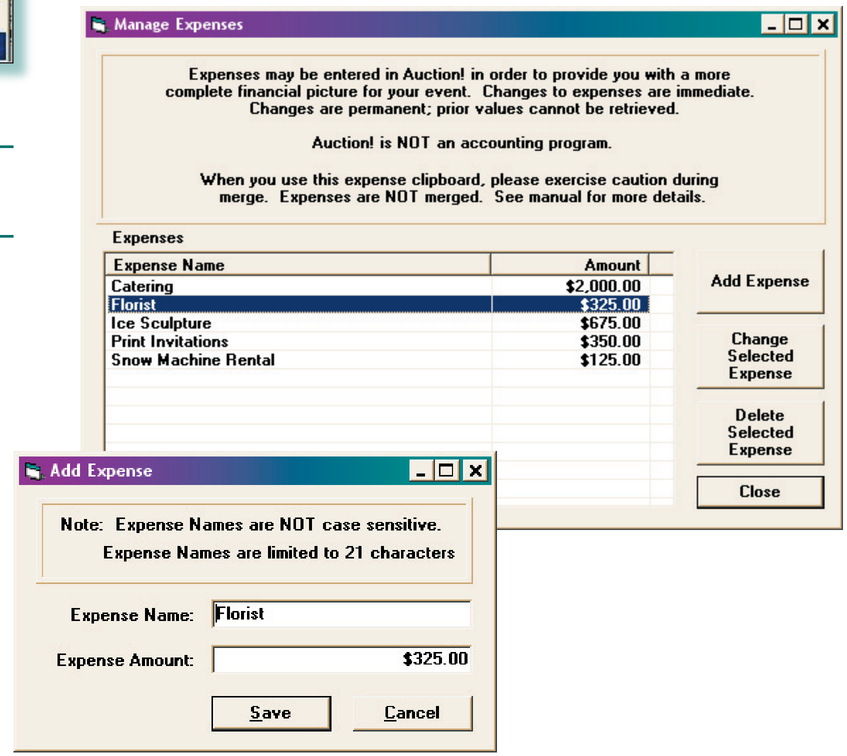
Expense names may be up to 21 characters long; each expense name must be unique. Expenses are displayed in alphabetical order on **Manage Expenses** and on ***Reports*, *Financial Statement***.

Expenses are not merged. When working independently in multi-user or network editions, designate one individual as the "expense-tracker." At some point, merge data to their project, and then backup & restore to team members if they need to see expense detail.

Add a New Expense

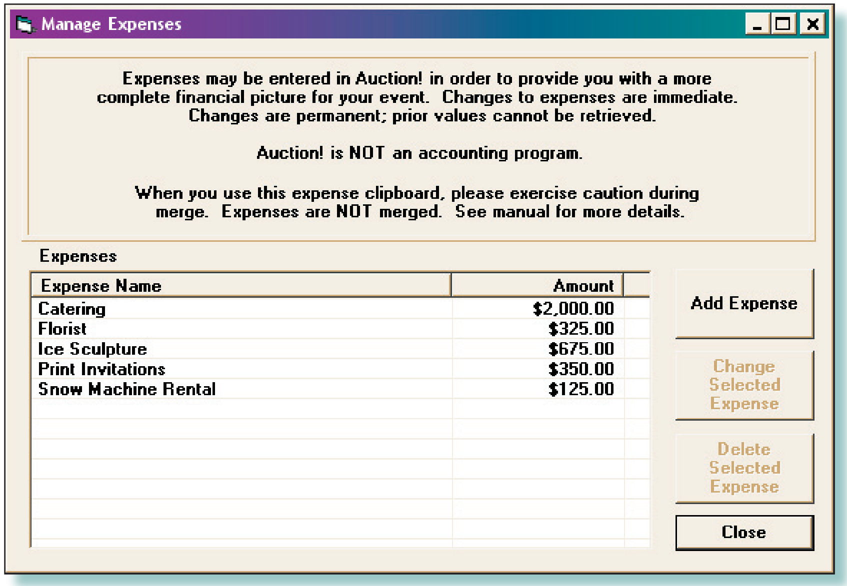
1. Click **Insert, Expense.**
2. Click **Add Expense.**
3. **Type** a description of your expense.
4. Click **Save.**





Revising or Deleting an Expense

1. Select **Edit**, **Expense**.
2. Click to highlight a specific expense.
3. Click **Change Selected Expense**, or **Delete Selected Expense** and confirm.



Thank You & Solicitation Letters

Most organizations send a letter to each donor, thanking them for their generous donation. With slight changes, that format can also be used for donor solicitation letters or invitations to your guests. You can re-thank the donor for their specific gift given last year, and ask them to consider giving a similar gift for the upcoming event.

Letters are created by exporting data from ***Auction!***, and mail merging it with a formatted letter template in Word™ or another word processing program. For more assistance on Export, see ***Export: Sending Auction! Data to Other Programs***. Export your data, choosing fields such as first name, last name, company, address, city, state, zip, items donated, and total donation.

See ***Appendix B*** for instructions on completing thank you letters in Microsoft Word™.