



GROUP LEADER PORTAL & PRE-PACKS

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FAQs

What is Group Leader Portal?

Group Leader Portal is an online tool for group leaders and was designed to improve the fundraising experience for group leaders. Each fundraiser in FR Pilot has a unique link on a website, called MyFundraisingPlace.com, that the group leader can use as an online ordering tool and to view their invoice(s). Group Leader Portal also helps a dealership by streamlining internal processes.

Why should you use Group Leader Portal?

- It saves you time!
 - It eliminates the order tabulator for group leaders. They can submit & update their order on MyFundraisingPlace.com which updates the invoice in FR Pilot for you automatically!
 - Group leaders can view the invoice(s) from their page which means that you don't have to email the invoice to them.
 - Since the seller information is stored in FR Pilot, you can easily generate pre-pack labels and other reports needed for a pre-pack delivery.
- It reduces the chance of making order entry errors!
 - The group leader can make their own changes rather than emailing or calling you with changes. This means that you don't need to manually type in the quantity changes.
- We give you control!
 - You have control over the following settings on MyFundraisingPlace.com:
 - The background color scheme and the logo that is displayed
 - The background colors for each individual flavor
 - The instructions text that explains how to use the online ordering tool
 - 3 Custom Columns that allow you to label the seller name and teach/coach columns exactly how you want
 - Whether or not to display the invoice(s) to the group leaders
 - The group leader sees the flavors from the program and the pricing from the price list based on their specific fundraiser rather than generic flavors and pricing information.
 - There is a Lock/Unlock property on the fundraiser that allows you to control when the group leader can make changes to their order and when they can no longer edit the order.

*Note: The "lock" setting on the fundraiser is **automatically** set for you when certain events happen in FR Pilot. When locked, it will not allow any edits by the group leader. You can "unlock" this for a specific fundraiser, if needed, which would allow the group leader to edit their order.

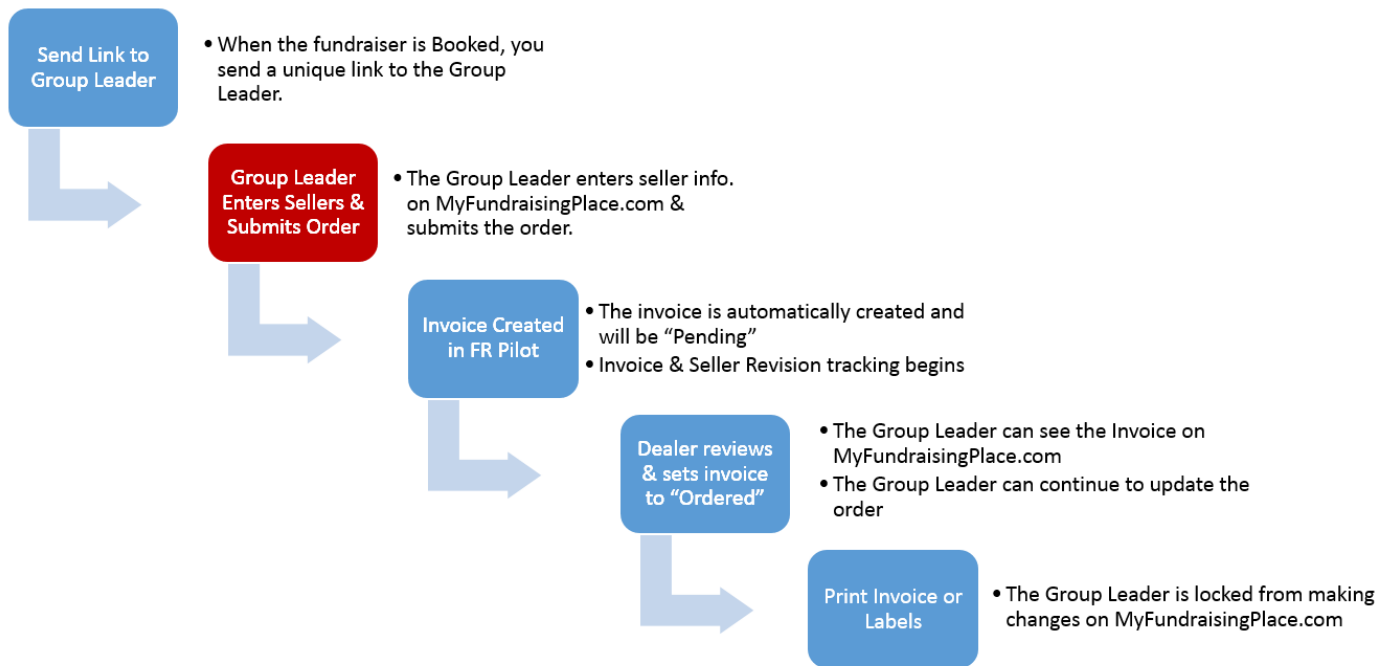
How is MyFundraisingPlace.com different than when a group leader submits an order on my own website?

The biggest difference for the **group leader** is that they can save seller information and come back to enter more sellers at a later date. The group leader can also submit an order and update the same order at a later date, if there were any add-on orders.

The biggest difference for your **dealership** is that MyFundraisingPlace.com and FR Pilot are tied together. This means we can share information between the sites. Here are a few examples:

- The group leader will see the flavors and pricing specific to the program and price list on that group's fundraiser.
- When an order is submitted by a group leader, FR Pilot automatically creates an invoice for you.
- The seller information is in FR Pilot, so you can easily print your pre-pack labels in just a few clicks!
- When you print the invoice or print pre-pack labels in FR Pilot the group leader is locked out of making further changes on MyFundraisingPlace.com.
- Group leaders can view and print their invoices from MyFundraisingPlace.com!

How do FR Pilot and MyFundraisingPlace.com work together?



If the unique GLP link is active, the group leader **will always be able to edit seller collection information.**

The link is inactivated when **any one** of the following conditions are met:

1. Fundraiser is deleted
2. Fundraiser is cancelled
3. Current date is greater than 180 days past the fundraising StartOn date
4. Fundraiser has been paid for more than 60 days

The logo and background color scheme can be customized.

Allows the group leader to print the seller information.

Allows the group leader to export to Excel.

Allows the group leader to Save. We automatically save every 5 minutes.

Order Form

Please email or call us if you need to make changes to your order. Thank you!

Buttons: Print, Export, Edit Amount Collected, Print Invoice(s), Update Order

The group leader can Submit the order by using this button.

The instruction text to help the group leader. You have control over the text that displays.

Group Name: Zion Lutheran Church - Mhezi Ministry Team Submit Order By: 10/13/2016 Total Amount to Collect: \$3,642.00

Seller #▲	Last Name	First Name	Teacher/Coach	Double Chocolate	Apple	Blueberry/CC	Cherry	Cinnamon	Raspberry	Strawberry/CC	Choc. Chip Cookie	Total Items Sold	Total Amount to Collect	Total Amount Collected	Remaining Amount to Collect from Seller	Estimated Group Profit. See invoice for actual profit
1	Walters Crammond	Karen		1	1	3	1	0	6	2	0	13	\$182.00	\$182.00	\$0.00	\$78.00
2	Mhezi Team			4	7	7	3	9	9	2	35	\$492.00	\$456.00	\$36.00	\$211.00	
3	Riggle Team	Marilyn		0	5	1	2	1	1	2	0	13	\$182.00	\$182.00	\$0.00	\$78.00
4	Walter	Colleen		1	3	11	6	6	7	4	42	\$592.00	\$592.00	\$0.00	\$254.00	
5	Yoder	Roberta		5	3	9	9	6	12	2	55	\$772.00	\$758.00	\$14.00	\$331.00	
6	Keith	Ray & Beth		1	2	5	5	5	6	1	29	\$412.00	\$197.00	\$215.00	\$177.00	
7	Square Account			1	0	0	1	2	1	0	5	\$70.00	\$70.00	\$0.00	\$30.00	
8	Meyer	Gerald		1	1	0	0	3	1	0	0	5	\$84.00	\$70.00	\$14.00	\$36.00
9	Overton	Deb		1	1	0	1	2	0	0	1	6	\$85.00	\$85.00	\$0.00	\$36.50
10	Swanson	Duane		0	1	2	0	0	3	1	0	7	\$98.00	\$98.00	\$0.00	\$42.00
11	Taylor	Sornie		2	5	4	4	5	6	3	1	28	\$393.00	\$281.00	\$112.00	\$168.50
12	Mhezi Team	EXTRA		0	2	4	2	4	6	4	0	20	\$280.00	\$0.00	\$280.00	\$120.00
13				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
14				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
15				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
16				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
17				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
18				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
19				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
20				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
21				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
22				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
23				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
24				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
25				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
Totals:				18	26	47	36	40	39	37	16	259	\$3,642.00	\$2,971.00	\$671.00	\$1,562.00

Buttons: Add 5, Add 25, Add 50

The Group Name, Submit Order Date and Remaining Amount to Collect from sellers for the Fundraiser.

You have control over 3 column names and which of the 3 you want to display. The flavors displayed and flavor background color come from the related program. The pricing is retrieved from the related price list.

These buttons allow the group leader to add more rows for additional sellers.

MyFundraisingPlace.com (continued)



Cedar Valley Fundraising
(877) 677-1444
West Bend, IA
info@CedarValleyFR.com

Submission Successful

Your order has been successfully submitted. An email has been sent to jennifer.williams@ankenschools.org.

[Go back to Order Entry page](#)

After the order has been submitted the group leader will be taken to the Submission Successful page. They have the option to go back to the Order Entry Page in case they want to print the seller list.



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West Bend, IA
info@CedarValleyFR.com

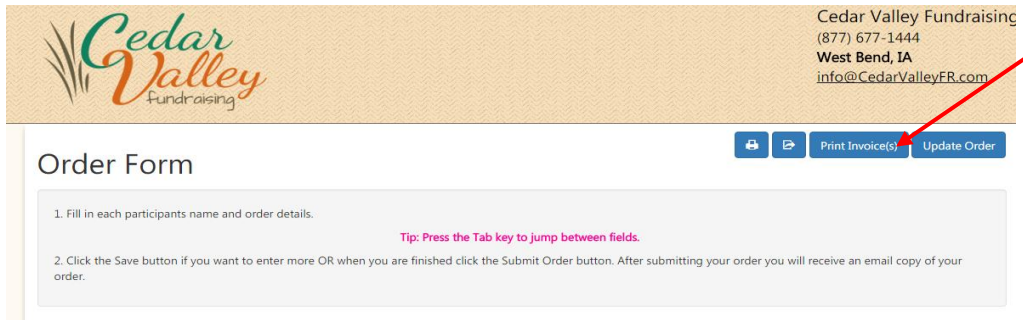
Order Form

1. Fill in each participants name and order details.
Tip: Press the Tab key to jump between fields.

2. Click the Save button if you want to enter more OR when you are finished click the Submit Order button. After submitting your order you will receive an email copy of your order.

[Update Order](#)

After the order has been submitted the group leader can go back to the site to update the order by using the Update Order button.



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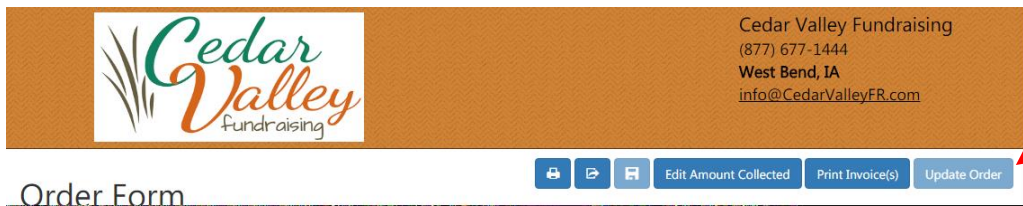
Order Form

1. Fill in each participants name and order details.
Tip: Press the Tab key to jump between fields.

2. Click the Save button if you want to enter more OR when you are finished click the Submit Order button. After submitting your order you will receive an email copy of your order.

[Print Invoice\(s\)](#) [Update Order](#)

If the Display Invoices setting is enabled, then the Print Invoice(s) button will display after you have advanced the invoice from Pending to Ordered in FR Pilot.

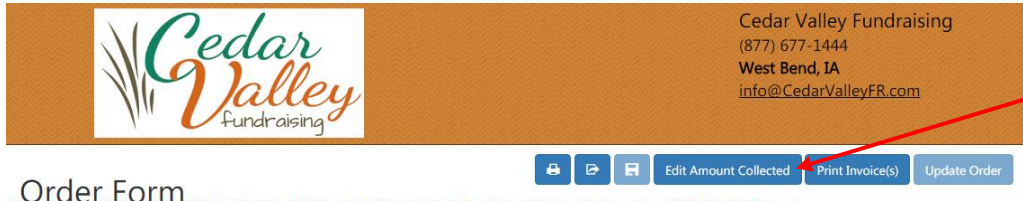


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West Bend, IA
info@CedarValleyFR.com

Order Form

[Edit Amount Collected](#) [Print Invoice\(s\)](#) [Update Order](#)

The Update Order button and Seller Info grid are disabled when the Locked setting is set on the fundraiser. This gets "locked" automatically when you print the invoice, print pre-pack labels or make an invoice quantity change in FR Pilot.



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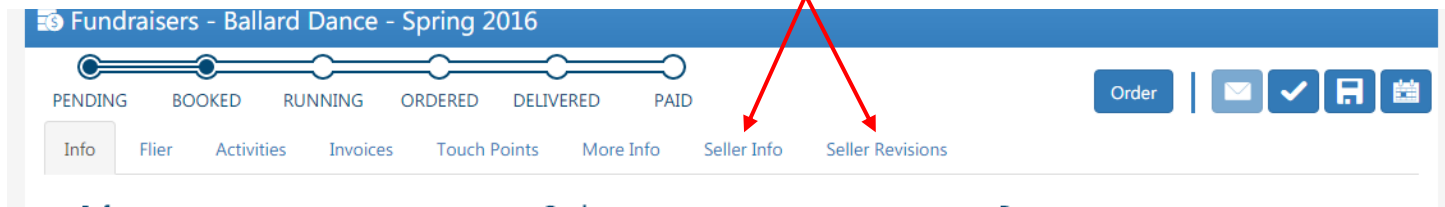
Order Form

[Edit Amount Collected](#) [Print Invoice\(s\)](#) [Update Order](#)

The Edit Amount Collected button will display when the group leader is locked from making quantity changes. Clicking on this button will allow the group leader to edit the Total Amount Collected per seller.

Fundraisers

The Seller Info tab has the seller details by flavor and the Seller Revisions tab show revision information by seller.



Notes:

- We only allow the group leader to submit one order per fundraiser, but they can continue to update that order until the Locked settings on the fundraiser is set. An FR Pilot user can still create additional invoices as needed though.
 - *The Locked setting on the Seller Info tab of the Fundraiser gets set automatically for you when the invoice is printed, pre-pack labels are printed or if an FR Pilot user edited the invoice quantities.
- Once the order is submitted from MyFundrasingPlace.com, the Fundraiser State will automatically advance to Ordered. The related invoice will be in the Pending state until an FR Pilot user advances the state of the invoice to Ordered. When the order has been submitted you will receive an email and we show the # of Pending Invoices on the Home Page above the Touchpoint Activity section.

Seller Info tab

Used to select the pre-pack label template.

Creates the pre-pack labels and reports. Clicking this will set the Lock setting which prevents any seller or quantity changes on MyFundraisingPlace.com.

Please see the next page for more information on these buttons.

Info Flier Activities Invoices Touch Points More Info **Seller Info** Seller Revisions

Selected Template: **Print Label** **Reset Seller #**

Select	Totals:				Double Chocolate	Apple	Blueberry/CC	Cherry	Cinnamon	Raspberry	Strawberry/CC	Choc. Chip Cookie	Total Items Sold	Total Amount to Collect	Total Amount Collected	Remaining Amount to Collect from Seller	Estimated Group Profit. See Invoice for actual profit
<input type="checkbox"/>	1	Walters Crammond	Karen		2	1	3	1	0	4	2	0	13	\$182.00	\$182.00	\$0.00	\$78.00
<input type="checkbox"/>	2	Mhezi Team			4	2	6	5	3	5	2	32	\$450.00	\$456.00	-\$6.00	\$193.00	
<input type="checkbox"/>	3	Riggle	Marilyn		0	5	2	2	1	1	2	0	13	\$182.00	\$182.00	\$0.00	\$78.00
<input type="checkbox"/>	4	Walter	Colleen		1	3	11	4	6	6	7	4	42	\$592.00	\$592.00	\$0.00	\$254.00
<input type="checkbox"/>	5	Yoder	Roberta		5	3	9	8	9	6	12	2	54	\$758.00	\$758.00	\$0.00	\$325.00
<input type="checkbox"/>	6	Keith	Ray & Beth		1	2	5	5	5	4	1	6	29	\$412.00	\$197.00	\$215.00	\$177.00
<input type="checkbox"/>	7	Square Account			1	0	0	1	2	1	0	0	5	\$70.00	\$70.00	\$0.00	\$30.00
<input type="checkbox"/>	8	Meyer	Gerald		1	1	0	0	3	1	0	0	6	\$84.00	\$70.00	\$14.00	\$36.00
<input type="checkbox"/>	9	Overton	Deb		1	1	0	1	2	0	0	1	6	\$85.00	\$85.00	\$0.00	\$36.50
<input type="checkbox"/>	10	Swanson	Duane		0	1	2	0	0	3	1	0	7	\$98.00	\$98.00	\$0.00	\$42.00
<input type="checkbox"/>	11	Taylor	Bonnie		2	5	4	4	5	4	3	1	28	\$393.00	\$281.00	\$112.00	\$168.50
<input type="checkbox"/>	12	Mhezi Team	EXTRA		0	2	4	2	4	4	4	0	20	\$280.00	\$0.00	\$280.00	\$120.00
<input type="checkbox"/>	13				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	14				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	15				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	16				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	17				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	18				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	19				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	20				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	21				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	22				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	23				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	24				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	25				0	0	0	0	0	0	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00
		Totals:			18	26	46	33	40	39	37	16	255	\$3,586.00	\$2,971.00	\$615.00	\$1,538.00

Add 5 **Add 25** **Add 50**

Displays the Seller information that has been entered for this fundraiser. You can sort the grid before printing pre-pack labels by clicking on the column names.

These buttons allow you to add more rows for additional sellers. You must click the Edit button for these to be enabled.

Any notes that the group leader entered while submitting orders or updates will be displayed here.

Notes from Customer:

Group Portal - Invoice Print Autosave

If we get a few orders in this weekend, do we REDO this order or send in on a new order form?

Seller Info tab (continued)

The Edit button must be clicked in order to make any changes to the Seller Info grid.

The Lock/Unlock button controls if the group leader can make changes to the Seller Info grid on MyFundraisingPlace.com. This automatically gets set to locked when you print invoices, labels or make invoice quantity changes in FR Pilot.

This allows you to reset the seller #'s. This should only need to be used if you printed and need to resort.

This exports the Seller Info to Excel for pre-pack labels where you can do a mail merge to Microsoft Word.

Info Flier Activities Invoices Touch Points More Info **Seller Info** Seller Revisions

Selected Template Print Label

Select	Seller #	Last Name	First Name	Teacher/Coach	Double Chocolate	Apple	Blueberry/CC	Cherry	Cinnamon	Raspberry	Strawberry/CC	Choc. Chip Cookie	Total Items Sold	Total Amount to Collect	Total Amount Collected	Remaining Amount to Collect from Seller	Estimated Group Profit. See Invoice for actual profit
		Totals:			18	26	46	33	40	39	37	16	255	\$3,586.00	\$2,971.00	\$615.00	\$1,538.00
<input type="checkbox"/>	1	Walters Crammond	Karen		2	1	3	1	0	4	2	0	13	\$182.00	\$182.00	\$0.00	\$78.00
<input type="checkbox"/>	2	Mhezi Team			4	2	6	5	3	5	5	2	32	\$450.00	\$456.00	-\$6.00	\$193.00
<input type="checkbox"/>	3	Riggle	Marilyn		0	5	2	2	1	1	2	0	13	\$182.00	\$182.00	\$0.00	\$78.00
<input type="checkbox"/>	4	Walter	Colleen		1	3	11	4	6	6	7	4	42	\$592.00	\$592.00	\$0.00	\$254.00
<input type="checkbox"/>	5	Yoder	Roberta		5	9	9	8	9	6	12	2	54	\$758.00	\$758.00	\$0.00	\$325.00
<input type="checkbox"/>	6	Keith	Rav & Beth		1	2	5	5	5	4	1	6	39	\$413.00	\$197.00	\$216.00	\$177.00

This button allows you to add columns to the grid. The additional columns that can be added can help track down seller related changes.

Opens MyFundraisingPlace.com in a new tab for this specific fundraiser

Opens an email with the link for MyFundraisingPlace.com

Allows you to print the Seller Information

Seller Revisions tab

The Seller Revisions tab will show details on any seller changes that have happened after the initial order has been submitted. It will let you know which sellers were added, flavor quantity changes, who made the modification and when the change happened.

*Note the Seller information displayed in these notes are based off the **Seller ID** and **NOT** the **Seller #**. Each seller has a Seller ID that cannot be changed. If you need to track down the exact Seller based off the Seller Revision notes you can go to the Seller Info tab and add the Seller ID column to the grid.

The screenshot shows the FR Pilot Online interface. At the top, there is a green navigation bar with the following menu items: Sales, Marketing, Operations, Analytics, Settings, Contacts, Groups, Fundraisers, Invoices, Activities, Calendar, Sales Maps, and Delivery Tools. Below this is a blue header for the fundraiser: Fundraisers - Algona Football - Fall 2018. A progress bar below the header shows stages: OPPORTUNITY, PENDING, BOOKED, RUNNING, ORDERED (highlighted), DELIVERED, and PAID. Below the progress bar are several tabs: Info, Flier, Activities, Invoices, Touch Points, More Info, Seller Info, and Seller Revisions (selected). The main content area shows a scrollable box with the following text:

Modified By BobDay2 On 7/14/2018 2:00:24 PM

Seller ID 1:

Product	Old Item Qty	New Item Qty
CI	1	0
SC	1	0

Seller ID 2:

Product	Old Item Qty	New Item Qty
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The **Reset Seller Info Button** resets the Group Leader Portal order entry form. It will delete all seller information for the fundraiser and related invoices. However, these changes cannot be undone once completed.

This screenshot is similar to the previous one, showing the same fundraiser page. However, a red box highlights a button in the bottom right corner labeled "Reset Seller Info". The rest of the interface, including the navigation bar, progress bar, and tabs, is identical to the previous screenshot.

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Pre-Pack

You can generate pre-pack labels in just a few clicks if an order was submitted from MyFundraisingPlace.com. Just open the fundraiser, sort the Seller Info grid and click on the Print Label button. Doing this will generate the following files:

- *Pre-pack labels* – the labels needed for each individual seller
- *Pick Ticket Report* – a report that shows totals by flavor and can be used to get product from the freezer. This report is based off the seller information. A “System Batch” pick ticket will also be generated if items were added to the invoice that are not part of the program or if a flavor has a different price than the fundraiser.
- *Group Name Report* – a report that can be used to label a cart after it has been pre-packed
- *Group Summary Report* – a summary report for the group that shows totals by flavor, pricing information, profit, total sellers, avg. items per seller and avg. profit per seller.
- *Seller Stats* – an Excel file that can be printed to show a summary by seller

*Note: there are both Dealer level settings and Program level settings that control some of the pre-pack options and how some reports are generated. Please see the Dealer Settings, Programs and Templates sections in this document for more information.

Making seller changes after printing labels

If you had to make a change after you had already printed the labels... The row of the seller(s) that have been added or modified will be highlighted yellow in the Seller Info grid (shown below).

When adding a new seller, you can change the seller #, if needed. Some dealers change the seller # for any add-on orders to a # like 500 so they would come at the end and would clearly know that the seller was added late. Other dealers want to include the new seller, so they are still sorted alphabetically. To do this you can change the seller # to a decimal. If the new seller should go between sellers 3 and 4, you could set the new seller’s # to 3.5 and not have to reprint all of the labels.

Once you have printed the labels we save the sorting information and the seller # is now saved with that seller. If you had to resort alphabetically and the seller #'s were no longer in the correct order, you could use the Reset Seller # button which will set the seller # to whatever row that seller is currently in.

Select	Seller #	Last Name	First Name	Teacher/Coach	Double Chocolate	Apple	Blueberry/CC	Cherry	Cinnamon	Raspberry	Strawberry/CC	Choc. Chip Cookie	Total Items Sold	Total Amount to Collect	Total Amount Collected	Remaining Amount to Collect from Seller	Estimated Group Profit. See Invoice for actual profit
	1	Walters Crammond	Karen		2	1	3	1	0	4	2	0	13	\$182.00	\$182.00	\$0.00	\$78.00
	2	Mhezi Team			4	2	7	7	3	5	5	2	35	\$492.00	\$456.00	\$36.00	\$211.00
	3	Riggie	Marilyn		0	0	2	2	1	3	2	0	13	\$182.00	\$182.00	\$0.00	\$78.00
	4	Walter	Colleen		1	3	11	4	6	6	7	4	42	\$592.00	\$592.00	\$0.00	\$254.00
	5	Yoder	Roberta		5	3	9	9	9	6	12	2	55	\$772.00	\$758.00	\$14.00	\$331.00
	6	Keith	Ray & Beth		1	2	5	5	5	4	1	6	29	\$412.00	\$197.00	\$215.00	\$177.00
	7	Square Account			1	0	0	1	2	1	0	0	5	\$70.00	\$70.00	\$0.00	\$30.00
	8	Mayer	Gerald		1	1	0	0	3	1	0	0	6	\$84.00	\$70.00	\$14.00	\$36.00
	9	Overton	Deb		1	1	0	1	2	0	0	1	6	\$85.00	\$85.00	\$0.00	\$36.50
	10	Swanson	Duane		0	1	2	0	0	3	1	0	7	\$98.00	\$98.00	\$0.00	\$42.00

If there were modifications made to a seller(s) and you try to print again, you will see an option to Print All or Print Modified (shown below). Selecting *Print Modified* would generate the labels only for the sellers that had been changed since you last printed.

Select Print Option

Print All
 Print Modified

**Update Invoice warning notification:*

When you try to print labels, you may see a warning message like the screen shot below. This will appear if the flavor totals from the invoice do not match the flavor totals from the Seller Info. tab on the Fundraiser. This can happen if an FR Pilot user had previously selected “Edit Invoice” and made quantity changes. If a user had done that, then there would not be a related seller for that invoice quantity change.

This warning gives you the opportunity to make changes prior to printing labels. Selecting “Update Related Invoice” will change the quantities on the invoice. Selecting Save Seller Info Only will only update the seller information and will **not** modify the quantities on the invoice.

Seller Info and Invoice Total Mismatch

Product	Seller Info Qty	Invoice Qty	From Group Portal
Cinnamon Roll	38	45	Y
Caramel Roll	41	43	Y

Update Related Invoice

Save Seller Info only

Cancel

Invoices

The Pending state on the Invoice is ONLY used when the order has been submitted from MyFundraisingPlace.com. This allows you to approve it and set it to Ordered. Invoices created inside of FR Pilot are set to the Ordered state.

If the order came from MyFundraisingPlace.com the # of Sellers field is set for you and is automatically updated as new sellers are added. If you need to edit the number click on the Edit button.

If the order came from MyFundraisingPlace.com and you click on the Edit button, you will have two options on how to edit the invoice quantities. Please see the following pages for more information on how this works.

Clicking the Print button will set the lock setting on the fundraiser Seller Info tab to prevent any changes on MyFundraisingPlace.com.

Invoice - Ballard Dance - Spring 2016

PENDING ORDERED STAGED DELIVERED PAID

Ordered Print Email Refresh Checkmark Save

Info More Info

Invoice Name: Ballard Dance - Spring 2016 # of Sellers: 1

Group: Ballard Dance Price List: \$5 Profit 9-14

Fundraiser: Ballard Dance - Spring 2016 Invoice Date: 5/19/2016

Bill To: Heidi Ihle Invoice Date Same as Delivery: Pre Pack:

Item #	Items	Price Per Item	Extended Amt
BPAP	7	\$9.00	\$63.00
BPBC	5	\$0.00	\$0.00
BPCH	4	\$9.00	\$36.00
BPCI	7	\$9.00	\$63.00
BPSC	9	\$9.00	\$81.00

Total Items: 32 Total Detail Amount: \$243.00
 Total Ext. Items: 32 Discount Amount: 0
 Group Profit: \$205.00 Sub Total: \$243.00
 Profit %: 45.76% Delivery Fee: 0

Tax Calculation: Rate: 0% Tax Amount: \$0.00
 Total Tax: \$0.00
 Total Due: \$243.00

Notes:

Customer: Invoice revised on 5/19/16

Internal: Modified By GroupPortal@cedarvalleyfr.com On 5/19/2016 9:47:50 AM

Product	Old Qty	New Qty	Old Price	New Price
+ BPAP 9.00	0	7	\$ 0.00	\$
+ BPCH 9.00	0	4	\$ 0.00	\$
+ BPBC 0.00	0	5	\$ 0.00	\$
+ BPSC 0.00	0	9	\$ 0.00	\$

The Pre-Pack check box was added to allow you to control if the fundraiser is a pre-pack. This is saved at the fundraiser level.

After the initial order submission, any quantity changes will be recorded here. For example, if the group leader added 2 apples to seller #1 and 3 apple to seller #2, the total change for the flavor – which would be 5 – would be recorded here.

Editing Invoices

For invoices that were created **INSIDE** of FR Pilot (meaning they were NOT submitted from MyFundraisingPlace.com):

There are no changes to how you edit invoices if it was created inside of FR Pilot. FR Pilot knows where the order was created from so when you click on the Edit button for these invoices, the Product Details grid will display, and you can add and edit product information like you have in the past.

For Editing Orders Submitted from MyFundraisingPlace.com:

Keep in mind that group leaders can continue to make their own changes on MyFundraisingPlace.com until the locked setting on the fundraiser is set to “locked” so you can encourage them to use the site because FR Pilot will automatically update the invoice for you!

If the order was submitted from MyFundraisingPlace.com and you need to edit an invoice in FR Pilot, then you will see two options when you click on the Edit button. A dialog box will display where you can select either Edit Invoice or Edit Seller Info. **If you are editing an invoice for a fundraiser that is a pre-pack or might become a pre-pack (based on total units) then we highly recommend you select Edit Seller Info.**

If you select Edit Seller Info and click Ok, the Seller Info dialog box (shown below) will appear. Choosing this option will ensure that your seller information is in sync for generating pre-pack labels. After making changes to the Seller Info and clicking Ok, the invoice totals will update.

Select Edit Option

- Edit Invoice
- Edit Seller Info

Ok Cancel

Edit Seller Info

Totals:				7	5	9	7	9	32
Seller #▲	First Name	Last Name	Teacher/Coach	Apple	Blueberry & Cream Cheese	Cherry	Cinnamon	Strawberry & Cream Cheese	Total Items Sold
1	Dan	Cook	Anderson	1	0	0	1	1	3
2	John	Jacobs	Anderson	1	0	1	1	2	5
3	Allison	McCann	Anderson	2	1	0	0	1	4
4	Susan	Meyers	Anderson	1	2	3	2	2	8
5	Mike	Peterson	Anderson	1	1	3	1	1	5
6	Kim	Vaughn	Anderson	1	1	3	2	2	7
7				0	0	0	0	0	0
8				0	0	0	0	0	0
9				0	0	0	0	0	0
10				0	0	0	0	0	0
11				0	0	0	0	0	0
12				0	0	0	0	0	0
13				0	0	0	0	0	0
14				0	0	0	0	0	0
15				0	0	0	0	0	0
16				0	0	0	0	0	0
17				0	0	0	0	0	0
18				0	0	0	0	0	0
19				0	0	0	0	0	0
20				0	0	0	0	0	0
21				0	0	0	0	0	0
22				0	0	0	0	0	0
23				0	0	0	0	0	0
24				0	0	0	0	0	0
25				0	0	0	0	0	0
Totals:				7	5	9	7	9	32

Add 5 Add 25 Add 50

Ok Cancel

Editing Invoices (continued)

If you select Edit Invoice and click Ok, the Product Details dialog box will appear, and you can make changes at the product level. We do NOT recommend using this option unless you know this will NOT be a pre-pack if you are adding new flavors to the invoice or making pricing changes.

If this option is selected, we set the lock setting on the fundraiser to prevent the group leader from making changes on MyFundraisingPlace.com.

Select Edit Option

- Edit Invoice
- Edit Seller Info

Ok Cancel

Product Details



Item #	Current Item Qty	Item Qty Difference	New Item Qty	Price Per Item	From Group Portal
BPAP	7			\$9.00	Y
BPBC	5			\$0.00	Y
BPCH	4			\$9.00	Y
BPCI	7			\$9.00	Y
BPSC	8			\$9.00	Y

Ok Cancel

*Note: If you selected "Edit Invoice" and made quantity changes on a pre-pack fundraiser by mistake, we do warn you when you try to print the labels and allow you to correct this prior to printing labels. To correct this, you can go to the Seller Info tab on the fundraiser, add a made-up seller with the difference and when saving those changes select "Save Seller Info. Only". Selecting the Save Seller Info Only option will only update the seller info and not modify the quantities on the invoice.

Dealer Settings

MyFundraisingPlace.com Settings tab

The screenshot shows the 'MyFundraisingPlace.com Settings' tab for a dealer. The top navigation bar includes 'Info', 'Settings', 'Custom Fields', 'MyFundraisingPlace.com Settings', 'Pre-pack Settings', and 'Email Notifications'. The main content area is divided into three sections:

- MyFundraisingPlace.com Custom Column Labels:** A table with three rows. Each row has a checked 'Enabled' checkbox, a label 'Seller Form Custom Field X Label', and a text input field. The inputs are 'First Name', 'Last Name', and 'Teacher/Coach'.
- Color Scheme, Logo & Instructions:** Contains a 'Background Color' dropdown menu, a 'Logo Template' dropdown menu, and a rich text editor for 'Instructions'. The instructions text includes a tip: 'Tip: Press the Tab key to jump between fields.' and a numbered list: '1. Fill in each participants name and order details.' and '2. Click the Save button if you want to enter more OR when you are finished click the Submit Order button. After submitting your order you will receive an email copy of your order'.
- Preview Page:** A live preview of the fundraiser page. It features the Cedar Valley Fundraising logo and contact information: 'Cedar Valley Fundraising (877) 677-1444 West Bend, IA info@CedarValleyFR.com'. Below the logo is a section titled 'Preview Page' containing the same instructions text as the rich text editor.

There are 3 Custom Columns you can use on MyFundraisingPlace.com. If you wanted your group leaders to enter a First Name, Last Name and Teacher, you could enable all 3 Custom Fields and name them how you wanted. If you only wanted to use 2, you can do that and leave Custom Field 3 disabled (unchecked).

The Background color allows you to select a background color scheme for MyFundraisingPlace.com.

Select a WebLogo template type to display on MyFundraisingPlace.com

The Instruction text that will display at the top of the page on MyFundraisingPlace.com. The Instructions are only visible while the lock setting on the fundraiser is "unlocked" and the group leader can make changes. Once the lock setting on the fundraiser is "locked" the group leader will see the locked message in this same area instead.

After saving you will be able to preview the color scheme, logo and instructions text here.

MyFundraisingPlace.com Settings tab (continued)

Order Submission Confirmation Email

Group Order Confirmation Subject

Order Confirmation

Group Order Confirmation Body

B *I* U **abc** [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon]

(inherited font) (inherited size) A

Your order has been received. Thank you!

Group Order Confirmation Email - the subject of the order confirmation email and the body of the email that will be sent to the group leader after an order has been submitted.

Message to display to group leader when locked from editing

B *I* U **abc** [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon]

Tahoma, Geneva, sans-serif 5 (18pt) A

THIS IS A TEST. Display when seller info grid is locked.
THIS IS A TEST. Display when seller info grid is locked.
THIS IS A TEST. Display when seller info grid is locked.

This message will be displayed on MyFundraisingPlace.com when the lock setting on the fundraiser is set to "locked". This text can be used to help the group leader know that you are no longer accepting order changes from the site and that they should contact you directly with changes or questions.

We set the lock setting on the fundraiser to prevent group leaders from making changes on MyFundraisingPlace.com in the following scenarios:

- The invoice has been printed in FR Pilot
- The pre-pack labels have been printed or exported
- An edit has been made to the invoice quantities in FR Pilot

Display Invoices on MyFundraisingPlace.com:

This setting controls whether a group leader can view invoices on MyFundraisingPlace.com when the invoice is in the Ordered, Staged, Delivered or Paid state. This is turned on by default. If this were turned off, then you would need to email your group leader the invoice.

*Note: we do NOT display invoices in the Pending state even if this setting is turned on. We set it up this way because we do not want a group leader to see an invoice before it has been approved by an FR Pilot user since you may need to apply a delivery fee, discounts, etc.

Email Notifications tab

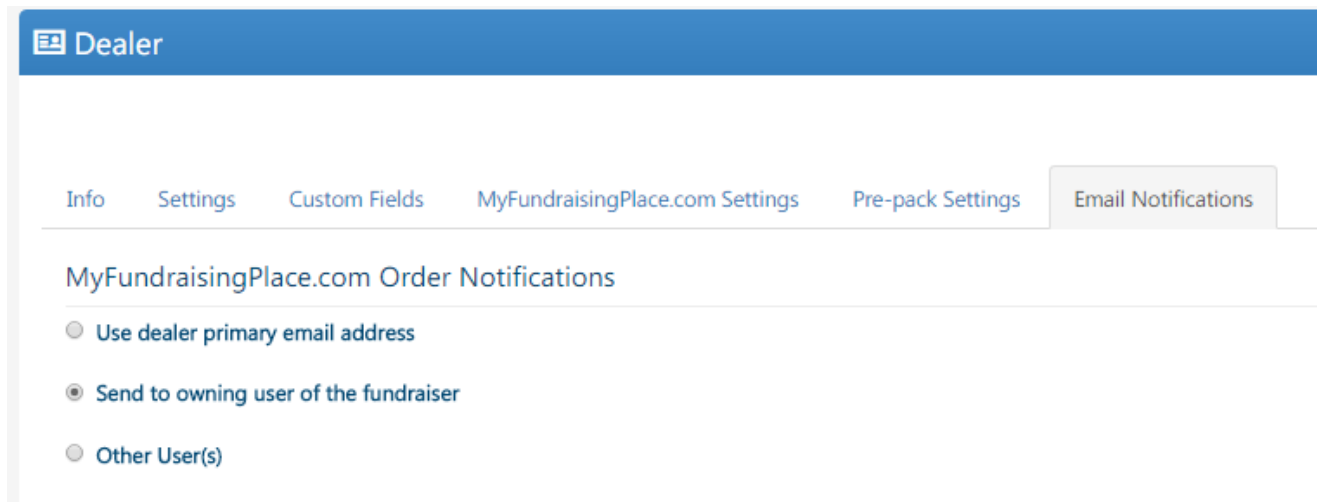
MyFundraisingPlace.com Order Notifications

This controls who will be emailed when an order is submitted from MyFundraisingPlace.com. You have the following options:

Use dealer primary email address - this option will send to the dealer's primary email address that is set in Dealer Settings

Send to owning user of the fundraiser - this option will send the email to the owning user of the fundraiser. This is the default option.

Other User(s) - this option allows you to look-up other FR Pilot users and send to their email address. This could be used if you wanted all of the emails to go to an office manager's email address rather than a sales rep.



The screenshot shows a web interface for a 'Dealer' account. At the top, there is a blue header with the word 'Dealer' and a small icon. Below the header is a navigation bar with several tabs: 'Info', 'Settings', 'Custom Fields', 'MyFundraisingPlace.com Settings', 'Pre-pack Settings', and 'Email Notifications'. The 'Email Notifications' tab is currently selected and highlighted. Below the navigation bar, the page title is 'MyFundraisingPlace.com Order Notifications'. Underneath, there are three radio button options: 'Use dealer primary email address', 'Send to owning user of the fundraiser' (which is selected), and 'Other User(s)'.

Pre-pack Settings tab

This tab allows you to control how pre-pack labels are generated per seller.

The Download Pre-Pack Settings button allows you to download the template that can be used to import your own custom settings for labels.

Extended Items	Number of Labels
42	6
41	6
40	6
39	6
38	6
37	6
36	6
35	5

The Extended Items Per Case setting controls how many items will be in a box before a new label is created for a seller. By default, this value is 7. If you import your own pre-pack settings, this value will be ignored.

The Import Custom Pre-Pack Settings option allows you to import custom values on how to generate the labels per seller if you do not always use the same # for all quantities. Below is an example, of how some dealers would use the custom settings rather than just the Extended Items Per Case setting.

- 1 label: 1-8 extended items
- 2 labels: 9-14 extended items
- 3 labels: 15-21 extended items
- 4 labels: 22-27 extended items

To use this option, you must click on the Download Pre-Pack Settings button first so you can use the correct template to upload. After updating the Excel file, you can click on Select files to select your custom settings and upload it.

If you chose to import your own settings, then the Extended Items Per Case value will be ignored.

The Hide zero quantity flavors on labels setting is turned off by default. If this setting is turned on and you are using the correct template, then this setting will hide flavor(s) from the pre-pack labels if a seller did not sell a certain flavor. For example, if the program contained Apple, Cinnamon, Cherry, Blueberry & Strawberry, but Seller #1 only sold Apple, then only the Apple would show up on that seller's pre-pack label.
***Please Note that a special pre-pack label template is needed when using this setting.

Templates & Merge Fields

Merge Fields

The merge field that can be used on your email templates to send the unique link to your group leader is called **GroupPortalURL**. This link will take the group leader directly to their unique page, so they can enter seller information, submit the order, update the order and print invoices. Use of this field will replace the need for attaching an excel order tabulator!

Template types

WebLogo

This can be used as the logo that displays on MyFundraisingPlace.com. After uploading your web logo as a template, you can go to Settings/Dealer, then go to the MyFundraisingPlace.com Settings tab and select the template name in the Logo Template drop down.

Pre-pack Labels

You can have multiple pre-pack label templates if needed for your different programs. A pre-pack label template is similar to flier templates on a program where you can have multiple pre-pack labels related to a program and you can have a primary pre-pack label template per program too.

Group Pick Report

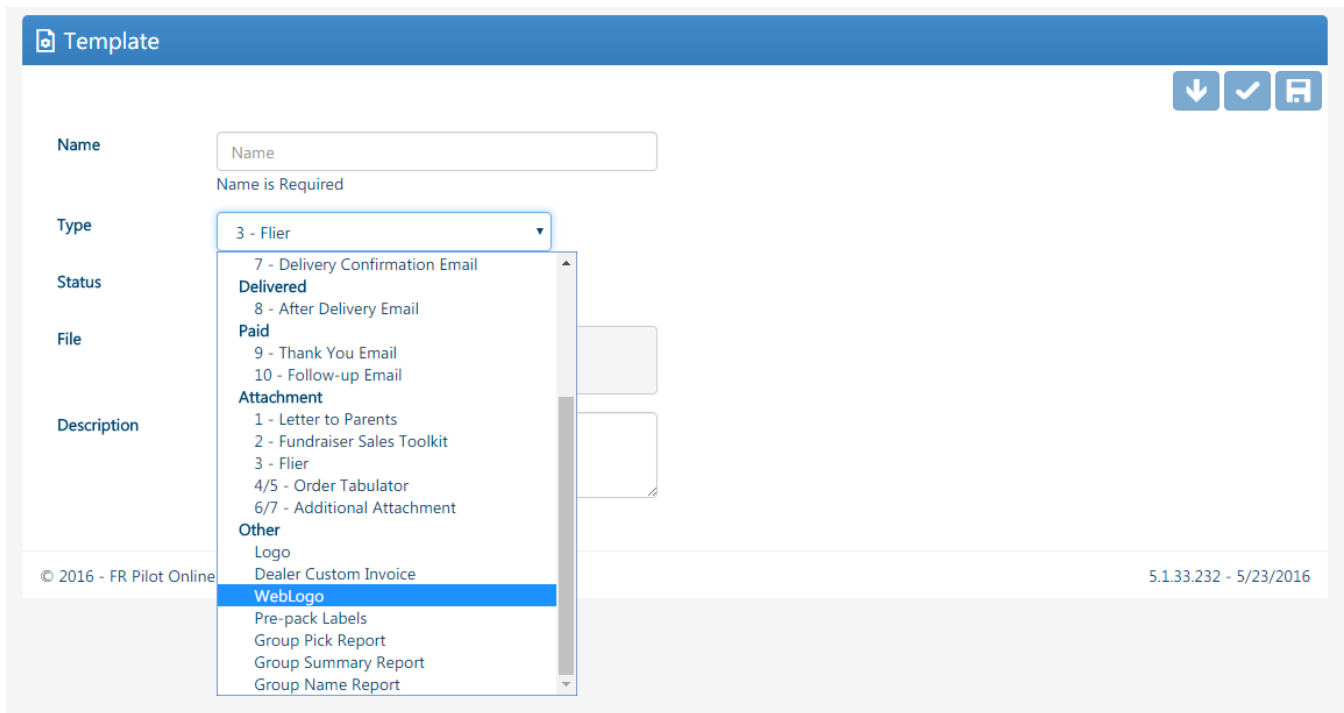
This is the template that will be used for the Pick Ticket Report which gets generated when printing pre-pack labels.

Group Summary Report

This is the template that will be used for the Summary Report which gets generated when printing pre-pack labels.

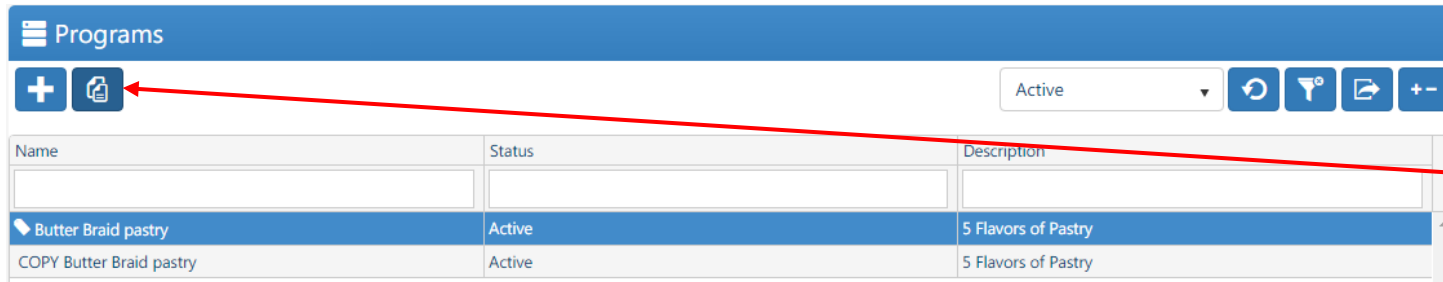
Group Name Report

This is the template that will be used for the Group Name Report which gets generated when printing pre-pack labels.



Programs

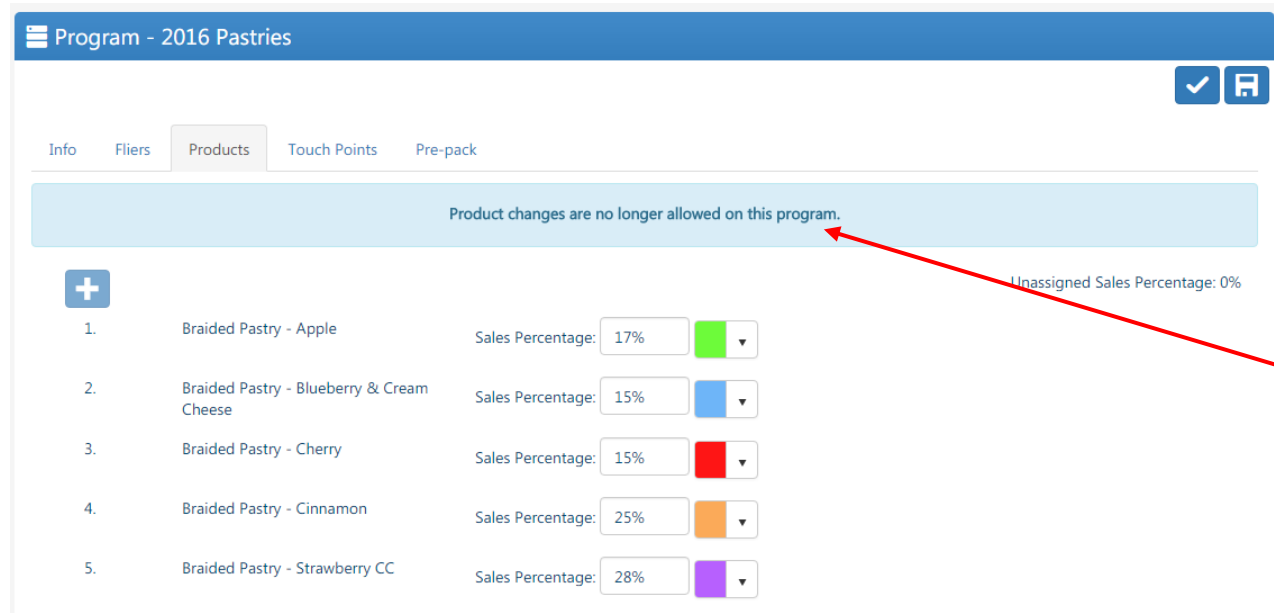
You will be required to create a new program if seller level information exists for a program and you want to add/remove flavors or re-order flavors on a program. For example, if a group is running with Program A and has entered sellers on MyFundraisingPlace.com you would be locked from adding / removing flavors or re-ordering flavors on Program A. If you wanted to make a flavor change you will need to create a new program. We have added a Copy Program button to the Programs grid to help make this process easier for you.



Name	Status	Description
Butter Braid pastry	Active	5 Flavors of Pastry
COPY Butter Braid pastry	Active	5 Flavors of Pastry

The Copy Program button will copy everything from the selected program and create a new program with "Copy" at the beginning of the program name. You can edit the flavors on this program until seller information has been entered.

Products tab



Product changes are no longer allowed on this program.

Unassigned Sales Percentage: 0%

Item	Product Name	Sales Percentage	Color
1.	Braided Pastry - Apple	17%	Green
2.	Braided Pastry - Blueberry & Cream Cheese	15%	Blue
3.	Braided Pastry - Cherry	15%	Red
4.	Braided Pastry - Cinnamon	25%	Orange
5.	Braided Pastry - Strawberry CC	28%	Purple

When seller level information exists for a program, you will see this warning message. The add, remove and re-order buttons on the products tab will also be disabled, however, you can still change the sales percentages and the flavor colors.

On the product tab of a program, you can set the background color that will be displayed on MyFundraisingPlace.com for that specific flavor.

The screenshot shows a web interface for managing a fundraising program. The title bar reads "Program - 2016 Pastries". Below the title bar are navigation tabs: "Info", "Fliers", "Products" (which is selected), "Touch Points", and "Pre-pack". In the top right corner, there are two icons: a checkmark and a save icon. The main content area displays a list of five products, each with a sales percentage and a color selection dropdown. The products are:

- 1. Braided Pastry - Apple (Sales Percentage: 17%, Color: Yellow)
- 2. Braided Pastry - Blueberry & Cream Cheese (Sales Percentage: 15%, Color: Blue)
- 3. Braided Pastry - Cherry (Sales Percentage: 15%, Color: Red)
- 4. Braided Pastry - Cinnamon (Sales Percentage: 25%, Color: Orange)
- 5. Braided Pastry - Strawberry & Cream Cheese (Sales Percentage: 28%, Color: Purple)

At the bottom right of the product list, there are three icons: an up arrow, a down arrow, and a close (X) icon. The text "Unassigned Sales Percentage: 0%" is visible in the top right of the product list area.

Pre-pack Settings tab

Prepack Templates

You can add multiple pre-pack label templates to a program by using the magnify glass icon. You can use the Set Selected Template as Default button to set a pre-pack label template as the primary template that is used for the program.

Batch Size

This setting allows you to split large orders from a single group into smaller orders for pre-packing. Doing this can help you find quantity issues easier since the orders would be split into smaller sizes. For example, if you had a group turn in an order of 1,200 units and your batch size for the program was set to 300, the order would be split into approximately 4 batches. You can treat those 4 batches like 4 separate deliveries. If there was a mistake you found while pre-packing and you had an extra Apple, you could potentially only have to go through 1 of the batches of 300 units rather than having to possibly go through all 1,200 units.

*Notes:

- By default, the Batch Size value is set to 5,000 on all programs which essentially has this feature turned off.
- We don't split sellers into multiple batches. A seller will always be in only 1 batch.
- We round down on the batches. For example: Your batch size is set at 300. If the first 30 sellers had sold a total of 295 units and seller #31 sold 10 units, we would create a new batch starting with seller #31. Batch #1 would have sellers 1-30 with a total of 295 units.

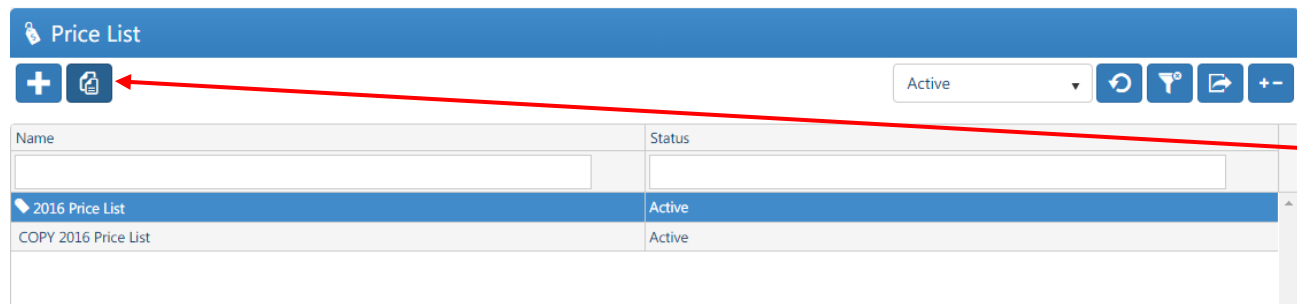
The screenshot shows the 'Pre-pack' settings for a program named '2016 Pastries'. The interface includes a navigation bar with tabs for 'Info', 'Fliers', 'Products', 'Touch Points', and 'Pre-pack'. The 'Pre-pack' tab is active. Below the navigation bar, there is a 'Prepack Templates' section with a search icon, a minus sign, and a trash icon. A table lists the templates, with one entry: 'Prepack' (Type: Pre-pack Labels, Status: Active). Below the table, there is a 'Batch Size' section with a text input field containing the value '5000'.

Prepack	Type: Pre-pack Labels	Status: Active	
prepack			

Batch Size: 5000

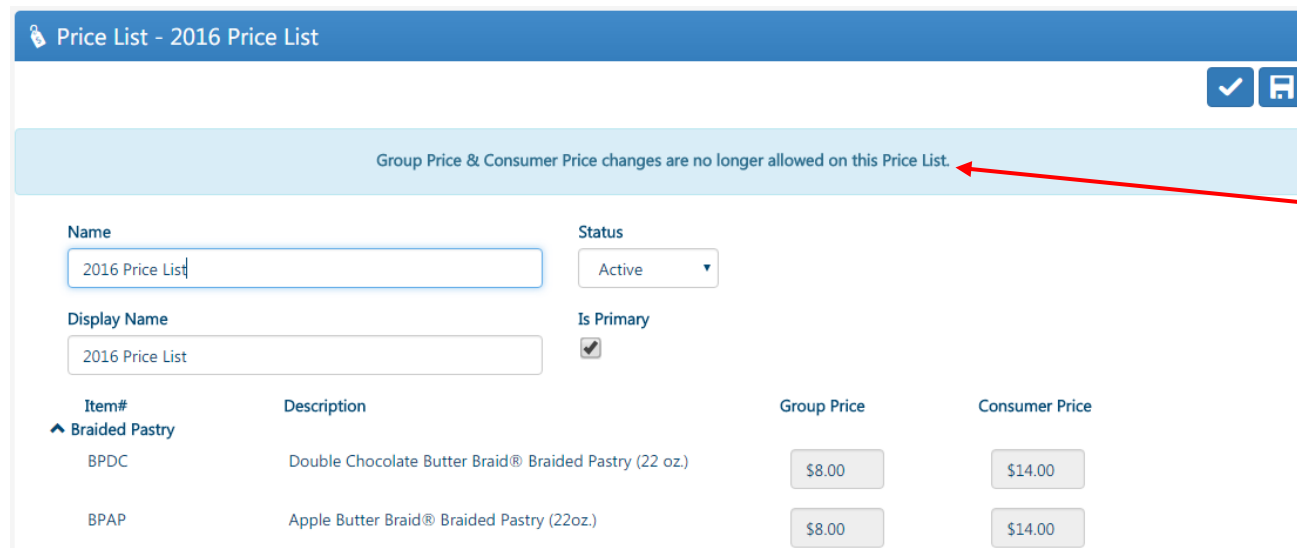
Price Lists

You will be required to create a new price list if you need to edit prices when seller level information already exists for a price list. For example, if a group is using Price List A and has entered sellers on MyFundraisingPlace.com you would be locked from editing the group and consumer prices for Price List A. If you wanted to make a change you will need to create a new price list. We have added a Copy Price List button to the Price List grid to help make this process easier for you.



The screenshot shows the 'Price List' management interface. At the top, there is a blue header with a lock icon and the text 'Price List'. Below the header, there is a toolbar with a plus sign, a copy icon (highlighted by a red arrow), a dropdown menu set to 'Active', and several other icons. Below the toolbar is a table with columns for 'Name' and 'Status'. The table contains two rows: '2016 Price List' with status 'Active' and 'COPY 2016 Price List' with status 'Active'.

The Copy Price List button will copy the selected price list and create a new price list with "Copy" at the beginning of the name. You can edit the group & consumer prices on the new price list until seller information has been entered.



The screenshot shows the 'Price List - 2016 Price List' edit form. At the top, there is a blue header with a lock icon and the text 'Price List - 2016 Price List'. Below the header, there is a toolbar with a checkmark and a save icon. Below the toolbar is a light blue warning message: 'Group Price & Consumer Price changes are no longer allowed on this Price List.' (highlighted by a red arrow). Below the warning message are form fields for 'Name' (containing '2016 Price List'), 'Status' (set to 'Active'), 'Display Name' (containing '2016 Price List'), and 'Is Primary' (checked). Below the form fields is a table with columns for 'Item#', 'Description', 'Group Price', and 'Consumer Price'. The table contains two rows of items: 'Braided Pastry' with sub-items 'BPDC' and 'BPAP', both with a group price of \$8.00 and a consumer price of \$14.00.

When seller level information exists for a price list, you will see this warning message. The group and consumer fields for each flavor will be disabled.