My Fundraising Place
Resource Book
5/20/19

Table of Contents

Getting Started

Fundraiser Stages in My Fundraising Place

Opportunity: A specific time frame has been identified where you have a possibility to win a fundraiser with a group. You will be actively working a sales process to close the sale. My Fundraising Place will allow you to manage a potential book date (when the group will choose what fundraising solution they want to use) and you can estimate the amount of potential business that it will bring to your dealership.

Pending: A group has committed to running a fundraiser with your dealership (opportunity = won) – but you are working out the specific details (scheduling, etc.)

Booked: The fundraiser event is all booked and setup in My Fundraising Place. My Fundraising Place is all set to execute on the promises your dealership has made.

Running: The fundraiser "Start On" date is past, and the group should be running the sale & is waiting for an order to be turned in.

Ordered: An order has been received against this fundraiser.

Delivered: All invoices associated with the fundraiser have been delivered

Paid: All invoices associated with the fundraiser have been marked as paid

Glossary of Terms

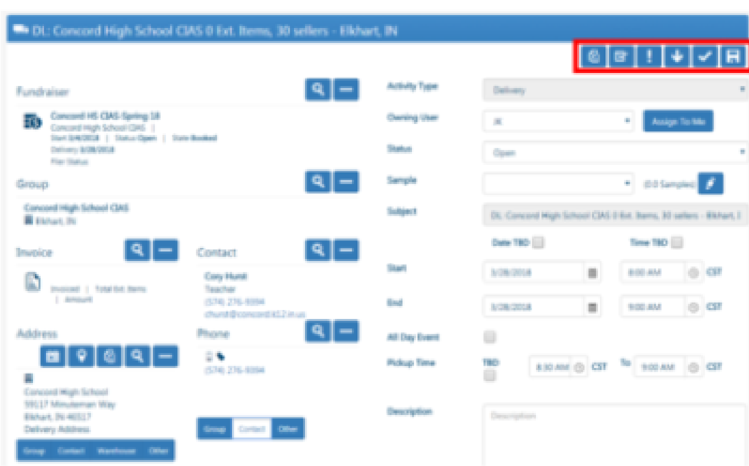
Term	Description
Activity Sheet	Should be used to capture information that is time sensitive and further action is needed to complete the interaction. Things to do related to a group and/or a contact (Appointment, Phone Call, Sales Call, etc.). Shows details about the group, contact, fundraiser and the last 5 activities related to the group.
Arrival Time	Time that the delivery person will arrive (not when the kids arrive)
Booked	Commitment received, send confirmation email and touch point emails to start
Contact	Contacts are individuals who might be interested in doing business or are currently doing business with your organization. People associated with a group
Customer	Someone who has or will be purchasing from you
Dashboard	An My Fundraising Place screen that is customizable to hold tiles for functions you commonly perform
Delivery Date	Date of the delivery to the group
Email Campaign	A coordinated set of email messages sent out from a Marketing List
End Time	Time the delivery person leaves
Excel Data Connector	An ODBC connector to read only My Fundraising Place backup database to allow a dealer to pull data into Excel, a static list
Fundraiser	An event held to generate financial support for a charity or organization
Group	Groups are a company, club or organization interested in running a fundraiser. A group may have multiple contacts related to the group.
Group Leader	The leader of the group. The main contact for the fundraiser
Group Leader Portal / My Fundraising Place	An online tool for group leaders designed to improve the fundraising experience. Orders are entered here.
Incentive	An inducement or supplemental reward that serves as a motivational tool for selling a product
Inventory Adjustment	Allow you to add or remove the quantity for a flavor(s) in the selected warehouse (Samples, physical count of inventory proves the quantities need to be changed)
Inventory Maintenance Count	Used to set your starting inventory for each warehouse, done after a physical inventory count
Inventory Transfer	Allows you to move product from one warehouse to another
Invoice	An itemized bill for goods sold
Lead	A person or company who has shown interest in a product or service in some way (think "one-way communication"). A group that is a potential prospect.
Lead Conversion	The process of converting a lead into an account, contact, and/or opportunity
Lead Generation	The action or process of identifying and cultivating potential customers for a business's products or services.
Lead Rating	A rating system from 0 to 5 based customized by the dealer to help with which groups to focus on. One dealer's example: (0 stars - groups they do not wish to pursue) (1 star - all groups start at) (2 stars - last FR: 125-199 units) (3 stars - last FR: 200-299 units) (4 stars - last FR: 300-449 units) (5 stars - last FR: 450+ units)
Lead Score	A calculation based on the lead rating and the group type. The higher the score the better
Lead Source	A tool to track where groups came from
Load Summary Report	Shows the # of cases and eaches by flavor for each delivery that day
Marketing Campaign	The efforts of a company to increase awareness for a product or service

Marketing List	Contain members that meet specific criteria and are managed manually by users. A static list
My User Restriction	Only allows a user to see entities that belong to that user
Notes	Should be used to capture information that needs to be associated with a date but does NOT require further action
Online Signup	The process of signup up online from a link
Operations Restricted	Allows for partial access to the operations area, can't see purchase orders
Opportunity	Going through sales process, getting some dialogue. Realistic opportunity to generate revenue
Order Tabulator	Spreadsheet used by group leaders to figure out their totals
Ordered	Fundraiser stage when the group calls in their fundraiser totals and is done running the fundraiser
Outlook Activity Sync	The process of syncing My Fundraising Place activities to Microsoft Outlook
Pending	Enough information to start reserving dates on the calendar
Pickup Time	Time the kids arrive to pick up their orders
Power Bi	A business analytics solution that lets you visualize your data and share insights across your organization
Pre-Pack	Orders that are packed
Price List	A list of current prices of items on sale
Product	An item that is being sold
Program	Unique collections of products used in a fundraiser
Prospect	A qualified lead, or group that has shown they are going to make a buying decision that your dealership wants to pursue, think "two-way communication"
Purchase Order	A document issued by a buyer to a seller, indicating types, quantities, and agreed prices for products or services.
Qualified Lead	A group that meets all criteria for moving them along in the sales process
Quantity Left to Buy	Number of units necessary to buy to fulfill all the fundraisers in all the different stages
Quantity on Hand (QOH)	Actual number of units in storage
Quickbooks	A set of software solutions to manage payroll, inventory, sales and the other needs of a small business
Recycle Bin	Where deleted items in My Fundraising Place are stored. Deleted items can be restored here.
Route Summary Report	Shows details about the selected activity types in the order that they are scheduled for that person
Running	Group is actively running the sale
Sales Funnel	The buying process that companies lead customers through when purchasing products
Sales Planning Map	A map used to see the locations of potential clients in relation to one another
Sample	Free product given to achieve a sale or strengthen relationship with customer
Smart List	Saved queries for groups, fundraisers, invoices, contacts and activities. Memorized queries of data, a dynamic live list (available on certain grids).
Template	Documents designed to receive data from My Fundraising Place automatically (Custom Flier, Touch Point Emails, TP Email Attachments, Logo for Invoice, Web Logo for GLP)
Territory	The customer group or geographical area for which an individual salesperson or sales team holds responsibility to sell
Touch Points	Series of automated or semi-automated emails to help with communications during the fundraiser process
Unqualified Lead	A group that does NOT meet all, or even some, of your criteria for moving them along in the sales process
Warehouse	A building where you store your products

Buttons & Icons

- Manual Load Data or refresh grid
- Add new record to database
- Delete record from database or move to recycle bin
- Mark object as complete (activities) or advance stage (invoices)
- Mark object Active or Inactive
- Remove association
- Edit
- Export to Excel
- Add or remove columns to grid
- Reset / clear grid filter row
- Lookup or search
- Mark as primary
- Pass address to schedule tool & open tool
- Copy
- Paste
- Merge
- Add to marketing list

Buttons & Icons – Activity



- On Activities (from left to right):
  1. Complete activity and copy description to a new activity (and you can pick a new activity type before saving)
  2. Mark complete and close activity
  3. Mark as high priority
  4. Mark as low priority
  5. Save and close
  6. Save

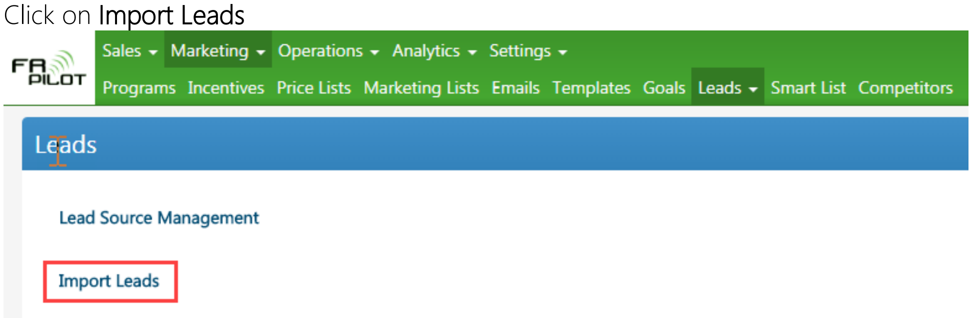
Assign To Me

- Assigns owning user to currently logged in user

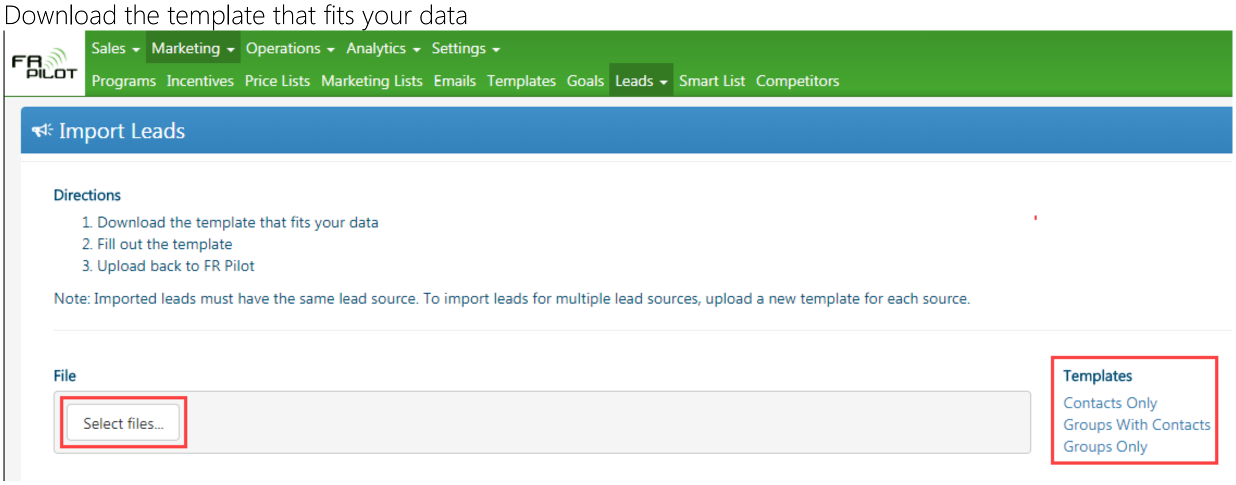
Lead Generation

How to import groups and contacts

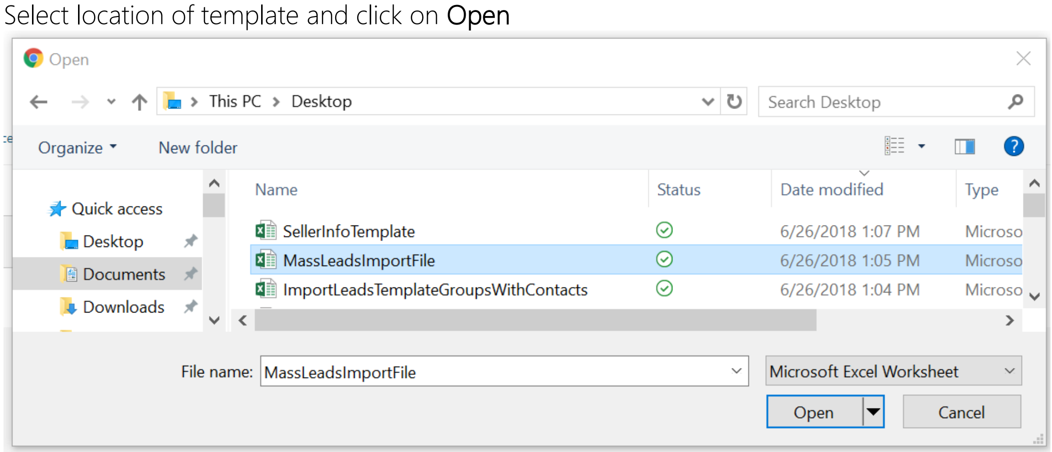
1. Log in to My Fundraising Place
2. Go to Marketing > Leads
3. Click on Import Leads



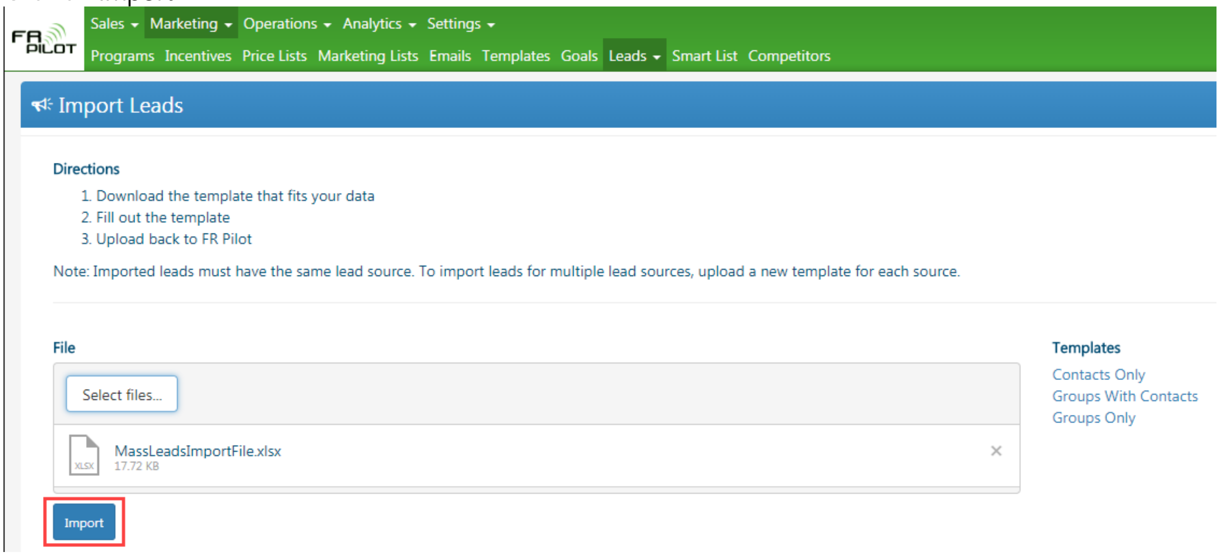
4. Download the template that fits your data



5. Fill out the template by entering your data and saving it
6. Click on Select Files
7. Select location of template and click on Open

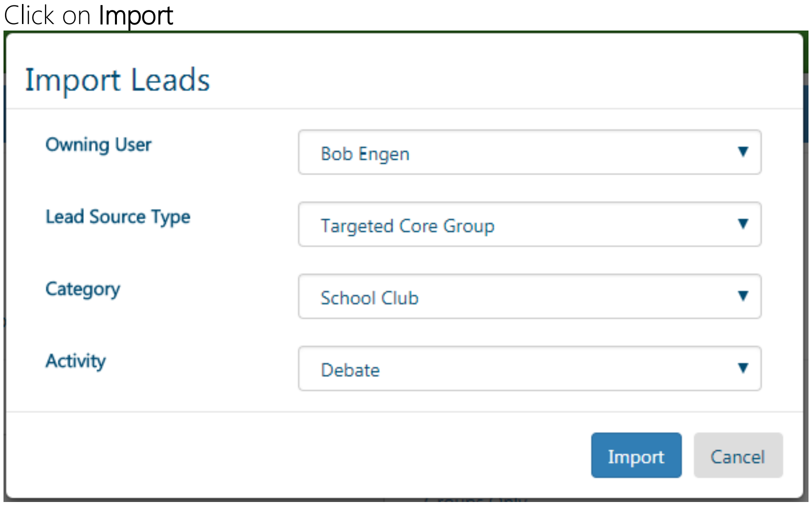


8. Click on **Import**

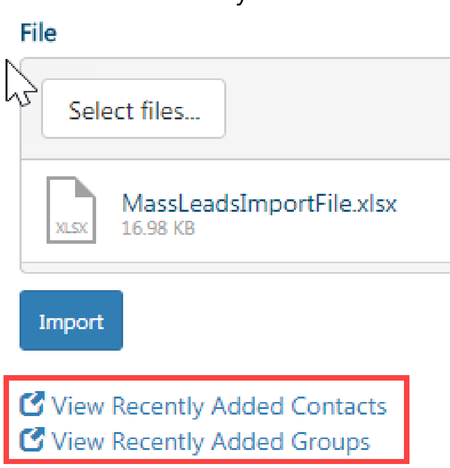


9. Select fields from drop down for all records in template:
   - Owning User
   - Lead Source Type
   - Category
   - Activity

10. Click on **Import**

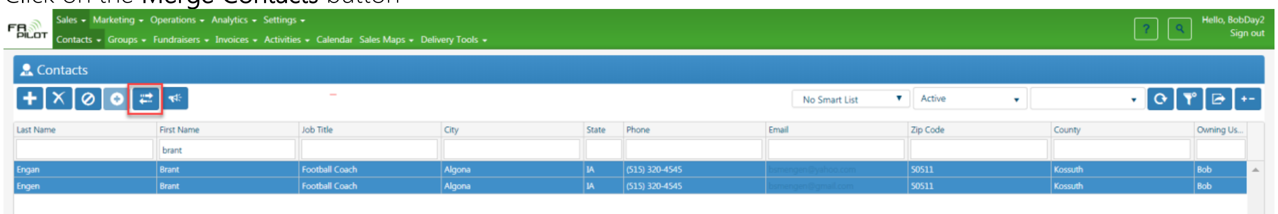


11. Click on either **Recently Added Contacts** or **Recently Added Groups** to verify import



How to merge contacts

1. Log in to My Fundraising Place
2. Go to Sales > Contacts
3. Select the two contacts you want to merge
4. Click on the Merge Contacts button



5. Click on the Swap Source and Target button if you have the contacts reversed

6. Click on the Magnifying Glass button for either contact if you would like to search for another contact to merge
7. Once you have the contacts in the correct order to merge, click the OK button to merge

Why enter group addresses

If you want to get a sale, you're going to need the right information about your leads. Leads that contain the right information are more likely of being turned into a sale.

Group addresses are needed to take advantage of:

- The Sales Planning Map tool which will help you target the right groups and help you be more efficient with your sales calls
- The Delivery Scheduling Map tool which can help you find other activities in the same area within a certain timeframe, so you can be more efficient with your time
- Route planning for turn by turn instructions for your activities
- Filtering your grids by location to find the right groups, contacts or activities
- Mailing lists for marketing purposes
- Sales analytics by location

Why select the Category - Activity on every group?

Selecting the Category: Activity on the group will help you work smarter and help you learn more about your business. By filling out this one key item, you can start to learn about:

Customer Mix:

- Total sales and total # of customers by category or activity
- How averages were impacted by your customer mix
    - One of the key factors in comparing an average from year to year is evaluating the changes in your Customer Mix. The change in your customer mix could have a bigger impact on your average than a price increase.

It can help you determine if you are focusing on the right groups:

- The average # of touch points it took to get a customer to sign up by category or activity
- The retention rate by category or activity
- The closing rate by category or activity

Tips:

You may have a lot of groups in My Fundraising Place and you may feel overwhelmed when you think about filling the Category: Activity out for all your groups. Here are a few suggestions:

- Filling out your Category: Activity for your groups is a great late spring / early summer project!

- Consider limiting the list of groups that you update to the groups that have had a fundraiser in the last 4 years.

Develop a plan to help you fill out the attributes as you go throughout the year. You could enter the Category: Activity for every new group that gets entered into My Fundraising Place and when an existing group signs up for a fundraiser you could add an additional step in your process to verify that the Category: Activity is filled out prior to booking the fundraiser.

Why should you enter leads, activities and samples into My Fundraising Place?

Know where your leads are at in the sales cycle

If your leads are not in My Fundraising Place, how can you market to them? Not all group leaders will be ready to buy based on their first interaction with you. In most cases, you will need to have multiple touch points with your leads, so you can move them through the sales cycle. If you don't track this information, then you won't know where they are at in the sales cycle.

Shorten the sales cycle

Tracking activities in My Fundraising Place allows you to learn from the past which will help you make better business decisions and shorten the sales cycle. If you don't track this information until they are ready to become a customer, then you have no way of figuring out what works and what doesn't work.

Activities are important to track so you can determine things like:

- On average, how many times you need to interact with a group to get a sale?
- What touch point plan is the most effective for closing the sale?

Scaling your business

As your business grows you may need to add employees. Having this information in My Fundraising Place is extremely important for internal communication and communication with your leads and customers. Your employees could be lost if the information is in your head or on a piece of paper.

If the information is in My Fundraising Place, your employees will know exactly where each lead or customer is at in the sales process. If the information was NOT entered into My Fundraising Place, they would have no idea what touch points had happened in the past which could lead to a lot of their time being wasted.

Having employees enter this information will also give you more visibility on how they are performing!

Group addresses are needed to take advantage of:

When you enter activities and samples in My Fundraising Place we track the last activity date and the last sample date for the group. These dates can be very helpful when you want to filter your data. Here are a few examples of how you could filter off these dates:

- You want to find all leads that haven't been sampled in the last year and schedule an appointment with them
- You want to create an email list for all of your leads that haven't had an activity since 2014
- You want to clean up your group list by finding all groups that haven't had an activity since 2012

Being able to filter by these dates is already valuable in My Fundraising Place today. These dates will become even more valuable to you as we add Smart Lists (saved queries), improve on our mapping tools and add customizable workflow (which will help with automation).

*Lead Tips:

- Make it a policy that every new lead, no matter what, gets entered into My Fundraising Place.

- Develop a plan on how to market to your leads
  - You don't have to treat all leads the same. Hot, warm and cold leads may have different touch point plans.

- Disqualify leads if there is no potential
  - Perform spring cleaning on your contacts & groups every year
  - Develop an "aging system" by setting contacts & groups to "Inactive" that haven't had an activity for a specific period

*Activity & Sample Tips:

- Create a plan on how to track different types of customer interactions. If a sales rep only tracks some of his or her activities, you will never have complete visibility into the total effort that it took to get that customer.
  Here are a few questions for you to think about:
  - If a sales rep leaves a voicemail, do you track it and create a follow up activity?
  - If you had an appointment with a lead, do you copy & complete it to a new activity as part of your follow-up plan?
  - When you get a referral, do you enter the new contact's information and create an activity with them?

- When to use Activities and when to use Notes:
  - Activities should be used to capture information that is time sensitive and further action is needed to complete the interaction. Activities are where most of the day to day information is held in My Fundraising Place.

  - Notes should be used to capture information that needs to be associated with a date but does NOT require further action. Example: If a contact was going on vacation for 2 weeks and didn't want to be contacted. This doesn't require further action but is something that needs to be recorded and related to a date.

- Sampled Flavors
  - Not all flavors that you sample must be your default sample flavors. The "Is Sampled" check box on each flavor in Settings/Products controls which flavors show up by default when you enter sample information on an activity. So, if you sample Cinnamon and Apple 99% of the time, you could set these two flavors as the only "Is Sampled" flavors and they would be the default flavors. If you had to sample a flavor other than Cinnamon or Apple, then you can click on the + button to add the flavor when entering the sample quantities.

Why should you track Lead Sources?

By tracking lead sources, you can learn which lead sources work and which lead sources don't work for your business. You can save time and money by not focusing on the lead sources that have poor results.

Tracking this information also helps Country Maid with our national advertising efforts. Country Maid receives leads from different sources (like Charms, American Heritage Girls, etc.) so knowing the lead source will help us gauge how effective a campaign was. If we know that a campaign was successful, then we can reinvest in getting you more quality leads!

Tips:

- The lead source on the group is where you should track where the lead originally came from. This should be set once, and it should never change.

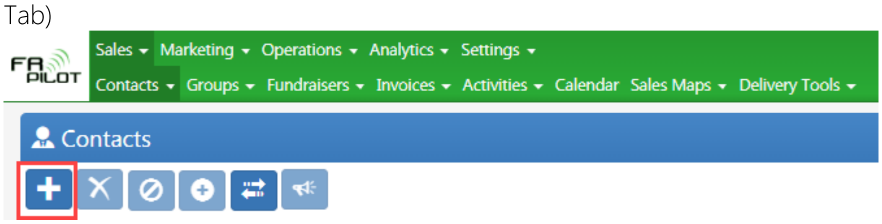
- Consider developing a different touch point plan based on different lead source types. For example, a lead from your website would be more likely to turn into a sale than one from a purchased list.

- After every season, review the new groups that were created and verify that they have a lead source filled out

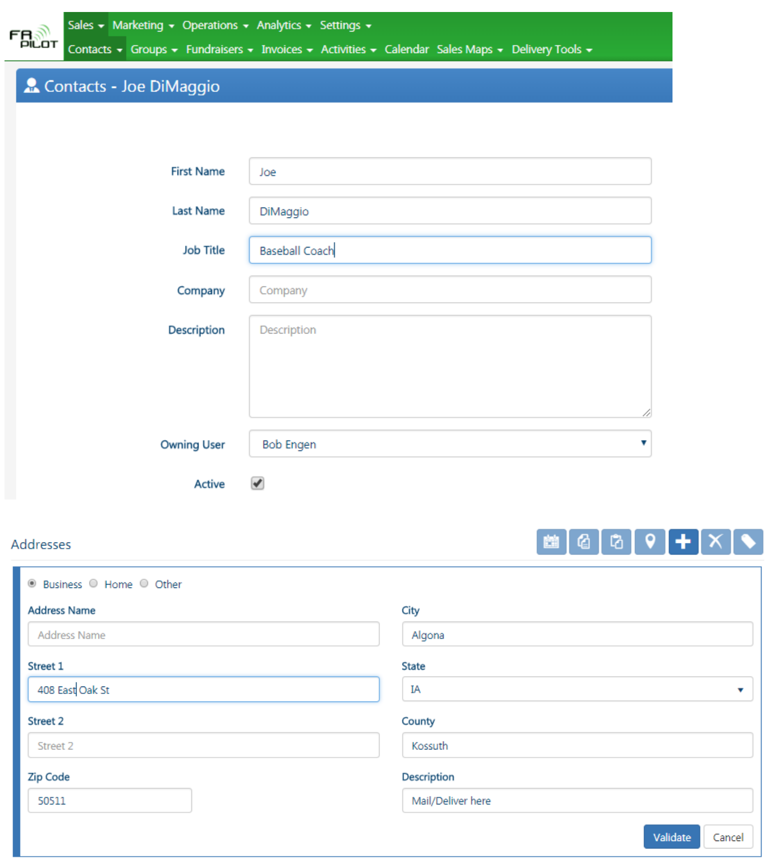
Lead Conversion

How to create a contact

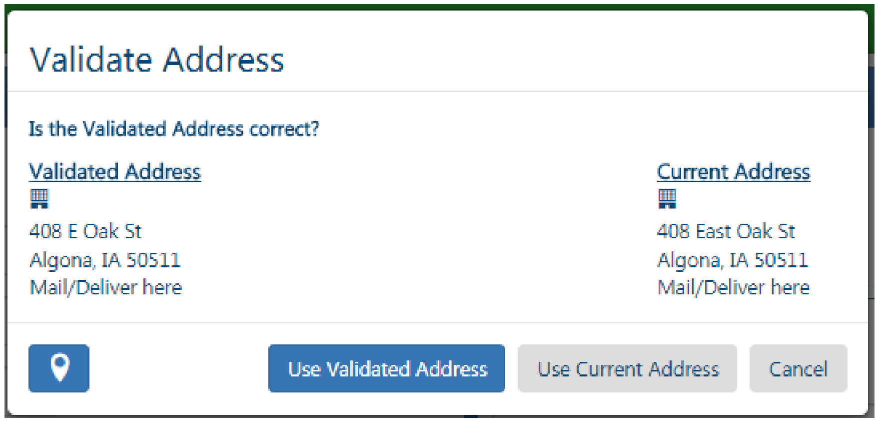
1. Log in to My Fundraising Place
2. Go to Sales > Contacts
3. Click on the + button to create a contact (Alternative creation: when in Group click on the + button under the Contact Tab)



4. Enter in fields:
   - First Name
   - Last Name
   - Job Title
   - Description
   - Owning User
   - Addresses:



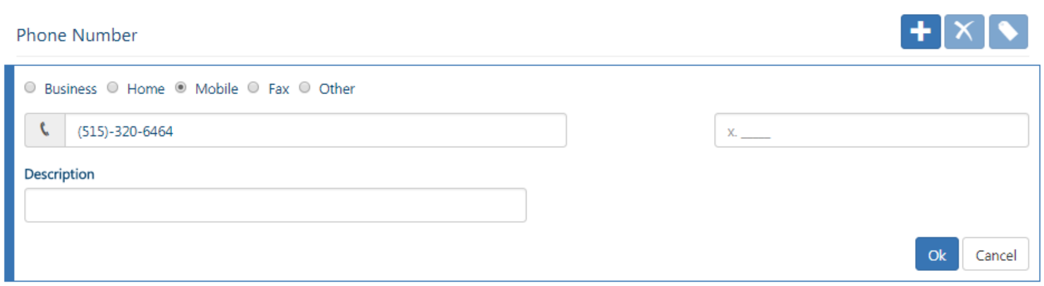
1. Enter in address and click on the **Validate** button. It is very important to validate addresses right away as you enter them. An accurate location is very important for all mapping purposes.



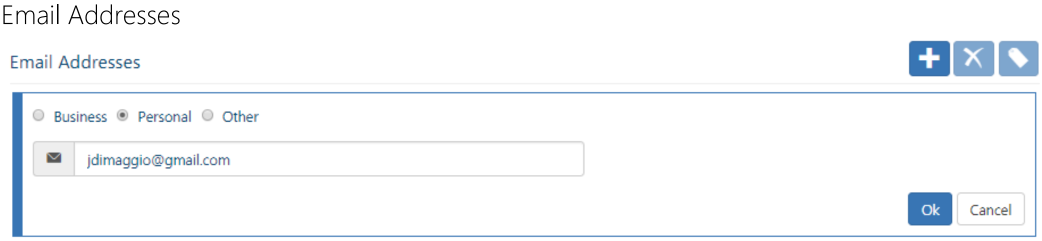
   - Click on either **Validated Address** button or **Use Current Address** button
2. Pick from address functions if needed:

   1. In Order from left to right:
      1. Open Scheduling Tool
      2. Copy
      3. Paste
      4. Map It in Google Maps
      5. New Address
      6. Delete
      7. Make Primary Address
3. If multiples, select primary

- Phone Number



   1. If multiples, select primary
- Email Addresses

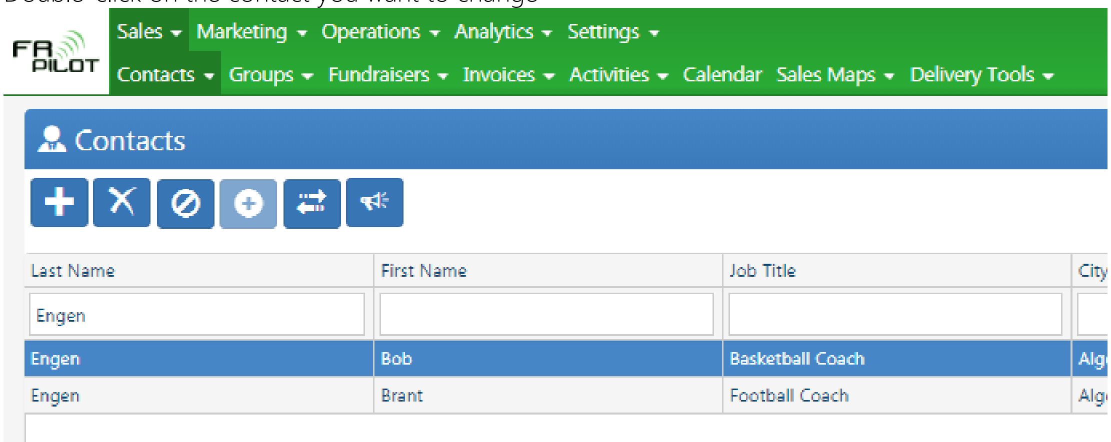


   1. If multiples, select primary

5. Click on the **Save & Close** button

Changing a contact

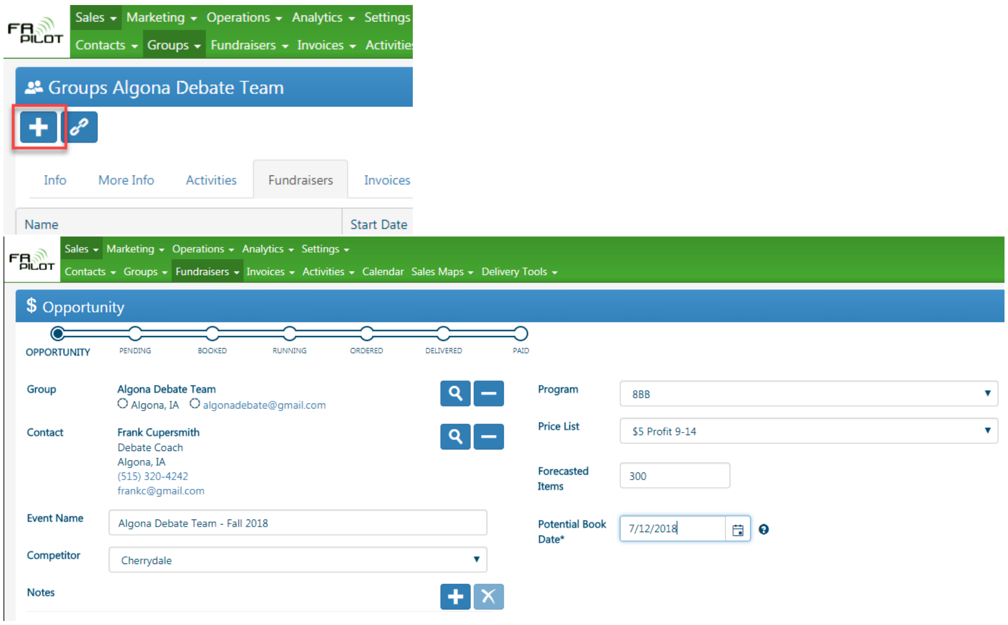
1. Log in to My Fundraising Place
2. Go to Sales > Contacts
3. Double-click on the contact you want to change



4. Make changes to contact
5. Click on the Save & Close button

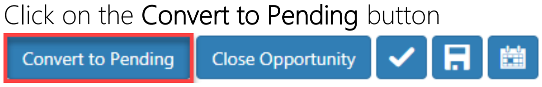
How to create a Fundraiser

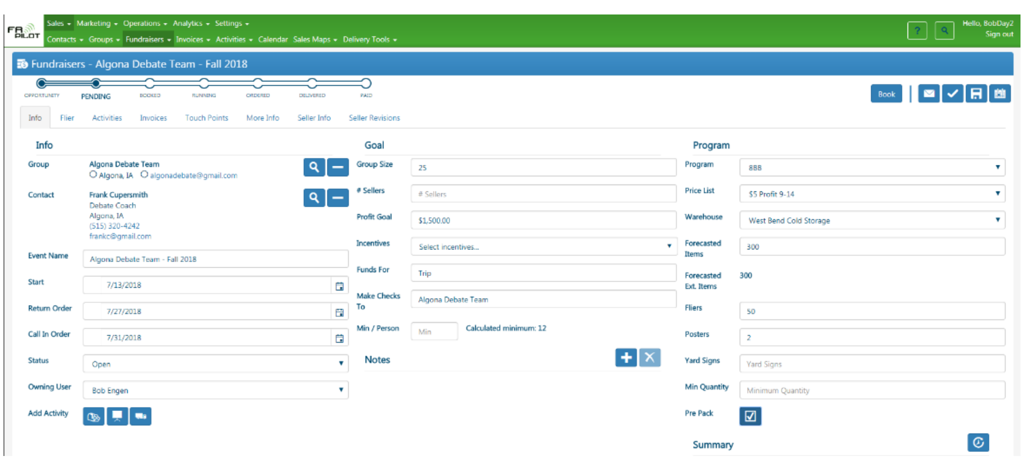
1. Log in to My Fundraising Place
2. Go to **Sales** > **Groups**
3. Select the group you want
4. Click on the Fundraisers Tab
5. Click on + button to create a fundraiser (Alternative creation: when in Fundraisers click on the + button)



6. Verify that the Program and Price List are correct (If there is a primary of each they pull in)
7. Enter Competitor, Forecasted Items and Potential Book Date.
8. Click on the **Save** button

9. Click on the **Convert to Pending** button

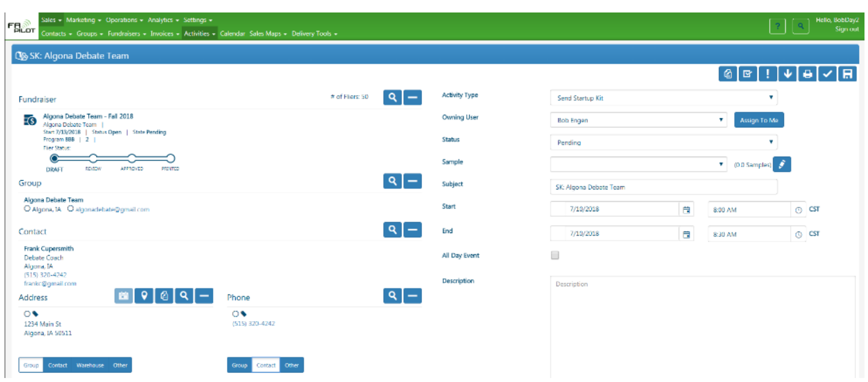




10. If done from the group page, both group and contact will be brought in
11. Select **Program** (primary program filled in if there is one)
12. Select **Price List** (primary price list filled in if there is one)
13. Verify **Group Size** and **Make Checks Payable To** (Coming from group record)

14. Enter these fields:
    - Profit Goal
    - Incentive
    - Funds For
    - Min / Person
    - Forecasted Items
    - Fliers
    - Posters
    - Custom Field1
15. Select **Pre-Pack** or not
16. Pick **Start Date** (4/16/18)
17. Pick **Return Order Date** (4/30/18)
    - Usually sell for 2 weeks from Start Date
18. Pick **Call In Order Date** (5/1/18)
    - Usually 2 days later than Return Order Date
19. Pick Activities at the bottom that apply:

- Send Startup Kit Activity
    1. Usually 2 weeks before Start Date

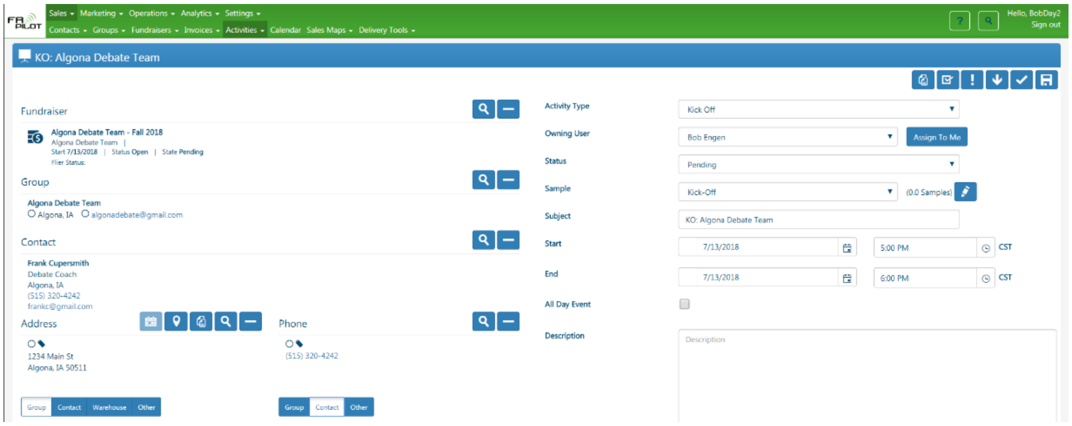


    2. Select address
    3. Select phone number
    4. Select Start Date and Time
        1. Usually 2 weeks before Start Date
    5. Add description if needed
    6. Activity Buttons:

        1. Complete and Copy Activity
        2. Complete and Close Activity
        3. Set to High Priority
        4. Set to Low Priority
        5. Print
        6. Save & Close
        7. Save Activity

7. Click on the **Save & Close** button

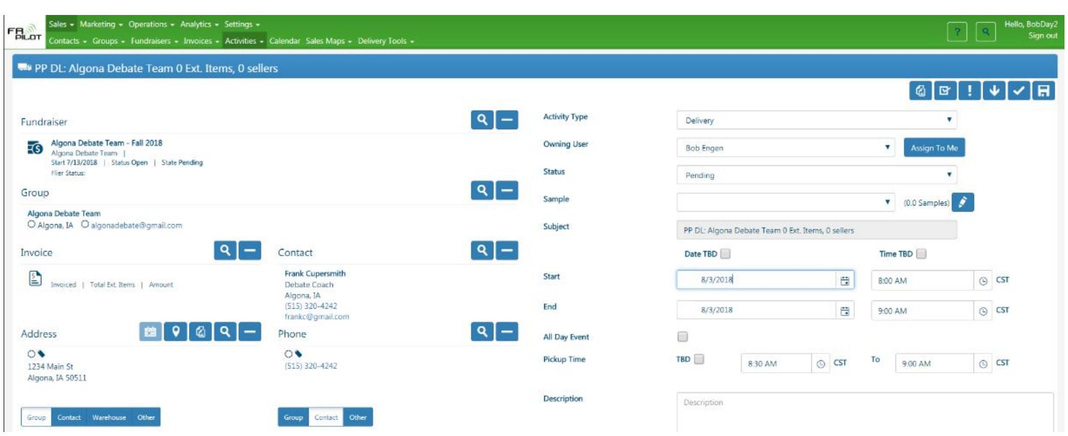
- Kickoff Activity
  1. If needed, look at last year's info



  2. Select address
  3. Select phone number
  4. Select Start Date and Time
  5. Add description if needed
  6. Activity Buttons:

     1. Complete and Copy Activity
     2. Complete and Close Activity
     3. Set to High Priority
     4. Set to Low Priority
     5. Print
     6. Save & Close
     7. Save Activity
  7. Click on the **Save & Close** button

- Delivery Activity
  1. Get the date from Sales Rep
  2. Check the time from last year



  3. Select address
  4. Select phone number

5. Select Start Date and Time
6. Add description if needed
7. Activity Buttons:

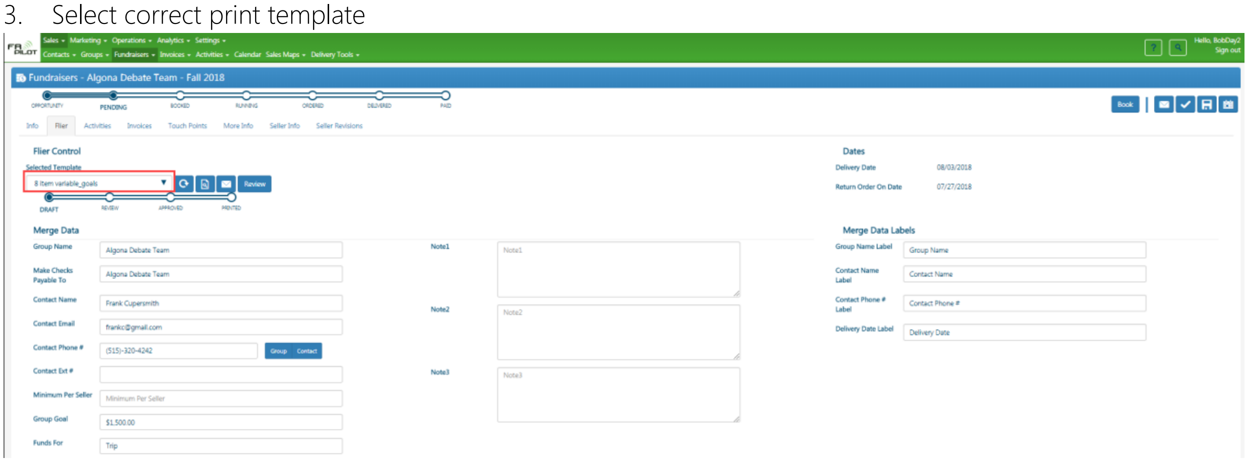
    1. Complete and Copy Activity
    2. Complete and Close Activity
    3. Set to High Priority
    4. Set to Low Priority
    5. Print
    6. Save & Close
    7. Save Activity
8. Click on the **Save & Close** button

Fundraiser Buttons:

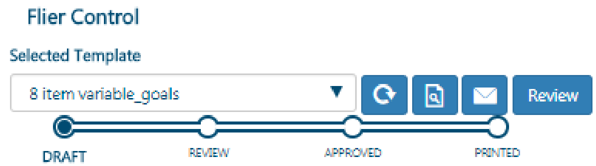
- Book the Fundraiser
- Email Confirmation
    1. Once Flier is approved
- Save & Close
- Save Fundraiser
- Open Scheduling Tool

Flier Review – if used

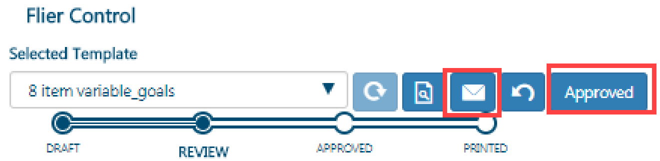
1. Log in to My Fundraising Place
2. Go to **Sales** > **Fundraisers** > **Flier Tab**
3. Select correct print template



4. Flier Buttons (Left to right):
    - Load button
    - Preview button
    - Email button
    - Flier Status button

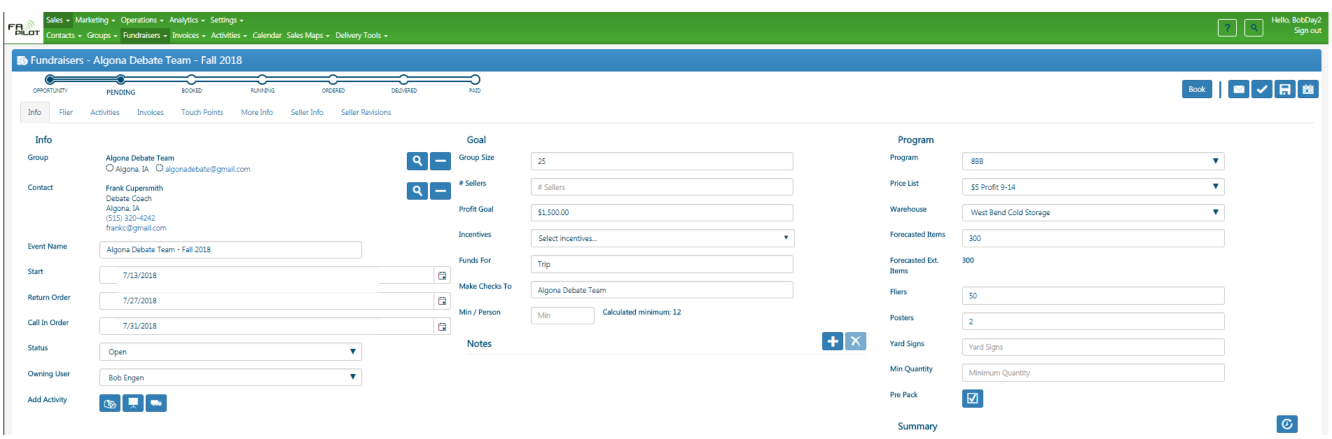


5. Click on the **Load** button
6. Click on the **Preview** button

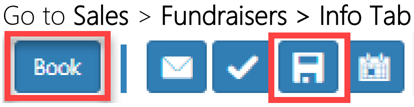


7. Make sure that flier looks OK
8. Click on the **Flier Review** button to update the flier status
9. Send email with flier to group leader for approval
10. Click on the **Email** button
11. Click on the **Send** button
12. If approved by the Group Leader,
    - Click on the **Approved** button on the Flier tab
13. If Group Leader has changes,
    - Make those changes on the flier and Save
    - Click on the **Approved** button on the Flier tab

Book the fundraiser

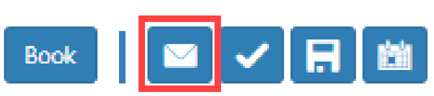


1. Go to **Sales** > **Fundraisers** > **Info Tab**

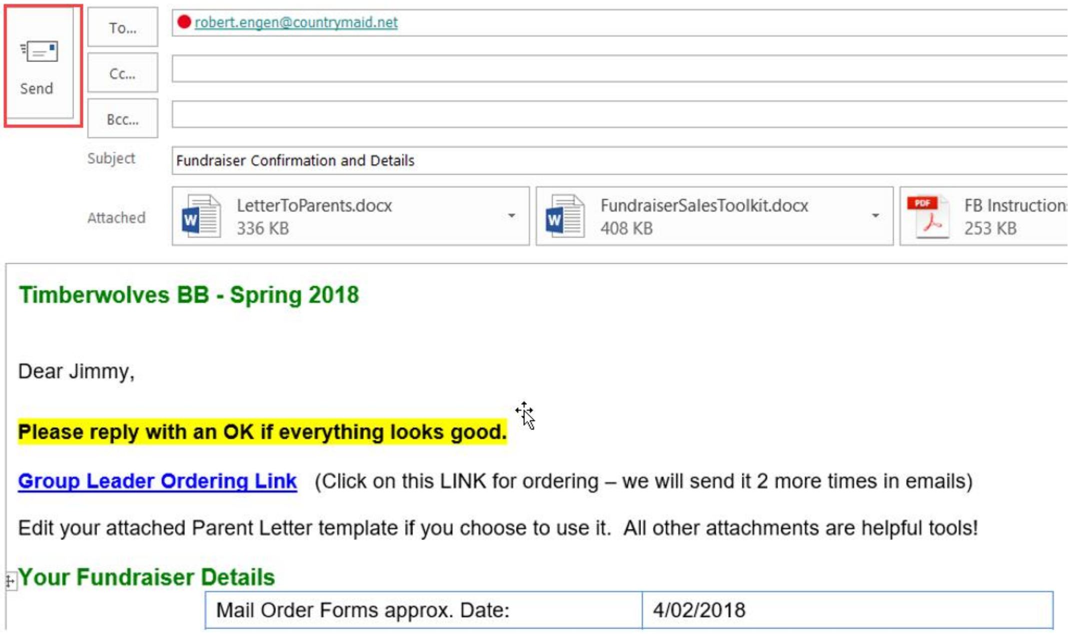


2. Click on the **Book** button to book the fundraiser
3. Click on the **Save** button

Booked Confirmation Email



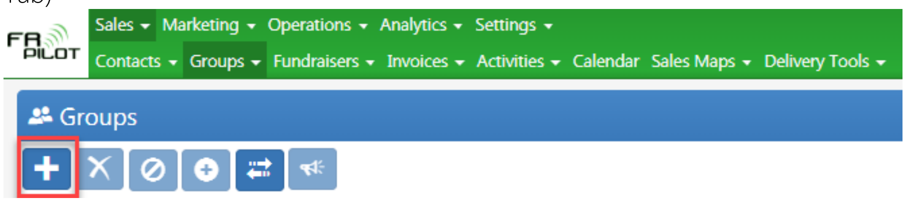
1. Click on the **Email Confirmation** button
    - This is the manual Fundraiser Booked Confirmation Email Touchpoint
2. Verify and customize email if needed

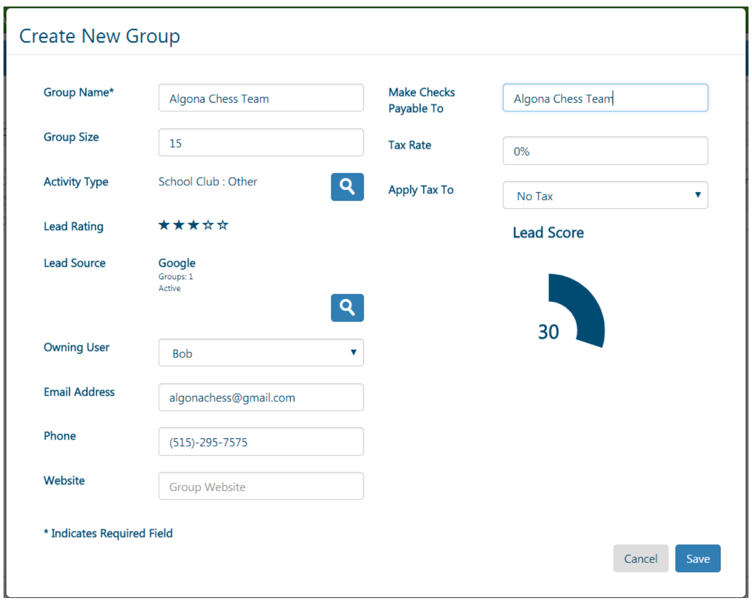


3. Click on the **Send** button

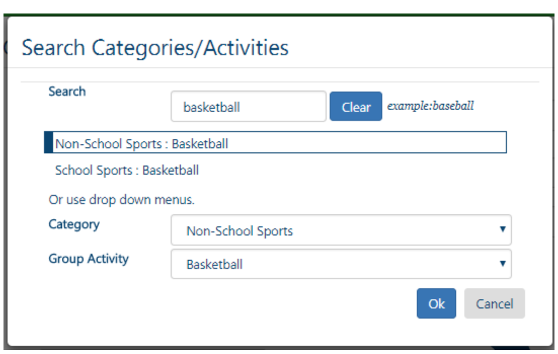
How to create a group

1. Log in to My Fundraising Place
2. Go to Sales > Groups
3. Click on the + button to create a group (Alternative creation: when in Contact click on the + button under the Group Tab)





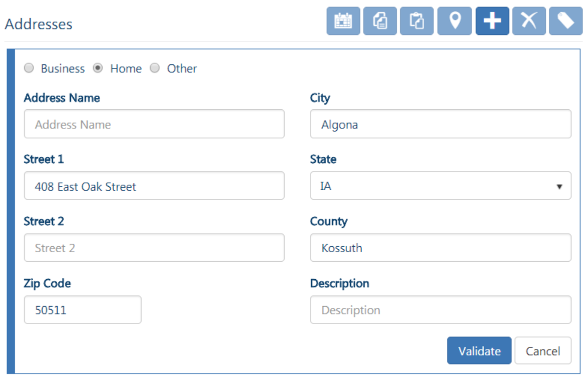
4. Enter in fields:
   - Name
   - Group Size
   - Category : Activity
     1. Enter activity in search box



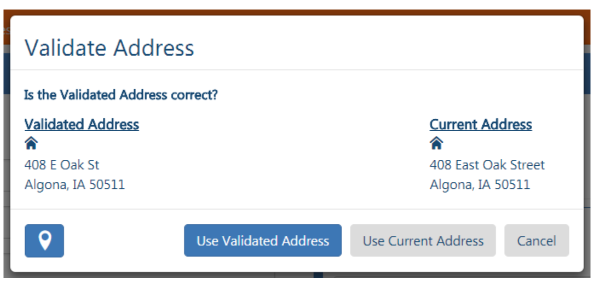
     2. Select activity and click OK
   - Lead Rating
   - Lead Source
   - Description

- Owning User
- Email Address
- Phone
- Website
- Make Checks Payable To
- Tax Rate

5. Click on the **Save** button
6. Enter in Address:

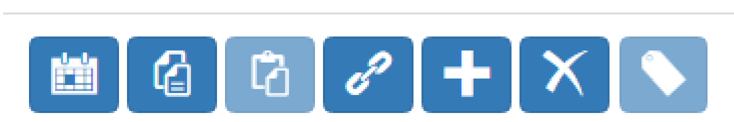


- Enter in address and click on the **Validate** button. It is very important to validate addresses right away as you enter them. An accurate location is very important for all mapping purposes.



2. Click on either **Validated Address** button or **Use Current Address** button

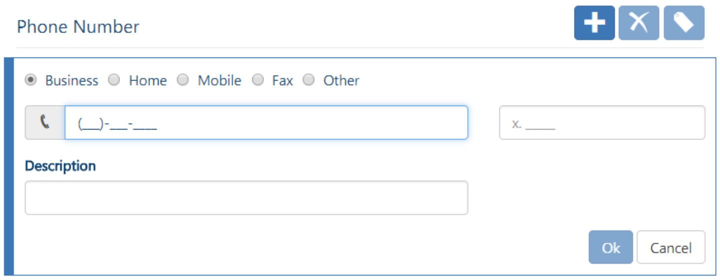
- Pick from address functions if needed (Left to right):



1. Open Scheduling Tool
2. Copy
3. Paste
4. Map It in Google Maps
5. New Address
6. Delete
7. Make Primary Address

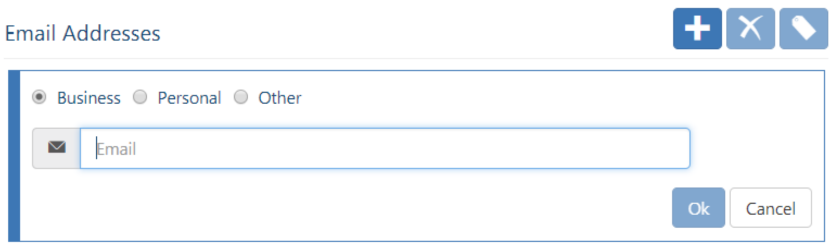
- If multiples, select primary

7. Verify that Phone Number and type are correct



- If multiples, select primary

8. Verify that Email Address and type are correct

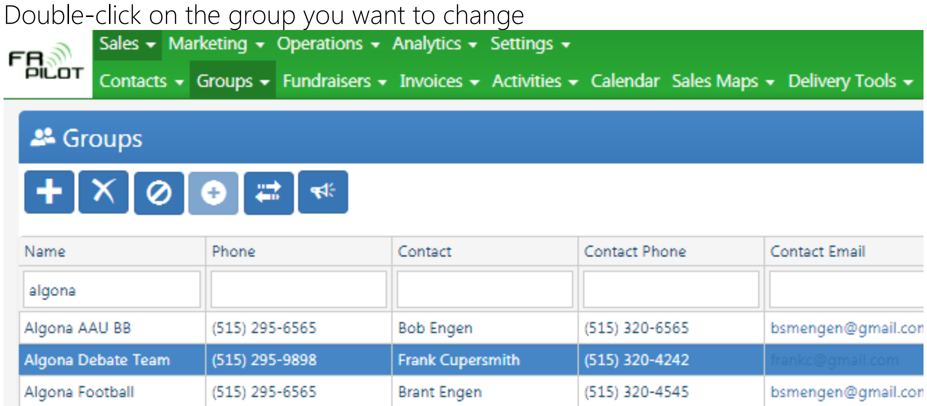


- If multiples, select primary

9. Click on the Save & Close button

Changing a group

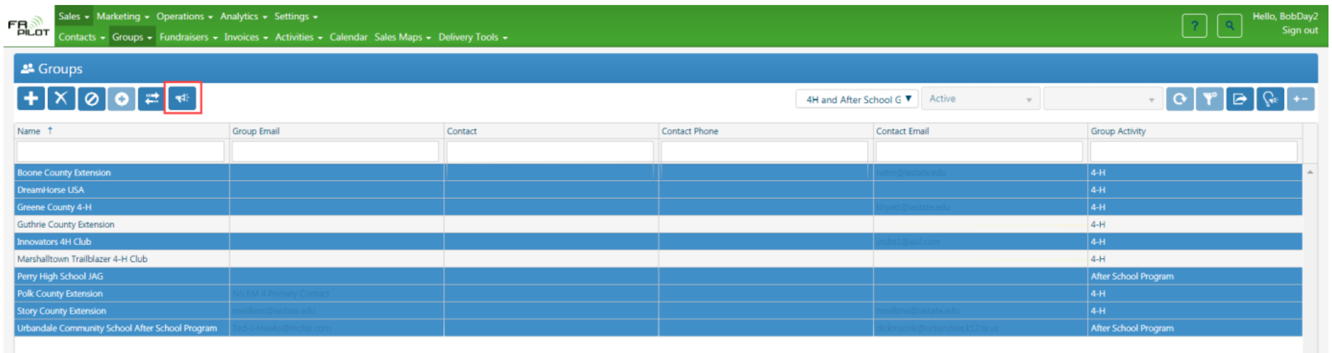
1. Log in to My Fundraising Place
2. Go to Sales > Groups
3. Double-click on the group you want to change



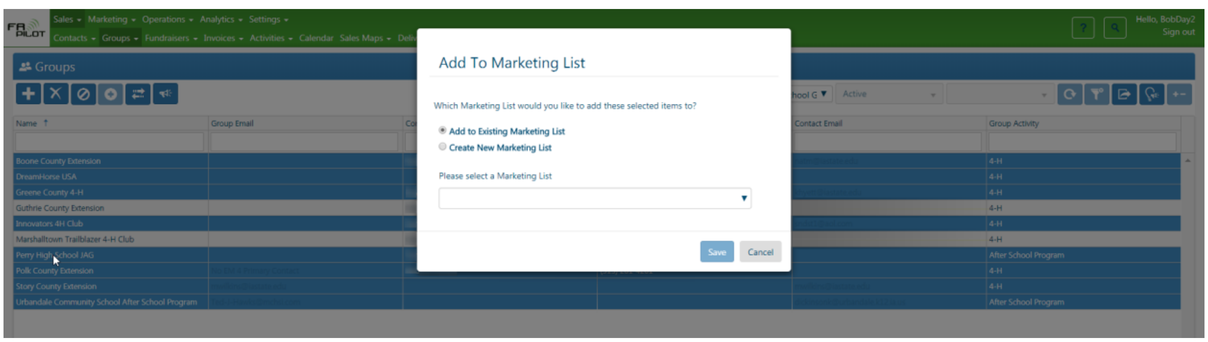
4. Make changes to contact
5. Click on the Save & Close button

Marketing Lists Walkthrough

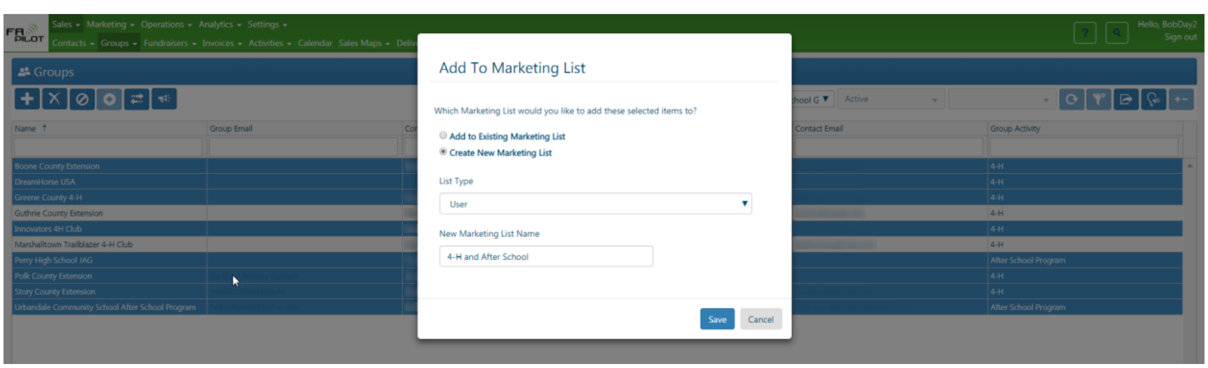
Marketing Lists are a new feature in My Fundraising Place, they allow for the sending of an email to many recipients at once. The first step to creating a Marketing List is the selection of recipients. These recipients are selected from either Contacts, Groups. All you need to do to select to the recipients is go the grid you want to work off and select all of the entries you want on the list. Control + Click will allow you to choose multiple entries, Shift + Click will allow to you select many entries at the same time.



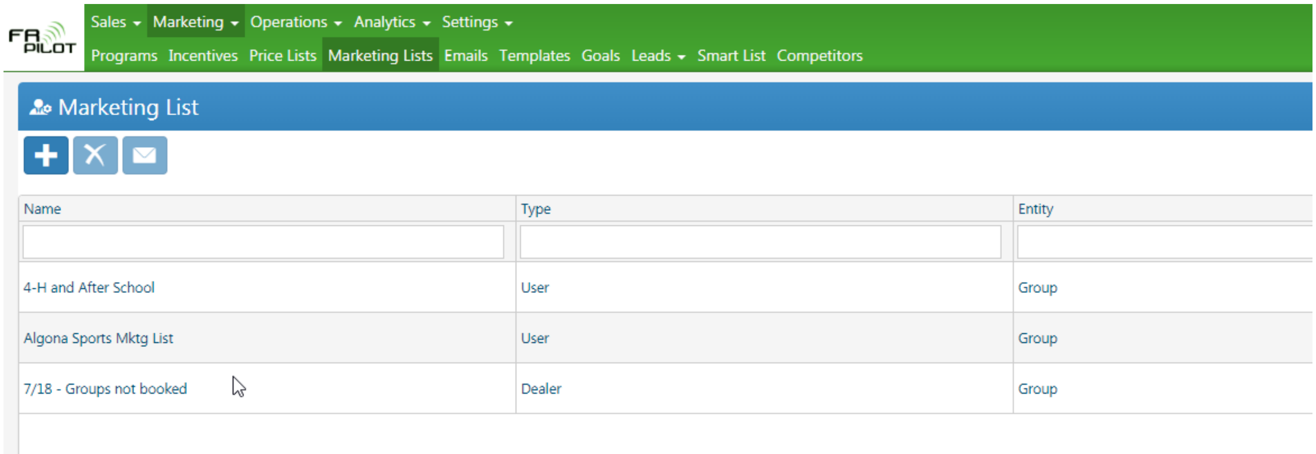
Once the desired entries are selected you will hit the megaphone icon at the top of the grid, this is the Marketing List button. It will open the following window:



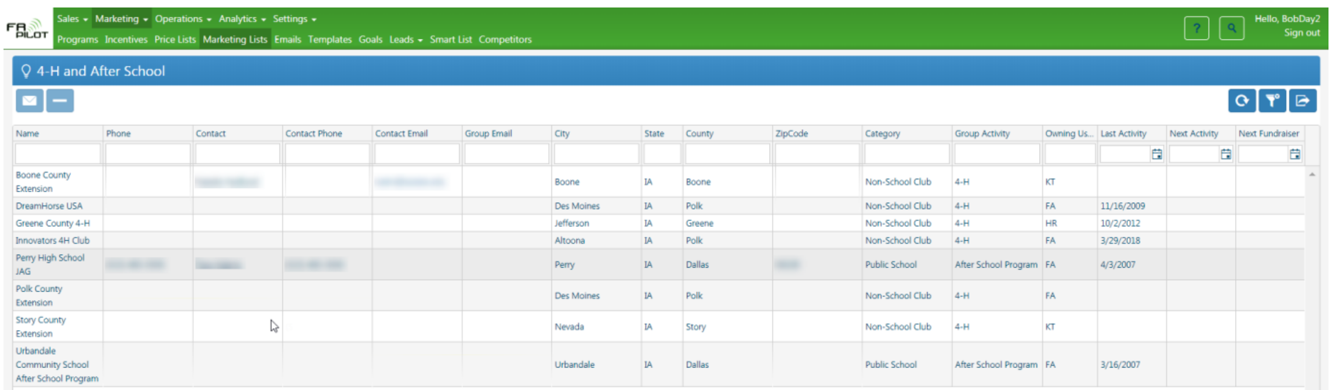
This allows you to select if you want the entries you selected to go to an existing Marketing List, and if so, which list to add the entries to.
Otherwise you can also create a new Marking List from your selection as well.



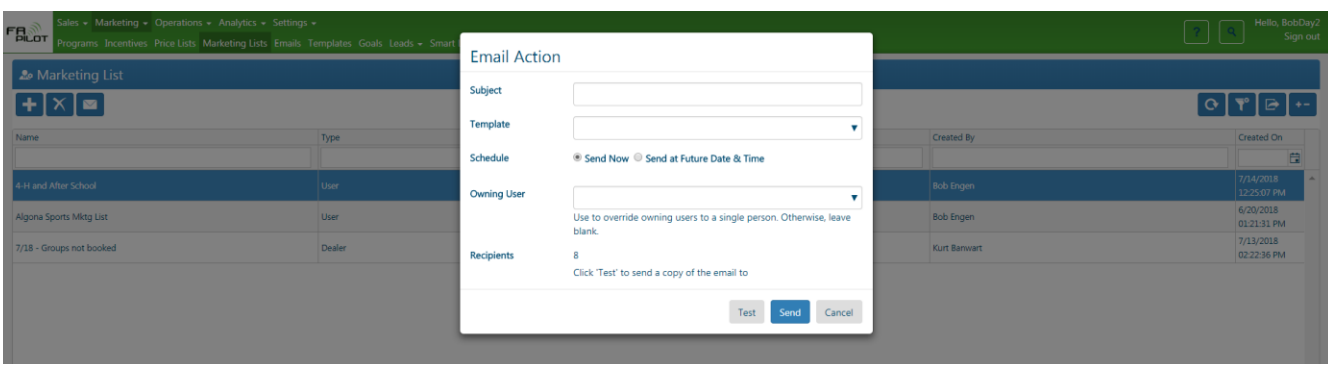
From here you'll need to give the new List a name and select if you want your whole dealership to have access to the List (Dealer) or just yourself (User). Once all the selections are made and the List named, hit save.
To view your new list, go to Marketing -> Marketing Lists.



From here you can double click on the list to open it up and see the receipt list.



You can choose just a few recipients from this list and hit the envelope button to send to just those. But if you want to send to the whole list head back to the main Marketing Lists list, select the list you want to use, then hit the envelope button there to bring up this window:



The Subject line here will the subject of the email when it goes out. You will choose the template for the email from the Template dropdown. If you want the emails to all go out from a single person choose that person from the Owning user dropdown, but for the most part you'll want to keep the owning user that the group already has and will therefore keep that field blank. Once everything here is set as desired you can hit test to send yourself a test copy, or send, to send out the email.

My Fundraising Place using your Office 365 account will automatically queue up your emails to go out over a short period of time, to help keep you off spam mail black lists.

Online Signup Checklist

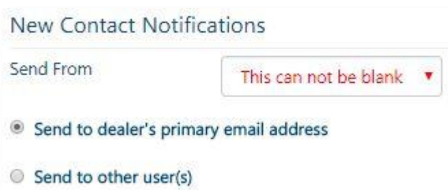
Four steps to prepare for online signup

☐ Verify your touchpoint email credentials are correct

1. Log in to frpilot.net
2. Go to Settings > Users > Select a user > Security tab
3. Verify the Email Credentials for User's Touchpoints are correct
4. Click Save
5. Repeat for each user

☐ Set up email notifications

1. Go to Settings > Dealer > Email Notifications tab
2. Choose who should receive fundraiser signup notifications
3. Choose one user to send new contact notifications from. My Fundraising Place will use this user's touchpoint credentials to send the notifications since a new contact does not yet have an owning user. New contact notification emails will not be sent unless a user is selected.
4. Choose who should receive new contact notifications
5. Click Save



☐ Review signup instructions

1. Go to Settings > Dealer > MyFundraisingPlace.com Settings tab
2. Scroll to the bottom of the page
3. Review the instructions that the group leader will see when signing up for a fundraiser and make changes if necessary
4. Click Save

☐ Preview your signup page

1. Go to Sales > Groups > Select a group > Fundraisers tab
2. Click link icon and generate link

3. Click the link to preview the page that your customers will see

Online Signup Options

Enable group leaders to sign up online

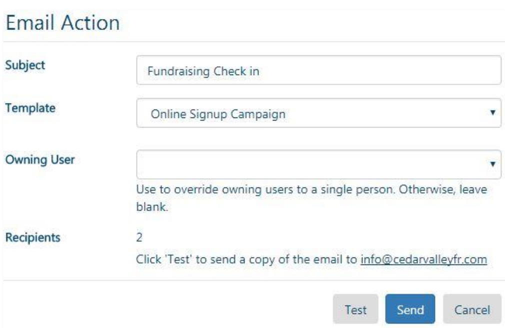
Option 1: Direct customers to your signup page (recommended)

1. Test your signup link by navigating to myfundraisingplace.com/dealername/signup/landing
2. You can then share your link on Facebook and link to it from your website
3. Current customers will be asked to enter their email address. New customers will enter their contact information and be entered as a contact in My Fundraising Place.

   Tip: If your link doesn't work, go to Sales > Groups > Select a group > Fundraisers tab, click the link icon, click Generate Link, and note the dealer name that is used in the link.

Option 2: Email customers their unique signup link

1. Create an email template using Microsoft Word and save as a .docx file
2. Be sure to include the merge field «SignupURL». This will generate a link for the group and include it in the email. A template has been posted on Dealer Connect.
3. Upload the Marketing Email Template under Marketing > Templates
4. Create a marketing list
5. Click on the marketing list name one time
6. Click the email icon and fill out the pop-up. Click 'Test' to test the email and then click 'Send' when you're ready to send the email.



Option 3: Manually send customers their signup link

1. Go to Sales > Groups > Select a group > Fundraisers tab, click the link icon, click Generate Link

2. Click 'Copy Link to Clipboard' or 'Email Link' to send your customer their unique signup link

Sales Cadence Checklist

Sales Cadence Check List **(shown in order of priority for a sales user)**	**Daily**	**Weekly**	**Bi-Weekly**	**Monthly**	**Season**	**Notes**
1. Calendar - Complete assigned activities	X					If using activities properly, anything important has an activity on the calendar
2. Current Season Group Smart List (sorted by booked On)-1Y						Prioritizing current customer retention
Call <30 day	X					
Send 45 Day group signup			X			
Send 60 Day group signup				X		
Send 90 Day "Are You Still Involved?" Email				X		
3. Current Season Group Smart List (sorted by booked On)-2Y & 3Y						Next priority is previous 2 years (same season) customers without Booked FR
Call <30 day	X					
Send 45 Day group signup			X			
Send 60 Day group signup				X		
Send 90 Day "Are You Still Involved?" Email				X		
4. Current Season Opportunities						Reviewing Fundraiser Opportunities that don't have an activity or aren't closed yet
Review Smart lists for Opportunity and Pending FRs		X				This is a "quality" step to ensure all employees in a dealership are using activities properly & that no groups slip through the cracks
5. Lead Smart List (built per dealer, lead rating, custom fields)						Smart lists created for pulling leads out of the dealer's DB to try to get them into a sales opportunity
Dealer designed sales cadence for "leads"	?	?		?	?	Depending on how a dealer wants to use the leads in their system, a lead smart list can be built to aid in a sales process for leads
6. Next Season Smart List						Working ahead into the next season
Signup Early / Update Contact Information Email					X	

Sales Cadence Process

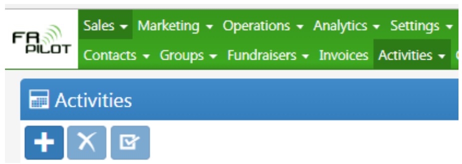
This document shares a "typical" method for a salesman to use My Fundraising Place to manage their time to sign up groups and work them through a sales process.

Gold Priority – Manage activities

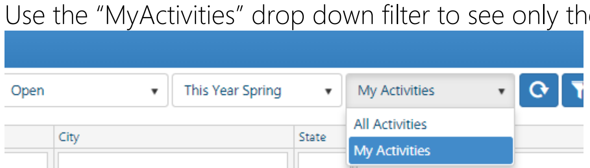
Activities represent a decision that was made by an My Fundraising Place user that some activity needed to be performed at a specific time and date. This requires the owning user to review the activity and decide what the next appropriate activity should be. My Fundraising Place users should NOT use activities if they do not intend to act at the scheduled date and time to avoid cluttering up their calendar and activity list.

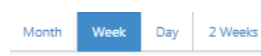
Activities are the highest priority items in My Fundraising Place for a user. To review activities, use 1 of the following methods:

1. Activity grid (use this view if you have a lot of activities assigned to you and you wish to see an easy to read list of things you are to do).



   - Here are some tips:
     - ✓ Use the "MyActivities" drop down filter to see only those activities assigned to you



2. Calendar: (use this view to see your activities in a day, week, 2-week or month view 

   - Here are some tips:
     1. The calendar is a great place to reassign activities by switching to the "day" calendar, turn on multiple users, un-merge calendars (if merged), enable event dragging
        1. Using these settings will allow you to drag events to a new user and drop them onto their calendar and it will reassign them automatically
     2. Use the "Open" activities filter to hide all completed activities
3. Dashboards: There are several dashboard tiles that will tell you that you have activities that need your attention including:
   - Overdue, due today, due tomorrow

Tips when interacting with activities

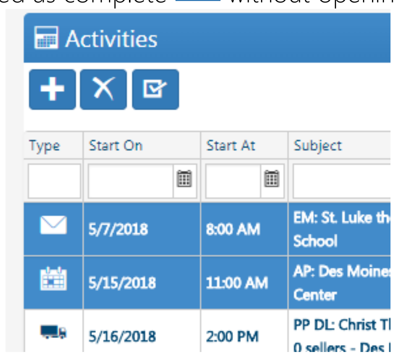
When an activity was completed (even if it was unsuccessful) – always mark the activity as closed after you add your notes about what happened during the activity, and then create a new activity that sets the "next action." This helps you understand how many touches it takes to work with a specific customer or type of customers. Here are some tips to help you save some time when working with activities:

Time saving tips:

- Use the "Complete and copy to new" function to automatically do the following steps:
  - Mark the current activity as "closed"
  - Create a new activity (that allows you to choose the activity type)

- Copies the description of the completed activity to the new activity and inserts some language that details the date, time and user who completed the prior activity and created this one.
- After this is generated, the user has the option to make the following adjustments before saving:
  - ✓ Change the activity type (phone call, appointment, etc.)
  - ✓ Change the owning user (to assign the new task to a new user)
  - ✓ Change the date and time when the new activity is scheduled to be completed

- If the activity is the last activity in a sequence, go ahead and record the details of the activity (the outcome of the actions taken) and then click the button that will complete and close the activity
- To mark multiple activities as completed (to clean up old tasks that have been long past), you can easily do that from the activity grid. Shown here is an example of two activities that are selected at the same time, and they can both be deleted at the same time or marked as complete without opening each individual activity.



Silver Priority – Group smart list(s)

To identify groups that do NOT have specific activities scheduled in the future, use one of the system smart lists or create your own to show you a list of the types of groups you want to pay attention to. From this list, you can easily see which groups need to have activities scheduled to get them into the sales process. Here is an example of the smart lists you can use, in order of priority:

1. Current Season Groups without a booked fundraiser 1 YR: this smart list will show you a list of groups who ran a fundraiser last year in the same season and do NOT currently have a booked fundraiser. This list is sorted by the last fundraiser booked date. You can see when the last activity was completed, and when the next activity is scheduled to be completed (if there is one).
2. Next Season Groups without a booked fundraiser 1 YR: this smart list will show you a list of groups who ran a fundraiser last year in the same season and do NOT currently have a booked fundraiser. This list is sorted by the last fundraiser booked date. You can see when the last activity was completed, and when the next activity is scheduled to be completed (if there is one).
3. Current Season Groups without a booked fundraiser: this smart list will show you a list of groups who ran a fundraiser last 3 years in the same season and do NOT currently have a booked fundraiser. This list is sorted by the last fundraiser booked date. You can see when the last activity was completed, and when the next activity is scheduled to be completed (if there is one).
4. Next Season Groups without a booked fundraiser: this smart list will show you a list of groups who ran a fundraiser last 3 years in the same season and do NOT currently have a booked fundraiser. This list is sorted by the last fundraiser booked date. You can see when the last activity was completed, and when the next activity is scheduled to be completed (if there is one).

Bronze Priorities – Leads who need to be pursued

A dealer's My Fundraising Place database is a great place to track every organization they come across. As a dealer learns about those organizations, we recommend that they set the "star rating" on the group to a "zero" start setting if they do not wish to pursue that group in the future so they can filter that group out from future activities or email campaigns.

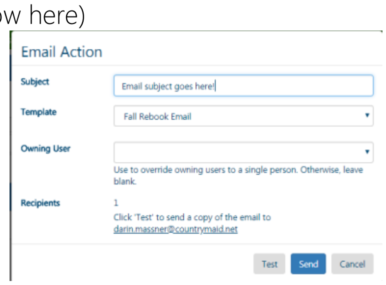
Here is an example of a smart list that a dealer could create to pursue leads in their database.

- Good Leads without a next activity: this smart list shows groups that:
  - have a 1-star rating or more
  - Have never ran a fundraiser
    - ✓ Defined as never having a completed / closed fundraiser and excluding opportunities or cancelled fundraisers if there are no completed / closed fundraisers.
  - Do NOT have an open activity in the future
  - Are active

Other Sales Priorities – Sending automated emails for signing up for a fundraiser

My Fundraising Place can email a group a unique signup link that will allow the group leader to go to myfundraisingplace.com and sign up for a new fundraiser. The preferred way to send these emails is by using the following process:

- Find groups to add to a marketing list
  - Use smart lists (can add selected groups from the smart list or an entire smart list)
  - Manually filter the group grid and add groups (one at a time, or using multiple select)
- Create an email campaign from the marketing list
  - Select the appropriate email template from the email library for the groups on the marketing list
  - Set the email options (show here)



  - Click send to send the group of emails now
- As groups get the emails and signup, the new fundraiser will come into My Fundraising Place as a "pending" fundraiser that was created by GLP user (see tile on dashboard that will take you to those fundraisers).

Email template tips

Dealers can create different email templates to appeal to different customer groups and increase the likelihood that they will respond to the request to be a client of the dealer. Here are some examples:

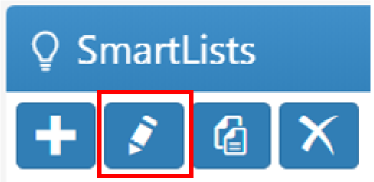
- Come back? - An email template specifically designed to get groups to come back to a Butter Braid® pastry fundraiser after being away for more than 1 year (or some other length of time that a dealer determines)
- Early Bird Email – entice them to signup early with a discount, small group gift (such as a gift card) or with a promise that they will get their choice of delivery slots.
- Announcing new products – email that highlights new offerings by a dealership (new flavor, service, etc.)

Timing – try to target the email arrival to be as close to when they typically make their decision to signup for a fundraiser (give them relavent information at the right time). Use the previous fundraiser booked date to determine the right time.

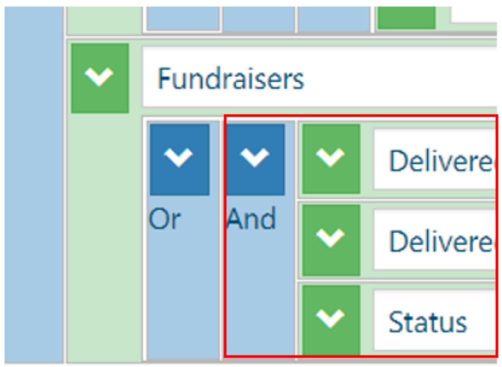
Smart Lists – How to add another query section

How to add another group:

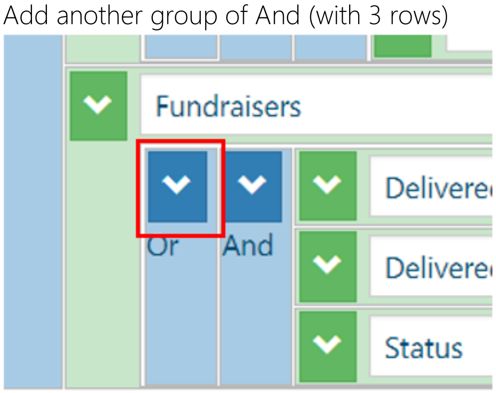
1. Go to Marketing > Smart List
2. Highlight Smart List you want to edit

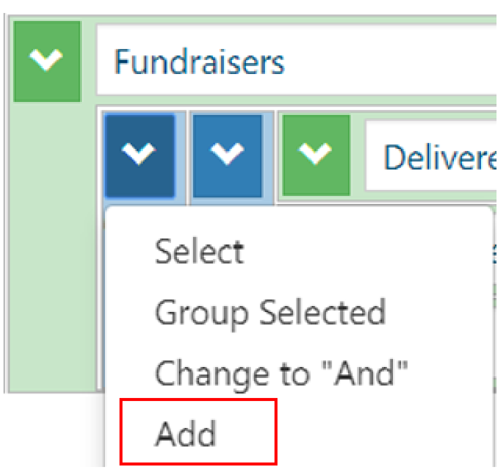


3. Click on Edit Selected

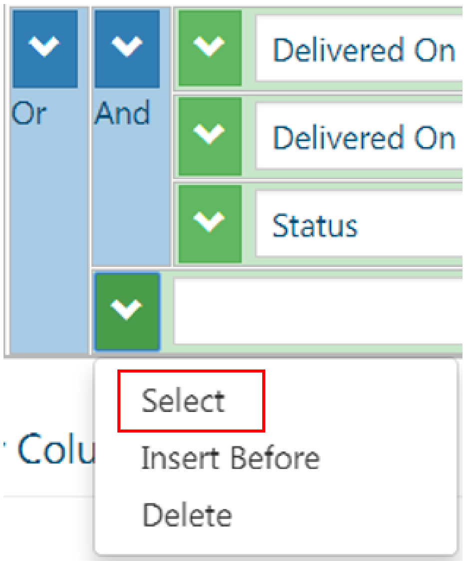


4. Add another group of And (with 3 rows)

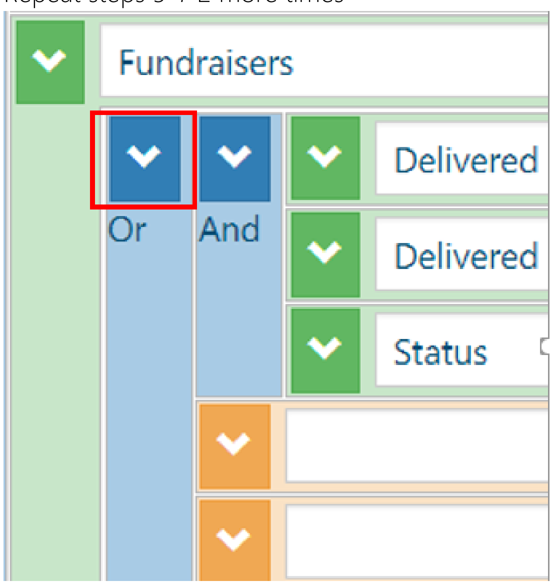


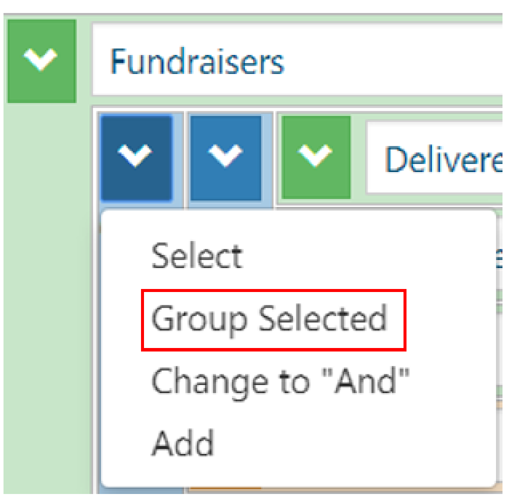


5. Click on **Or** button
6. Click on **Add**



7. Click on New row and hit **Select**
8. Repeat steps 5-7 2 more times





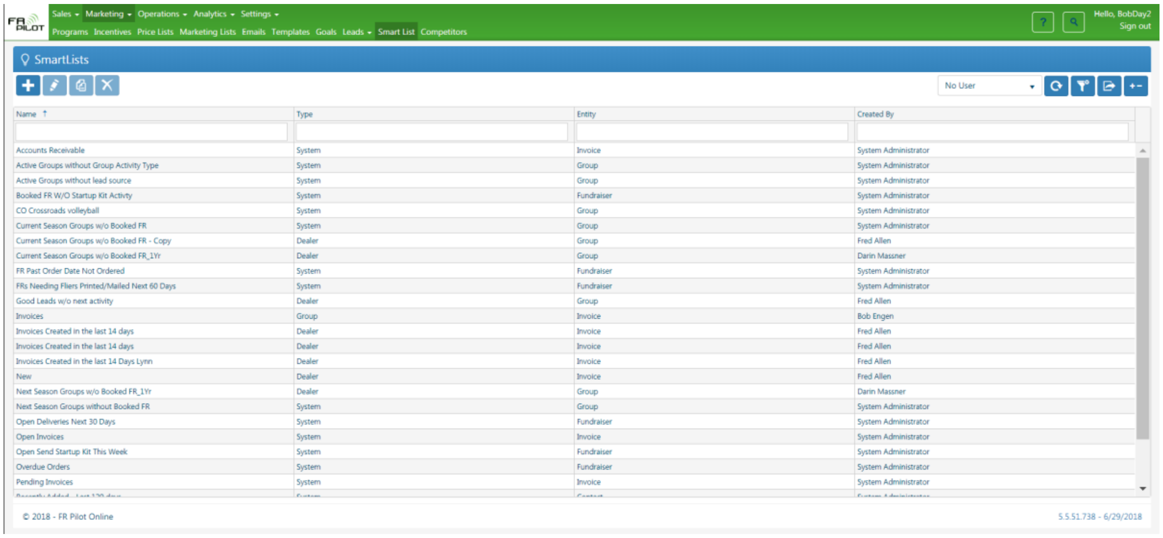
9. Click on Group Selected
10. Modify query criteria as needed

Smart Lists Walk-through

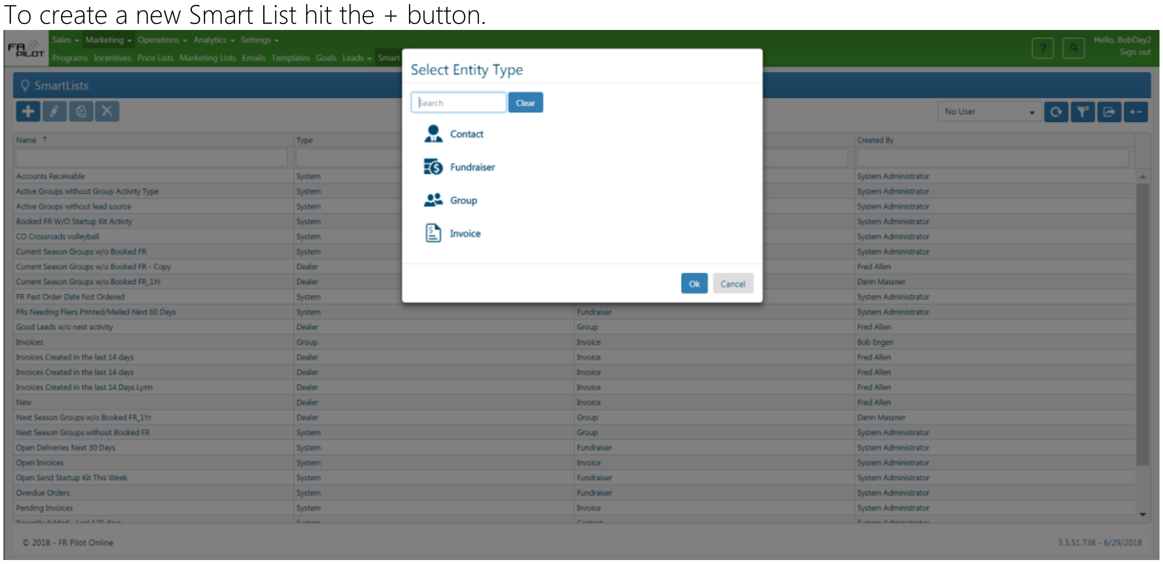
Smart Lists are a new feature in My Fundraising Place, they allow for more complex filtering of data the main grids.

Smart lists are located on their specific grids, and as a master list under Marketing -> Smart List.

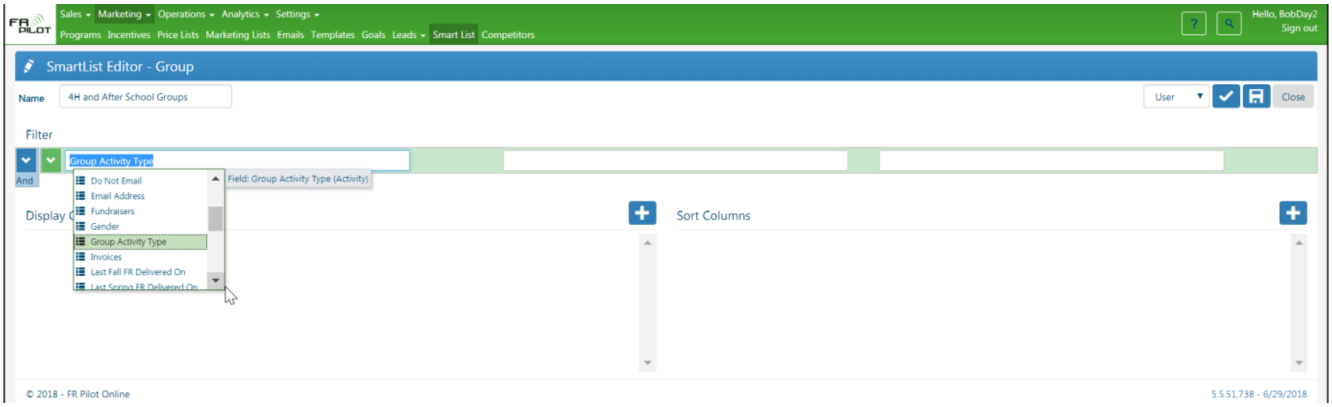
Double clicking on any of the smart lists here will take to their grid of data.



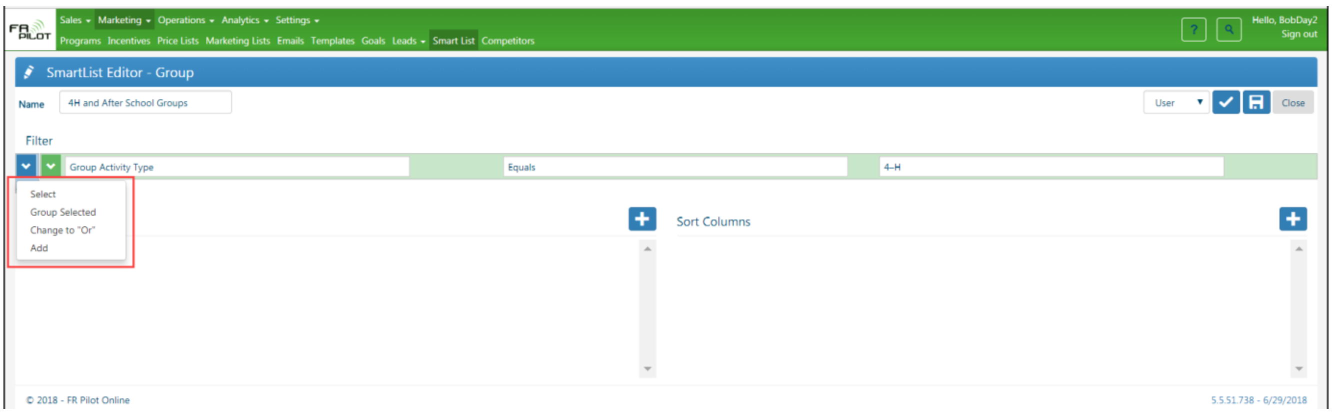
To create a new Smart List hit the + button.



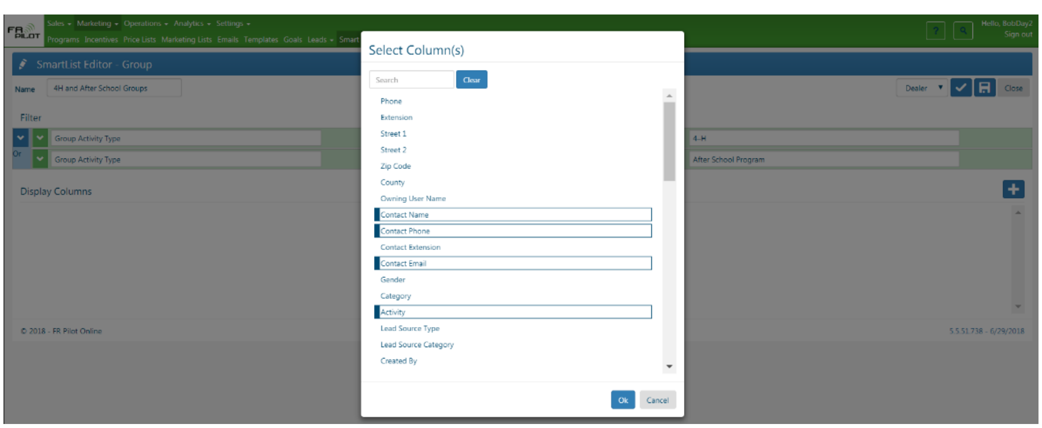
From the dialog that pops up you will select the grid that you want to create the Smart List on, the data that you want to search through.
For this example, I will use Group. I'll be creating a Smart List that will give me all the groups that are either 4-H clubs or After School Groups.



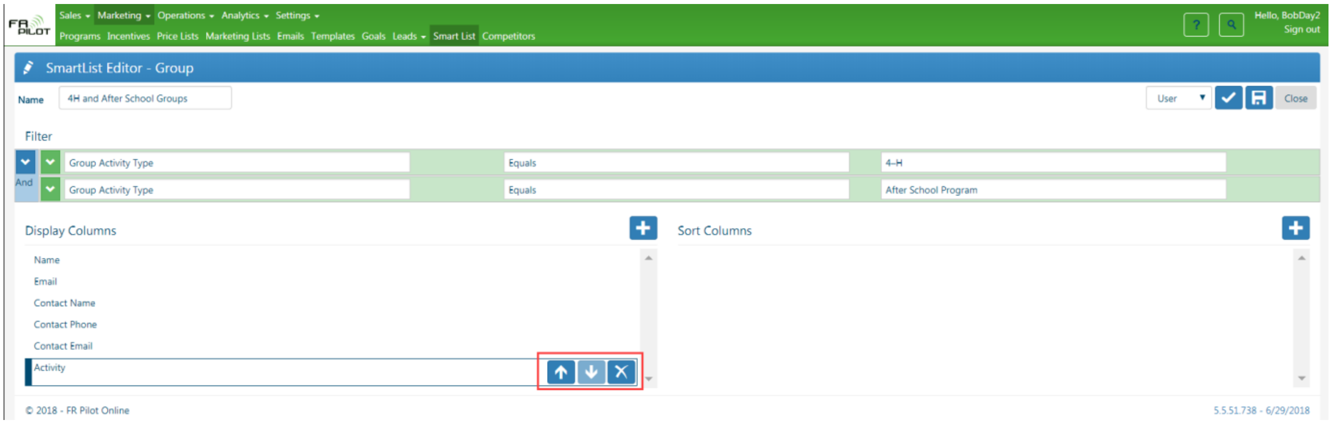
I set the name in the name field.
The list of fields below is where you will create the search that you want to perform. To find all groups that are 4H or After School Groups we will want to search on Activity Type, so I've selected that from the drop-down that opened when I clicked on the first field. I then selected Equals from the next field and 4-H from the last.



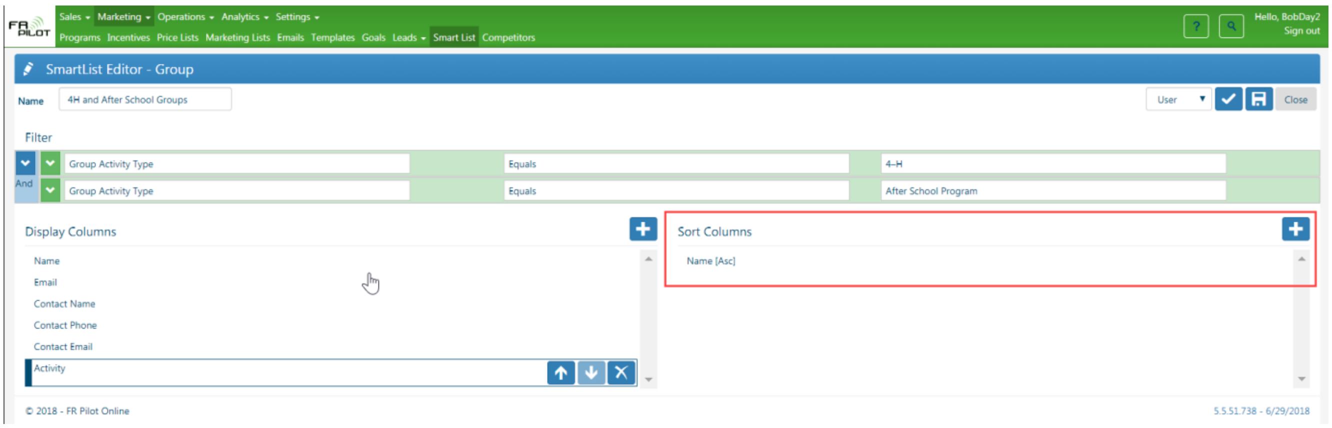
I want to include groups that are After School groups as well, so I need another search option. Hit the blue arrow at the top left of the search lists to bring down another drop-down list, and select Add to add another search option. Also, since we want to have the group be either 4-H *or* After School group we'll change the search type to 'Or'. Select Change to "Or" also from that same blue arrow drop-down menu.
Once we have the other Search option added we'll fill the fields with, Activity Type, Equals, After School.
Once the search has been created we'll need to select which columns we want to show. Click on the + button on Display Columns. The select all the columns what you want to show. Hit OK when done.



Once the columns are selected they can be sorted on the main page by clicking on them and hitting the up or down arrows to move then up or down on the list. The big X deletes the selection.



We'll next add the Sorting Column. This will determine how the list is sorted, I want it to be alphabetically by name, so I choose name from the list that pops up when I hit the + button.



You can now save and close. The Smart List will show up on the main list as well as under the Smart List selection option on the main Groups grid. Select that Smart List to sort the Groups grid using that Smart List

Why create different programs for different seasons

You can't add or remove products once an order has been submitted through My Fundraising Place. So, if you have different programs for different seasons, you can book a fundraiser in a future season and maintain the ability to still change flavors and prices.

Same with a price list… you can't edit it if an order has been received that used it (because it would affect the profit calculation).

Why track sub groups as separate groups

Why should you track "sub groups" at a school as separate groups in My Fundraising Place?

Here's an example of how some users do this and why it's NOT a best practice:

You go to XYZ High School and talk to the volleyball coach, the band director and the Spanish teacher. Rather than creating 3 separate groups in My Fundraising Place, you just enter XYZ High School. You create all 3 contacts and relate them all to XYZ High School.

Two weeks later the Spanish teacher calls and wants to sign up for a fundraiser. You rename XYZ High School to XYZ High School Spanish Club. Since you just renamed the group, the band director and volleyball coach are still related to this group.

A few months later, the Volleyball team decides to run a fundraiser, so you create a new group called XYZ High School Volleyball and relate the volleyball coach to this new group.

Why wouldn't you want to do it this way in My Fundraising Place?

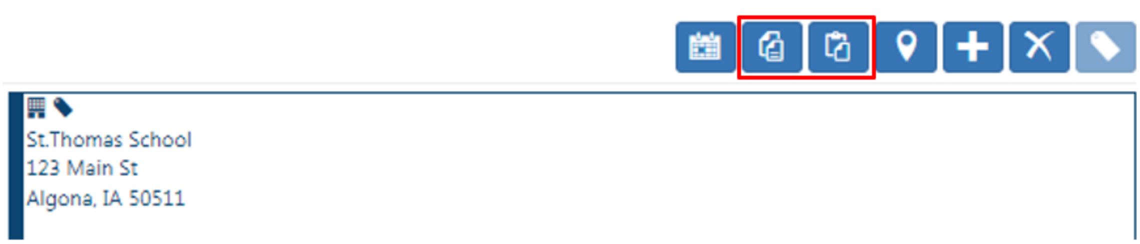
- You could lose important historical information on the Volleyball team group because your previous activities with that contact would be with the group that was renamed to XYZ High School Spanish Club.
- Not having that history with the correct group would also mean that you wouldn't be able to filter by the last activity date or last sample date for the Volleyball team because it would be blank.
- The coach of the volleyball team would now be related to the Spanish Club and the Volleyball team if you don't remember to remove the contact from the Spanish Club and that can cause confusion.

Country Maid's recommendation:

Using the same example above, we would recommend that you create 3 separate groups right away in My Fundraising Place. One for the volleyball team, one for the band and one for the Spanish club. The contacts would be related to the right groups and the history would be with the right groups as well.

Tips:

You can copy an address from one group to another group by using the copy and paste buttons (the 2nd and 3rd buttons from the left in the screen shot below).



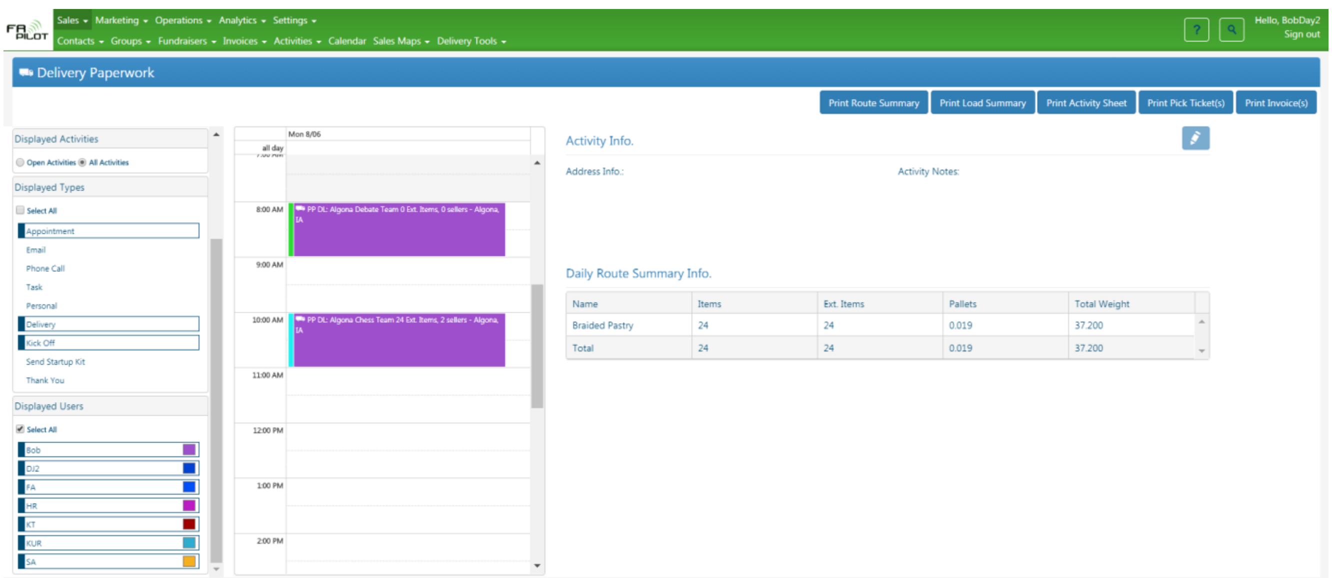
Fulfillment

Delivery Wizard

Select the day, user, and the activity types that you want to display in the delivery wizard and that you want to show up on the reports.

Select the reports that you want to view at the bottom left of the Delivery Wizard

- The Route Summary Report shows details about the selected activity types in the order that they are scheduled for that person.
- The Load Summary Report shows the # of cases & eaches by flavor for each delivery for that day.
- The Activity Sheet shows details about the group, contact, fundraiser and the last 5 activities related to the group
- Clicking on Invoices will generate an invoice for each delivery for that day that is assigned to the selected driver

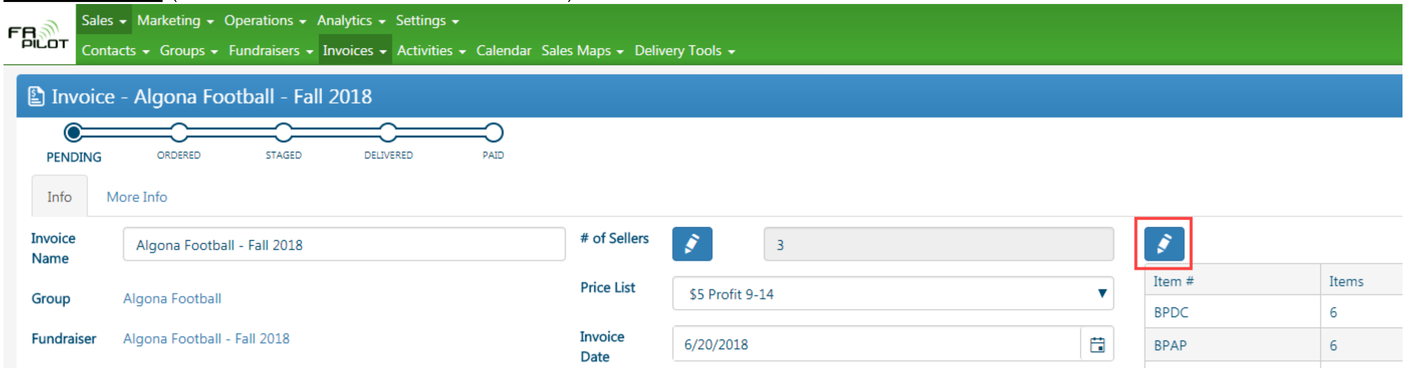


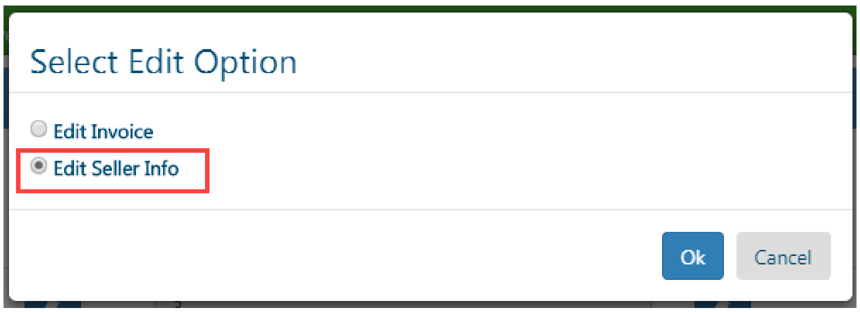
To view the details of an item in the Delivery Wizard, click once on the activity to the left and it will display information on the right. For delivery activities it will show details about the related invoice.

Edit Seller Info

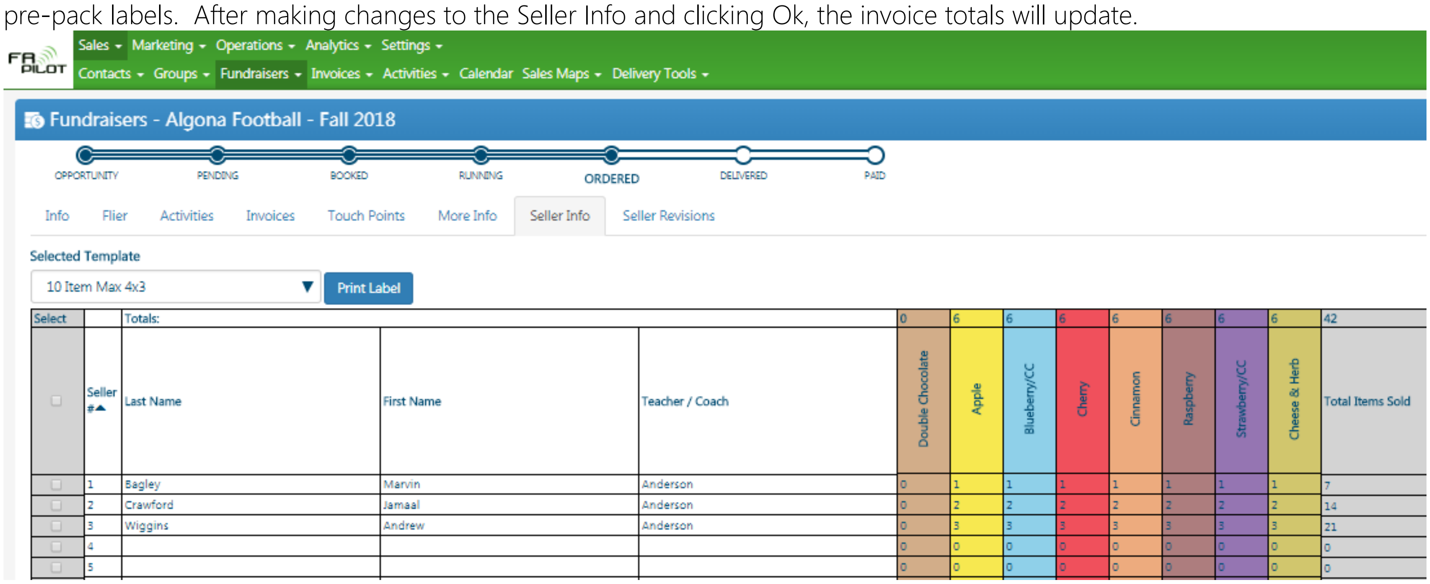
<u>Adding or Editing Seller Information from the Invoice</u>

If the order was submitted from MyFundraisingPlace.com and you need to edit the quantities in My Fundraising Place, then I'd recommend you edit from the invoice. If you click the edit button (the pencil icon), a dialog box will display where you can select <u>Edit Seller Info</u> (shown in the 2nd screen shot below).





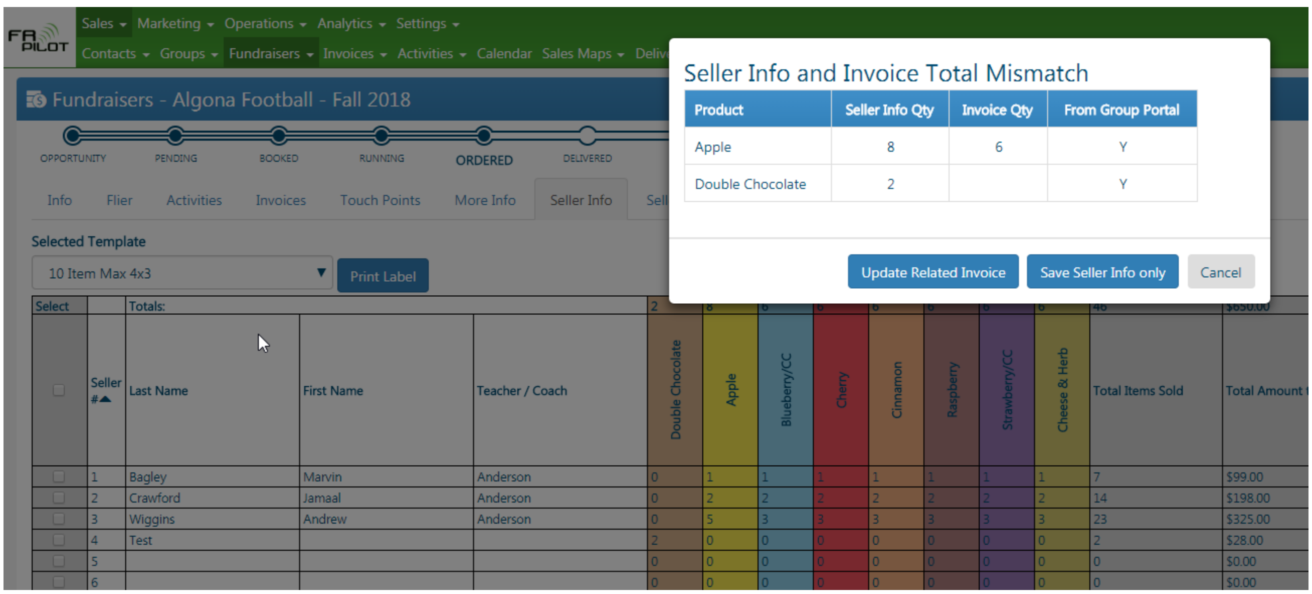
Choosing this option will show the screen on the next page and it will ensure that your seller information is in sync for generating pre-pack labels. After making changes to the Seller Info and clicking Ok, the invoice totals will update.



A few notes:

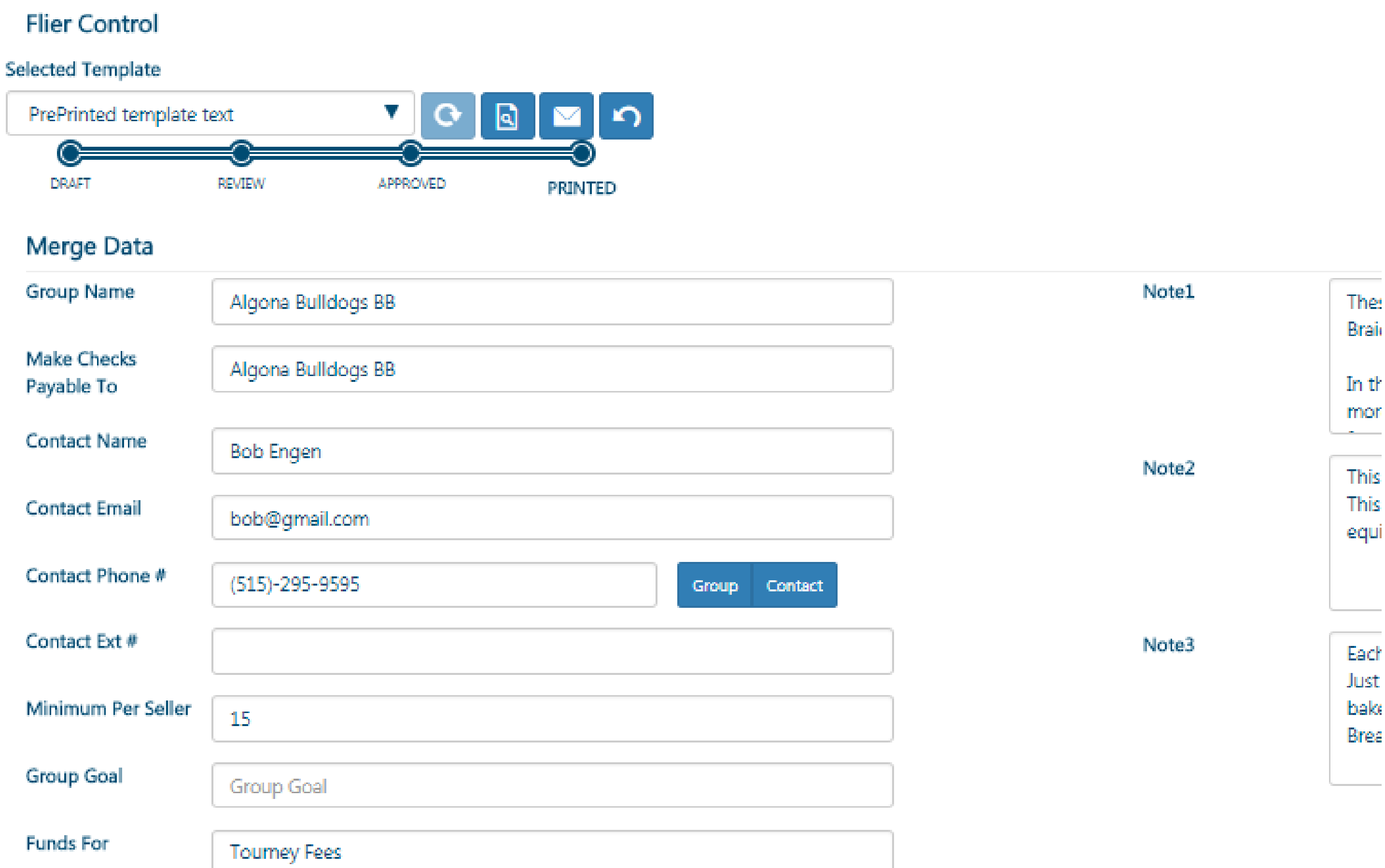
- If you would have chosen "Edit Invoice" in the 2nd screen shot above instead of "Edit Seller Info" this will cause the seller information and the invoice to become out of sync.
    - The reason we have the Edit Invoice option is for fundraisers that use MyFundraisingPlace.com but it is NOT a pre-pack order. If it's not a pre-pack order, then we don't want My Fundraising Place users to be forced to enter seller names when all they need to do is change a quantity.

- We do allow you to edit seller information from the Fundraiser, if you do make changes here and you click the save button you should see something like this screen shot below.
    - Clicking Update Related Invoice will update the quantities on the invoice.
    - Clicking Save Seller Info Only will NOT update the invoice.
        - This option is needed to get seller information back in sync if an My Fundraising Place user had edited the invoice qty, but the order should be a pre-pack. I can give you a few scenarios on why you might need this option, but it shouldn't be used often.



Flier Intercept Page

- On the Fundraiser "Flier" tab
  - The default flier for the program will be selected.
    - You can change the template if the program has other flier templates associated with it. For example, if the default template has goals but this group does NOT want goals then you could select the template with NO goals
- Click the "Load data" button to bring in the default data
  - You can now change the Merge Data and the Merge Data Labels, and this information will save with the fundraiser, so you can regenerate the template at a later time, if needed.
- Click the Preview button to view what it looks like on the template
- Click the Email button to send it to the group leader
- Change the status by clicking on the button next to the "Export" button.
  - Draft – has not been sent to the customer
  - Review – has been emailed to the customer but has not been approved (data is now locked but you can "roll back" if needed)
  - Approved - final changes have been made
  - Printed - the user has printed & completed the activity



My Fundraising Place Ordering and Invoice Instructions

My Fundraising Place – Ordering Steps

Once a fundraiser has completed running, these are the general steps that will need to happen.

1. Group leader will submit totals. One of two methods will occur.
   a. Method 1 – the group leader will submit via My Fundraising Place (or MyFundraisingplace.com)
   b. Method 2 – The group leader will submit the order via phone, email, or email an excel order tabulator
2. Create invoice. This will happen one of two ways.
   a. Method 1 – Invoice is automatically generated when group leader submits the order through My Fundraising Place.
      i. Tip: If the group leader emails an excel order tabulator, the My Fundraising Place user could copy that data into the upload template and upload the seller info to My Fundraising Place and submit it for the group leader.
   b. Method 2 – Dealer manually creates an invoice
      i. Go to the fundraiser, click the "ordered" button in the top right to automatically generate an invoice with the following defaults:
         1. Auto-associate the invoice to the fundraiser delivery activity
         2. Products from the fundraiser program are automatically added
         3. Price list from the program is automatically added
         4. Group & primary contact is set (billing contact can be manually changed on invoice more info tab)
      ii. Add any shipping charges, discounts, and taxes
      iii. Preview invoice for accuracy
3. Invoice submission to customer:
   a. Method 1: Using My Fundraising Place to send invoice copies:
      i. Email copy of invoice to group leader using the email icon in the top right of the invoice screen. The email will use the Touch Point email template associated with the fundraiser, and attach the invoice
   b. Method 2: Submit Invoice to QB, then use QB to send invoice
      i. After invoice created, set the sync status to "pending" on invoice "more info" tab. This sync status will be automatically set to pending every time there is an invoice modification after the invoice has been marked as delivered.
      ii. Run the QB / My Fundraising Place sync agent to bring invoices to QB
      iii. Use QB to email invoices and collect funds
4. Mark Delivery activity as delivered after delivery.
   a. This will advance the related invoice to delivered & the associated fundraiser
   b. This will advance the invoice sync status to "pending"

My Fundraising Place Ordering and Invoice Instructions with Prepaids

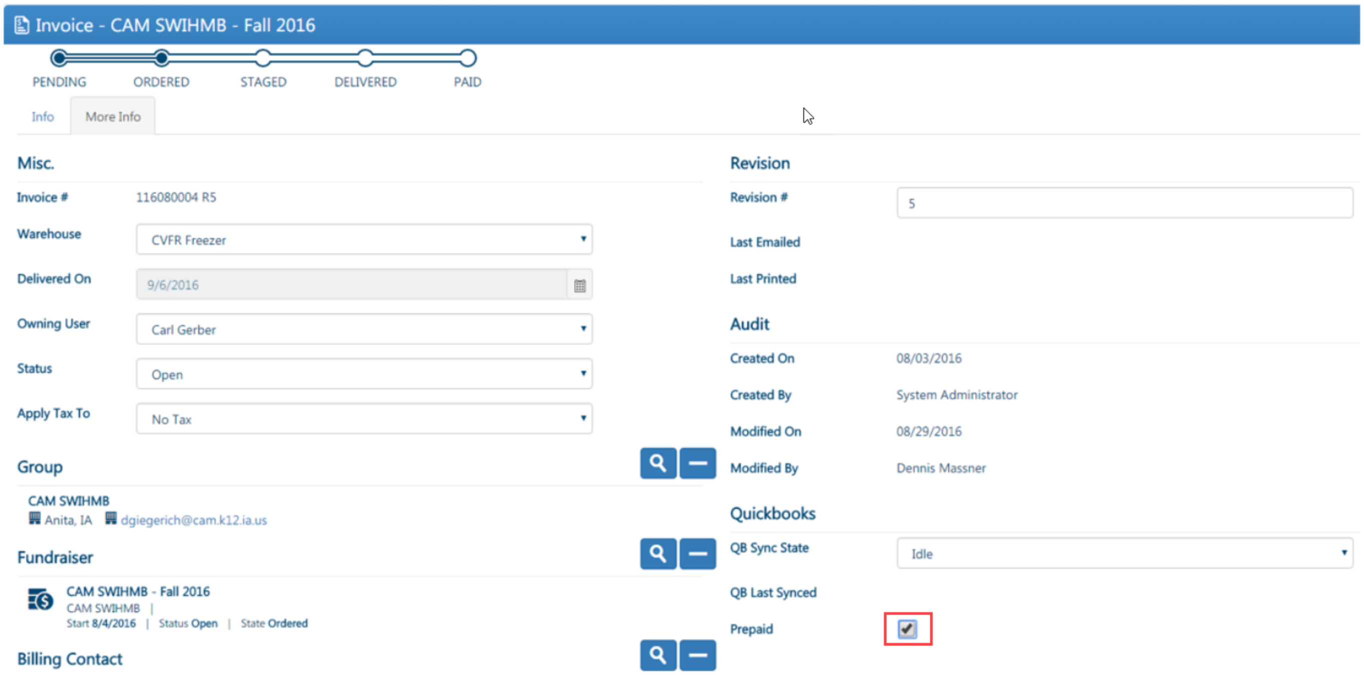
My Fundraising Place – Ordering Steps

Once a fundraiser has completed running, these are the general steps that will need to happen.

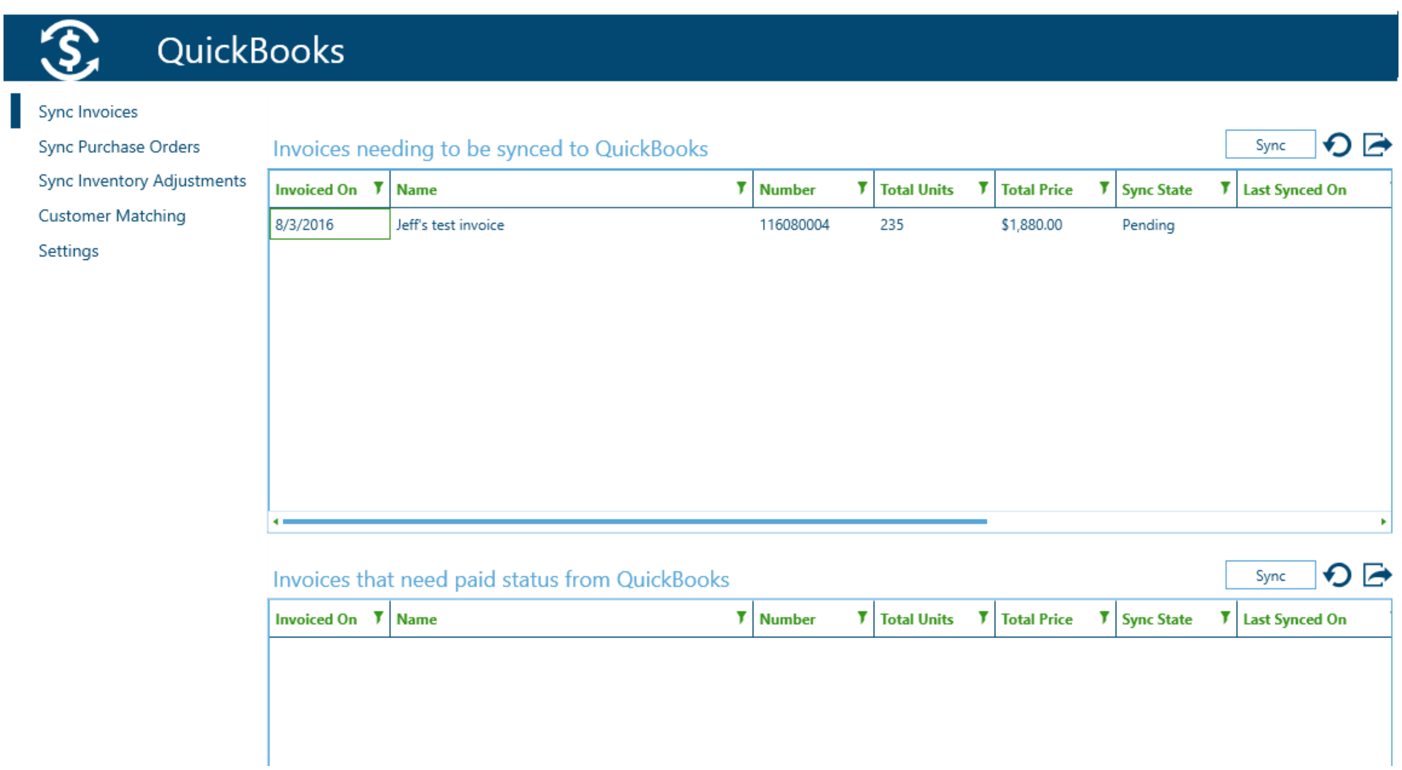
1. Group leader will submit totals. One of two methods will occur.
   a. Method 1 – the group leader will submit via My Fundraising Place (or MyFundraisingplace.com)
   b. Method 2 – The group leader will submit the order via phone, email, or email an excel order tabulator
2. Create invoice. This will happen one of two ways.
   a. Method 1 – Invoice is automatically generated when group leader submits the order through My Fundraising Place.
      i. Tip: If the group leader emails an excel order tabulator, the My Fundraising Place user could copy that data into the upload template and upload the seller info to My Fundraising Place and submit it for the group leader.
   b. Method 2 – Dealer manually creates an invoice (Move to "ordered")
      i. Go to the fundraiser, click the "ordered" button in the top right to automatically generate an invoice with the following defaults:
         1. Auto-associate the invoice to the fundraiser delivery activity
         2. Products from the fundraiser program are automatically added
         3. Price list from the program is automatically added
         4. Group & primary contact is set (billing contact can be manually changed on invoice more info tab)
      ii. Add any shipping charges, discounts, and taxes
      iii. Preview invoice for accuracy
   c. Method 3 – Dealer manually creates an invoice (Prepaid's – where you don't want to change the fundraiser status)
      i. Go to the fundraiser/invoice tab or invoice page and click on the +
      ii. Fundraiser status will not be moved to "ordered"
      iii. It will not associate the delivery activity with the invoice
3. Invoice submission to customer:
   a. Method 1: Using My Fundraising Place to send invoice copies:
      i. Email copy of invoice to group leader using the email icon in the top right of the invoice screen. The email will use the Touch Point email template associated with the fundraiser, and attach the invoice
   b. Method 2: Submit Invoice to QB, then use QB to send invoice
      i. After invoice created, set the sync status to "pending" on invoice "more info" tab. This sync status will be automatically set to pending every time there is an invoice modification after the invoice has been marked as delivered.
      ii. Run the QB / My Fundraising Place sync agent to bring invoices to QB
      iii. Use QB to email invoices and collect funds
4. Mark Delivery activity as delivered after delivery.
   a. This will advance the related invoice to delivered & the associated fundraiser
   b. This will advance the invoice sync status to "pending"

Prepaid Invoices

To set an invoice as Prepaid in My Fundraising Place, go to the More Info tab on the invoice and click on the Prepaid check box.



The invoice will now show in the Sync Agent where you can sync it to QuickBooks. Receive payment on the invoice in QuickBooks like you normally do.



The invoice in QuickBooks will be paid and the invoice will show in the bottom list in the Sync Agent, but the invoice in My Fundraising Place is not delivered yet so we do NOT update the state of the My Fundraising Place invoice to paid. When you sync your invoices, you will see the message below where it says that the invoice has been paid in QB, but it has NOT been delivered. Once the My Fundraising Place invoice has been delivered the invoice will show up in the top list again where you will sync it back to QuickBooks. This step is needed in case there were any changes to the invoice. After it's been synced back to QuickBooks, the invoice will show up again in the bottom list. If nothing changed on the invoice that impacts the price, then the state of the My Fundraising Place invoice will be updated to Paid when you sync.

Invoices needing to be synced to QuickBooks

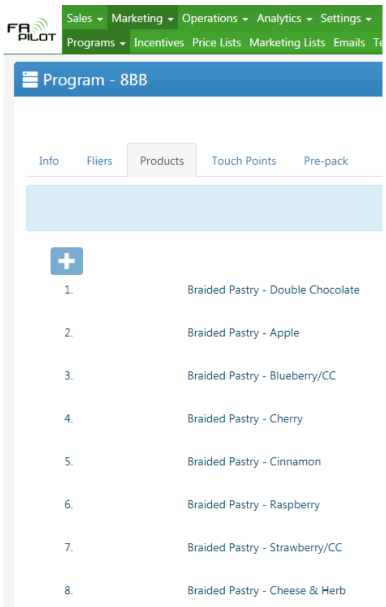
Invoiced On	Name	Number	Total Units	Total Price	Sync State	Last Synced On	Sync Message

Invoices that need paid status from QuickBooks

Invoiced On	Name	Number	Total Units	Total Price	Sync State	Last Synced On	Sync Message
8/3/2016	Jeff's test invoice	116080004	235	$1,880.00	Synced	8/30/2016 8:21:59 AM	Invoice Number:'116080004' has been paid in QB but has NOT been delivered.

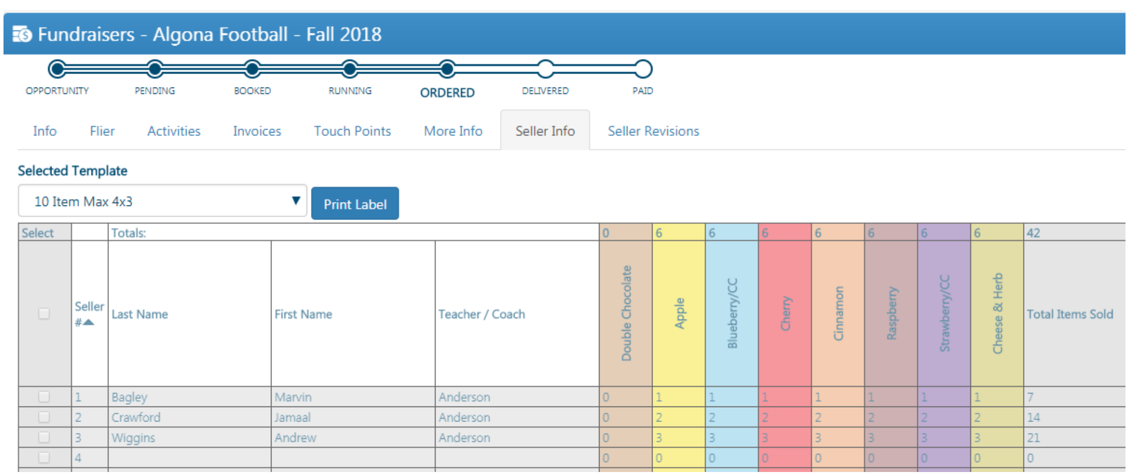
What happens if I add flavors to an invoice that came from mfp.com

Here are the products on the program in this example:



The group leader will <u>ONLY</u> see the flavors from the related program, even if you add flavors to the invoice.

- If I added Choc. Chip cookies to the invoice, the group leader would NOT see that in the seller grid
- If I added the same flavor to an invoice thru My Fundraising Place that is already on the program then the group leader would not see that either.



We know which flavors originally came from MyFundraisingPlace.com and which were manually added in My Fundraising Place so we always know which flavors to update EVEN if you added the same flavor to an invoice. An example is shown below, where I added Apple to the invoice at a $0 price and Apple was already part of the program. If the group leader added or modified Apple for a seller, or if an My Fundraising Place user edited the seller info from the invoice or from the fundraiser seller info tab, we know to update the Apple flavor that originally came from MyFundraisingPlace.com. This screen shot shows how you can tell if a flavor was originally added from Group Portal (MyFundraisingPlace.com) or from My Fundraising Place. In most cases, you shouldn't need to know this, but you can see this from the invoice, if needed, by editing the invoice quantities and selecting Edit Invoice. The BPAP at $0, BPCI and BPSC were all manually added to the invoice by clicking the plus button on this screen. In the far-right column, you can see that they all have an "N" in the From Group Portal column- which means they were not added from MyFundraisingPlace.com.

Product Details

Item #	Current Item Qty	Item Qty Difference	New Item Qty	Price Per Item	From Group Portal
BPAP	3			$0.00	N
BPAP	6			$9.00	Y
BPBC	6			$9.00	Y
BPCH	6			$9.00	Y
BPCI	3			$9.00	N
BPRA	6			$9.00	Y
BPSC	3			$9.00	N
BPFC	6			$9.50	Y

Ok Cancel

If the group leader prints the invoice from MyFundraisingPlace.com or if you email the invoice it will show ALL flavors on the invoice. So, if any changes are made from the Seller info. grid (whether it's by the group leader or by you in My Fundraising Place) we will ONLY update the invoice for the flavors from the program.

Fundraising Professionals
206 S Broadway Ave
West Bend, IA 50597
kurt.banwart@countrymaid.net
www.frpro.com

Invoice #: 118060033 R6
Invoice Date: 8/06/2018
Event Name: Algona Football - Fall 2018
Delivery Date: 8/06/18 at 12:00 PM CST
Cust. Pickup: 12:30 PM - 01:00 PM CST

Bill To: Brant Engen
Algona Football
206 E Oak St
Algona, IA 50511
(515) 320-4545

Ship To:
Algona Football
206 E Oak St
Algona, IA 50511

Rec By	Items	cs + ea	Product Name	Unit Price	Total Unit Price
	3	0 + 3	Apple Butter Braid® Braided Pastry (22oz.)	$0.00	$0.00
	6	1 + 0	Apple Butter Braid® Braided Pastry (22oz.)	$9.00	$54.00
	6	1 + 0	Blueberry & Cream Cheese Butter Braid® Braided Pastry (22 oz.)	$9.00	$54.00
	6	1 + 0	Cherry Butter Braid® Braided Pastry (22 oz.)	$9.00	$54.00
	3	0 + 3	Cinnamon Butter Braid® Braided Pastry (22 oz.)	$9.00	$27.00
	6	1 + 0	Raspberry Butter Braid® Braided Pastry (22 oz.)	$9.00	$54.00
	3	0 + 3	Strawberry Cream Cheese Butter Braid® Braided Pastry (22 oz.)	$9.00	$27.00
	6	1 + 0	Four Cheese & Herb Butter Braid® Braided Pastry (22 oz.)	$9.50	$57.00
Total:	**39**				

Notes: Invoice revised on 7/14/18

Invoice revised on 7/14/18

Invoice revised on 7/14/18

Invoice revised on 7/14/18

Detail Total:	$327.00
Discount:	$0.00
Subtotal:	$327.00
Delivery Fee:	$0.00
Tax:	$0.00
Total Due:	**$327.00**

Received By: ______________________________
Approx. Profit: $183.00

Why track Group Size & Number of Sellers

Why should you care about entering the # of sellers and the group size?

Tracking this information will help you learn about your groups and help you make better business decisions!

The group size, # of sellers and sales per seller are three key factors that can impact your group average. Understanding how these impacted your average is important so you develop the right strategies for your business. It is important to evaluate the changes in the sales force (the group size and # of sellers) and the change in sales per seller from year to year.

If you don't have the right information you might choose a strategy that doesn't solve the real problem. Tracking this information in My Fundraising Place helps you understand what is really happening when looking at all of your groups combined or when comparing a specific group's sales from year 1 to year 2. Below is an example to help explain this.

- In 2015, ABC Band sold 240 units. ABC Band ran again in 2016, but this time they only sold 216 units. You believe the drop-in sales has to do with the price increase that you implemented in 2016 and the sellers not being as motivated as they were in 2015. You decide to develop an incentive plan for this group for next year so that you can increase group participation.

- If you would have captured the group size and the # of sellers, you would see that the real reason this group sold less in 2016 is because it had fewer members in the group this year. In 2016, group participation was up, but the group size and # of sellers went down. Looking at the average sales per seller shows that there was no change from 2015 to 2016 so your price increase didn't seem to have an impact on what each seller sold. Here is a breakdown of year 1 vs. year 2 for ABC Band:

	Group Size	Participation %	# of Sellers	Sales per seller	Total Sales
Year 1	75	40%	30	8	240
Year 2	45	60%	27	8	216

Tips:

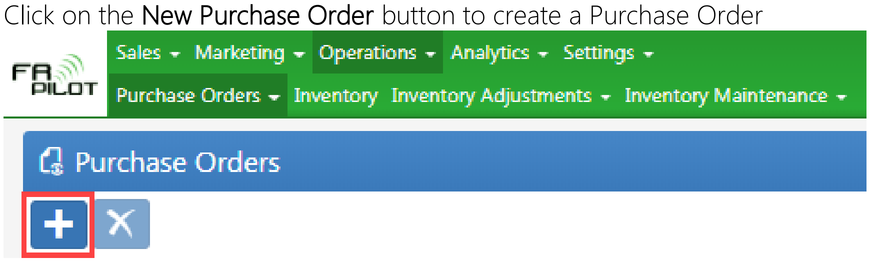
- When signing up a group, ask for the group size as part of your standard booking process
- When the group leader turns in their order, ask for the # of sellers as part of your standard order entry process
- When a group enters their order through My Fundraising Place (MyFundraisingPlace.com) – the number of sellers is gathered automatically!

Operations

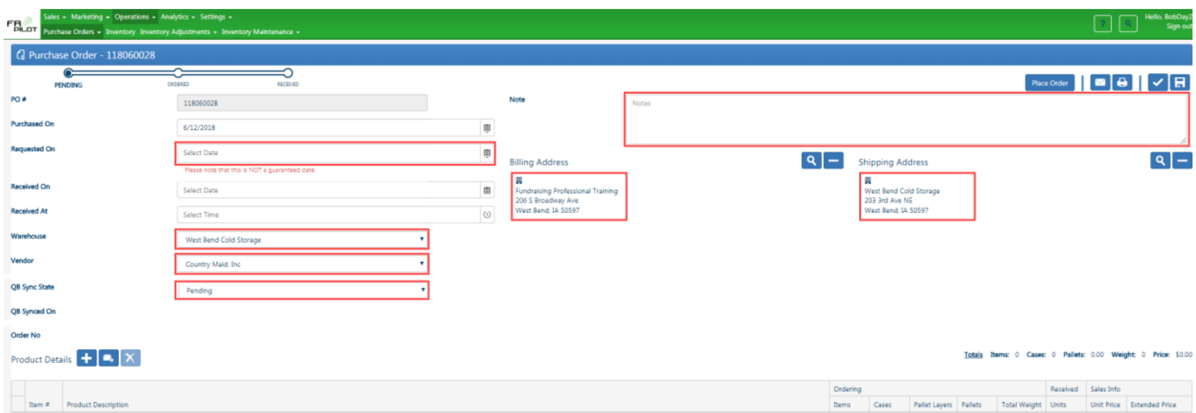
Creating a Purchase Order

1. Log in to My Fundraising Place
2. Go to Operations > Purchase Orders

3. Click on the New Purchase Order button to create a Purchase Order



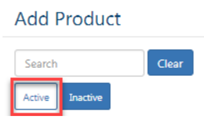
4. Enter in fields on the Purchase Order screen:



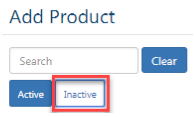
- Requested On Date (Delivery) – this is not a guaranteed date, but a target to arrange shipping and delivery. Please remember to consider the product lead times
- Received On/Received At - will be entered when you receive the Purchase Order
- Warehouse – select the warehouse where you want this PO shipped
- Vendor – select the appropriate vendor for the products you need to order
- QB Sync State – will default to “Pending” if you are using Quickbooks as your accounting system
- Notes – add any special instructions or notes that pertain to this order
- Billing Address – verify
- Shipping Address - verify

5. Adding product
   - Adding by individual products
     1. Click on the Add Products button

     2. Active products are selected by default



3. Inactive products may be selected by clicking on **Inactive**

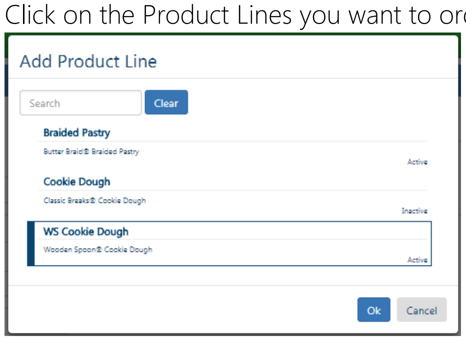


4. Highlight the products you want to order. You will see a blue box around those you have successfully selected

5. Click on the **OK** button

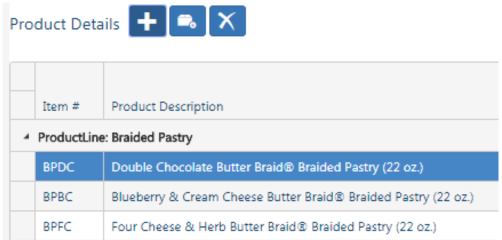
- Adding a full product line
  1. Click on the **Add Product Lines** button

  2. Click on the Product Lines you want to order



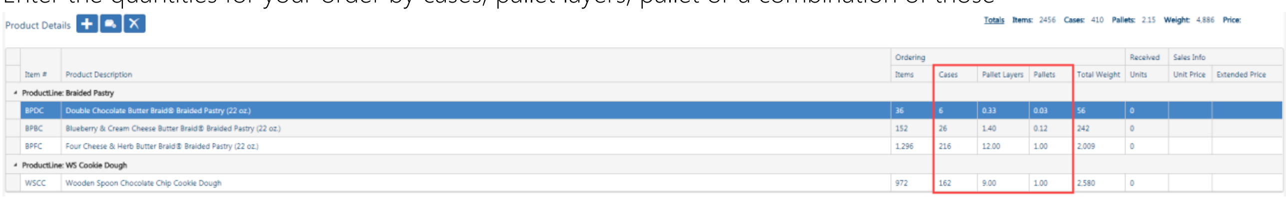
  3. Click on the **OK** button

- Removing a product line from the Purchase Order
  1. Highlight product line to remove



2. Click on the **Remove Products** button

6. Enter the quantities for your order by cases, pallet layers, pallet or a combination of those

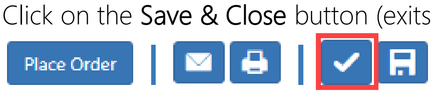


- You can hit return to go to the next line to add your next quantity rather than having to click in every box

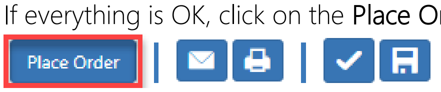
7. Not ready to submit
   - Click on the **Save** button (stay on current screen)

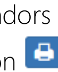
     

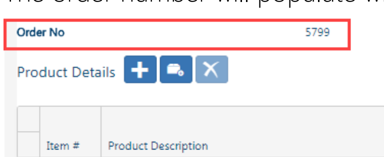
     OR
   - Click on the **Save & Close** button (exits out of current screen)

   - These will both save a draft you can open later and revise
8. Submitting your order
   - At this point, you should review your purchase order to be sure it is correct and complete.
   - If everything is OK, click on the **Place Order** button

     1. Only the initial order will be transmitted. Any changes to the order will need to be called in or emailed to your BDM or other Country Maid representative.
     2. Only orders to Country Maid can be submitted electronically. All other vendors will need to have a copy of the Purchase Order either printed and mailed using the **Print** button  or emailed using the **Email** button .
9. Order Confirmation
   - The order number will populate when successful

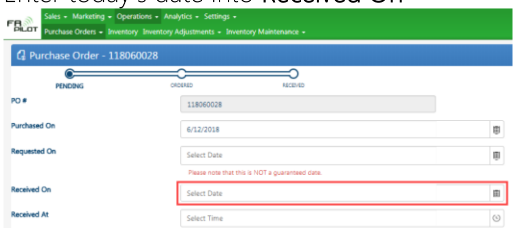
     

   - You will receive a confirmation email from Country Maid

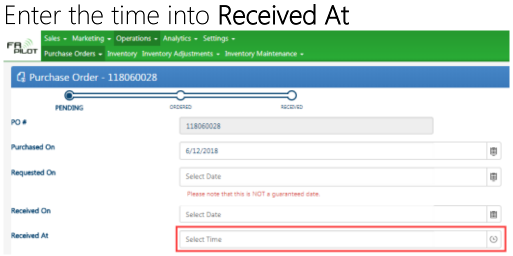
Receiving a Purchase Order

1. Log in to My Fundraising Place
2. Go to Operations > Purchase Orders

3. Double-click on the Purchase Order that you want to receive
4. Enter today's date into Received On



5. Enter the time into Received At

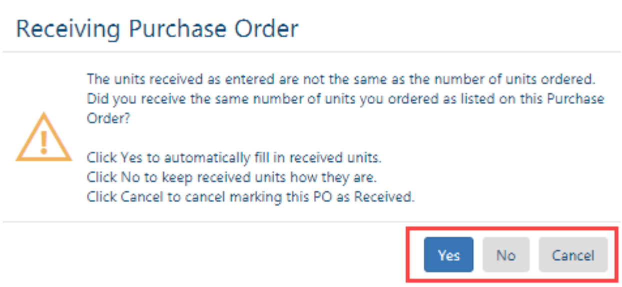


6. Fill in the Received Units column

		Ordering					Received	Sales Info	
Item #	Product Description	Items	Cases	Pallet Layers	Pallets	Total Weight	Units	Unit Price	Extended Price
ProductLine: Braided Pastry									
BPDC	Double Chocolate Butter Braid® Braided Pastry (22 oz.)	36	6	0.33	0.03	56	0		
BPBC	Blueberry & Cream Cheese Butter Braid® Braided Pastry (22 oz.)	152	26	1.40	0.12	242	0		
BPFC	Four Cheese & Herb Butter Braid® Braided Pastry (22 oz.)	1,296	216	12.00	1.00	2,009	0		
ProductLine: WS Cookie Dough									
WSCC	Wooden Spoon Chocolate Chip Cookie Dough	972	162	9.00	1.00	2,580	0		

7. Click on the Mark Purchase Order as Received button

8. You now see the Receiving Purchase Order Screen



- Yes – automatically fill in the Received Units column from the Ordered Items column
- No – the Received Units column will be received as entered
- Cancel – stop the PO Receiving Process

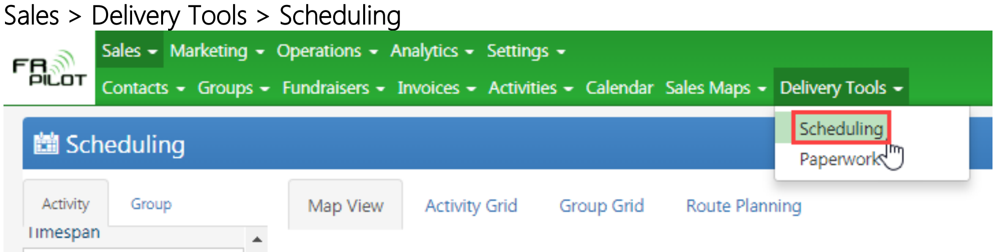
Delivery Scheduling Tool

Benefits

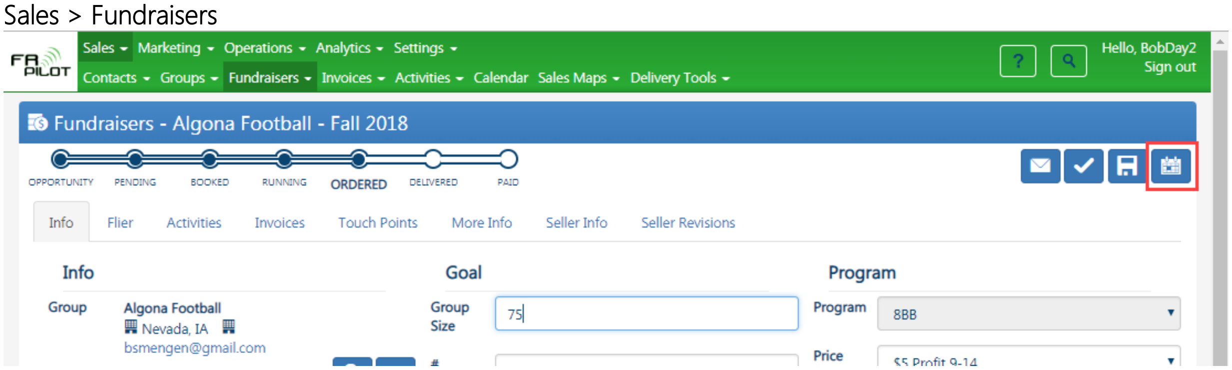
- Helps you find other activities in the same area within a certain timeframe to increase efficiency by picking the best delivery date and time
- Route planning for turn by turn instructions

Access Points

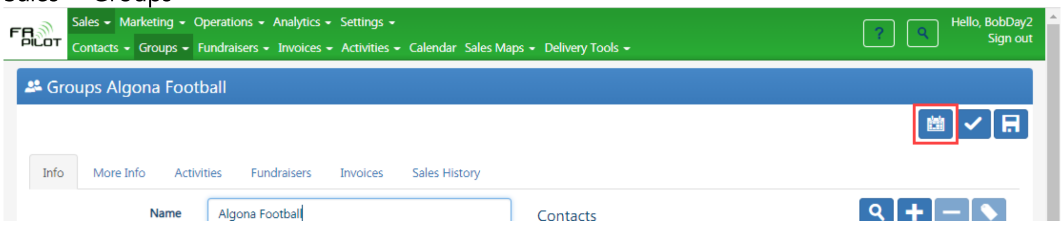
- Sales > Delivery Tools > Scheduling



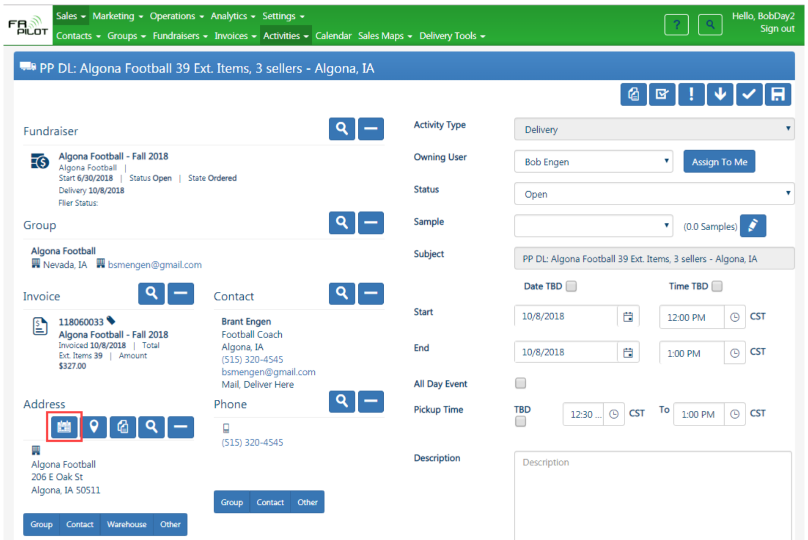
- Sales > Fundraisers



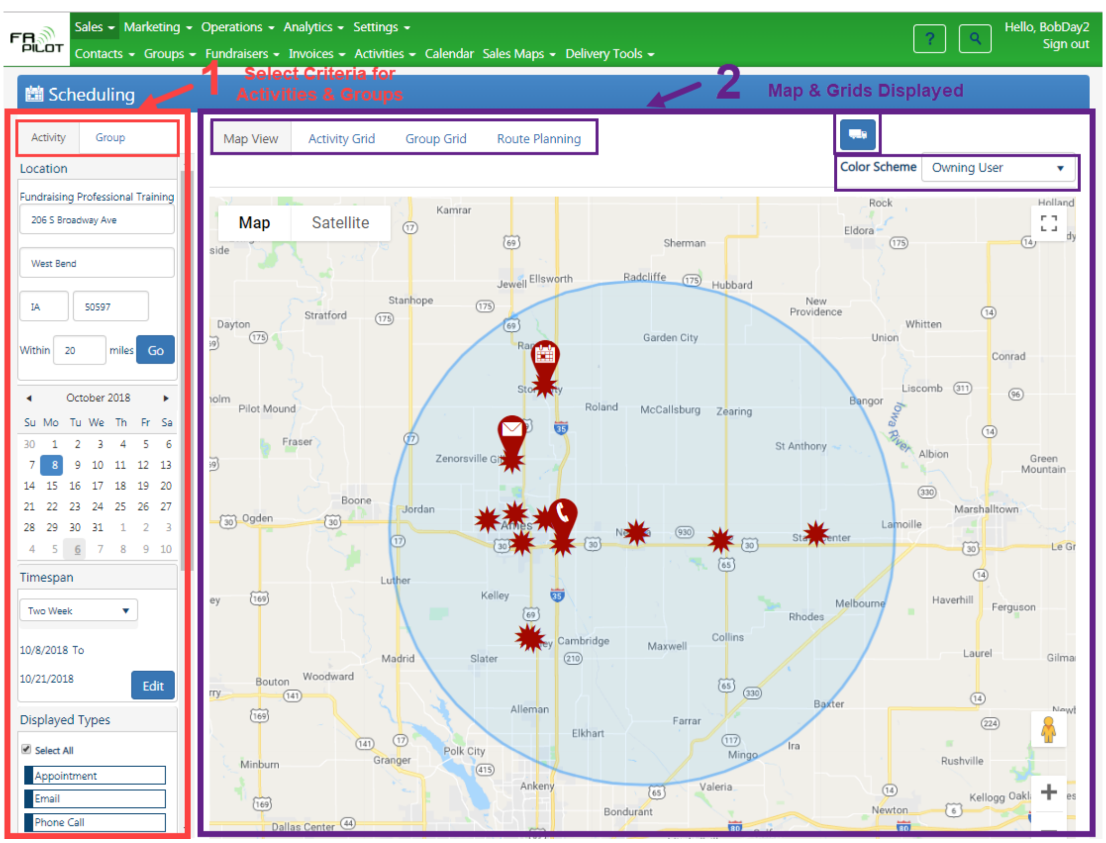
- Sales > Groups



- Sales > Activities

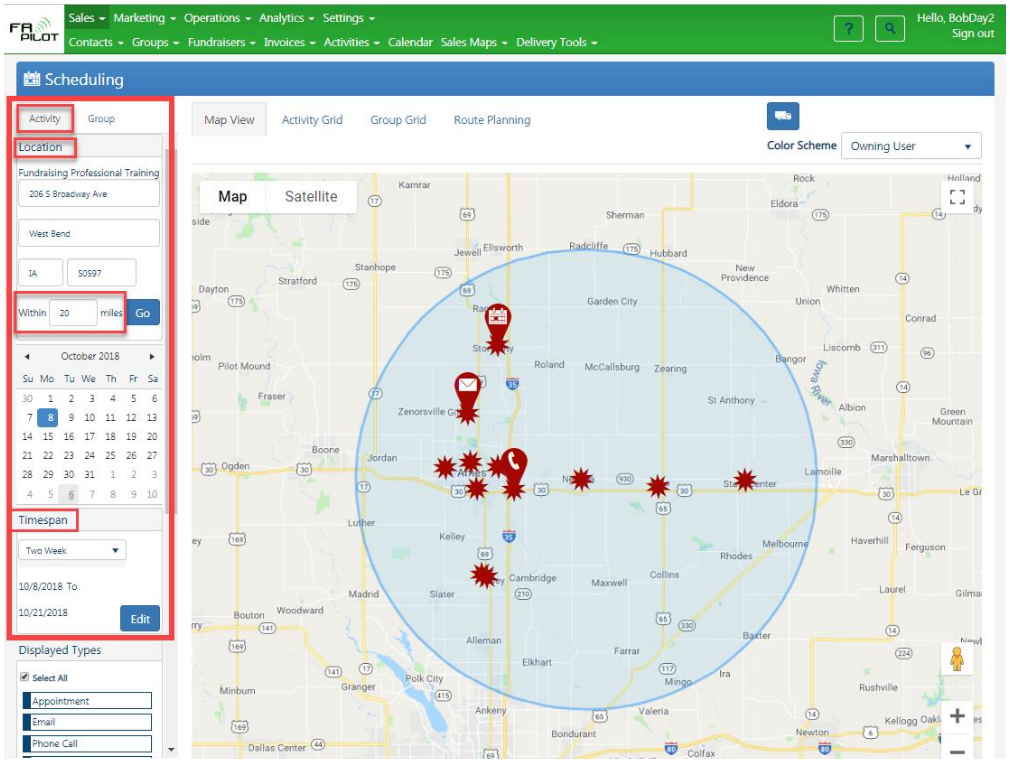


Main Screen



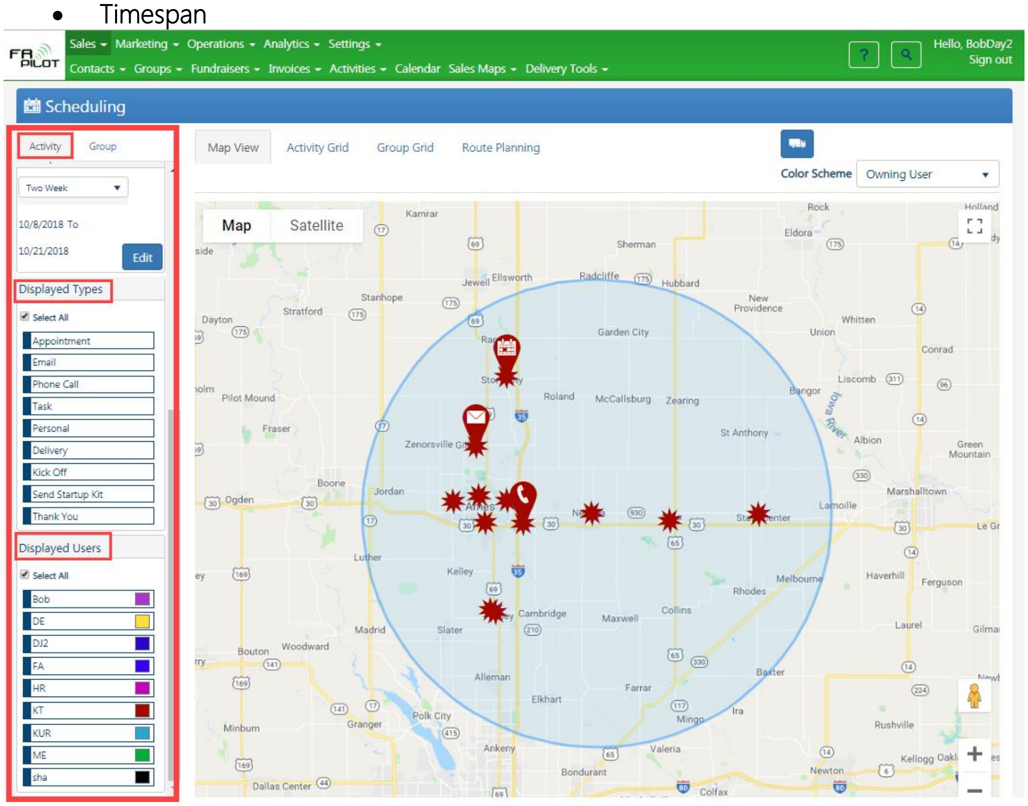
1 - Selection Criteria for Activities & Groups

Activity Tab Selection Criteria



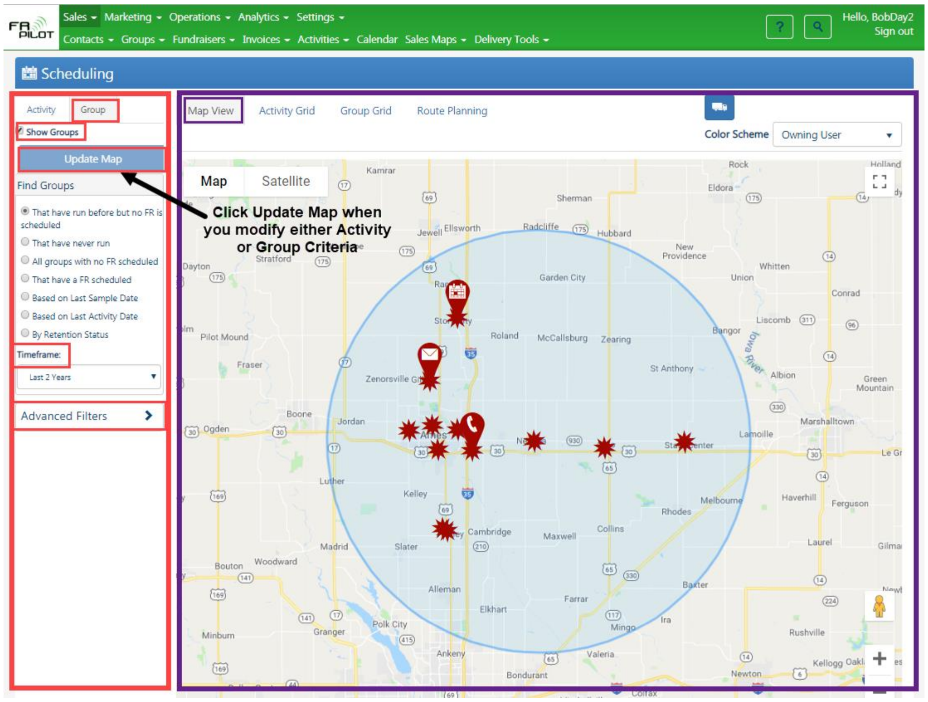
Options:

- Location
- Mile Radius
- Timespan

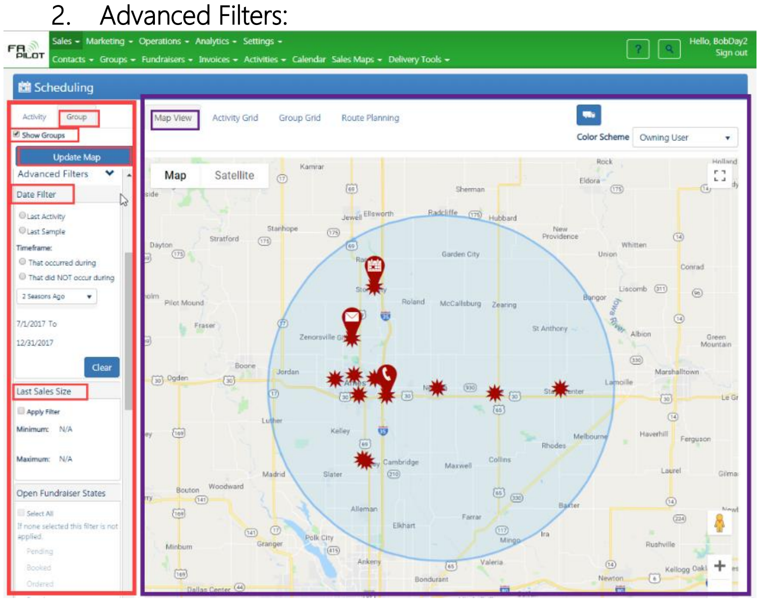


- Displayed Types
- Displayed Users

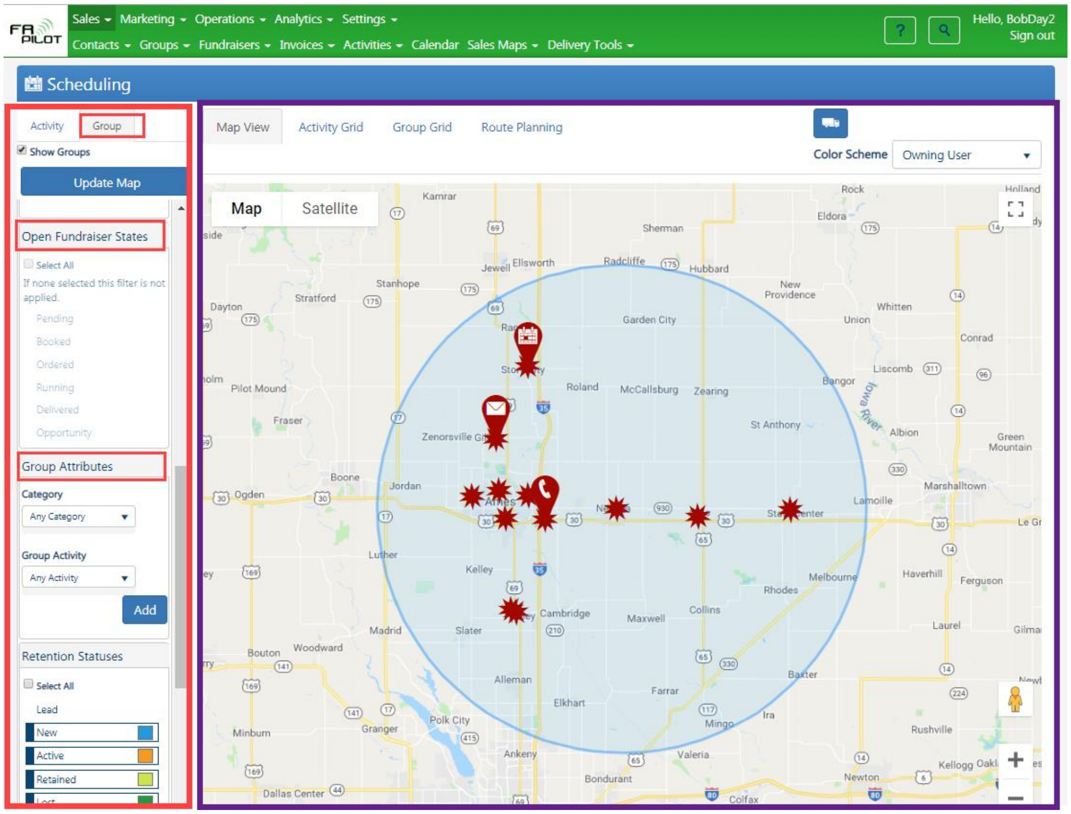
Group Tab Selection Criteria



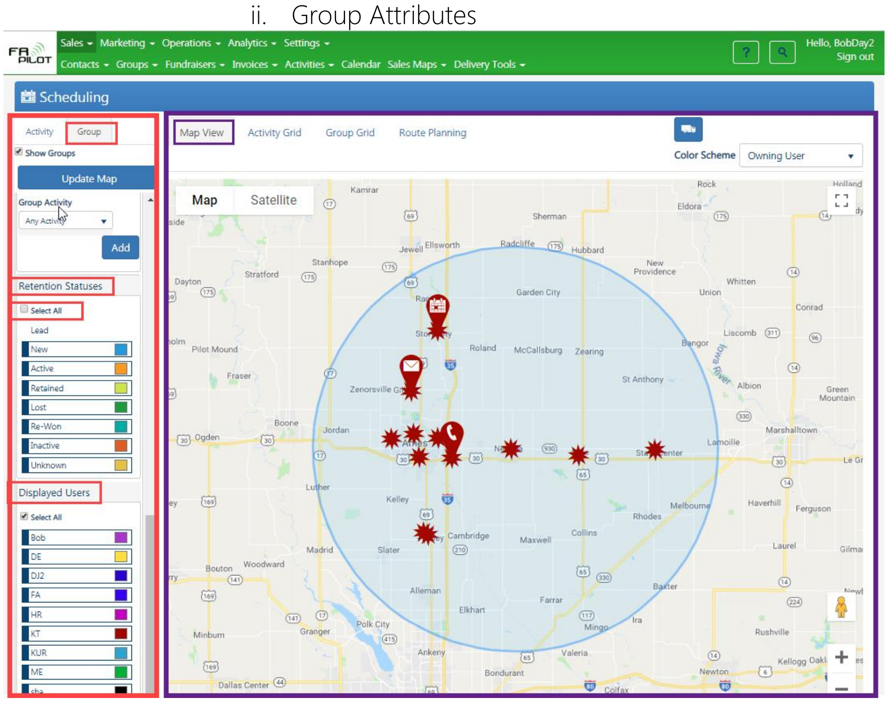
1. Options:
    - Show Groups Checkbox
    - Update Maps Button
        i. Displayed only on Group Criteria Tab, but needed when either Group or Activity criteria are modified to update the map or grids
    - Timeframe:
        i. This Season
        ii. Next Season
        iii. 2 Seasons From Now
        iv. Custom – you pick the date range
2. Advanced Filters:



- Date Filter
    i. Last Activity
    ii. Last Sample
    iii. Timeframe
- Last Sales Size



- Open Fundraiser States
- Group Attributes:
    i. Category
    ii. Group Attributes

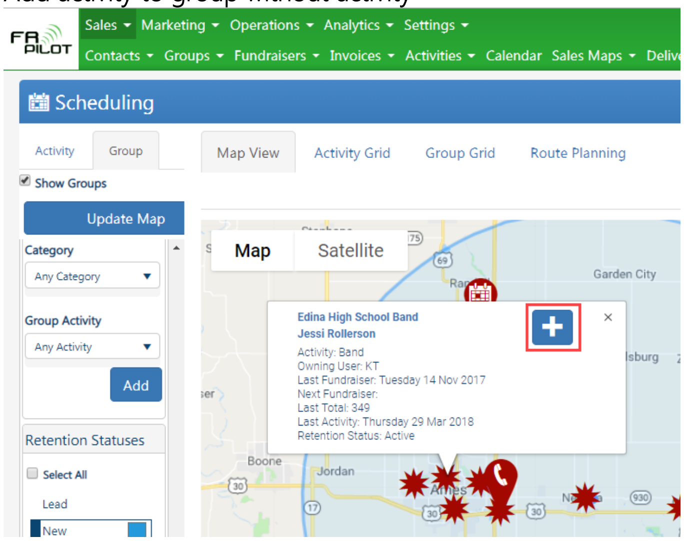


- Retention Statuses
- Displayed Users

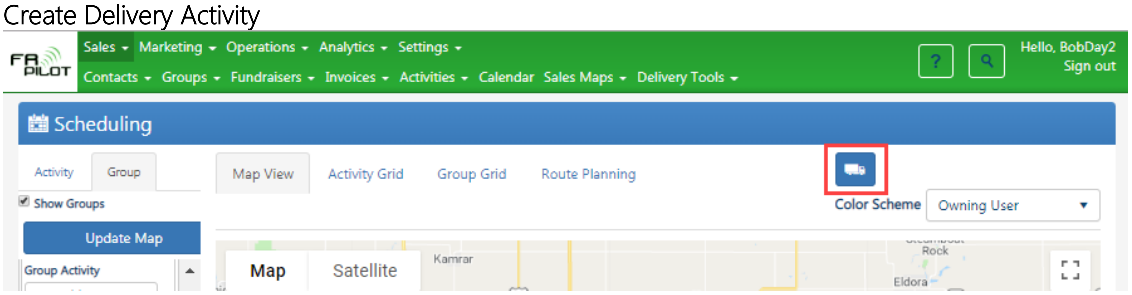
2 – Map & Grids Displayed

Map View

Add activity to group without activity

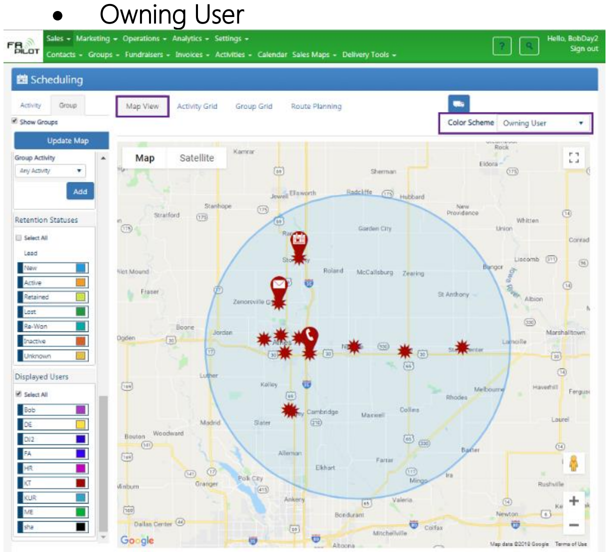


Create Delivery Activity

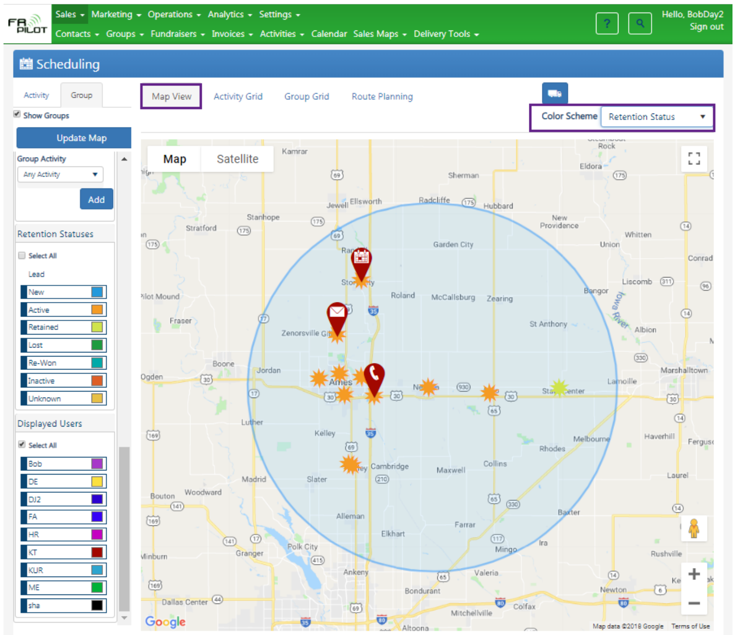


Color Schemes:

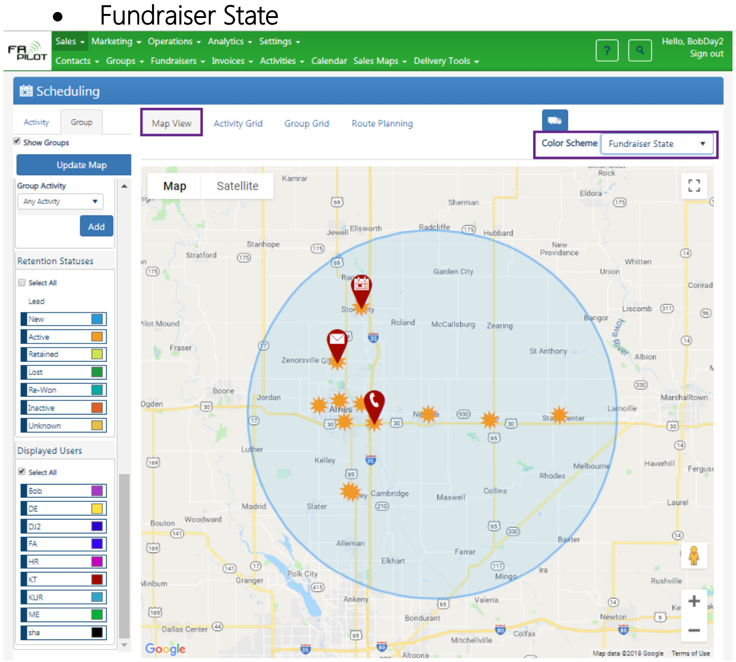
- Owning User



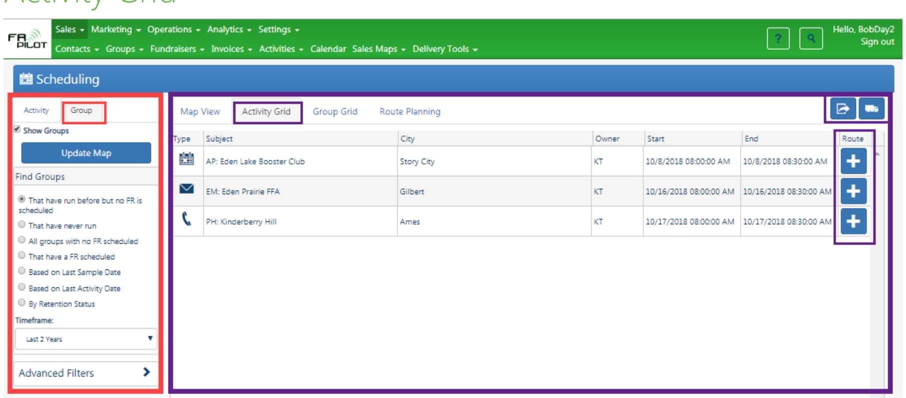
- Retention Status



- Fundraiser State

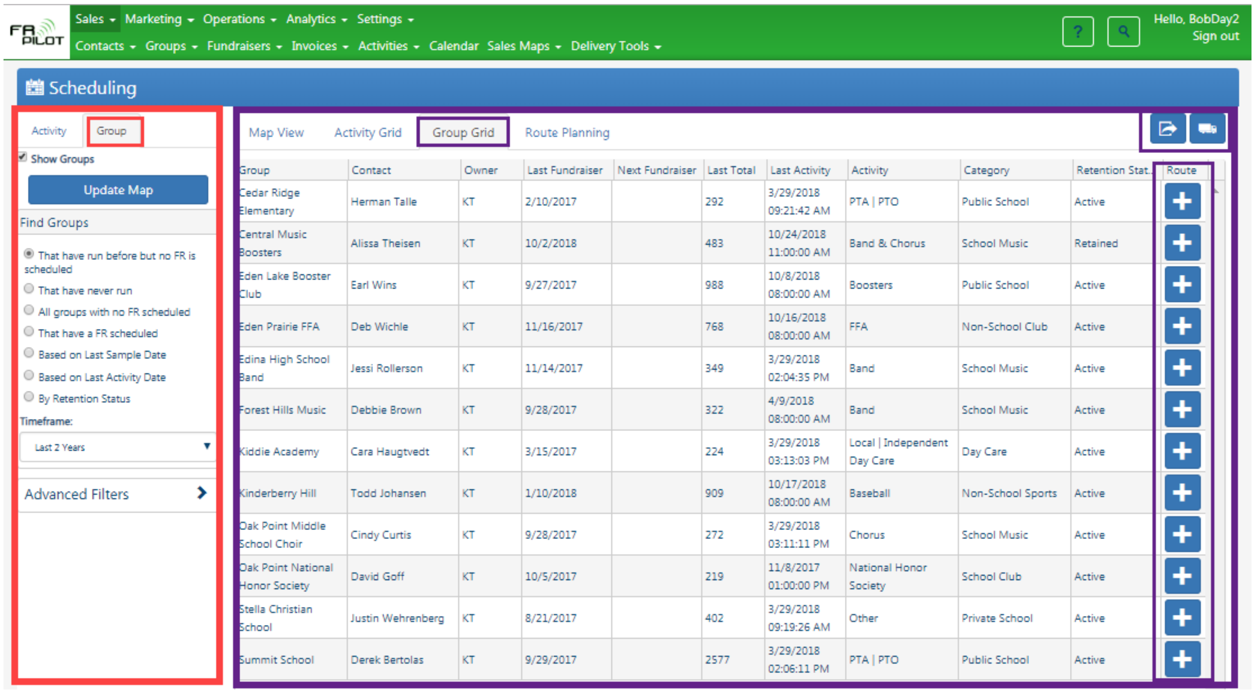


Activity Grid



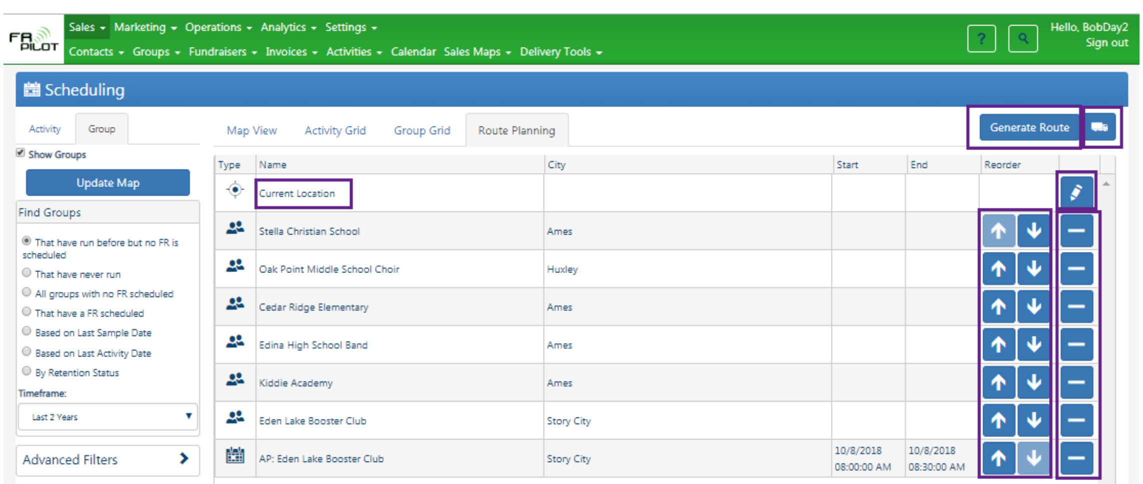
- Activities from map converted to grid
- Create Delivery Activity Button
- Export to Excel Button
- Add to Route Button

Group Grid



- Groups from map converted to grid
- Create Delivery Activity Button
- Export to Excel Button
- Add to Route Button
    - Add group to the Route

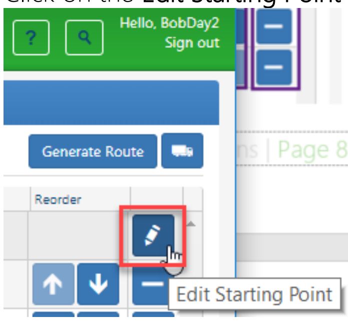
Route Planning



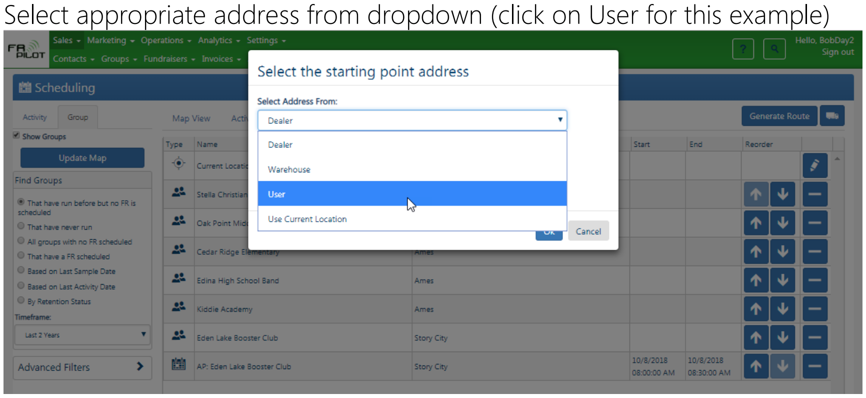
- Will display all groups or activities that were added to the route
- Move up or down along the route by clicking on the **up or down arrows**
- Delete from the route by clicking on the **(-) button**
- **Create Delivery Activity** Button
- **Generate Route** Button

Change Starting Point

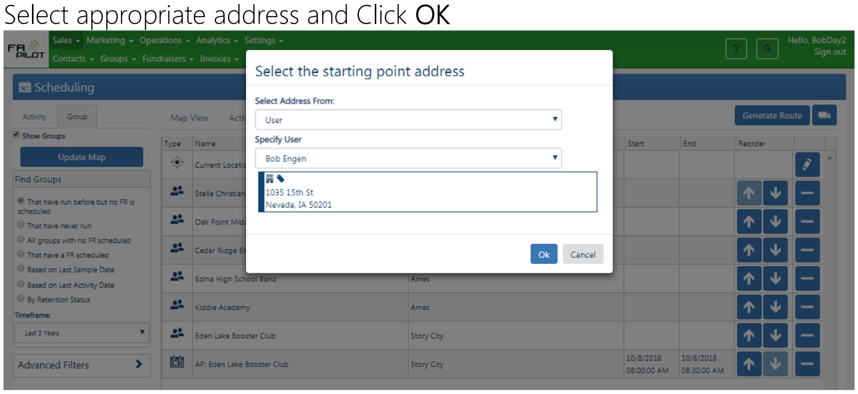
Click on the **Edit Starting Point button**



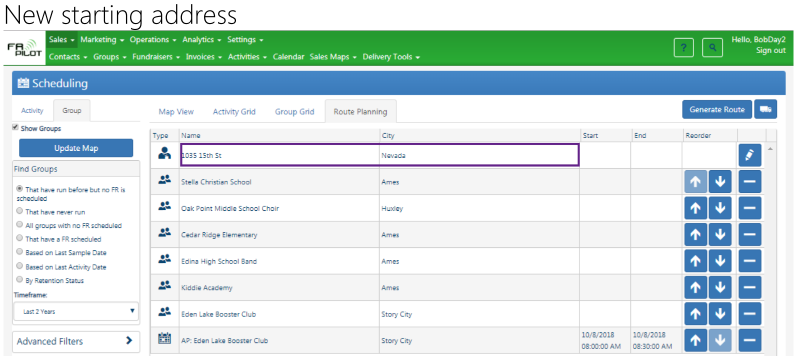
Select appropriate address from dropdown (click on User for this example)



Select appropriate address and Click **OK**

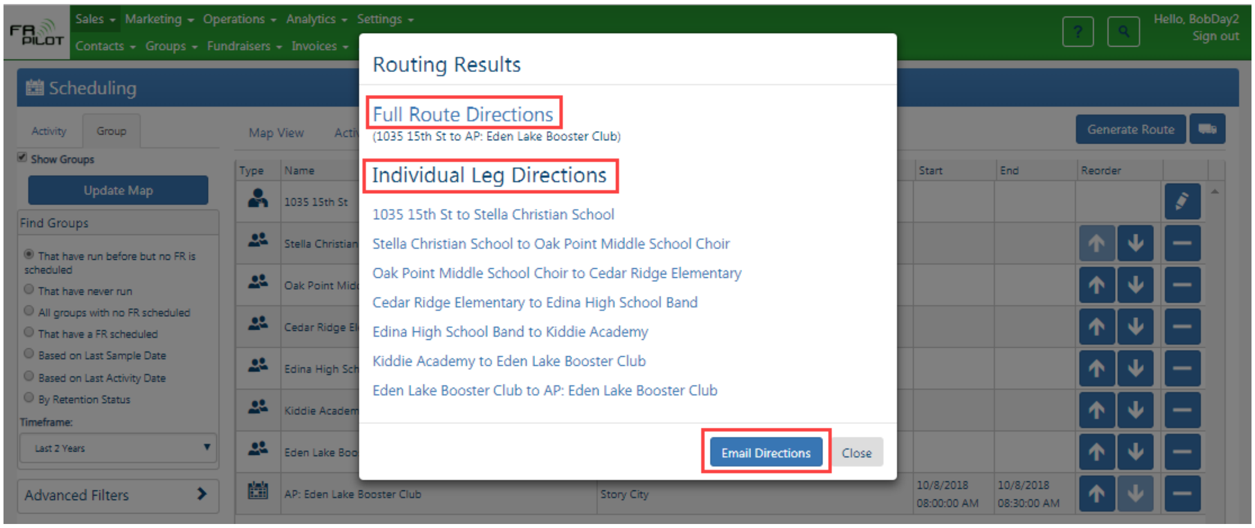


New starting address

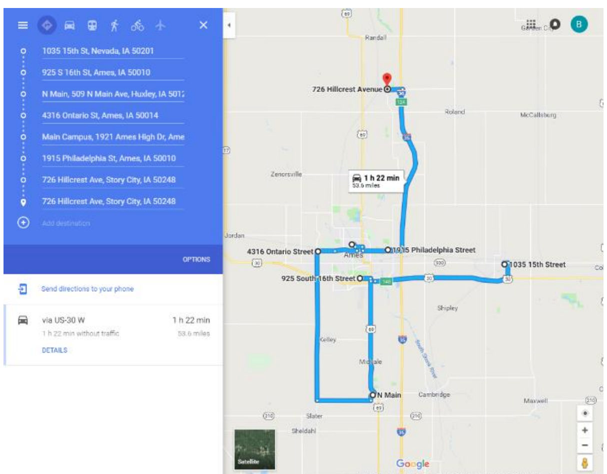


Generate Route

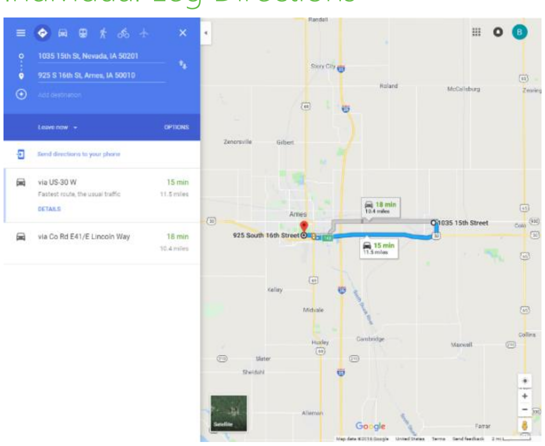
Click on the **Generate Route** button to create a Google Maps Route



Full Route Directions



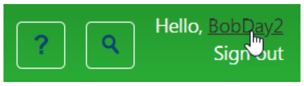
Individual Leg Directions



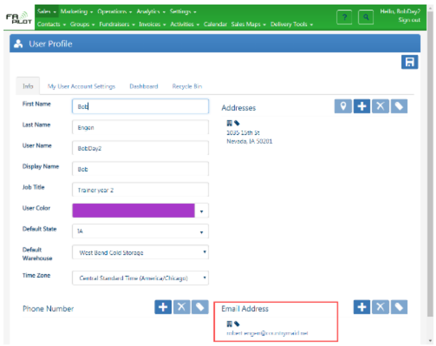
Email Route Directions

Click on the **Email Directions** button to email all directions to the signed in user email address

- To check the email address of signed in user:
    - Click on the User Name in top right corner



    - Look in the bottom right for the email address:



How to track selling product to another dealer

Create an invoice in My Fundraising Place with a group that has a name of the dealership you are selling to, but do NOT tie the invoice to a fundraiser:

- As the invoice is created, adjust the price for what you expect to receive for the product
    - You will end up with approximately zero $$ of gross margin for this sale, and as long as it is a small percentage of your overall sales, your financial statements will be an accurate representation of your core business activity.
- Since the invoice won't be tied to a fundraiser, it won't affect your statistics on the home page or in analytics
- The invoice can sync over to QB and you can receive payment like you would for any other sale
- Inventory is deducted accurately & a delivery activity can be scheduled from the invoice
- Record the lot numbers in the notes of the invoice
    - This keeps traceability in place if the FDA ever asks for a dealership to account for all product that you transferred on
    - Technically you are selling to another dealer as a distributor, in which case the FDA requires you to track lot numbers when you don't sell to an end customer or retail outlet

Inventory Adjustments

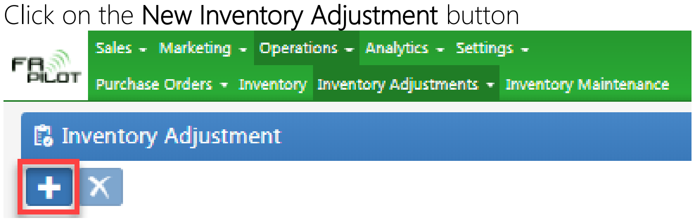
Frequency is up to you, but monthly adjustments seem to work well.

Types of Inventory Adjustments:

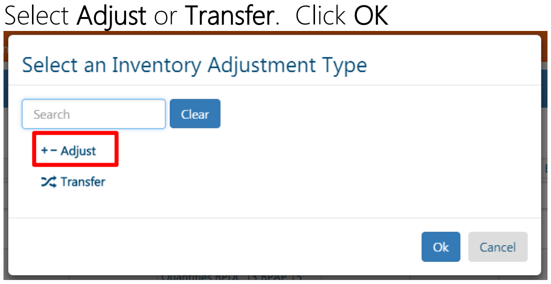
- Sample Logs
- Lost Product
- Transfers

How to do an inventory adjustment:

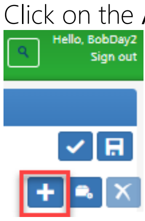
1. Go to **Operations > Inventory Adjustments**
2. Click on the **New Inventory Adjustment** button



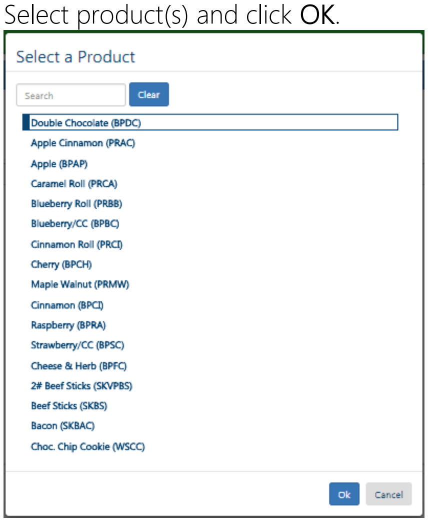
3. Select **Adjust** or **Transfer**. Click **OK**



4. Click on the **Add Product** button.

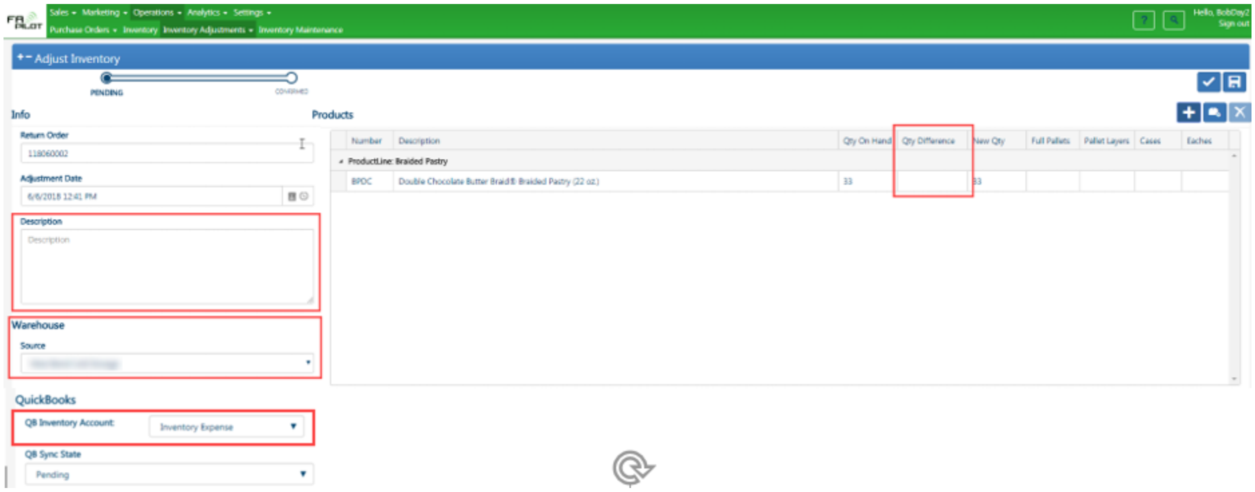


5. Select product(s) and click **OK**.



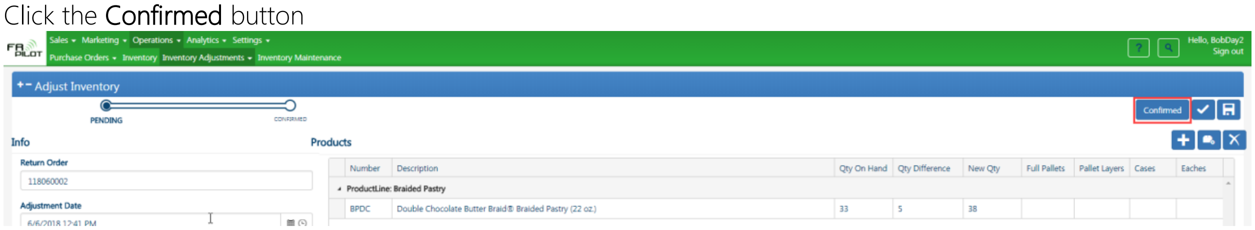
6. Update Inventory Adjustment information:

a. Enter in the **Qty Difference(s)** and **Description**
b. Select **Warehouse** and **QB Inventory Account**
c. Click **Save**
d. Confirm that the **New Qty(s)** is/are correct

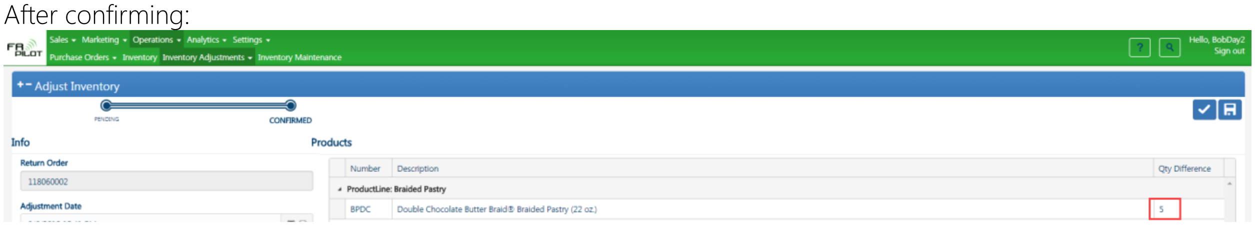


7. Click on the **Save** button

8. Click the **Confirmed** button

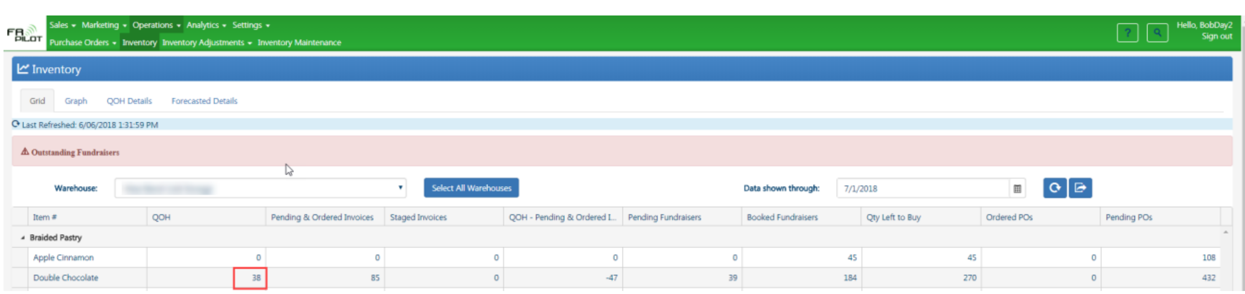


9. After confirming:



10. Click on the **Save & Close** button

11. Check your inventory after the adjustment:
    a. Go to **Operations > Inventory**

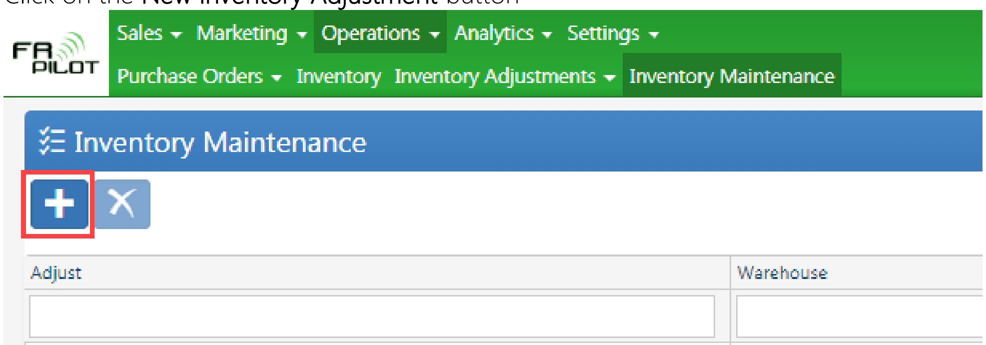


Inventory Maintenance Counts

- Done after doing a physical count of all your inventory. It will reset all inventory numbers to that physical count
- Recommend doing twice a year (end or beginning of each season)
- This will improve application performance and it will be easier to track inventory issues

How to do an Inventory Maintenance Count:

1. Go to Operations > Inventory Maintenance
2. Click on the New Inventory Adjustment button



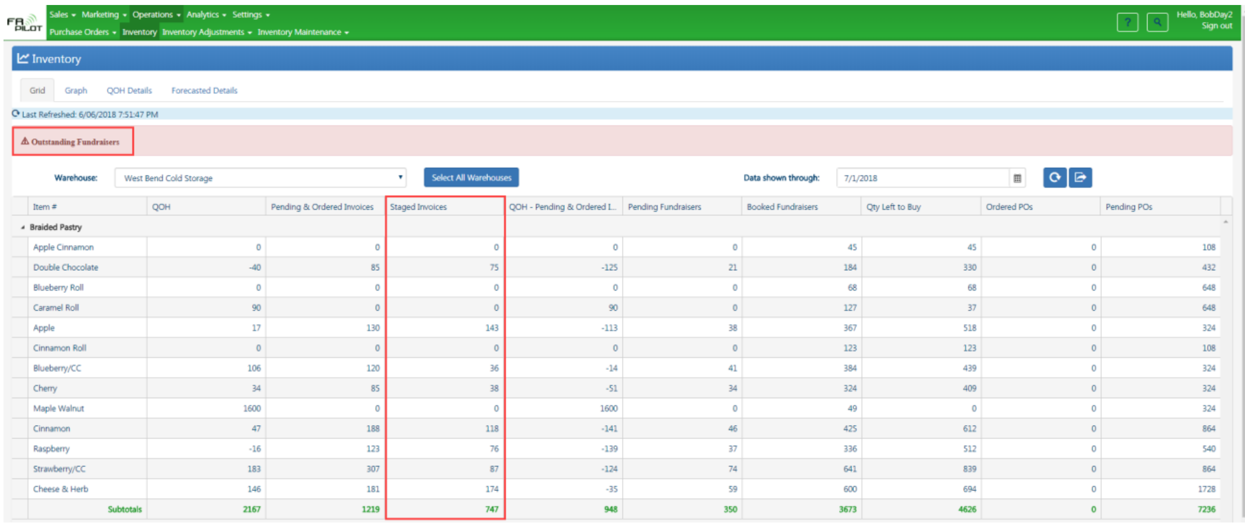
3. Select Source Warehouse

4. Enter in New Qty's (or enter combination of Full Pallets/Pallet Layers/Cases/Eaches – all will total to New Qty)
5. Click the Save button

6. Confirm that the New Qty's are correct for all items.
7. Click the Confirmed button

Inventory Staged Description

- Removes from the inventory without setting to delivered state
- Staged is removed from QOH
- Booked Fundraisers
  - Forecasts according to programs
- Outstanding Fundraisers Message
  - There are fundraisers still open that are scheduled to have been completed. This affects the below forecasted numbers.



Item #	QOH	Pending & Ordered Invoices	Staged Invoices	QOH - Pending & Ordered I...	Pending Fundraisers	Booked Fundraisers	Qty Left to Buy	Ordered POs	Pending POs
Braided Pastry									
Apple Cinnamon	0	0	0	0	0	45	45	0	108
Double Chocolate	-40	85	75	-125	21	184	330	0	432
Blueberry Roll	0	0	0	0	0	68	68	0	648
Caramel Roll	90	0	0	90	0	127	37	0	648
Apple	17	130	143	-113	38	367	518	0	324
Cinnamon Roll	0	0	0	0	0	123	123	0	108
Blueberry/CC	106	120	36	-14	41	384	439	0	324
Cherry	34	85	38	-51	34	324	409	0	324
Maple Walnut	1600	0	0	1600	0	49	0	0	324
Cinnamon	47	188	118	-141	46	425	612	0	864
Raspberry	-16	123	76	-139	37	336	512	0	540
Strawberry/CC	183	307	87	-124	74	641	839	0	864
Cheese & Herb	146	181	174	-35	59	600	694	0	1728
Subtotals	2167	1219	747	948	350	3673	4626	0	7236

Mixed Pallet Ordering Guide

Country Maid Inc. - Mixed Pallet Table						
Total Layers Per Pallet	Braided Pastry Layers	Cookie Dough Layers	Braided Pastry Cases	Cookie Dough Cases	Braided Pastry Units	Cookie Dough Units
12	12	0	216	0	1296	0
11	10	1	180	18	1080	108
11	9	2	162	36	972	216
11	8	3	144	54	864	324
11	7	4	126	72	756	432
10	5	5	90	90	540	540
10	4	6	72	108	432	648
10	3	7	54	126	324	756
9	1	8	18	144	108	864
9	0	9	0	162	0	972

Mixed Pallet Table 8/24/2016

Order Changes

Typical Order Process

Orders to Pack or Stage: Paperwork & Label Queue

Perform work of staging orders

Staged Orders: Paperwork & Label Queue

1. Print out orders
2. Paperwork and Label Queue (Orders to Pack or Stage)
3. Perform work of Staging orders
4. Paperwork and Label Queue (Staged Orders ready for delivery)
5. Delivery

Possible Order Change Errors

1. Invoicing
   a. Need for second invoice – first submitted for payment
   b. Pay the old revision – collections headache
   c. Hard to collect mistake – giving it away
2. Product Delivery
   a. Missing product at delivery
   b. No seller product – late order not prepacked
   c. Restaging an order – headaches (PT help/inventory)
   d. Wrong paperwork for operations

Order Change Scenarios

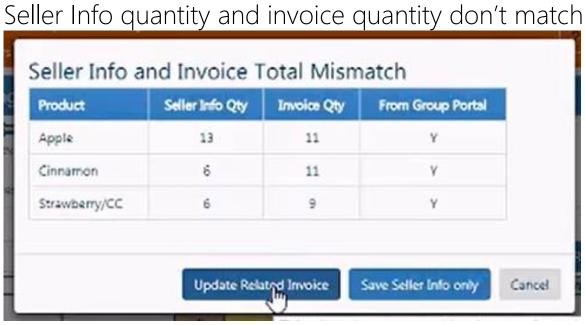
1. Not Printed Yet
   a. No worries, user will continue to make changes
2. Printed, not Staged
   a. To Do Box – hanging folders for each day
   b. If changes, replace paperwork
3. Staged
   a. Staged Box – hanging folders for each day
   b. Done – paperwork is lying down

c. Changes – paperwork is standing up

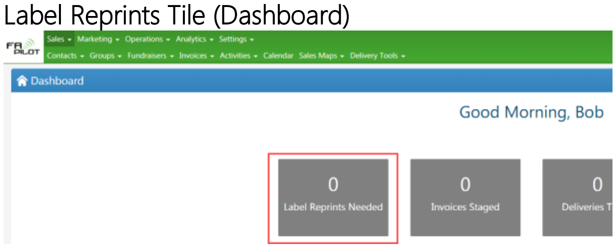
4. Delivered
    a. Do an add-on invoice

My Fundraising Place Tools to catch possible order change errors

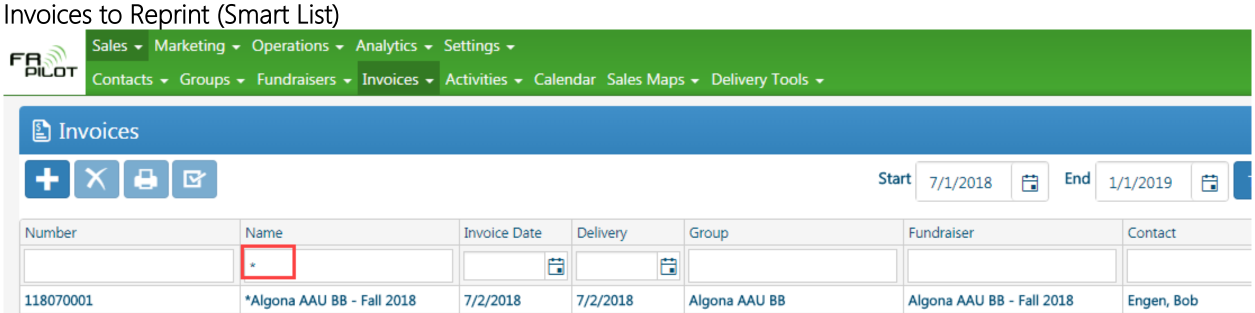
1. Group Leader Portal Locking
    a. Group Leader can make unlimited changes to their order and submit until labels or invoice is printed
        i. Once printed, GLP is locked at that point and you are made aware of any changes after that. You then must unlock or enter the order yourself
2. Printing Label's Error Messages:
    a. Seller Info and Invoice Total Mismatch
        i. Seller Info quantity and invoice quantity don't match



3. Label Reprints Tile (Dashboard)



4. Invoices to Reprint (Smart List)

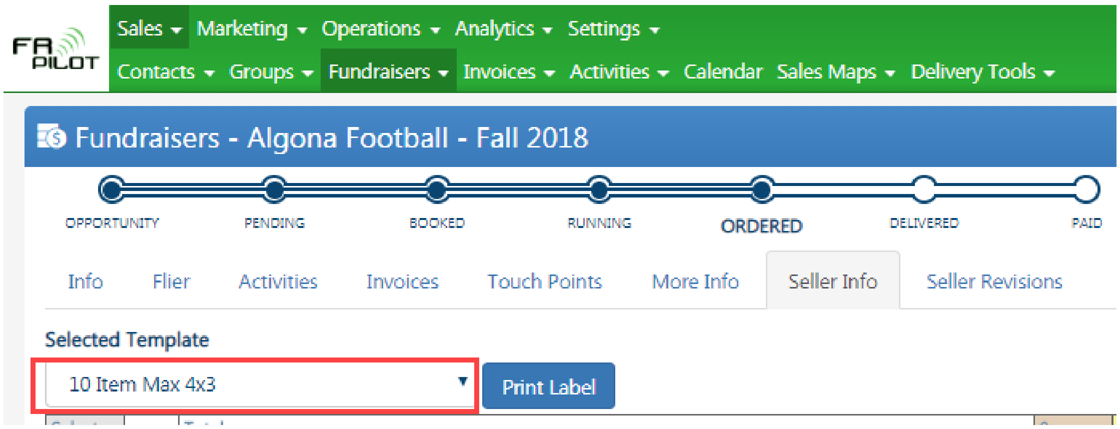


Tips/Takeaways:

1. Print labels later (minimize changes)
    a. Prepack Labor – run smart lists for units to plan ahead
2. Print invoices later (minimize multiple versions and invoices)
3. Follow through right away as changes happen
4. Do day of delivery checks in My Fundraising Place (My Fundraising Place Tools mentioned above)
5. Inventory will stay spot on if your invoices reflect all product (Do monthly adjustments also)
6. Mark multiple invoices to Stage at once on the Invoice Grid
7. Order changes offer you a competitive advantage. It adds value for your customers and the opportunity to outshine your competitors.

Printing Labels

1. Go to Sales > Fundraisers > Seller Info Tab



2. Select a Label Template from the dropdown
3. Click on Print Label button
    a. Once you click the Print Label button, My Fundraising Place assumes that you have printed the labels
    b. This will create a zip folder including these files:
        i. Batch 1 (Word document used to print out the prepack labels separated by batch size)
        ii. Group Name Report (Use as a label for the cart for the freezer)
        iii. Group Summary Report (Shows Items, cost, profit, averages)
        iv. Seller Info Pick Ticket 1 (Shows how many items. Cases plus eaches. Used to pick from the freezer)
        v. SellerStat (Seller Info Tab information in a spreadsheet to use however you want)

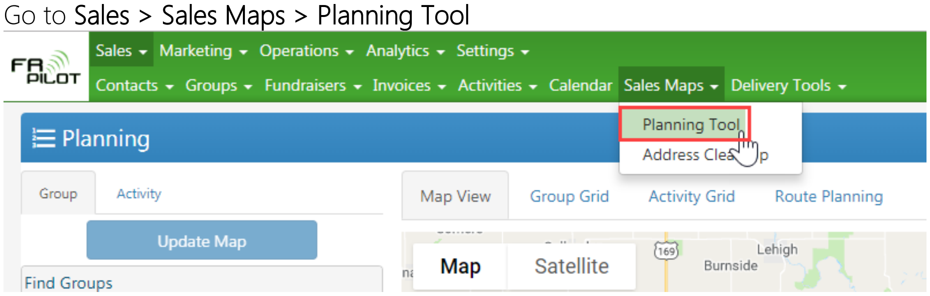
Sales Planning Tool

Benefits

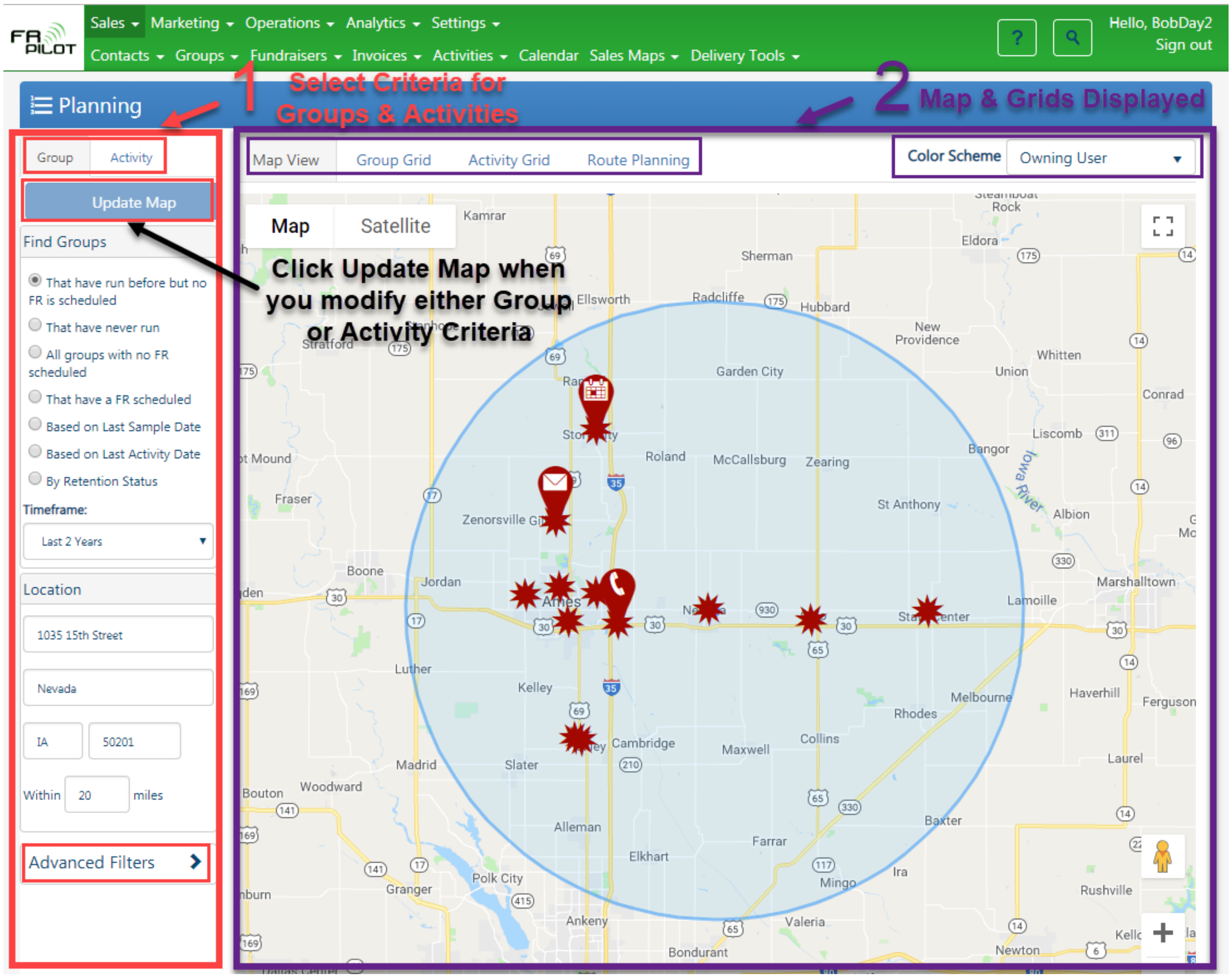
- See groups on a map instead of a list
- Helps you target and find the right groups, based on some of the most common search options
- Advanced search options
- Helps efficiency with your sampling efforts

Sales Planning Tool

- Go to Sales > Sales Maps > Planning Tool

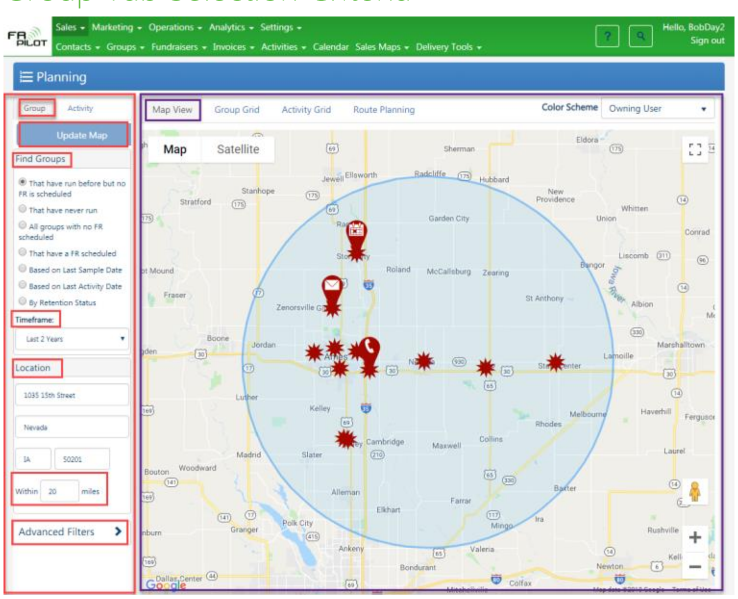


Main Screen

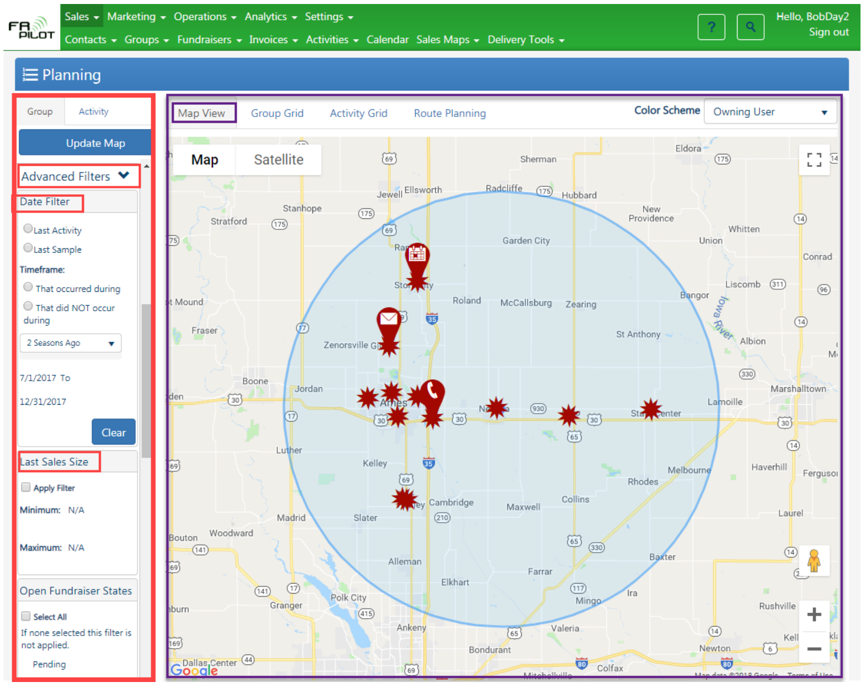


1 – Select Criteria for Groups & Activities

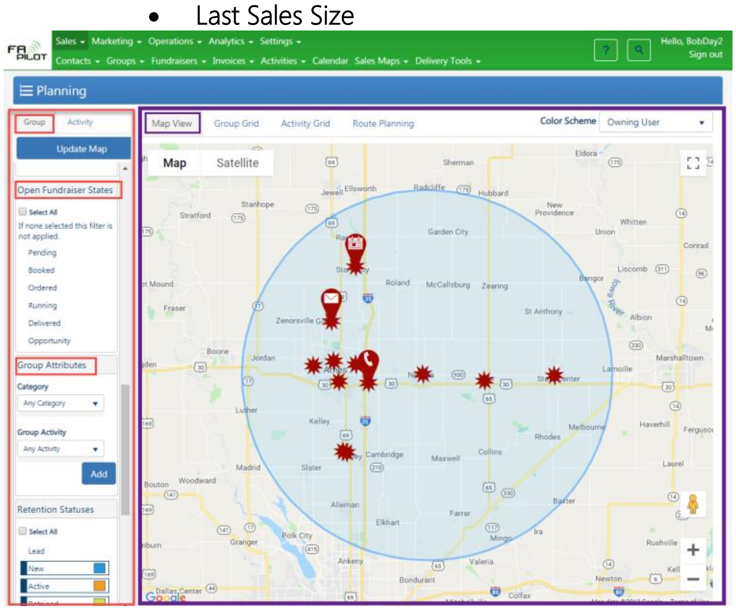
Group Tab Selection Criteria



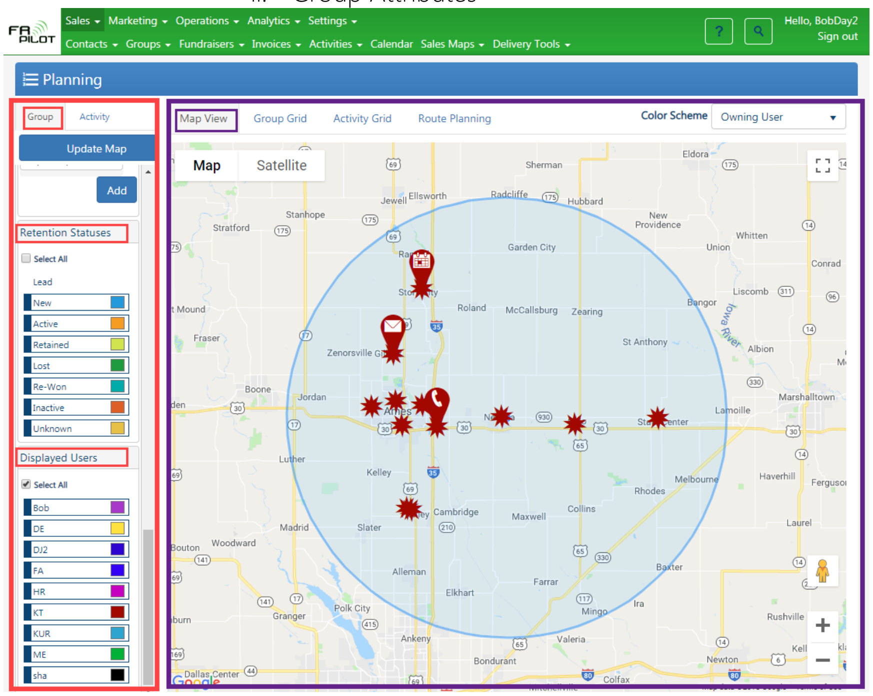
3. Options:
    - Find Groups:
    - Timeframe:
        i. This Season
        ii. Next Season
        iii. 2 Seasons From Now
        iv. Custom – you pick the date range
    - Location
    - Miles Radius (Within specific number of miles)
4. Advanced Filters:



    - Date Filter
        i. Last Activity
        ii. Last Sample
        iii. Timeframe
    - Last Sales Size



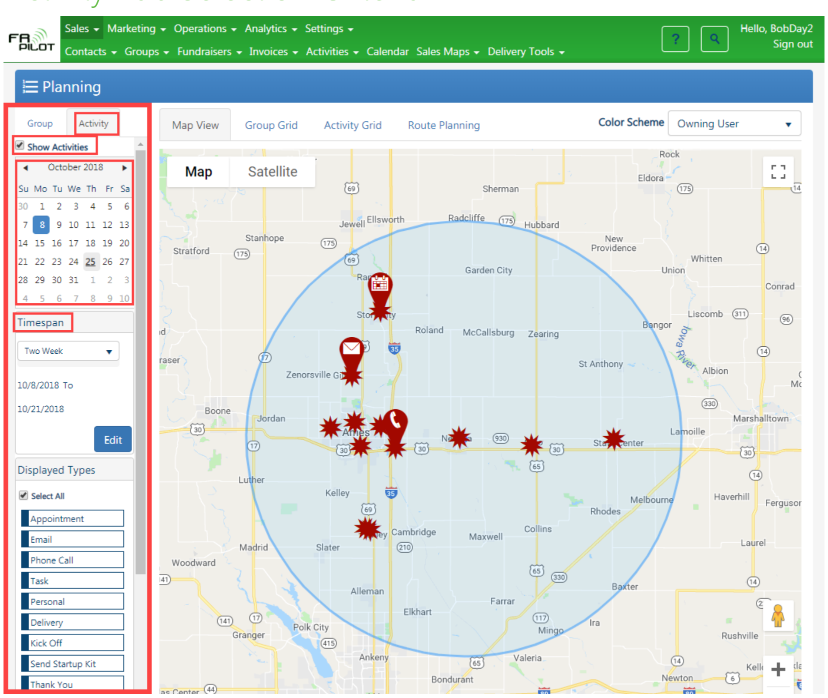
- Open Fundraiser States
- Group Attributes:
    i. Category
    ii. Group Attributes



- Retention Statuses
- Displayed Users

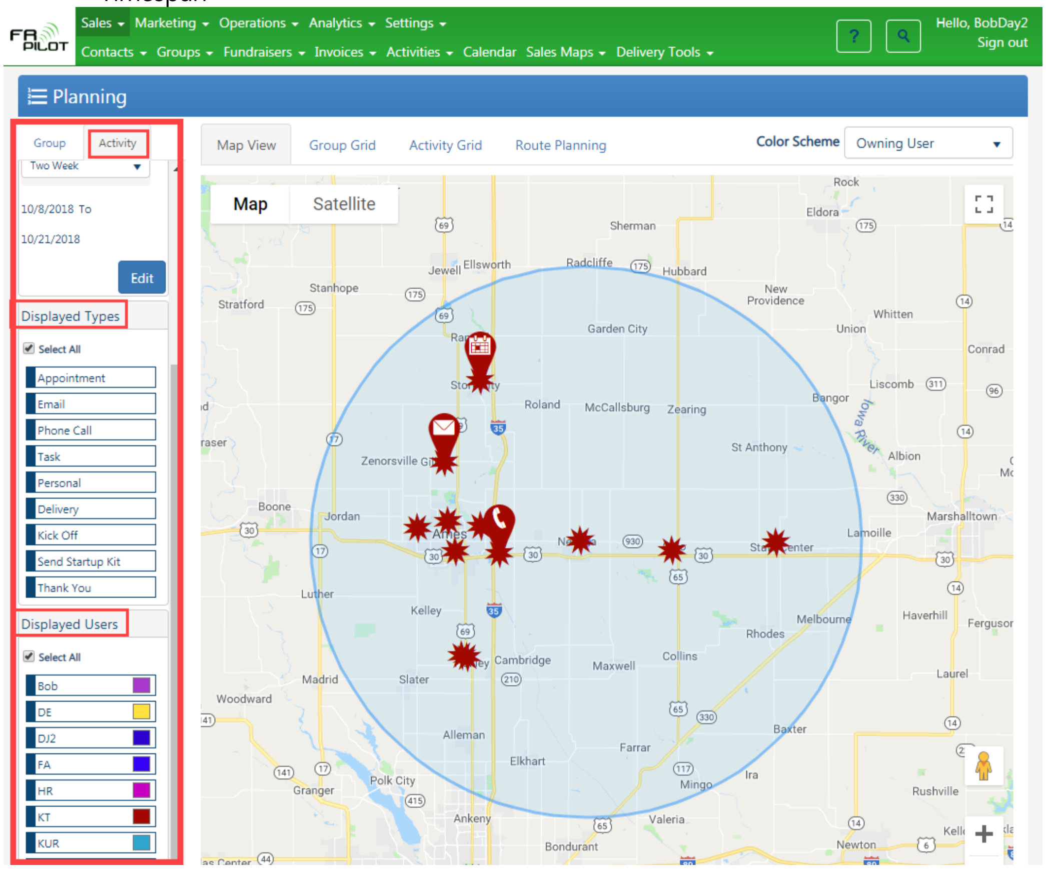
5. Update Map Button
    - Displayed only on Group Criteria Tab, but needed when either Group or Activity criteria are modified to update the map or grids

Activity Tab Selection Criteria



Options:

- Show Activities Checkbox
- Timespan

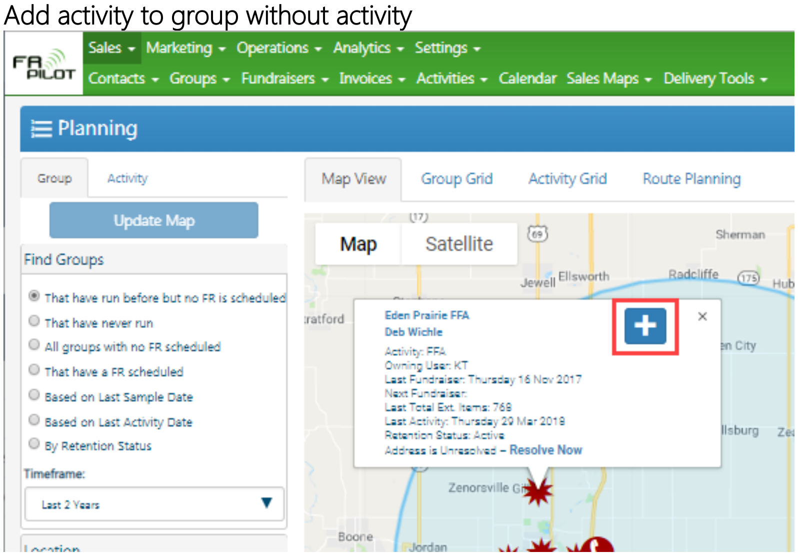


- Displayed Types
- Displayed Users

2 – Map & Grids Displayed

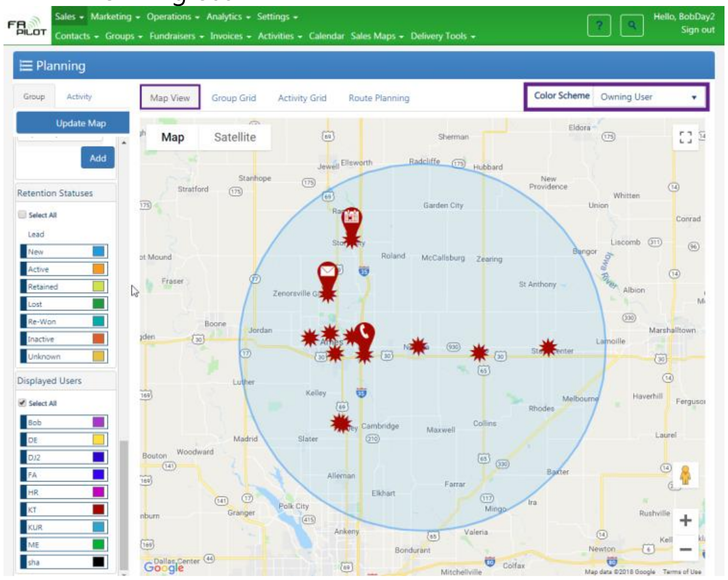
Map View

Add activity to group without activity

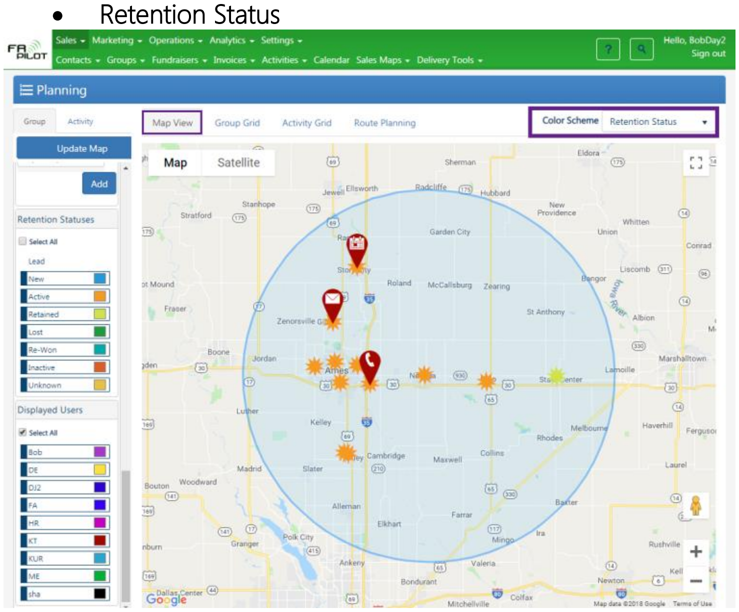


Color Schemes:

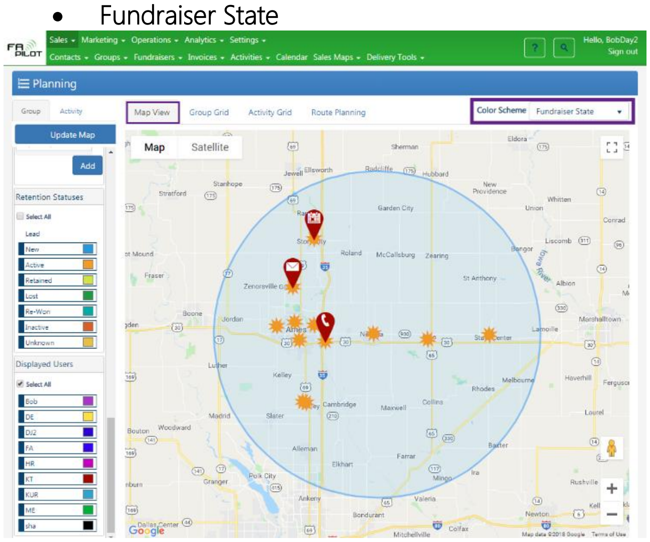
- Owning User



- Retention Status

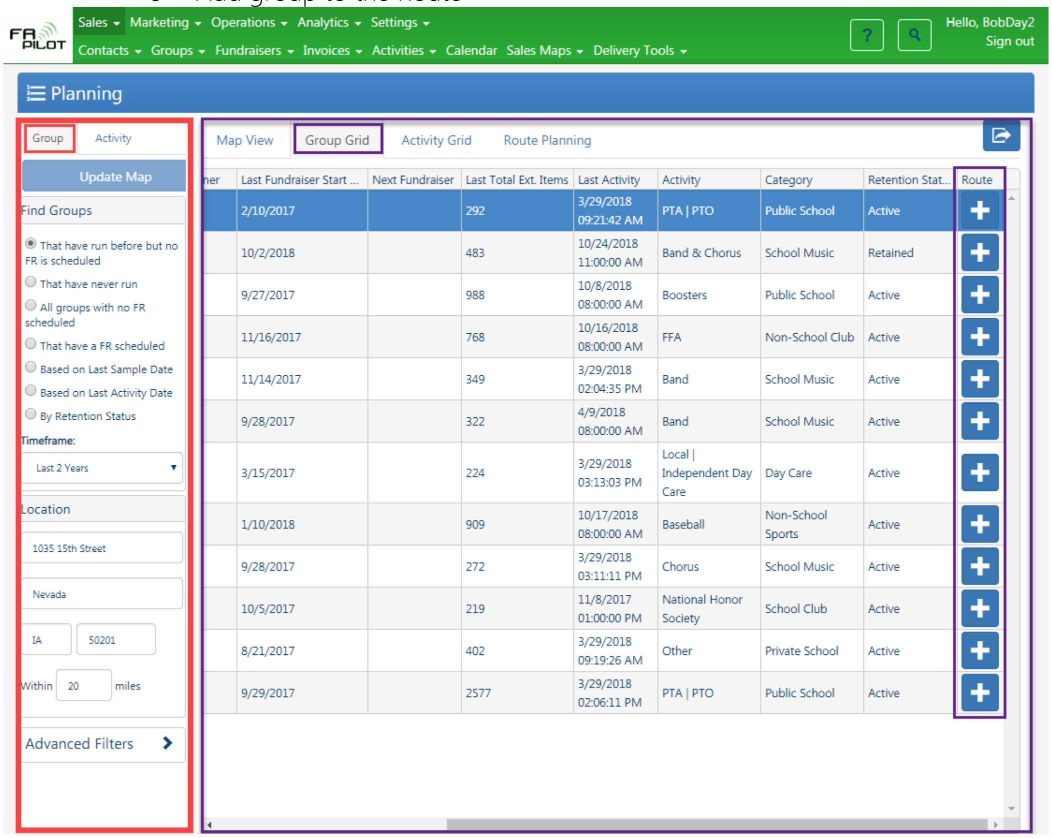


- Fundraiser State

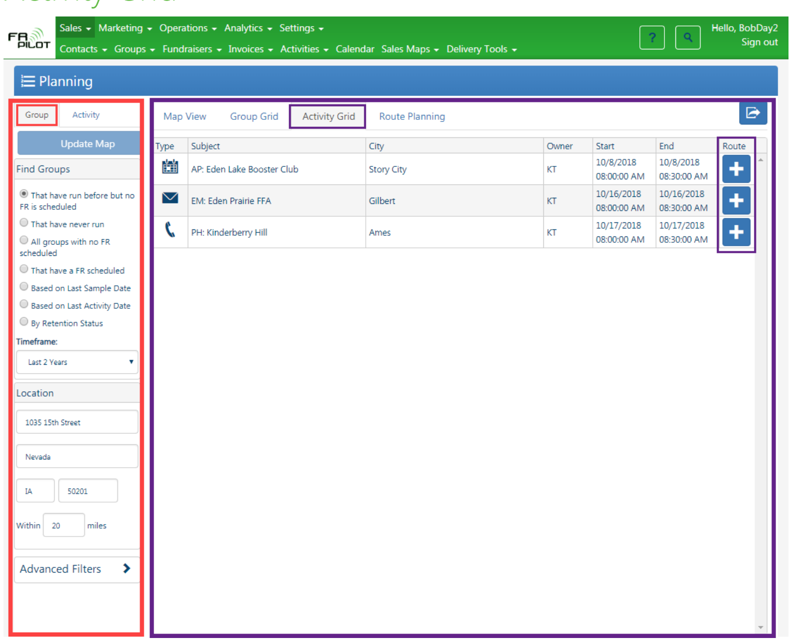


Group Grid

- Groups from map converted to grid
- Export to Excel Button
- Add to Route Button
  - Add group to the Route

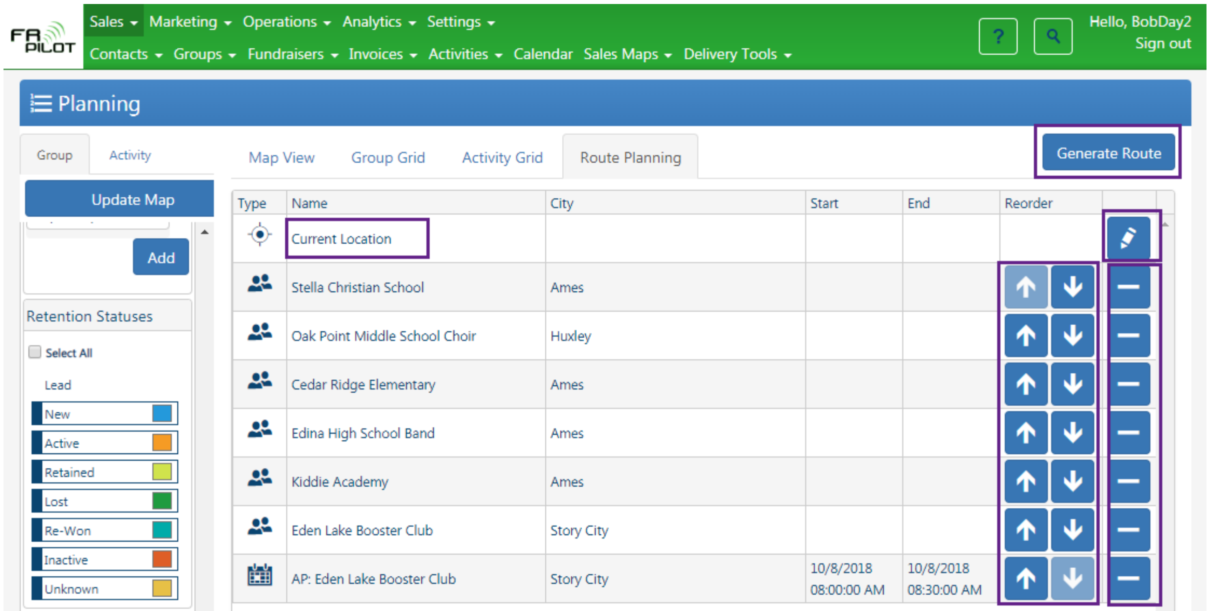


Activity Grid



- Activities from map converted to grid
- Export to Excel Button
- Add to Route Button

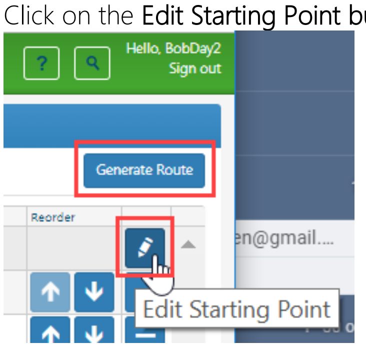
Route Planning



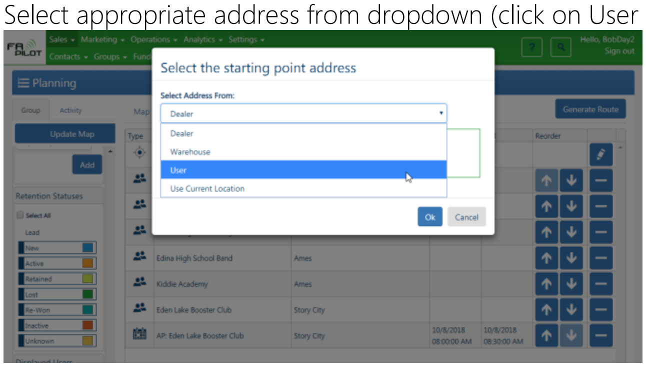
- Will display all groups or activities that were added to the route
- Move up or down along the route by clicking on the up or down arrows
- Delete from the route by clicking on the (-) button

Change Starting Point

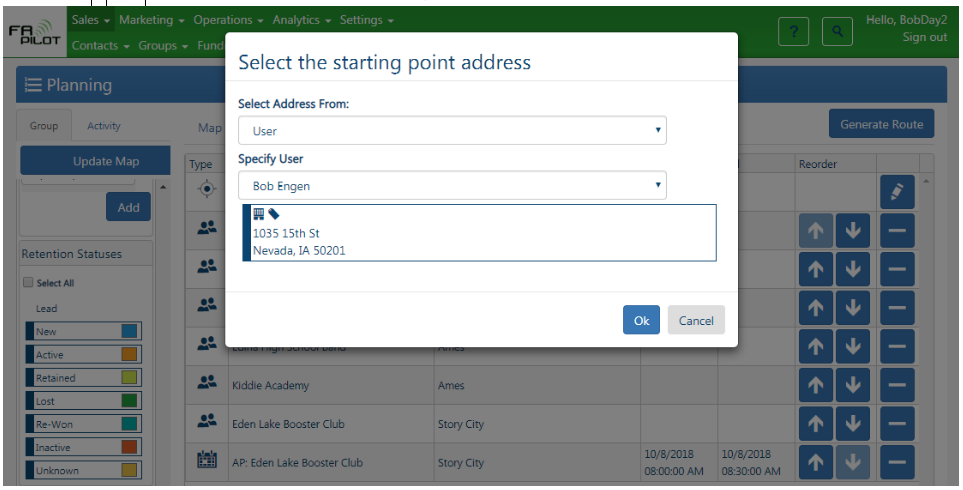
Click on the Edit Starting Point button



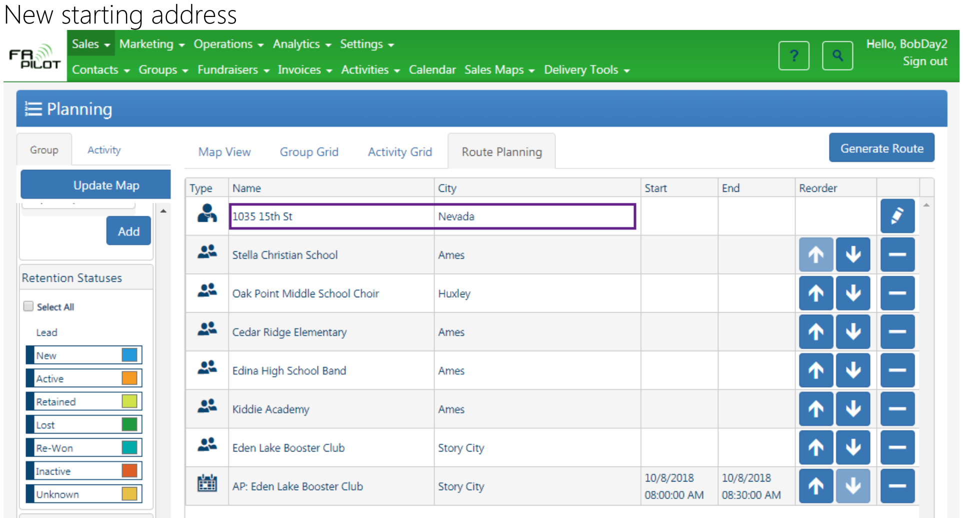
Select appropriate address from dropdown (click on User for this example)



Select appropriate address and Click **OK**

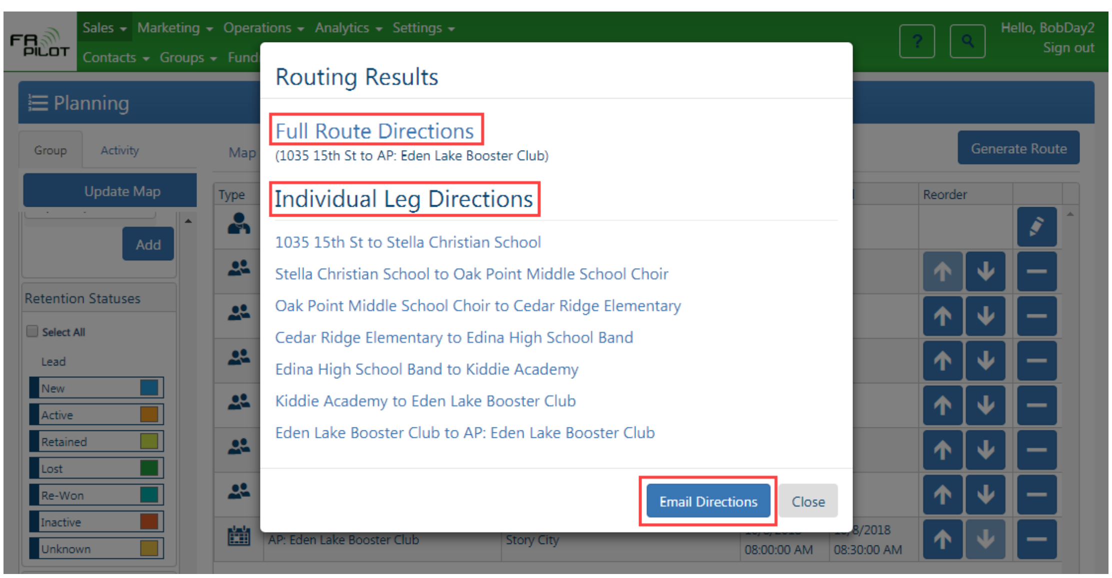


New starting address

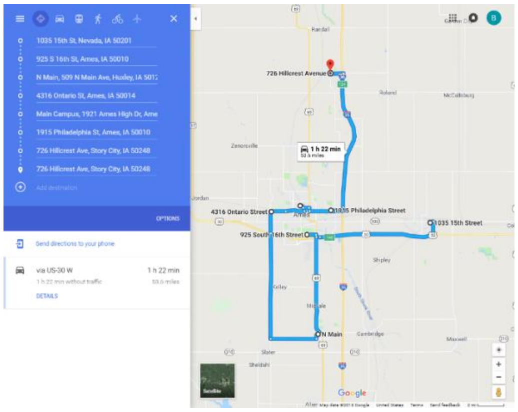


Generate Route

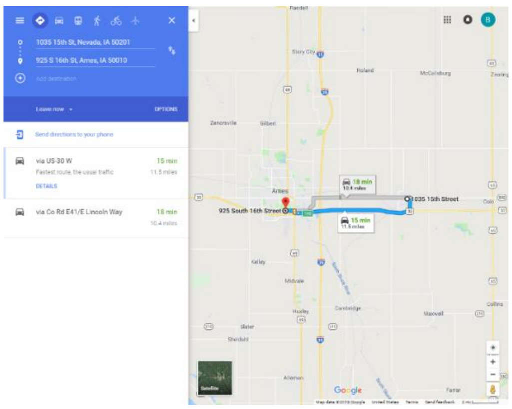
Click on the **Generate Route** button to create a Google Maps Route



Full Route Directions



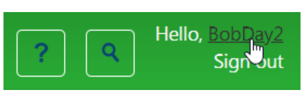
Individual Leg Directions



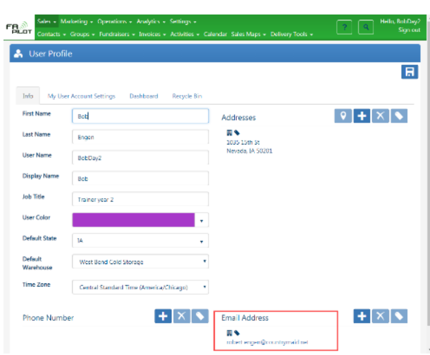
Email Route Directions

Click on the **Email Directions** button to email all directions to the signed in user email address

- To check the email address of signed in user:
  - Click on the User Name in top right corner



  - Look in the bottom right for the email address:



Why should you manage your inventory in My Fundraising Place?

Inventory forecasting in My Fundraising Place is very powerful and can help you make better business decisions. It requires very little data entry by you and by doing it, you will get some great benefits!

Why should you manage your inventory in My Fundraising Place?

- Deliver on your promises!
    - For some businesses, having enough product on hand is a matter of luck. They were lucky enough to have the product on hand when they needed it. This luck doesn't always last! If you don't have enough product on hand and fail to meet your commitments, then you risk losing that customer forever.
- Storage costs
    - Having too much inventory will lead to higher storage costs
- Cash flow
    - Accurate forecasts are important, so you don't tie up your cash in excess inventory
- Sales Planning
    - By forecasting you have visibility on what to expect in terms of sales. Knowing this information will allow you to adjust your sales plan instead of waiting until the end of the season to find out that your sales are down.
- Product Costs
    - The more accurate you are with your inventory needs, the better Country Maid can be at having the right amount of product, at the right warehouse, at the right time. This impacts your product costs!

Don't avoid forecasting because you are afraid that you won't be accurate! Forecasting is just an educated guess based on the information that you know about the group. Nobody is perfect when it comes to forecasting.

Tips:

- When forecasting for a fundraiser take the following into account:
    - Past performance of the group
    - The reason for the fundraiser (motivation)
    - The group sizes
    - Participation rates (based on this specific group's history or on this group type)
    - The group leader's strengths & weaknesses
- Perform Maintenance Counts once or twice per year
- Create Inventory Adjustments at least once per month
- Review your forecast accuracy by sales rep. Some reps might be too optimistic, and others might like "surprises" so they forecast too low. Knowing this information can help you be more accurate with your ordering.
- Compare your flavor percentages on the program to actual percentages multiple times throughout the season

Finance

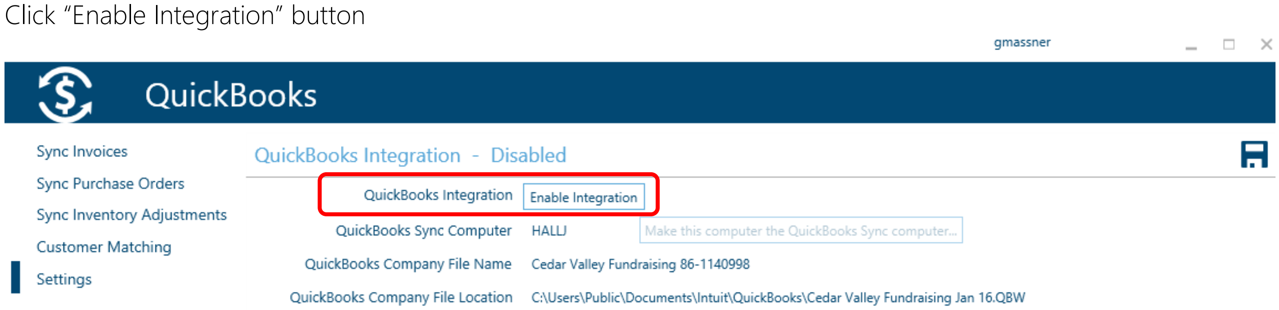
Setup & Use Quickbooks Integration

Country Maid will be glad to take you through the process of setting up QuickBooks integration.

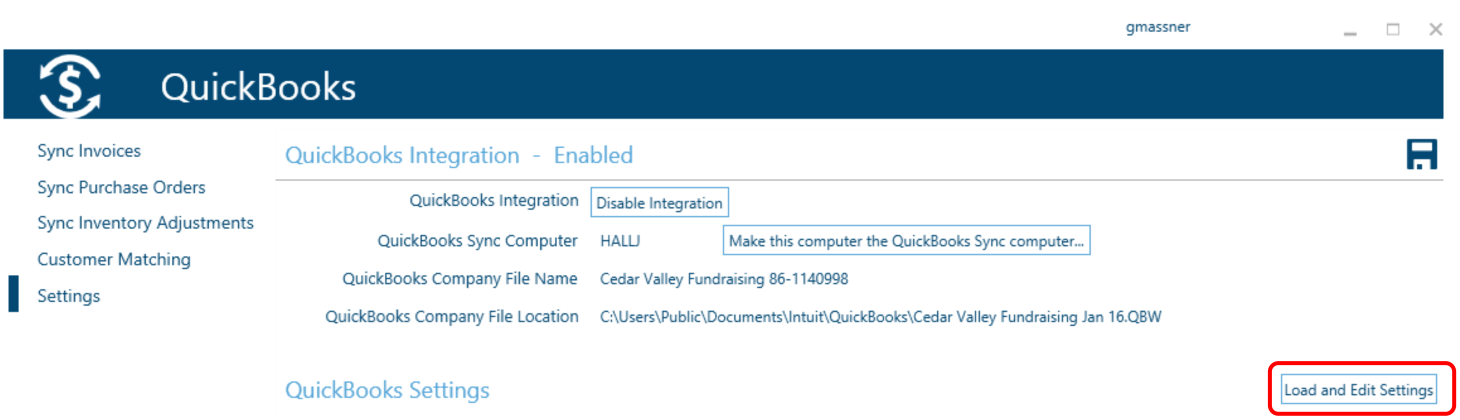
To Enable QuickBooks Integration

The general process for setting up integration is as follows:

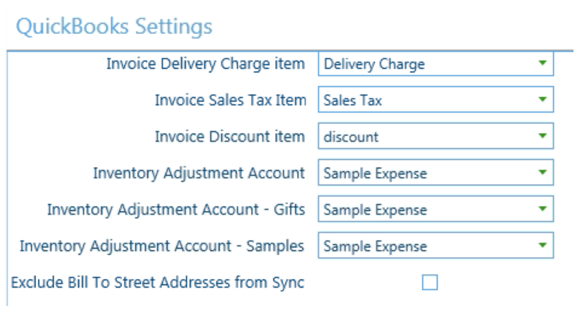
- Open My Fundraising Place on the computer that has QuickBooks installed. In sync agent, navigate to Settings
    - Click "Enable Integration" button



- Open QuickBooks into your company file (single user mode, logged in as an administrator)
- Click the "Make this computer the QuickBooks Sync Computer" button just below the "Enable Integration Button in My Fundraising Place (shown above)
- QuickBooks will then ask you if you want to let My Fundraising Place (or an unknown application) access its files. We recommend you say "Yes, when the QuickBooks file is open" from the list of options. You will have to answer this question 1 more time a little later as you do the next step.
- The next step is to click the "Load and Edit Settings" button (found on the right side of the screen, shown below)



- Now that settings are loaded (this will take a little while depending on the size of your QuickBooks file), you are ready to start selecting default "sync settings". The settings that are loaded into memory (but not retained by My Fundraising Place and will have to be re-loaded if you want to change settings) are:
    - Chart of accounts
    - Item list
    - Vendors
- The settings available to be matched to a QuickBooks expense account are as follows:
    - Invoice delivery charge item
    - Invoice Sales Tax Item
    - Invoice discount item
    - There are 3 types of inventory adjustments in My Fundraising Place. When creating the adjustments, you can select from the three adjustment types to send the cost to an expense account of your choice in QuickBooks:
        - Inventory Adjustment
        - Inventory Adjustment – Gifts
        - Inventory Adjustment – Samples



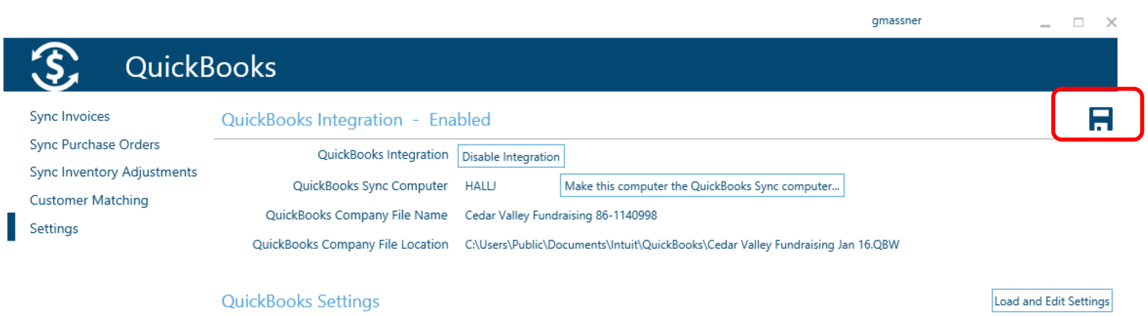
- After you map these accounts, the next step is to match products and vendors. My Fundraising Place allows you to map your product lines to different income, asset, and COGS accounts in QuickBooks. This is very helpful when using QuickBooks financial tools to analyze the sources of profitability and expenses. To map these, follow the following steps:
    - For each carried product line, match the income, asset and COGS accounts with the QuickBooks accounts that you have setup for them
    - Then for each carried product in My Fundraising Place, match them to an existing QuickBooks Item number (NOTE: if you later change the name of the QuickBooks item number or the My Fundraising Place item number, you will NOT have to re-map these settings)
    - Match the vendors in My Fundraising Place with the appropriate QuickBooks vendors

ProductLine	Carried	QuickBooks Income Account	QuickBooks Asset Account	QuickBooks COGS Account
Braided Pastry		Butter Braid	Inventory Asset	Butter Braid
Cookie Dough		Classic Breaks	Inventory Asset	Classic Breaks
Pastry Roll		Butter Braid Rolls	Inventory Asset	Butter Braid Rolls
Skoglund Meats		Skoglund Meats	Inventory Asset	Skoglund Meats

Product Number	Description	Carried	QuickBooks Item
BPAL	Almond Crème Butter Braid® Braided Pastry (22 oz.)		BBALMOND
BPAP	Apple Butter Braid® Braided Pastry (22oz.)		BBAPPLE
PRAC	Apple Cinnamon Butter Braid Pastry Roll		
BPBV	Bavarian Crème Butter Braid® Braided Pastry (22 oz.)		BBBV
SKJerky	Beef Jerky		SKBeefJerky
SKBS	Beef Sticks		SKBeefSticks
BPBC	Blueberry & Cream Cheese Butter Braid® Braided Pas		BBBLUEBERRY Butter Braid

Vendor	QuickBooks Vendor
Country Maid, Inc	Country Maid
Skoglund Meats	Skoglunds

- When finished with setup, click on the Save button in the upper right hand corner.



That's it for setting up QuickBooks integration! You now are ready to utilize this powerful tool as part of your dealership!

To start sync processes

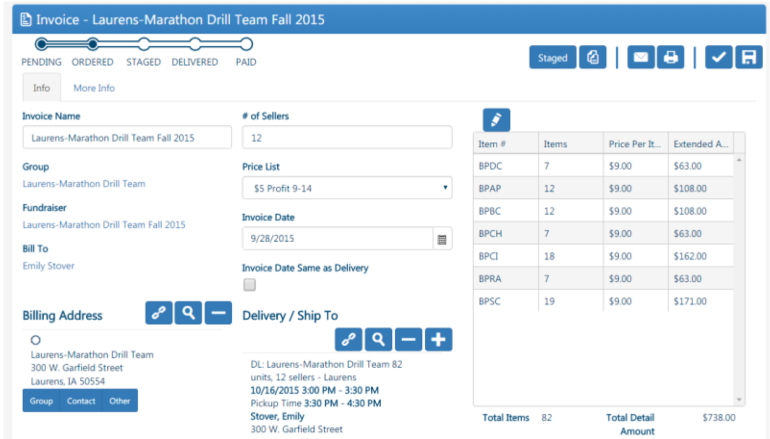
My Fundraising Place breaks up the sync process to ensure that it does not tie up a lot of internet bandwidth. You can sync the following entities independently:

- Invoices that need sent to QuickBooks
- Invoices that need to check QuickBooks for a paid status
- Inventory Adjustments
- Purchase Orders

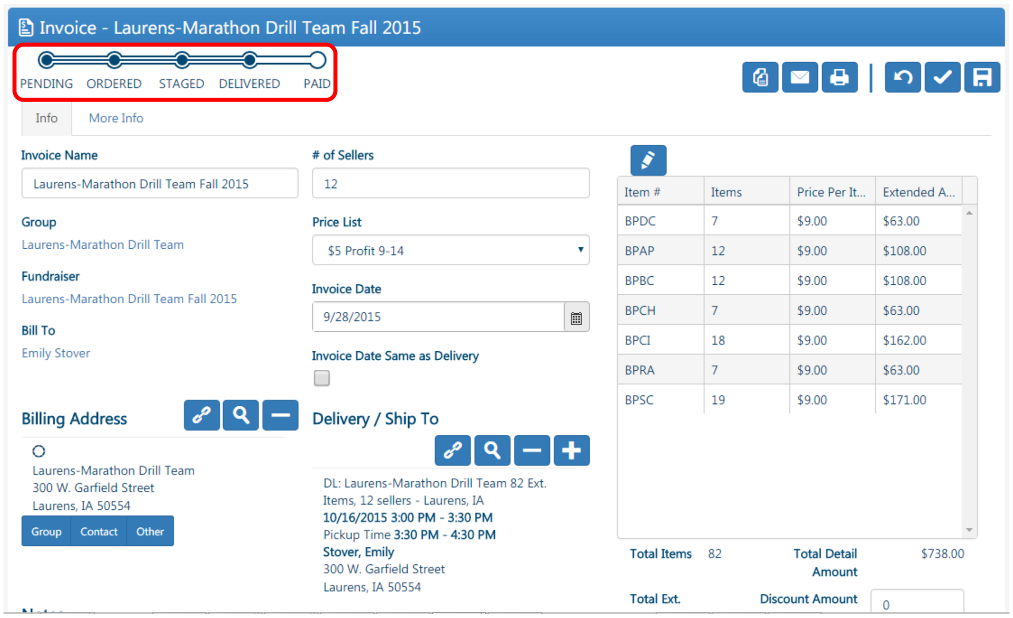
We will start with Invoices first. Inventory and purchase orders are self-explanatory once we understand invoices.

A) Invoices

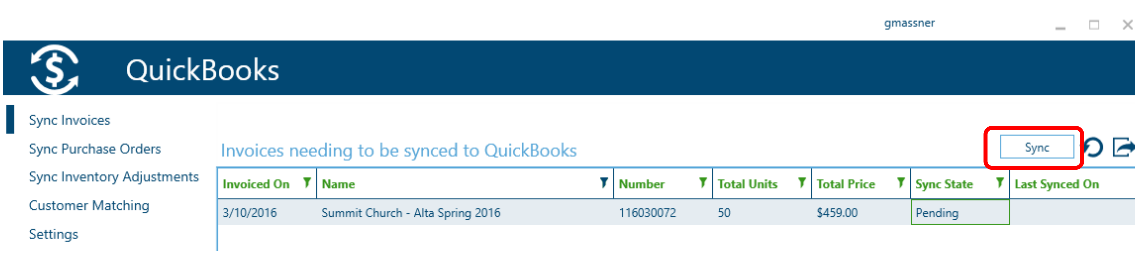
1. Step 1: Create Invoice(s) in My Fundraising Place



2. Step 2: Mark My Fundraising Place invoice(s) as "Delivered or "close" the related delivery activity

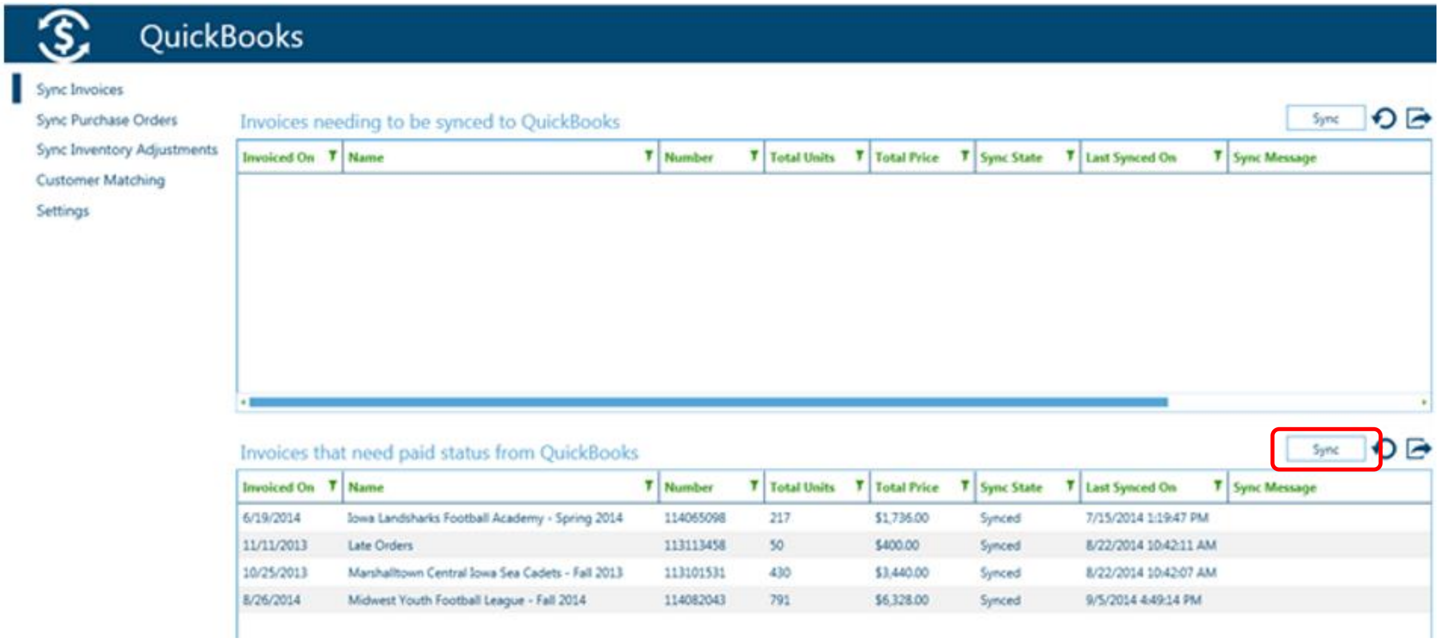


3. Step 3: In the Sync Agent, go to the Sync Invoices page and click the "Sync" button. Clicking this button will send the invoices listed in the grid below to QuickBooks.



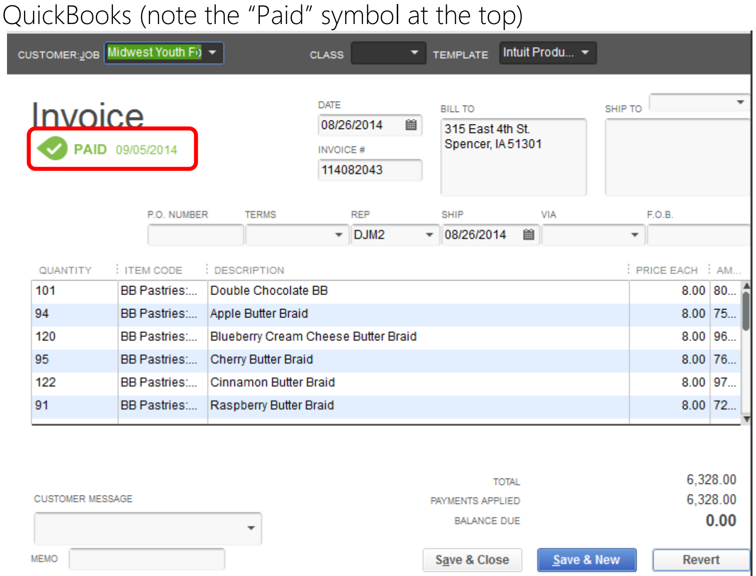
- Once the invoice is synced, the grid will show the following information that reflects that the sync was successful (a refresh will show an empty grid)

4. Once a user has received payment in QuickBooks (NOTE: The payment needs to be applied to the invoice so that QuickBooks records the invoice as "Paid") – the My Fundraising Place QuickBooks user can sync the lower grid on the invoice screen (shown below):



This grid shows the list of invoices waiting for QuickBooks to record the invoice as paid. By clicking this "sync" button, My Fundraising Place will look at the invoices in QuickBooks to determine if it has been paid or not.

Here is a look at the invoice in QuickBooks (note the "Paid" symbol at the top)



So now we will click the "sync" button on the lower grid and My Fundraising Place updates the invoice status to "Paid" and if this was the last open invoice for this fundraiser, it will mark the fundraiser as paid as well. In this example, you can see that 3 invoices were marked as paid when this sync was performed.

Invoices that need paid status from QuickBooks

Sync

Invoiced On	Name	Number	Total Units	Total Price	Sync State	Last Synced On	Sync Message
6/19/2014	Iowa Landsharks Football Academy - Spring 2014	114065098	217	$1,736.00	Synced	7/15/2014 1:19:47 PM	
11/11/2013	Late Orders	113113458	50	$400.00	Synced	9/5/2014 4:58:47 PM	Updated - Paid
10/25/2013	Marshalltown Central Iowa Sea Cadets - Fall 2013	113101531	430	$3,440.00	Synced	9/5/2014 4:58:49 PM	Updated - Paid
8/26/2014	Midwest Youth Football League - Fall 2014	114082043	791	$6,328.00	Synced	9/5/2014 4:58:53 PM	Updated - Paid

That is all there is to syncing invoices!

Purchase orders and Inventory adjustments are just a 1-way sync (My Fundraising Place pushes those over to QuickBooks so that the QuickBooks user can pay the bills and account for the inventory adjustment charges).

Other QuickBooks / My Fundraising Place Tools:

There are some tools in the Sync Agent that help My Fundraising Place users match existing QuickBooks and My Fundraising Place Customers. If you have merged QuickBooks customers together and now My Fundraising Place creates a new QuickBooks customer every time you sync an invoice from them, you likely need to re-map the My Fundraising Place group to an existing QuickBooks customer. Feel free to ask Country Maid to help you use these tools to solve your My Fundraising Place and QuickBooks integration issues!

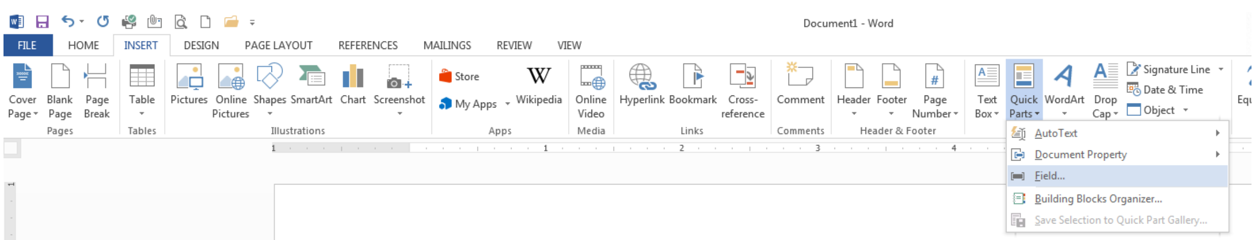
Setup

Adding and formatting merge fields in Microsoft Word

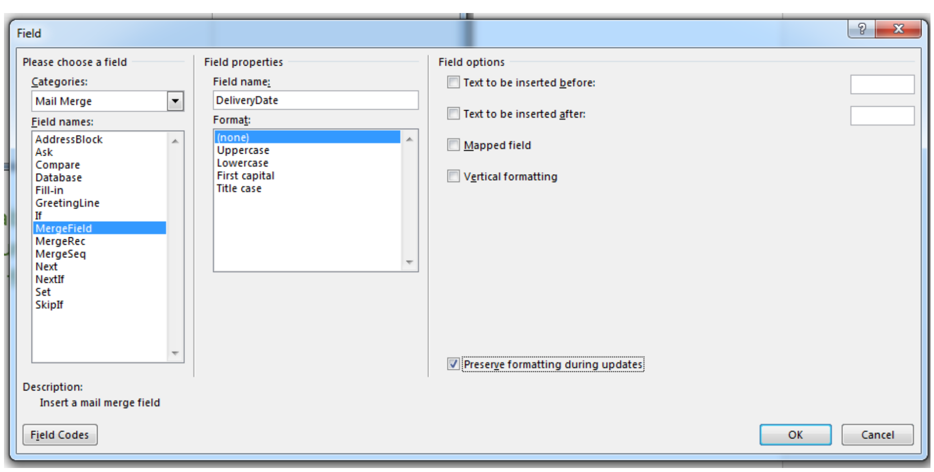
Here is a link to a 3 minute video showing an abbreviated summary of the content found in this document.
http://youtu.be/K7-5Ee91HF0

TIP: Appendix A is a handy reference when building templates, even if you already know how to use merge fields!

My Fundraising Place utilizes Microsoft Word® for email templates, custom flier templates, parent letters and (coming soon) the invoice templates.
My Fundraising Place passes numerical and date data into MS WORD as unformatted data, and the data formats must be applied within the MS WORD templates.
To add a merge field to a MS WORD Document, click on the insert field option found on the insert menu under the quick parts section.



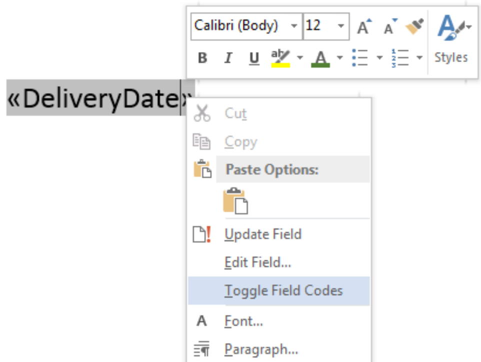
Then the following window will appear, and after you select "MailMerge" from the field categories and "MergeField" from the field names, your screen will look like this:



Then you can add any of the available field names for the email template that you are trying to create (see appendix B of this document for a list of all field names). This example is showing you how to add the “DeliveryDate” field to a MS WORD template. Once you click “OK” the following field is inserted into the document.

«DeliveryDate»

If you right click on the merge field and select “Toggle Field Codes”



Or hit “ALT + F9” you will toggle the merge field to see the merge field format codes. This is what it looks like when no field format codes have been applied.

{ MERGEFIELD DeliveryDate * MERGEFORMAT }

If you had data that was pushed into this delivery date field that was a date and time (such as: 04/07/2003), you could format the field several different ways (see appendix A for complete table of formatting options)

Date/Time Format Code	Description	Field Code Example	Output Example
Day			
d	Displays the day of the week or month as a number. Single digit day numbers will not include a leading zero.	{MERGEFIELD Date \@ "M/d/yyyy"}	4/7/2003
dd	Displays the day of the week or month as a number. Single digit day numbers will include a leading zero.	{MERGEFIELD Date \@ "d MMMM yyyy"}	07 April 2003
ddd	Displays a three-letter abbreviation for the day of the week.	{MERGEFIELD Date \@ "ddd, d-MMM-yy"}	Mon, 7-Apr-03
dddd	Displays the full name of the day of the week.	{MERGEFIELD Date \@ "dddd, MMMM d, yyyy"}	Monday, April 7, 2003
Month (Use uppercase M for months, lowercase m for minutes)			
M	Displays the month as a number. Single digit month numbers will not include a leading zero.	{MERGEFIELD Date \@ "M/d/yy"}	4/7/03
MM	Displays the month as a number. Single digit month numbers will include a leading zero.	{MERGEFIELD Date \@ "yyyy-MM-dd"}	2003-04-07
MMM	Displays a three-letter month abbreviation.	{MERGEFIELD Date \@ "MMM-yy"}	Apr-03
MMMM	Displays the full month name	{MERGEFIELD Date \@ "MMMM d, yyyy"}	April 7, 2003
Year			
yy	Displays a two-digit year number. For years 1-9, the year number will include a leading zero.	{MERGEFIELD Date \@ "MMM-yy"}	Apr-03
yyyy	Displays a four digit year number	{MERGEFIELD Date \@ "MMMM d, yyyy"}	April 7, 2003

If you are formatting time, you can use the following formats:

Hours			
h	Use lowercase h to display times based on the 12-hour clock. Lowercase h displays single-digit hours as single-digit numbers, without a leading zero.	{MERGEFIELD Time \@ "h:mm"}	6:05
hh	Use lowercase hh to display times based on the 12-hour clock. Lowercase hh displays single-digit hours with a leading zero.	{MERGEFIELD Time \@ "hh:mm am/pm"}	06:05 am
H	Use uppercase H to display times based on the 24-hour clock (military clock). Uppercase H displays single-digit hours as single-digit numbers, without a leading zero.	{MERGEFIELD Time \@ "H:mm"}	7:05
HH	Use uppercase HH to display times based on the 24-hour clock (military clock). Uppercase HH displays single-digit hours with a leading zero.	{MERGEFIELD Time \@ "HH:mm"}	18:30
Minutes (Use lowercase m for minutes, uppercase M for months)			
m	Displays single-digit minutes without a leading zero.	{MERGEFIELD Time \@ "m 'minutes'"}	2 minutes
mm	Displays single-digit minutes with a leading zero.	{MERGEFIELD Time \@ "hh:mm am/pm"}	06:05 am
AM & PM			
AM/PM	Displays uppercase AM or PM.	{MERGEFIELD Time \@ "hh:mm AM/PM"}	08:30 PM
am/pm	Displays lowercase am or pm.	{MERGEFIELD Time \@ "hh:mm am/pm"}	07:55 am
Other Text			
'text'	To display text within a date or time, enclose the text in single quotation marks.	{MERGEFIELD Date \@ "hh:mm 'EST'"}	06:15 EST
character	To include a character, such as - (hyphen), in a date or time, do not enclose in quotation marks.	{MERGEFIELD Date \@ "MMM-yy"}	Apr-03

If you are formatting other numbers, you can use the following formats:

Percentages

Frequently, percentages will display as decimals - e.g. 41% from the data may display as 0.41354836739 when merged into Word. To display the decimal as a percentage, you should create a calculated field e.g.:

{ ={ MERGEFIELD Amount } * 100 \# "0% "}   41%

%, $, *, and so on	Includes the specified character in the result. For example, { = netprofit \# "##%" } displays "33%".

For more information, refer to the following references:
http://www.officearticles.com/word/merge_field_formatting_in_microsoft_word.htm
http://support.softartisans.com/WordWriterV1/doc/features/format.asp
http://www.gmayor.com/formatting_word_fields.htm

Here is a link to a short video showing the insertion of a merge field and formatting the date.
http://youtu.be/K7-5Eif_e91HF0

Appendix A – List of all merge fields

Merge Field Format	Merge Field Name	Data Type	Notes
Flier	ContactName	string	
Flier	ContactNameLabel	string	
Flier	ContactPhone	string	
Flier	ContactPhoneLabel	string	
Flier	DealerCity	string	
Flier	DealerEmail	string	
Flier	DealerName	string	
Flier	DealerPhone	string	
Flier	DealerState	string	
Flier	DealerStreet1	string	
Flier	DealerStreet2	string	
Flier	DealerWebsite	string	
Flier	DealerZipcode	string	
Flier	DeliveryDate	DateTime	Same as DeliveryOn
Flier	DeliveryDateLabel	string	
Flier	DeliveryOn	DateTime	Format for DATE only!
Flier	FundsFor	string	
Flier	GroupGoal	decimal	
Flier	GroupName	string	
Flier	GroupNameLabel	string	
Flier	GroupProfitGoal	decimal	Called GroupGoal on flier
Flier	MakeChecksTo	string	
Flier	MinimumPerSeller	int	
Flier	Note1	string	
Flier	Note2	string	
Flier	Note3	string	
Flier	P01CP	decimal	
Flier	P01DN	string	
Flier	P01NM	string	
Flier	P02CP	decimal	
Flier	P02DN	string	
Flier	P02NM	string	
Flier	P03CP	decimal	
Flier	P03DN	string	
Flier	P03NM	string	
Flier	P04CP	decimal	
Flier	P04DN	string	
Flier	P04NM	string	
Flier	P05CP	decimal	
Flier	P05DN	string	

Flier	P05NM	string	
Flier	P06CP	decimal	
Flier	P06DN	string	
Flier	P06NM	string	
Flier	P07CP	decimal	
Flier	P07DN	string	
Flier	P07NM	string	
Flier	P08CP	decimal	
Flier	P08DN	string	
Flier	P08NM	string	
Flier	P09CP	decimal	
Flier	P09DN	string	
Flier	P09NM	string	
Flier	P10CP	decimal	
Flier	P10DN	string	
Flier	P10NM	string	
Flier	P11CP	decimal	
Flier	P11DN	string	
Flier	P11NM	string	
Flier	P12CP	decimal	
Flier	P12DN	string	
Flier	P12NM	string	
Flier	P13CP	decimal	
Flier	P13DN	string	
Flier	P13NM	string	
Flier	P14CP	decimal	
Flier	P14DN	string	
Flier	P14NM	string	
Flier	P15CP	decimal	
Flier	P15DN	string	
Flier	P15NM	string	
Flier	P16CP	decimal	
Flier	P16DN	string	
Flier	P16NM	string	
Flier	P17CP	decimal	
Flier	P17DN	string	
Flier	P17NM	string	
Flier	P18CP	decimal	
Flier	P18DN	string	
Flier	P18NM	string	
Flier	P19CP	decimal	
Flier	P19DN	string	
Flier	P19NM	string	
Flier	P20CP	decimal	
Flier	P20DN	string	

Flier	P20NM	string	
Flier	P21CP	decimal	
Flier	P21DN	string	
Flier	P21NM	string	
Flier	P22CP	decimal	
Flier	P22DN	string	
Flier	P22NM	string	
Flier	P23CP	decimal	
Flier	P23DN	string	
Flier	P23NM	string	
Flier	P24CP	decimal	
Flier	P24DN	string	
Flier	P24NM	string	
Flier	P25CP	decimal	
Flier	P25DN	string	
Flier	P25NM	string	
Flier	ReturnOrderOn	DateTime	Format for DATE only!
Invoice	AmountCollectedOnline	decimal	
Invoice	BillToAddress	string	
Invoice	BillToContactFirstName	string	
Invoice	BillToContactLastName	string	
Invoice	BillToContactName	string	
Invoice	BillToGroupName	string	
Invoice	BillToPhone	string	
Invoice	DealerAddress	string	
Invoice	DealerEmail	string	
Invoice	DealerLogo	image	
Invoice	DealerName	string	
Invoice	DealerWebsite	string	
Invoice	DeliveredOn	DateTime	
Invoice	Delivery	decimal	
Invoice	DeliveryArriveAt	DateTime	
Invoice	DeliveryArriveAtFormatted	string	
Invoice	DeliveryArriveOn	DateTime	
Invoice	DeliveryDate	DateTime	
Invoice	DeliveryPickupEnd	DateTime	
Invoice	DeliveryPickUpFormatted	string	
Invoice	DeliveryPickupStart	DateTime	
Invoice	DetailTotal	decimal	
Invoice	Discount	decimal	
Invoice	FundraiserName	string	
Invoice	InvoiceDate	DateTime	
Invoice	InvoiceNumber	string	
Invoice	Notes	string	
Invoice	Profit	decimal	

Invoice	ProfitPercentage	decimal	
Invoice	QuantityTotal	int	
Invoice	RevisionNumber	int	
Invoice	ShipToAddress	string	
Invoice	ShipToContactFirstName	string	
Invoice	ShipToContactLastName	string	
Invoice	ShipToContactName	string	
Invoice	ShipToGroupName	string	
Invoice	ShipToPhone	string	
Invoice	Subtotal	decimal	
Invoice	Tax	decimal	
Invoice	TotalDue	decimal	
Invoice Details	Cases	int	
Invoice Details	DisplayOrder	int	
Invoice Details	Eaches	int	
Invoice Details	ProductLineName	string	
Invoice Details	ProductName	string	
Invoice Details	ProductNumber	string	
Invoice Details	Quantity	int	
Invoice Details	TotalUnitPrice	decimal	
Invoice Details	UnitPrice	decimal	
Label	Box «X» of «N	string	
Label	CurrentLabelCount	decimal	
Label	CustomField1	string	
Label	CustomField2	string	
Label	CustomField3	string	
Label	DeliveryDate	DateTime	
Label	LabelCount	decimal	
Label	LastPrintedDate	DateTime	
Label	Organization	string	
Label	P01Nm	string	
Label	P01Qty	int	
Label	P01SNm	string	
Label	P02Nm	string	
Label	P02Qty	int	
Label	P02SNm	string	
Label	P03Nm	string	
Label	P03Qty	int	
Label	P03SNm	string	
Label	P04Nm	string	
Label	P04Qty	int	
Label	P04SNm	string	
Label	P05Nm	string	
Label	P05Qty	int	
Label	P05SNm	string	

Label	P06Nm	string	
Label	P06Qty	int	
Label	P06SNm	string	
Label	P07Nm	string	
Label	P07Qty	int	
Label	P07SNm	string	
Label	P08Nm	string	
Label	P08Qty	int	
Label	P08SNm	string	
Label	P09Nm	string	
Label	P09Qty	int	
Label	P09SNm	string	
Label	P10Nm	string	
Label	P10Qty	int	
Label	P10SNm	string	
Label	P11Nm	string	
Label	P11Qty	int	
Label	P11SNm	string	
Label	P12Nm	string	
Label	P12Qty	int	
Label	P12SNm	string	
Label	P13Nm	string	
Label	P13Qty	int	
Label	P13SNm	string	
Label	P14Nm	string	
Label	P14Qty	int	
Label	P14SNm	string	
Label	P15Nm	string	
Label	P15Qty	int	
Label	P15SNm	string	
Label	P16Nm	string	
Label	P16Qty	int	
Label	P16SNm	string	
Label	P17Nm	string	
Label	P17Qty	int	
Label	P17SNm	string	
Label	P18Nm	string	
Label	P18Qty	int	
Label	P18SNm	string	
Label	P19Nm	string	
Label	P19Qty	int	
Label	P19SNm	string	
Label	P20Nm	string	
Label	P20Qty	int	
Label	P20SNm	string	

Label	P21Nm	string	
Label	P21Qty	int	
Label	P21SNm	string	
Label	P22Nm	string	
Label	P22Qty	int	
Label	P22SNm	string	
Label	P23Nm	string	
Label	P23Qty	int	
Label	P23SNm	string	
Label	P24Nm	string	
Label	P24Qty	int	
Label	P24SNm	string	
Label	P25Nm	string	
Label	P25Qty	int	
Label	P25SNm	string	
Label	P26Nm	string	
Label	P26Qty	int	
Label	P26SNm	string	
Label	P27Nm	string	
Label	P27Qty	int	
Label	P27SNm	string	
Label	P28Nm	string	
Label	P28Qty	int	
Label	P28SNm	string	
Label	P29Nm	string	
Label	P29Qty	int	
Label	P29SNm	string	
Label	P30Nm	string	
Label	P30Qty	int	
Label	P30SNm	string	
Label	P31Nm	string	
Label	P31Qty	int	
Label	P31SNm	string	
Label	P32Nm	string	
Label	P32Qty	int	
Label	P32SNm	string	
Label	P33Nm	string	
Label	P33Qty	int	
Label	P33SNm	string	
Label	P34Nm	string	
Label	P34Qty	int	
Label	P34SNm	string	
Label	P35Nm	string	
Label	P35Qty	int	
Label	P35SNm	string	

Label	SellerCustomField	string	
Label	SellerFirstName	string	
Label	SellerLastName	string	
Label	SellerNumber	int	
Label	TotalItems	int	
Marketing Email	ContactAddressName	string	
Marketing Email	ContactCity	string	
Marketing Email	ContactEmail	string	
Marketing Email	ContactFirstName	string	
Marketing Email	ContactLastName	string	
Marketing Email	ContactPhoneExtString	string	
Marketing Email	ContactPhoneString	string	
Marketing Email	ContactState	string	
Marketing Email	ContactStreet1	string	
Marketing Email	ContactStreet2	string	
Marketing Email	ContactZipCode	string	
Marketing Email	DealerCity	string	
Marketing Email	DealerEmail	string	
Marketing Email	DealerName	string	
Marketing Email	DealerPhoneExtString	string	
Marketing Email	DealerPhoneString	string	
Marketing Email	DealerState	string	
Marketing Email	DealerStreet1	string	
Marketing Email	DealerStreet2	string	
Marketing Email	DealerWebsite	string	
Marketing Email	DealerZipCode	string	
Marketing Email	GroupAddressName	string	
Marketing Email	GroupCity	string	
Marketing Email	GroupEmail	string	
Marketing Email	GroupName	string	
Marketing Email	GroupPhoneExtString	string	
Marketing Email	GroupPhoneString	string	
Marketing Email	GroupState	string	
Marketing Email	GroupStreet1	string	
Marketing Email	GroupStreet2	string	
Marketing Email	GroupZipCode	string	
Marketing Email	SalesPersonEmail	string	
Marketing Email	SalesPersonFirstName	string	
Marketing Email	SalesPersonLastName	string	
Marketing Email	SalesPersonPhoneExtString	string	
Marketing Email	SalesPersonPhoneString	string	
Touchpoint Email	ArriveAtTBD	bool	
Touchpoint Email	CallInOrderOn	DateTime	Format for **DATE** only!
Touchpoint Email	ContactAddressCity	string	
Touchpoint Email	ContactAddressName	string	

Touchpoint Email	ContactAddressState	string	
Touchpoint Email	ContactAddressStreet1	string	
Touchpoint Email	ContactAddressStreet2	string	
Touchpoint Email	ContactAddressZipCode	string	
Touchpoint Email	ContactCity	string	
Touchpoint Email	ContactEmail	string	
Touchpoint Email	ContactFirstName	string	
Touchpoint Email	ContactLastName	string	
Touchpoint Email	ContactName	string	
Touchpoint Email	ContactNameFormatted	string	
Touchpoint Email	ContactPhone	long	
Touchpoint Email	ContactPhoneExt	int	
Touchpoint Email	ContactPhoneExtString	string	
Touchpoint Email	ContactPhoneString	string	
Touchpoint Email	ContactState	string	
Touchpoint Email	ContactStreet1	string	
Touchpoint Email	ContactStreet2	string	
Touchpoint Email	ContactZipCode	string	
Touchpoint Email	CustomField3	string	
Touchpoint Email	CustomField4	string	
Touchpoint Email	CustomLabel3	string	
Touchpoint Email	CustomLabel4	string	
Touchpoint Email	DaysLeftToSell	int	
Touchpoint Email	DealerAddressFormatted	string	
Touchpoint Email	DealerCity	string	
Touchpoint Email	DealerEmail	string	
Touchpoint Email	DealerName	string	
Touchpoint Email	DealerPhone	long	
Touchpoint Email	DealerPhoneExt	int	
Touchpoint Email	DealerPhoneExtString	string	
Touchpoint Email	DealerPhoneFormatted	string	
Touchpoint Email	DealerPhoneString	string	
Touchpoint Email	DealerState	string	
Touchpoint Email	DealerStreet1	string	
Touchpoint Email	DealerStreet2	string	
Touchpoint Email	DealerWebsite	string	
Touchpoint Email	DealerZipCode	string	
Touchpoint Email	DeliveryAddressFormatted	string	
Touchpoint Email	DeliveryAddressName	string	
Touchpoint Email	DeliveryCity	string	
Touchpoint Email	DeliveryEndAt	DateTime	Format for **TIME** only!
Touchpoint Email	DeliveryEndAtFormatted	string	
Touchpoint Email	DeliveryExtItems	string	
Touchpoint Email	DeliveryMinimum	int	
Touchpoint Email	DeliveryOn	DateTime	Format for **DATE** only!

Touchpoint Email	DeliveryOnFormatted	string	
Touchpoint Email	DeliveryOwnerFirstName	string	
Touchpoint Email	DeliveryOwnerLastName	string	
Touchpoint Email	DeliveryOwnerPhone	long	
Touchpoint Email	DeliveryOwnerPhoneString	string	
Touchpoint Email	DeliveryPickupAt	DateTime	Format for **TIME** only!
Touchpoint Email	DeliveryPickupAtFormatted	string	
Touchpoint Email	DeliveryPickupEndAt	DateTime	Format for **TIME** only!
Touchpoint Email	DeliveryPickupEndAtFormatted	string	
Touchpoint Email	DeliveryStartAt	DateTime	Format for **TIME** only!
Touchpoint Email	DeliveryStartAtFormatted	string	
Touchpoint Email	DeliveryState	string	
Touchpoint Email	DeliveryStreet1	string	
Touchpoint Email	DeliveryStreet2	string	
Touchpoint Email	DeliveryUnits	string	
Touchpoint Email	DeliveryZipCode	string	
Touchpoint Email	EndAtTBD	bool	
Touchpoint Email	EndOn	DateTime	This is the Return Order Date
Touchpoint Email	EndOnTBD	bool	
Touchpoint Email	FlierNote1	string	
Touchpoint Email	FlierNote2	string	
Touchpoint Email	FlierNote3	string	
Touchpoint Email	Fliers	int	
Touchpoint Email	FundraiserName	string	
Touchpoint Email	FundraiserYear	int	
Touchpoint Email	FundsFor	string	
Touchpoint Email	GroupAddressCity	string	
Touchpoint Email	GroupAddressName	string	
Touchpoint Email	GroupAddressState	string	
Touchpoint Email	GroupAddressStreet1	string	
Touchpoint Email	GroupAddressStreet2	string	
Touchpoint Email	GroupAddressZipCode	string	
Touchpoint Email	GroupCity	string	
Touchpoint Email	GroupEmail	string	
Touchpoint Email	GroupGoal	decimal	
Touchpoint Email	GroupIncentive	string	
Touchpoint Email	GroupName	string	
Touchpoint Email	GroupParticipation	decimal	Formatted as xx.x
Touchpoint Email	GroupPhone	long	
Touchpoint Email	GroupPhoneExt	int	
Touchpoint Email	GroupPhoneExtString	string	
Touchpoint Email	GroupPhoneString	string	
Touchpoint Email	GroupPortalURL	string	
Touchpoint Email	GroupProfit	decimal	
Touchpoint Email	GroupProfitGoal	decimal	

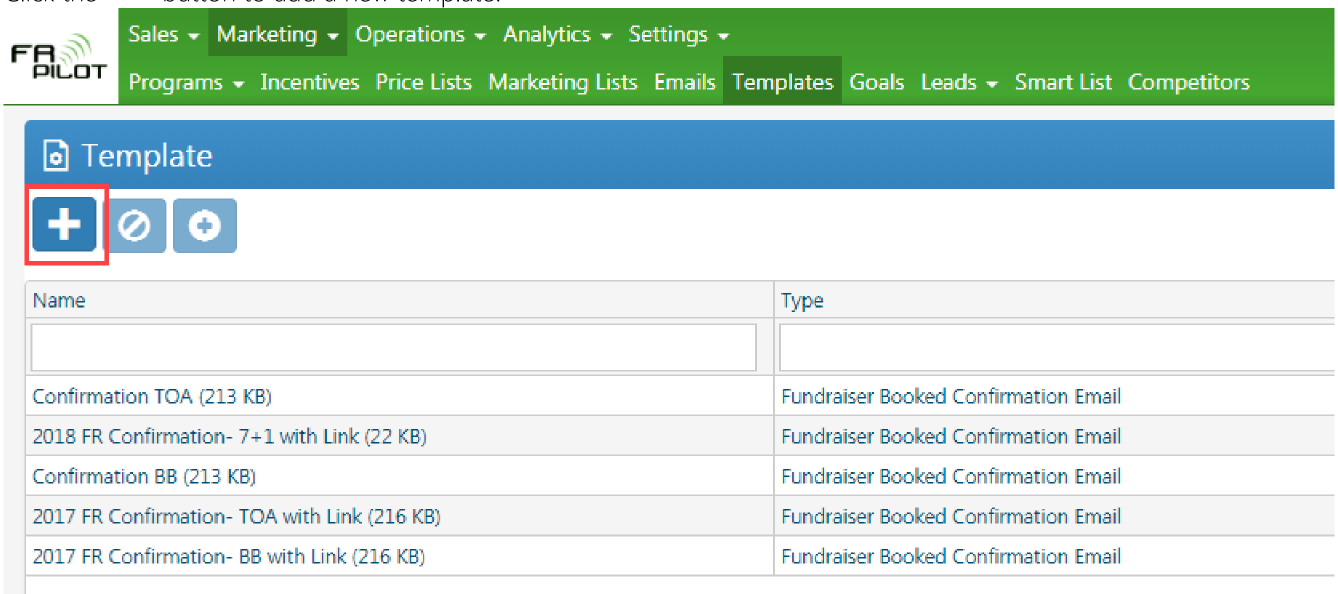
Touchpoint Email	GroupSize	int	
Touchpoint Email	GroupState	string	
Touchpoint Email	GroupStreet1	string	
Touchpoint Email	GroupStreet2	string	
Touchpoint Email	GroupZipCode	string	
Touchpoint Email	IncentiveDescription	string	
Touchpoint Email	IsPrePack	bool	"True" if checked
Touchpoint Email	KickOffAddressName	string	
Touchpoint Email	KickOffAt	DateTime	Format for **TIME** only!
Touchpoint Email	KickOffAtFormatted	string	
Touchpoint Email	KickOffCity	string	
Touchpoint Email	KickOffOn	DateTime	Format for **DATE** only!
Touchpoint Email	KickOffState	string	
Touchpoint Email	KickOffStreet1	string	
Touchpoint Email	KickOffStreet2	string	
Touchpoint Email	KickOffZipCode	string	
Touchpoint Email	LeaveAtTBD	bool	
Touchpoint Email	MakeChecksTo	string	
Touchpoint Email	MinimumPerSeller	int	
Touchpoint Email	PFAddressName	string	
Touchpoint Email	PFCity	string	
Touchpoint Email	PFState	string	
Touchpoint Email	PFStreet1	string	
Touchpoint Email	PFStreet2	string	
Touchpoint Email	PFZipCode	string	
Touchpoint Email	Posters	int	
Touchpoint Email	PriceListDisplayName	string	
Touchpoint Email	PriceListName	string	
Touchpoint Email	PrintFlierAddressName	string	
Touchpoint Email	PrintFlierCity	string	
Touchpoint Email	PrintFliersOn	DateTime	Format for **DATE** only!
Touchpoint Email	PrintFlierState	string	
Touchpoint Email	PrintFlierStreet1	string	
Touchpoint Email	PrintFlierStreet2	string	
Touchpoint Email	PrintFlierZipCode	string	
Touchpoint Email	ProgramDescription	string	
Touchpoint Email	ReturnOrderOn	DateTime	Format for **DATE** only!
Touchpoint Email	SalesPersonFirstName	string	
Touchpoint Email	SalesPersonLastName	string	
Touchpoint Email	SalesPersonNameFormatted	string	
Touchpoint Email	SalesPersonPhone	long	
Touchpoint Email	SalesPersonPhoneExt	int	
Touchpoint Email	SalesPersonPhoneExtString	string	
Touchpoint Email	SalesPersonPhoneFormatted	string	
Touchpoint Email	SalesPersonPhoneString	string	

Touchpoint Email	SendStartupKitOn	DateTime	
Touchpoint Email	SignupURL	string	
Touchpoint Email	StartAtTBD	bool	
Touchpoint Email	StartOn	DateTime	Format for **DATE** only!
Touchpoint Email	StartOnTBD	bool	
Touchpoint Email	StoreURL	string	
Touchpoint Email	TimeZone	string	
Touchpoint Email	TimeZoneAbbreviation	string	
Touchpoint Email	TotalExtItems	int	
Touchpoint Email	TotalUnits	int	

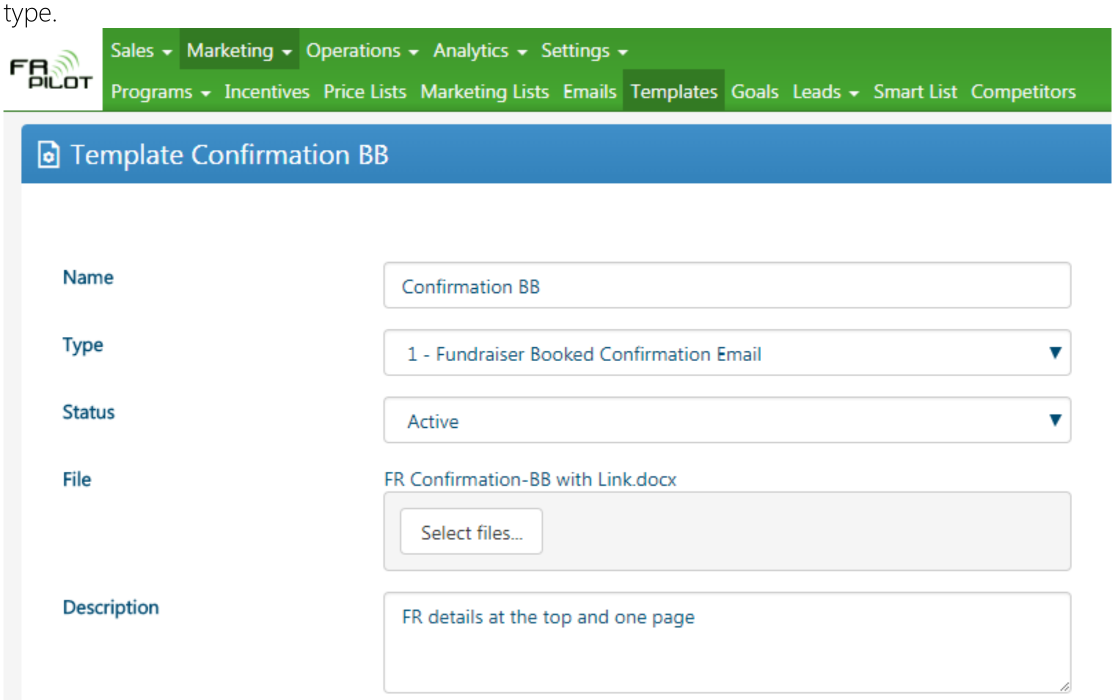
Adding Templates to My Fundraising Place and Selecting Templates on a Program

Go to Marketing and select Templates.

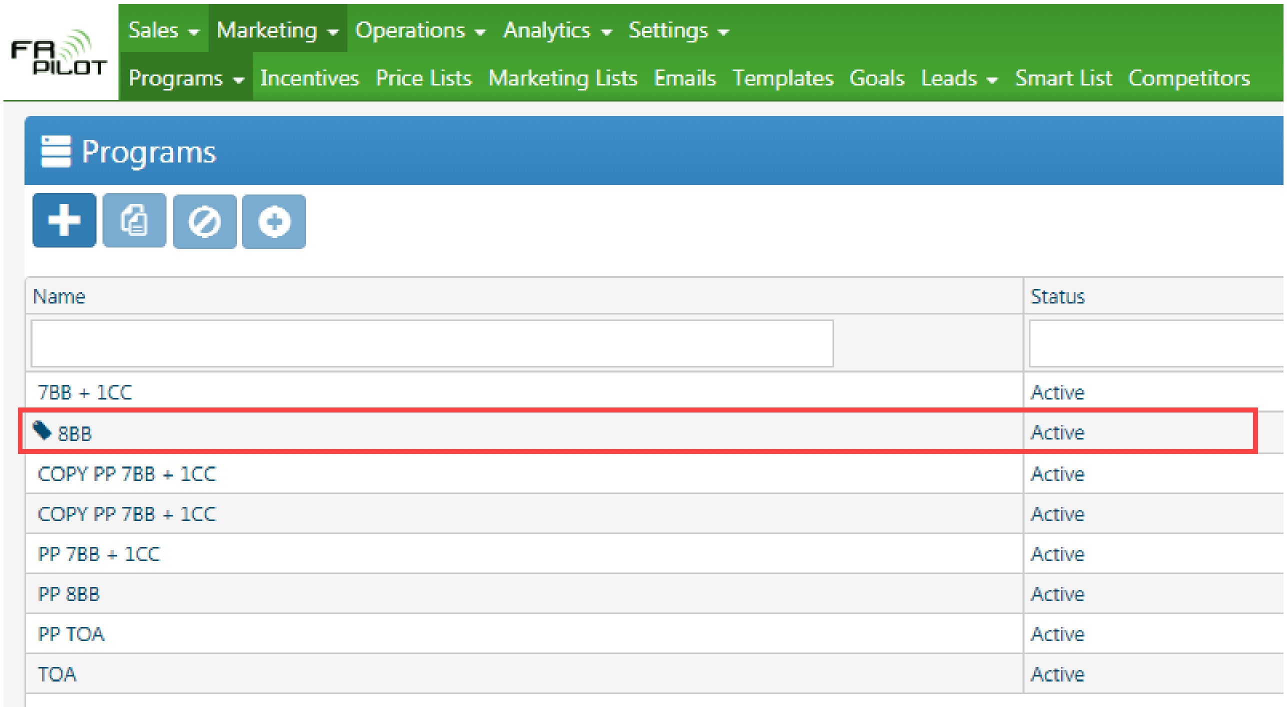
Click the button to add a new template.



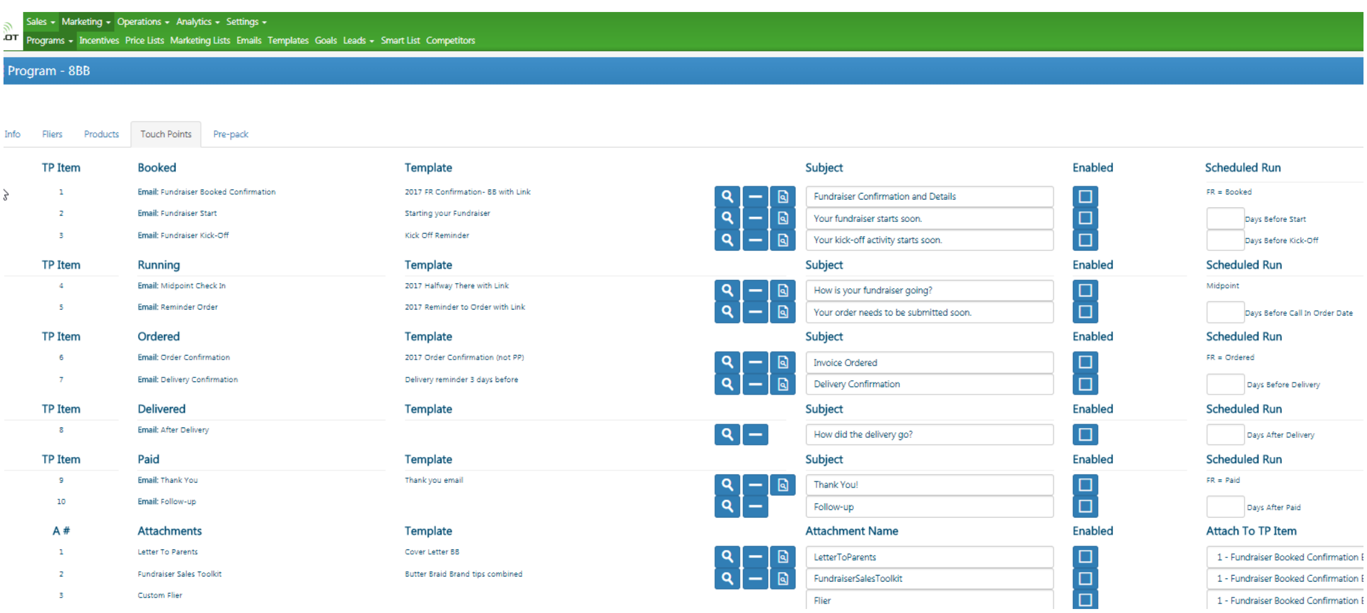
Fill out the name, select a type of template, set the status as "Active", select the file from your computer and enter a description of the template. When you are done click the "x" in the upper right hand corner. You will need to do this for each template type.



After uploading your templates, go to the Program you wish to add the templates too. You can double click an existing program to open it.



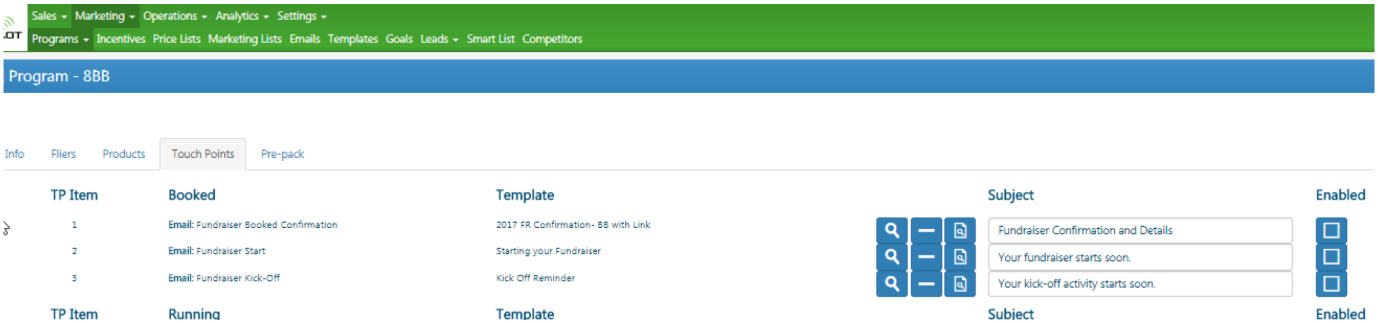
Click on the "Touch Points" tab on the left. From here you can use the to select any uploaded templates for that specific touch point item. To remove a template, use the button.



To have a touch point item set by default or to turn it off by default you can check or un-check the box. If it is checked it will pull over on each individual fundraiser as "checked".

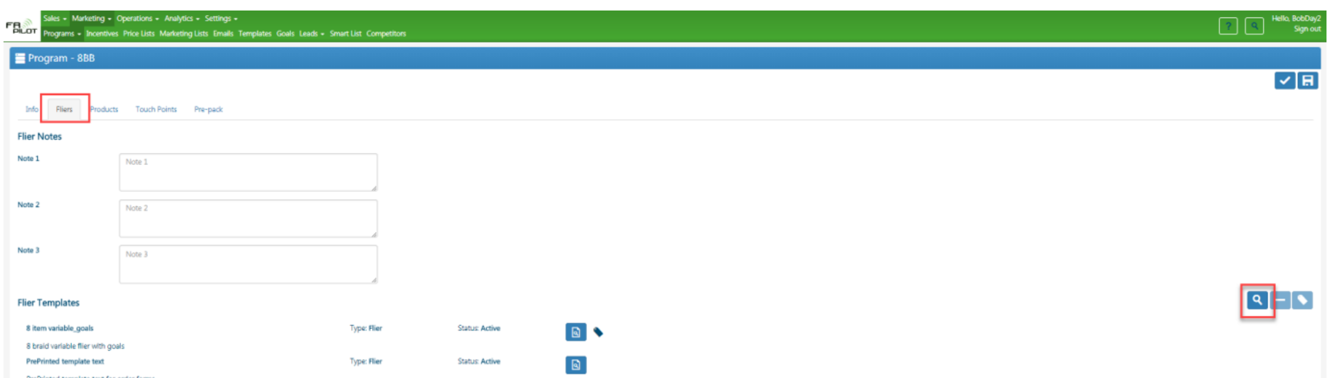
To preview a template use the preview button: .

***Note – if you didn't want to use have a touch point enabled by default but still wanted to occasionally use the touch point item then you should still upload a template for the touch point item, but you would uncheck the box. This will allow you to enable it at the fundraiser level



To select a flier for the program, click on the Fliers tab. Use the to select the flier template(s) that you want to use with this program. A dealer can have multiple fliers uploaded for the same program (example – one template with goals and one template without goals).

Use the to set the default flier. Use the to remove a flier.
***Note 1, 2 & 3 fields can be used to pull data in to the flier intercept page on the fundraiser IF a dealer wants to use it. These fields are intended to be used for allergen notices, and information about the products on this program. Many dealers will have this information on the flier template itself though.



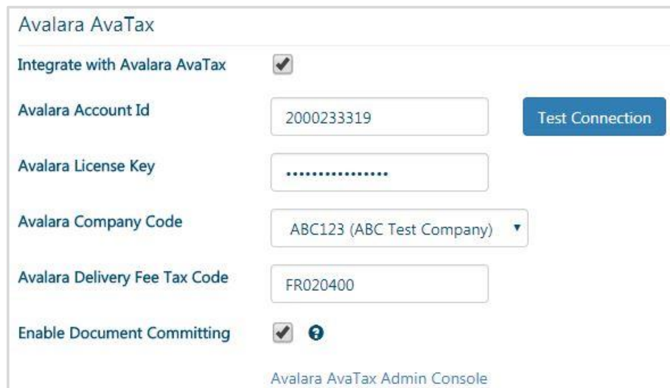
Avalara AvaTax for My Fundraising Place

User Guide

Avalara AvaTax is a cloud-based solution automating transaction tax calculations and the tax filing process. Avalara provides real-time tax calculation using tax content from more than 12,000 US taxing jurisdictions and over 200 countries, ensuring your transaction tax is calculated based on the most current tax rules.

Connect to AvaTax

1. Log in to My Fundraising Place (To access AvaTax sandbox, log in to test.frpilot.net)
2. Go to Settings > Dealer > Settings
3. Check the box next to Integrate with Avalara AvaTax
4. Enter your Avalara AvaTax credentials:
   - Account ID: Provided during your AvaTax account activation process
   - License Key: Provided during your AvaTax account activation process
5. Click Test Connection
6. Select your Company Code
7. Enter a default Delivery Fee Tax Code (FR020400)
8. Enable Document Committing: Leave checked unless Avalara transactions will be committed by or within another Avalara-integrated service
9. Use the Avalara AvaTax Admin Console link to access the Admin Console

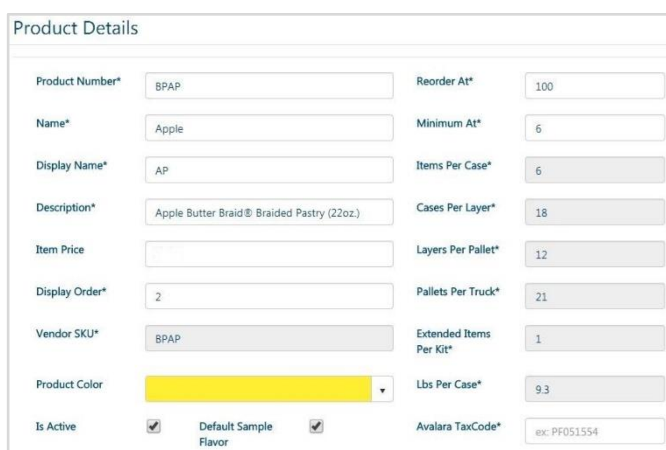


Assign a Tax Exemption Category to a Group

1. Go to Sales > Groups
2. Open a group and click the More Info tab
3. Check the box next to Tax Exempt
   1. In the Tax Exemption Number field, enter the group's exemption number
   2. In the Tax Entity/Use Code field, select the appropriate tax entity/use code
4. Click Save

Assign Tax Codes to Products

1. Go to Settings > Products
2. Select a Product to open the Product Details screen
3. Enter the applicable AvaTax Tax Code in the TaxCode field. (PF050001) To see a list of available tax codes, visit http://taxcode.avatax.avalara.com
4. Repeat for every product
5. Click Save



Building Email Templates

How to create a booked confirmation email template from scratch.

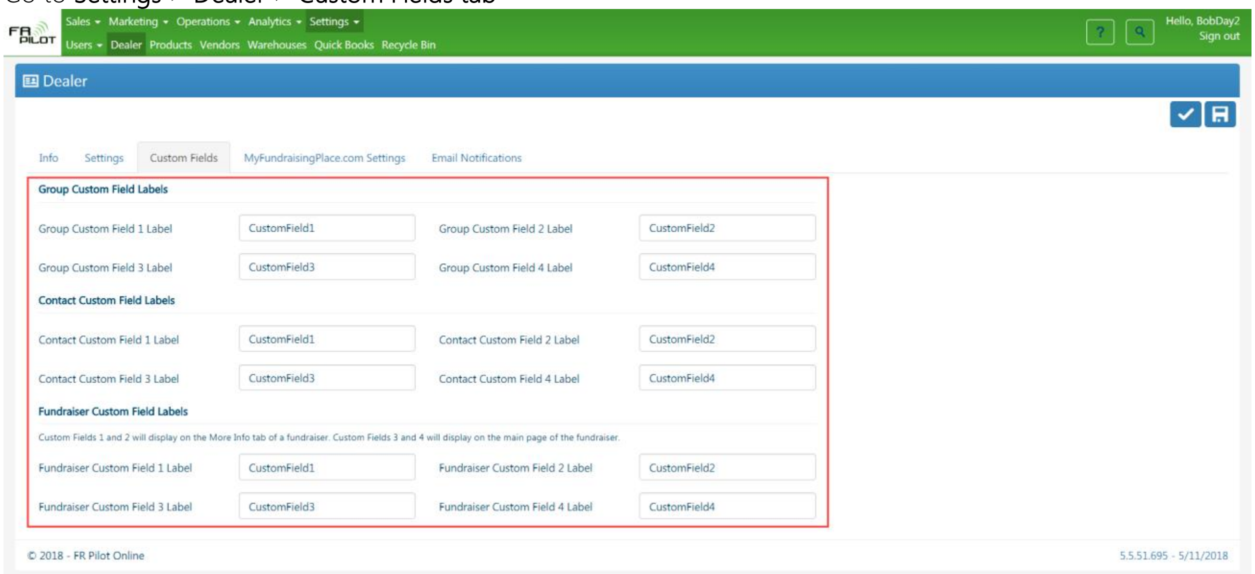
1. Identify the purpose of the email message you want to communicate
    a. What data elements are needed from My Fundraising Place to support the purpose?
    b. What communications strategy do you want to use (appearance of a personal email, sent from the dealership team, or from the sales person?)
    c. What logos / images should be included?
2. Identify data fields you want to include in the email template
3. Plan how you want to present your data and control spacing when viewed on different devices
4. Build display framework (tables or no tables)
5. Type message, insert merge fields, insert images, set formatting of text and merge fields
    a. Formatting: Stick with common fonts, fonts need to be available on Azure server
    b. Images: Use small images, png or gif formats work best, non-transparent background is also recommended
6. Test, double check formatting of merge fields

Custom Fields

Custom fields in My Fundraising Place allow the dealer to customize fields for any specific needs they may have in their business and processes. There are four fields available each for the contact, group and fundraiser pages.

Setting up the custom fields:

1. Go to Settings > Dealer > Custom Fields tab

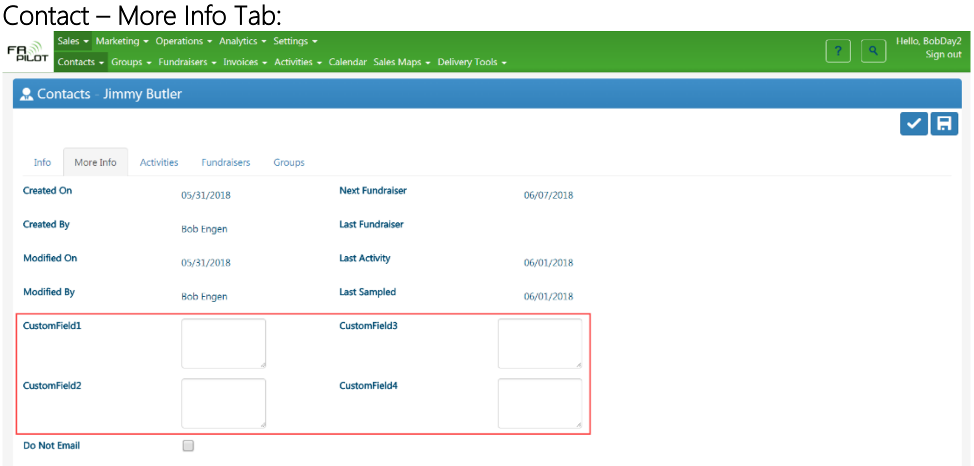


2. Enter in the appropriate custom field labels
3. Click on Save & Close

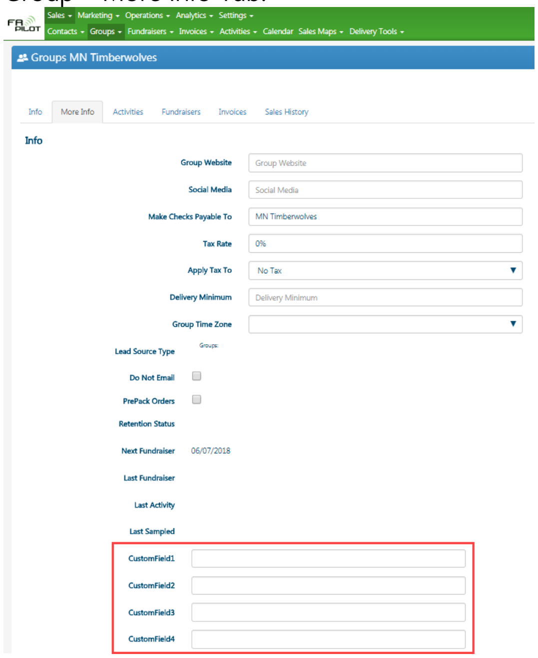
Location of the custom fields:

For this example, I entered the Custom Field number in each label name to show you where they are located for the contact, group and fundraiser.

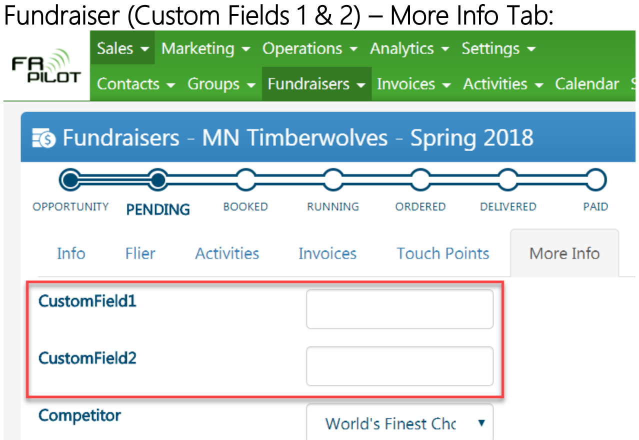
Contact – More Info Tab:



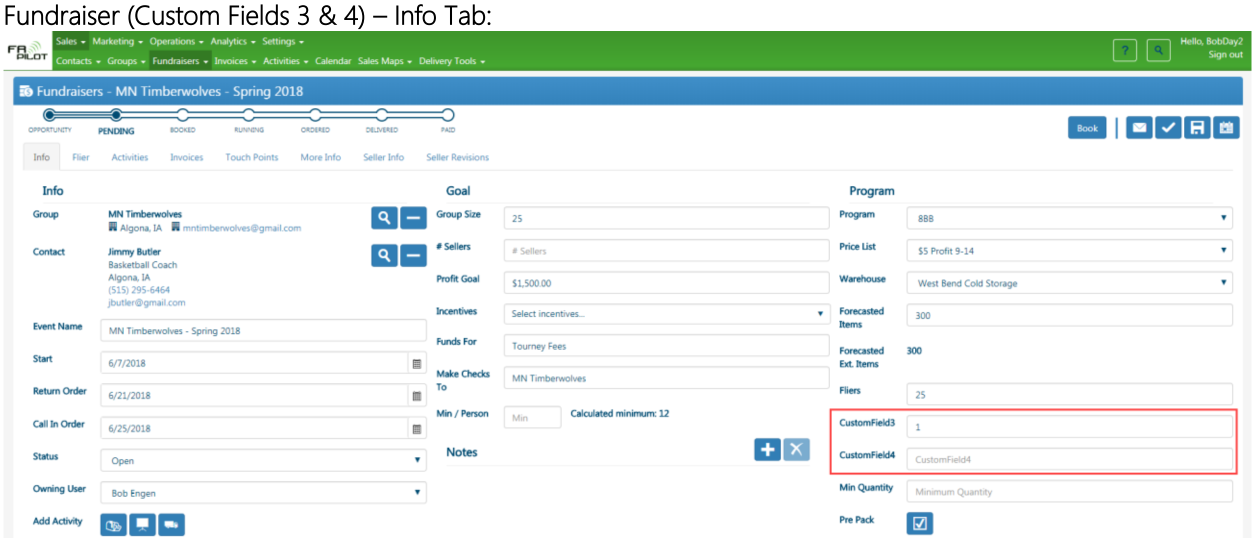
Group – More Info Tab:



Fundraiser (Custom Fields 1 & 2) – More Info Tab:

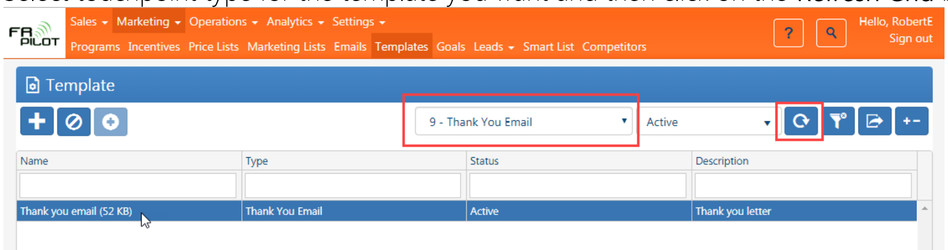


Fundraiser (Custom Fields 3 & 4) – Info Tab:

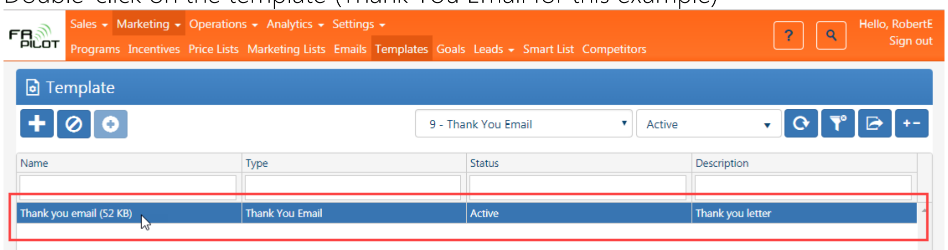


How to format merge fields in templates

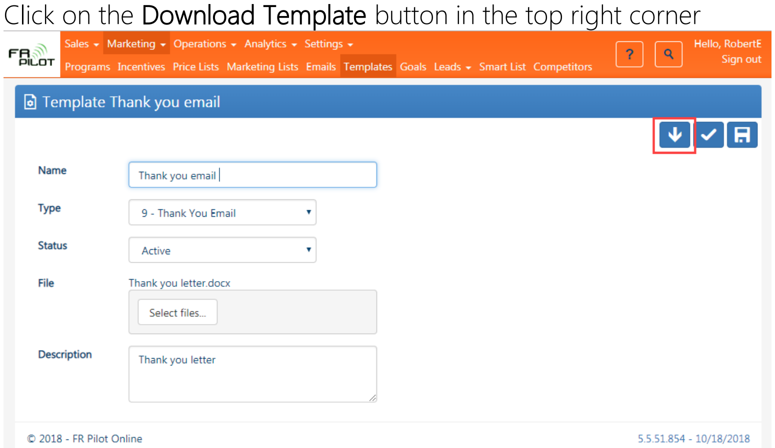
1. Download the word document template for the touchpoint you want to change:
    a. Go to **Marketing > Templates**
    b. Select touchpoint type for the template you want and then click on the **Refresh Grid** button



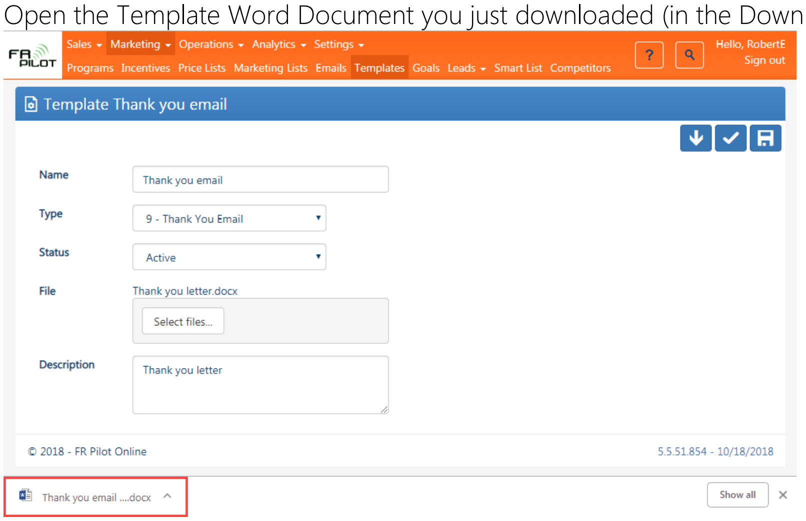
    c. Double-click on the template (Thank You Email for this example)



    d. Click on the **Download Template** button in the top right corner



2. Open the Template Word Document you just downloaded (in the Downloads folder)



3. View the contents of that document

Thank you for your business!

Hi «ContactFirstName»,

We hope that you have found the Butter Braid® pastry fundraiser to be a success, and we would be happy to discuss strategies to help your group raise additional funds if necessary!

Below is a summary of the fundraiser that you may wish to keep for future reference, and if you will not be the contact in the future, we would appreciate it if you could pass this summary along to them, and (ideally) let us know who the new contact person is so that the many happy consumers that your group sold to can have access to the wonderful, special Butter Braid® pastries in the future!

Our records show the following:

Total Units Sold	**«TotalUnits»**
Percentage of sellers participating	**«GroupParticipation»%**
Approximate gross profit earned	**$«GroupProfit»**

4. Hit Alt F9 - this will show the merge field formatting commands

Thank you for your business!

Hi { MERGEFIELD ContactFirstName * MERGEFORMAT },

We hope that you have found the Butter Braid® pastry fundraiser to be a success, and we would be happy to discuss strategies to help your group raise additional funds if necessary!

Below is a summary of the fundraiser that you may wish to keep for future reference, and if you will not be the contact in the future, we would appreciate it if you could pass this summary along to them, and (ideally) let us know who the new contact person is so that the many happy consumers that your group sold to can have access to the wonderful, special Butter Braid® pastries in the future!

Our records show the following:

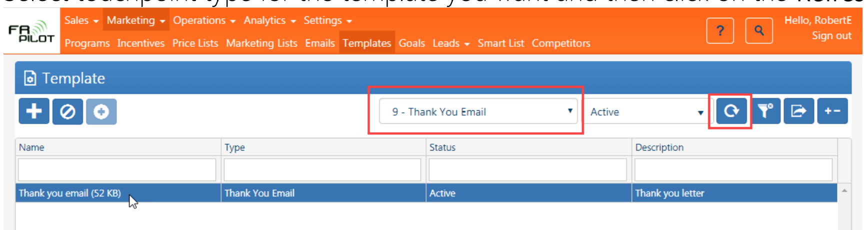
Total Units Sold	**{ MERGEFIELD TotalUnits * MERGEFORMAT }**
Percentage of sellers participating	**{ MERGEFIELD GroupParticipation * MERGEFORMAT }%**
Approximate gross profit earned	**${ MERGEFIELD GroupProfit * MERGEFORMAT }**

5. Now you can replace the \ * MERGEFORMAT with applicable formatting depending on the type of field and look you want:
    a. Time
        i. \@ "h:mm am/pm"
    b. Long Date
        i. \@ "MMM d, yyyy"
        ii. \@ "MM/dd/yy"
        iii. \@ "ddd, MMM d, yyyy"
    c. Currency
        i. \# ",0.00"
    d. Decimals (For this example)
        i. \@ "0.00"
    e. Phone Number
        i. \# "000'.'000'.'0000"
6. It should look like the text below when you are done:

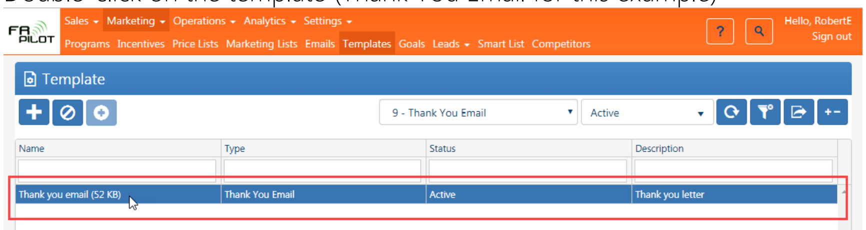
MERGEFORMAT }%
${ MERGEFIELD GroupProfit \@ "0.00"}

7. Save the document
8. Upload the document into My Fundraising Place
    a. Go to Marketing > Templates

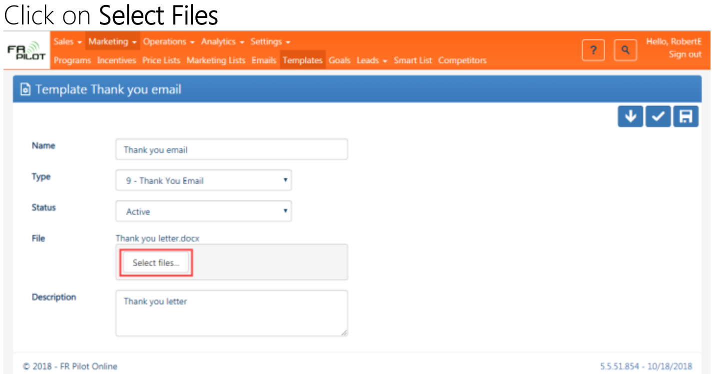
b. Select touchpoint type for the template you want and then click on the **Refresh Grid** button



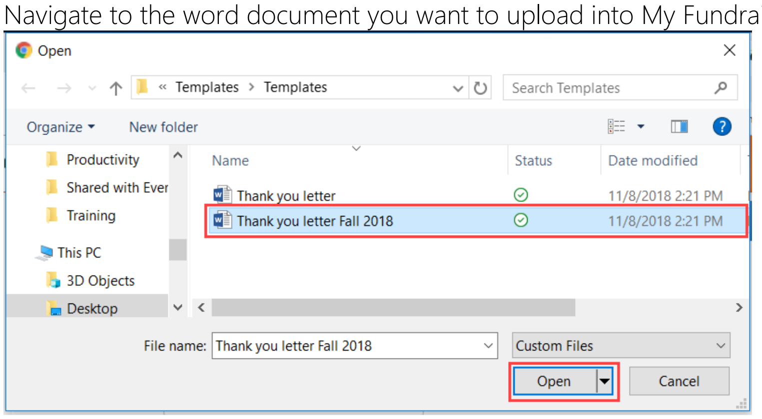
c. Double-click on the template (Thank You Email for this example)



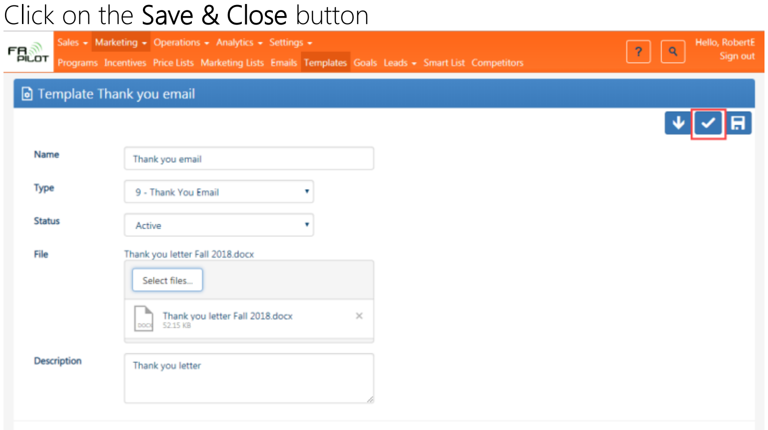
d. Click on **Select Files**



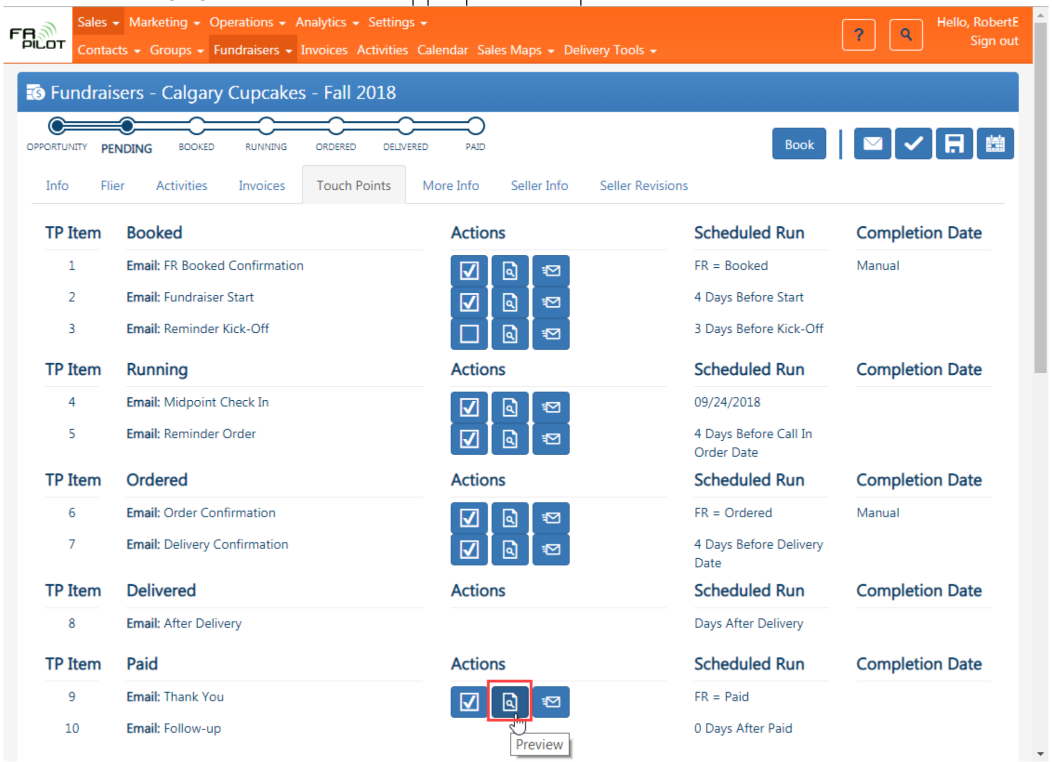
e. Navigate to the word document you want to upload into My Fundraising Place and click **Open**



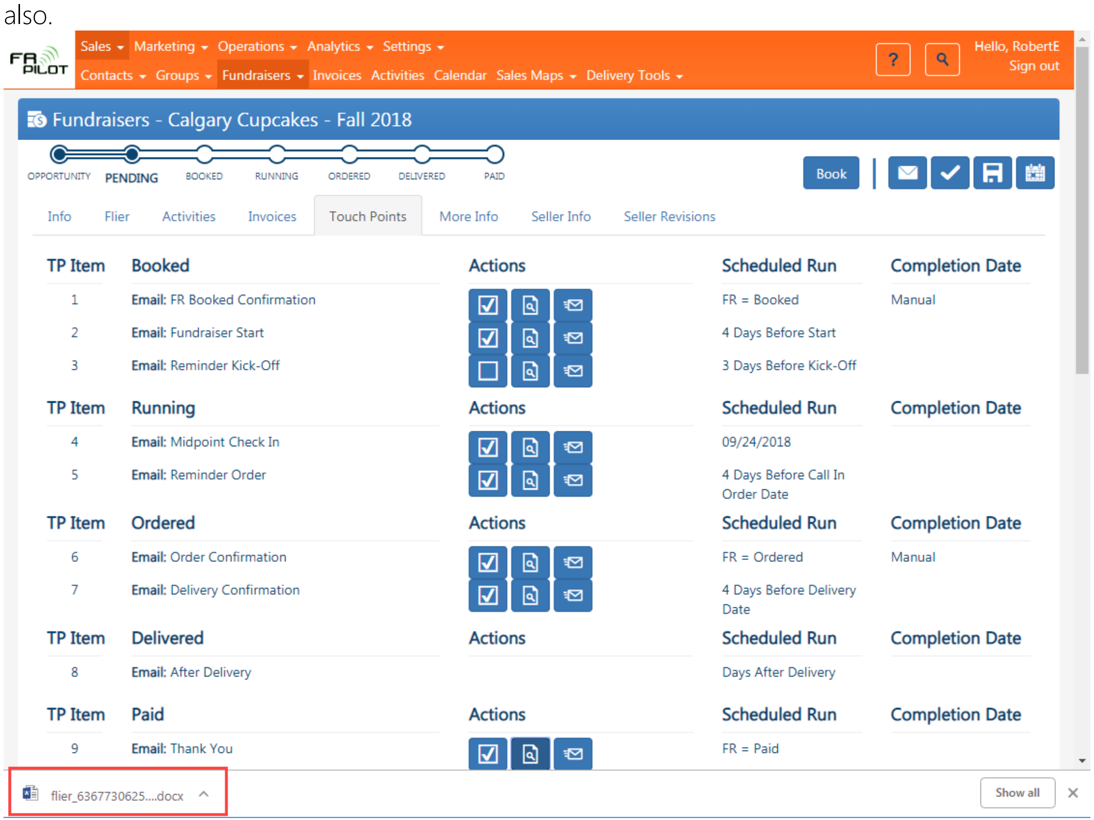
f. Click on the **Save & Close** button



9. Test the new touchpoint template you just uploaded
    a. Go to Sales > Fundraisers > Touch Points Tab
    b. Click on the **Preview** button for the appropriate template



    c. This will create a test touchpoint Word document in the bottom left corner. It will be in the Downloads folder also.



    d. Click on that document to view if your changes worked. If not, please modify current document and go through this process again

How to copy the GLP or MFP link

Here is the GLP/MFP link:

Click here

How to copy the GLP or MFP link to your templates:

1. Highlight the link above:

   Click here

2. Click on **Ctrl C** to copy the link
3. Go to the spot where you want it on the template you are copying to
4. Click on **Ctrl V** to paste link there

   Test Template

   Click here

5. To test the link:
   a. Hold the **Alt** key and press the **F9** key
   b. If everything is correct, it should look like below:

      Test Template

      { HYPERLINK "" { MERGEFIELD GroupPortalURL * MERGEFORMAT } * MERGEFORMAT }

6. If you want to change the text of the link:
   a. Let's say the desired text is "Go to the Online Link"

      Click here

   b. Click before the last 'e' in here and delete up to the 'C' in click

      Ce

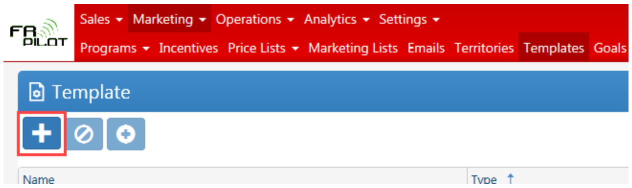
   c. Then enter the desired text after the 'C'

      CGo to the Online linke

   d. Click after the 'C' and backspace to delete it
   e. Click before the last 'e' and hit the delete key to delete forward

      Go to the Online link

   f. Hint:
      i. Ctrl Z will undo the last change, so if the link suddenly breaks you can sometimes bring it back via the undo function
7. **Save** your Template document
8. Is the template in Marketing Templates in My Fundraising Place?
   a. No
      i. Add to Marketing Templates

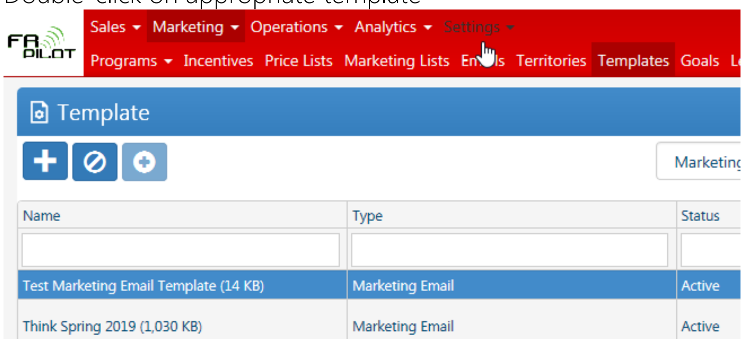


1. Enter in Name and Description
2. Make sure the correct Template Type is selected
3. Click on the Select Files button and select the template file
4. Click on the OK button

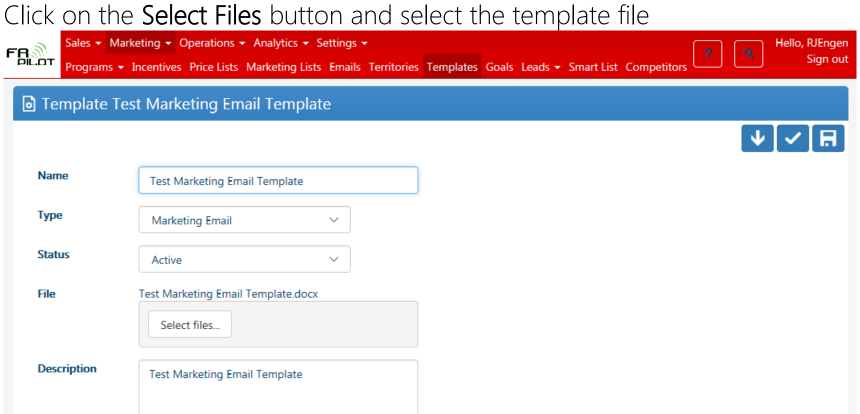
b. *Yes*

i. Upload the new template

1. Double-click on appropriate template



2. Click on the Select Files button and select the template file



3. Click on the OK button
4. Click on the Save & Close button

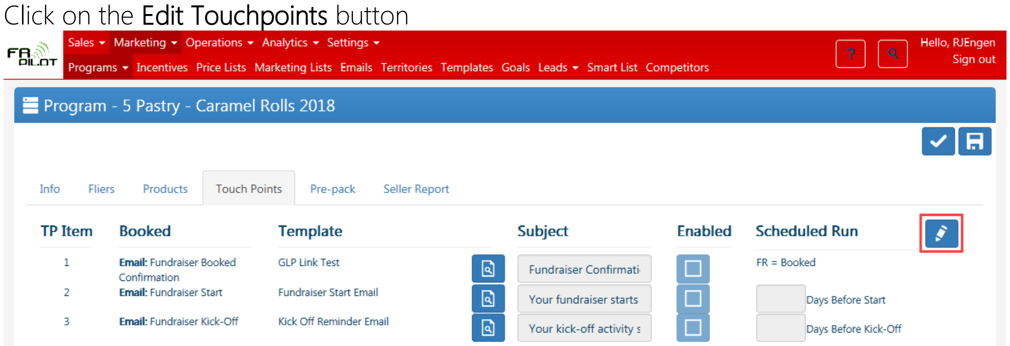
9. My Fundraising Place Testing

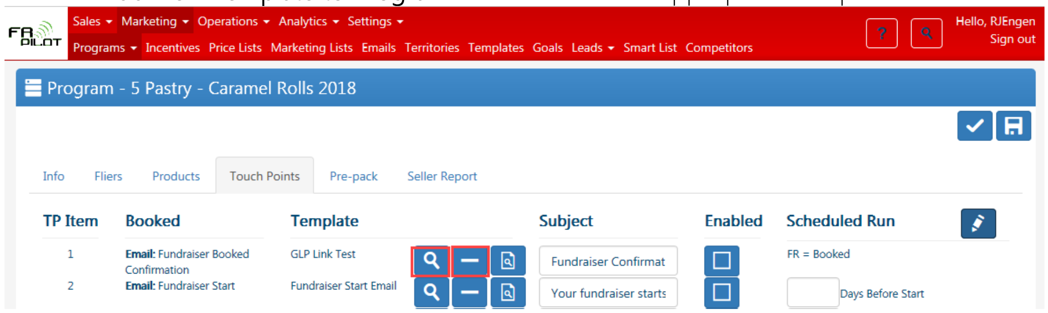
a. Touchpoint documents

i. Order Reminder & Midpoint typically are used with this link, possibly more

ii. If the Touchpoint Template is not associated with the correct Marketing Program:

1. Click on the Edit Touchpoints button

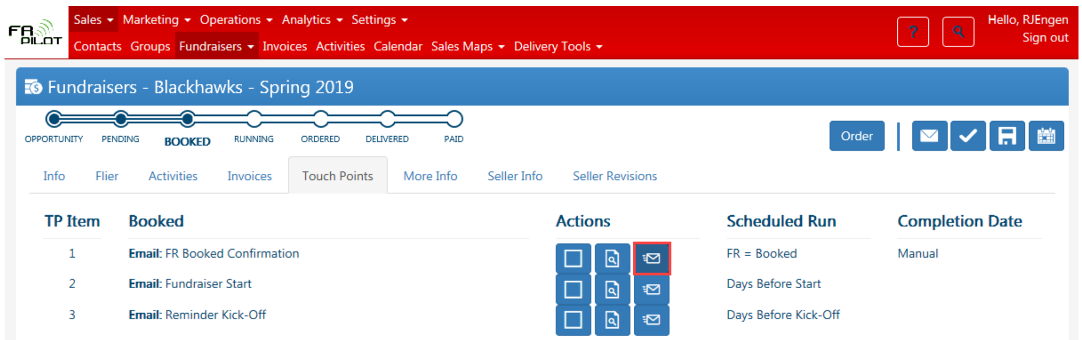


2. Click on **Delete Template from Program** button
3. Click on **Add New Template to Program** button and select appropriate template
4. 

5. Click on **Save & Close** button

iii. Test Touchpoint Template

1. Go to Sales > Fundraisers > Touch Points Tab



2. Click on the **Resend** button for the appropriate Touch Point
3. Remove the email address in the email – to eliminate the chance of accidentally sending
4. Click on the Link in the email to verify that it is working
5. Note: The **Preview** button that creates a Word Document does not work to test the link

How to copy the Signup link

Here is the Signup link:

Click here

How to copy the Signup link to your templates:

1. Highlight the link above:

   Click here

2. Click on Ctrl C to copy the link
3. Go to the spot where you want it on the template you are copying to
4. Click on Ctrl V to paste link there

   Test Template

   Click here

5. To test the link:
   a. Hold the Alt key and press the F9 key
   b. If everything is correct, it should look like below:

      Test Template

      { HYPERLINK "" { MERGEFIELD GroupPortalURL * MERGEFORMAT } * MERGEFORMAT }

6. If you want to change the text of the link:
   a. Let's say the desired text is "Go to the Online Link"

      Click here

   b. Click before the last 'e' in here and delete up to the 'C' in click

      Ce

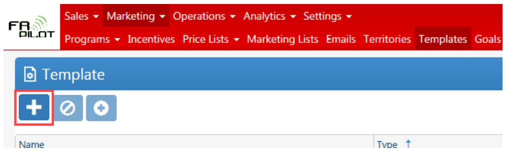
   c. Then enter the desired text after the 'C'

      CGo to the Online linke

   d. Click after the 'C' and backspace to delete it
   e. Click before the last 'e' and hit the delete key to delete forward

      Go to the Online link

   f. Hint:
      i. Ctrl Z will undo the last change, so if the link suddenly breaks you can sometimes bring it back via the undo function
7. Save your Template document
8. Is the template in Marketing Templates in My Fundraising Place?
   a. No
      i. Add to Marketing Templates

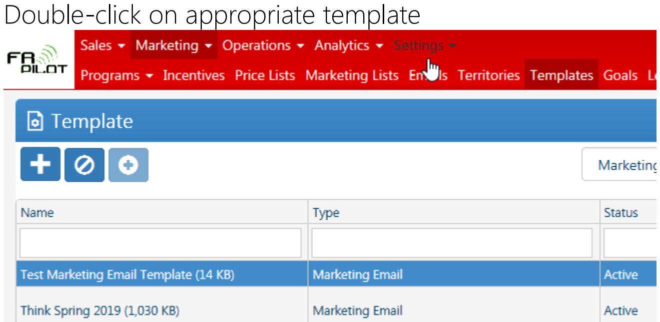


1. Enter in Name and Description
2. Make sure the correct Template Type is selected
3. Click on the **Select Files** button and select the template file
4. Click on the **OK** button

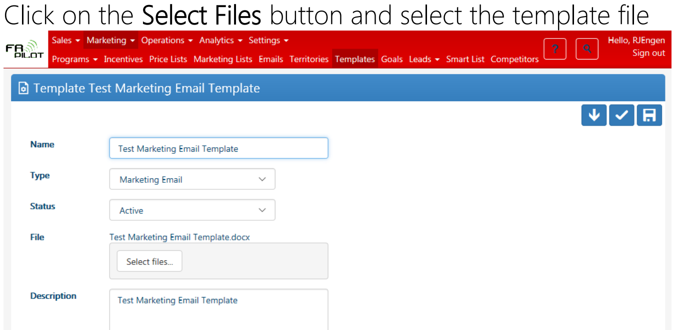
b. Yes

i. Upload the new template

1. Double-click on appropriate template



2. Click on the **Select Files** button and select the template file



3. Click on the **OK** button
4. Click on the **Save & Close** button

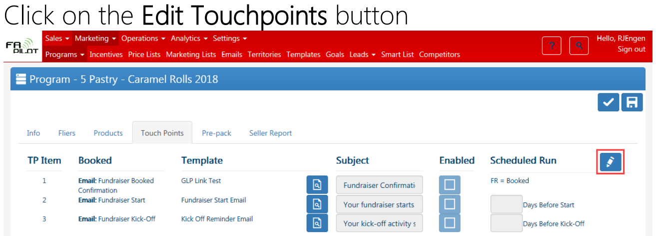
9. My Fundraising Place Testing

   a. Touchpoint documents

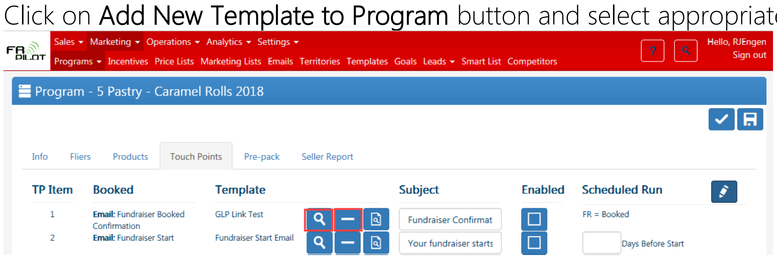
   i. Thank You & Follow-up Touchpoints typically are used with this link

   ii. If the Touchpoint Template is not associated with the correct Marketing Program:

1. Click on the **Edit Touchpoints** button



2. Click on **Delete Template from Program** button
3. Click on **Add New Template to Program** button and select appropriate template

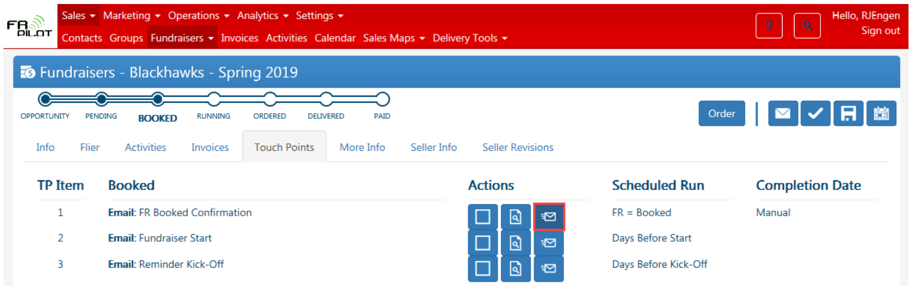


4.

5. Click on **Save & Close** button

iii. Test Touchpoint Template

1. Go to Sales > Fundraisers > Touch Points Tab



2. Click on the **Resend** button for the appropriate Touch Point
3. Remove the email address in the email – to eliminate the chance of accidentally sending
4. Click on the Link in the email to verify that it is working
5. Note: The **Preview** button that creates a Word Document does not work to test the link

b. Marketing Email

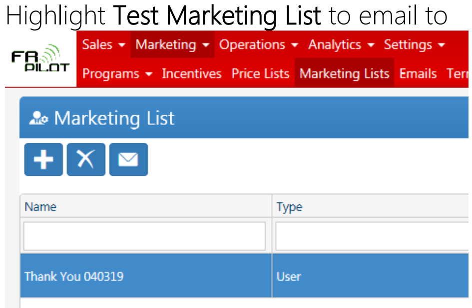
i. 2 Ways of Testing

1. Send a Test Marketing Email to the Test Marketing List

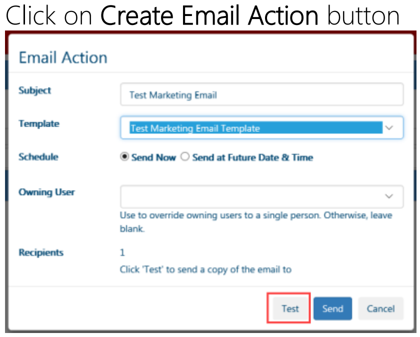
a. Create a Testing Contact (your email)
b. Create a Testing Group (your email)
c. Create a Testing Marketing List that only includes the Test Group
d. Send a Test Marketing Email using the Test Marketing Email Template (which includes the link) to the Test Marketing List
e. Verify that the link is working correctly

2. Inline Test

a. Highlight **Test Marketing List** to email to



b. Click on **Create Email Action** button



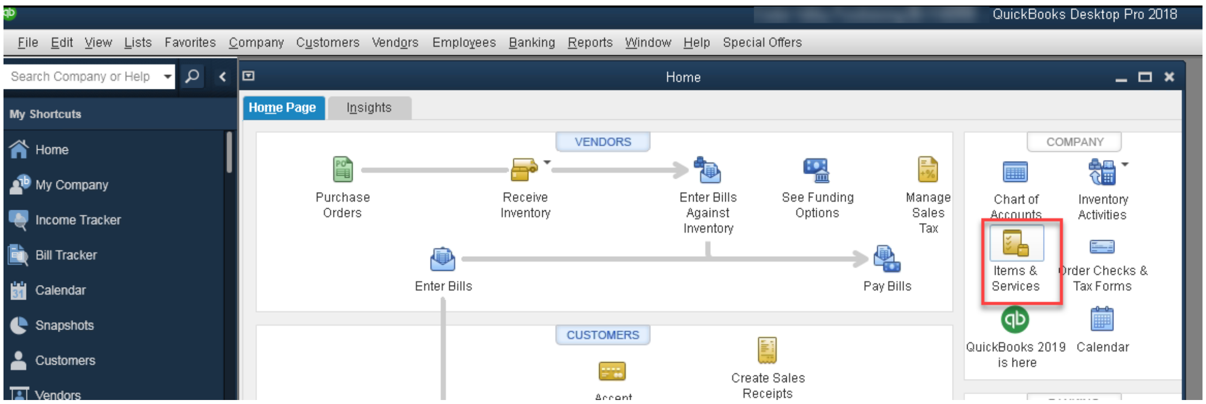
i. Enter Subject Line
ii. Choose **Test Marketing Email Template** from dropdown
iii. Choose **Send Now** or **Send at Future Date & Time**
iv. Click on **Test** button

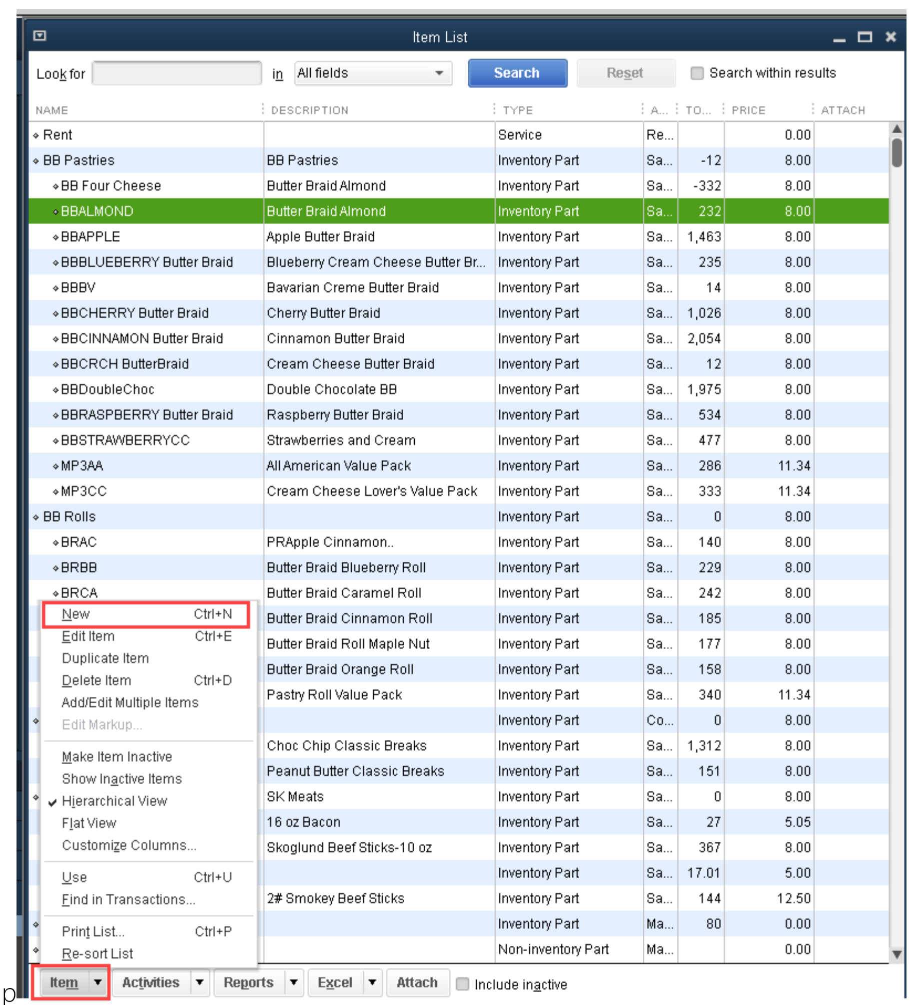
1. Will send email to the Users Primary Email Address in My Fundraising Place

How to not Sync Sales Tax from My Fundraising Place to QuickBooks

Open QuickBooks

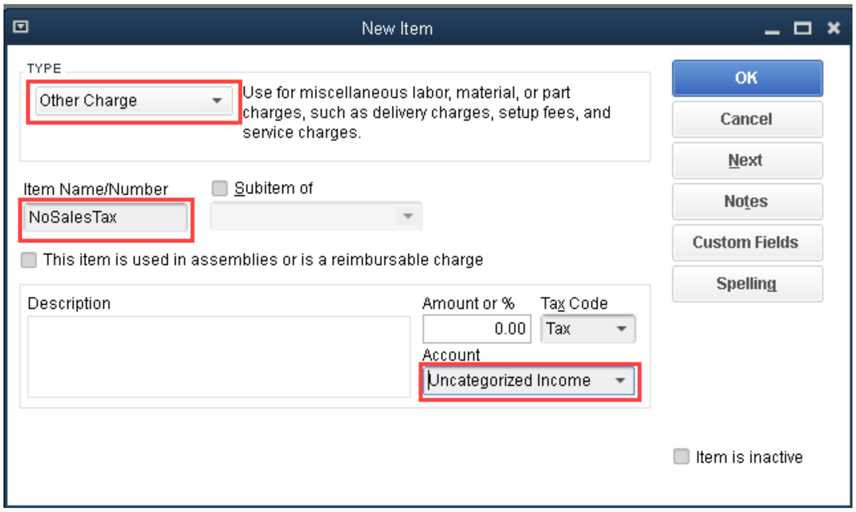
1. Click on Items & Services





2. Click on New in the Item pop-up

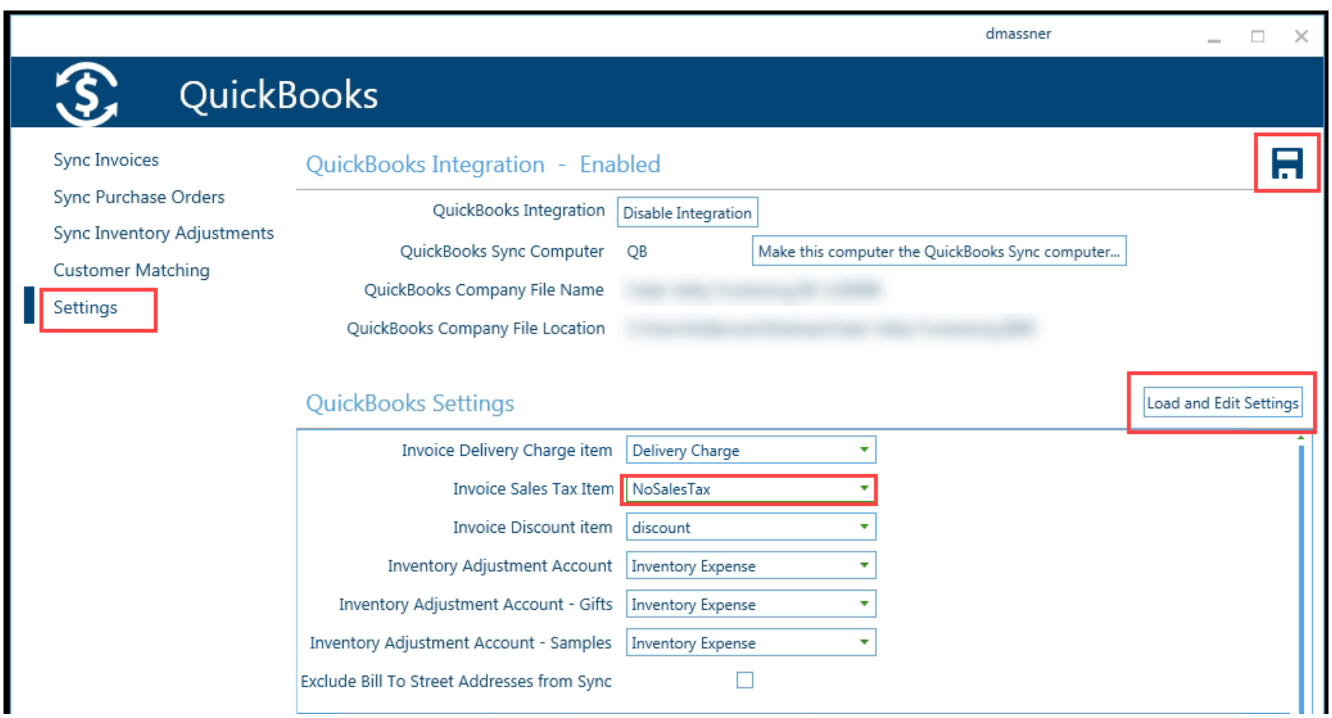
3. Fill in Item information:
   1. Type: select Other Charge
   2. Item Name/Number: enter NoSalesTax
   3. Account: select Uncategorized Income



4. Click on OK

Log in to My Fundraising Place Sync Agent

1. Click the Settings tab on the left side of the window
2. Click Load and Edit Settings
3. Under Invoice Sales Tax Item select your NoSalesTax
4. Click Save



Outlook Activity Sync Instructions

Sync My Fundraising Place activities to Microsoft Outlook

Enter Credentials

1. Log in to frpilot.net
2. Click your username in the top right corner
3. Click **My User Account Settings**
4. Enter your Office 365 **Email Address** and **Password** under Outlook Activity Feed Credentials
5. Click **Save**

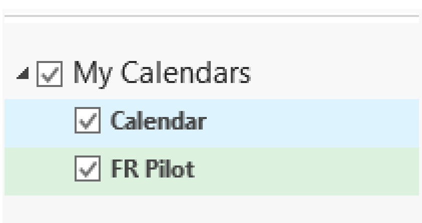
Enable Activity Sync

1. Check the box next to **Enable Outlook Activity Feed**
2. Adjust settings if necessary
3. Click **Save**
4. Add other users' calendars by clicking the **+** icon

Start Syncing

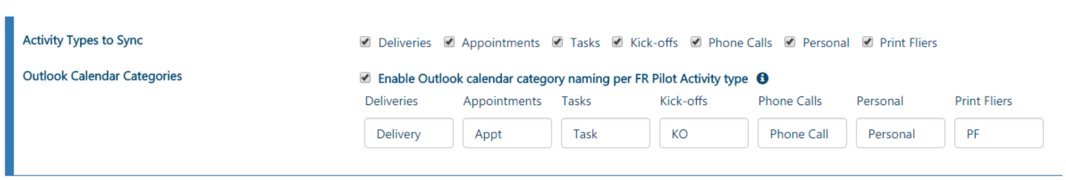
Note: Only activities created after sync is enabled will be synced. Changes to an activity in Outlook will not sync back to My Fundraising Place.

1. Create a new activity
2. Close Microsoft Outlook and reopen
3. Select your new calendar

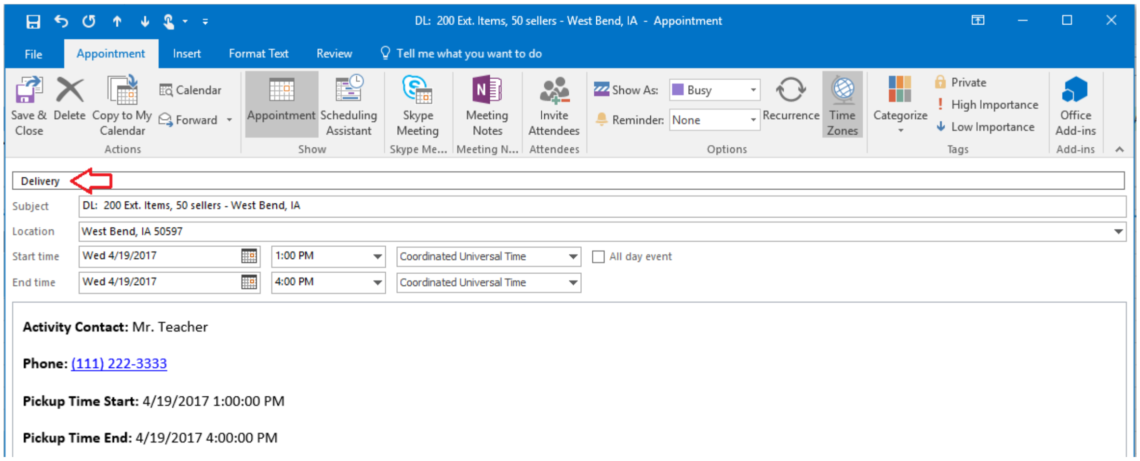


Optional: Enable Activity Categories

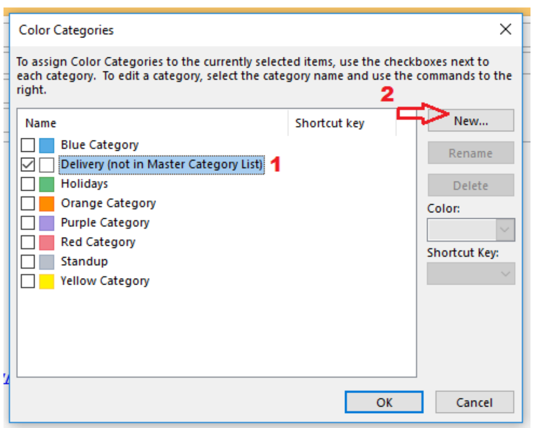
1. Select **Enable Outlook Calendar category naming** to categorize activities by type and color.
2. Type a name for each category



3. In Outlook, double click on an activity
4. Double click on the category name



5. Select CategoryName (Not in Master Category List)
6. Click New



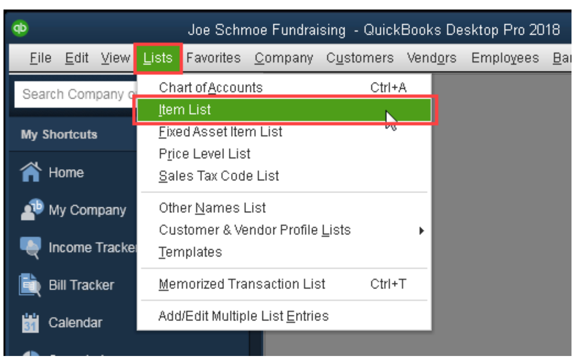
7. Choose a category color
8. Click OK
9. Click OK
10. Repeat steps 3-9 for each category

Picking Up a New Flavor

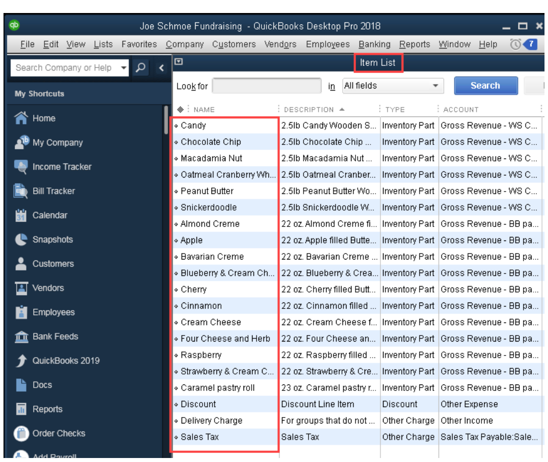
- *Add/Activate Product (if needed)*
  - See Product Maintenance Information Sheet on the My Fundraising Place Support Website: https://support.myfundraisingplace.com/knowledgebase/products-maintenance/
    - Adding a Non-CountryMaid Product Line
    - Adding a Non-CountryMaid Product
    - Activating/Deactivating a Product Line
    - Activating/Deactivating a Product
- *Create the product in Quickbooks (if not already created)*
- *Map the My Fundraising Place item to the Quickbooks item in the Sync Agent*
- *Modify Price List/Create New Price List*
- *Modify Fliers/Prepack Labels (if needed)*
- *Create a New Program*

Create the product in Quickbooks (if not already created):

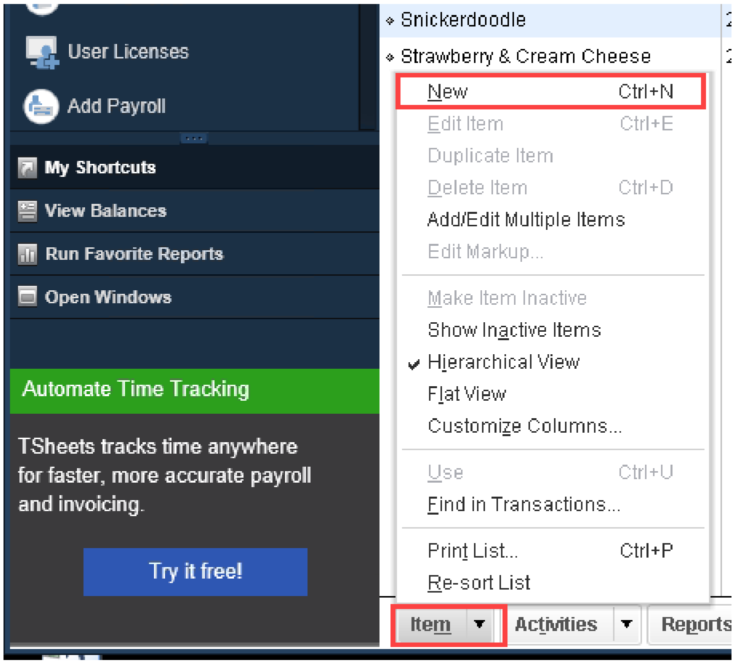
1. Log into Quickbooks
2. Click on **Lists**
3. Click on **Items List**



4. Check to see if you have the new flavor in the **Items List**

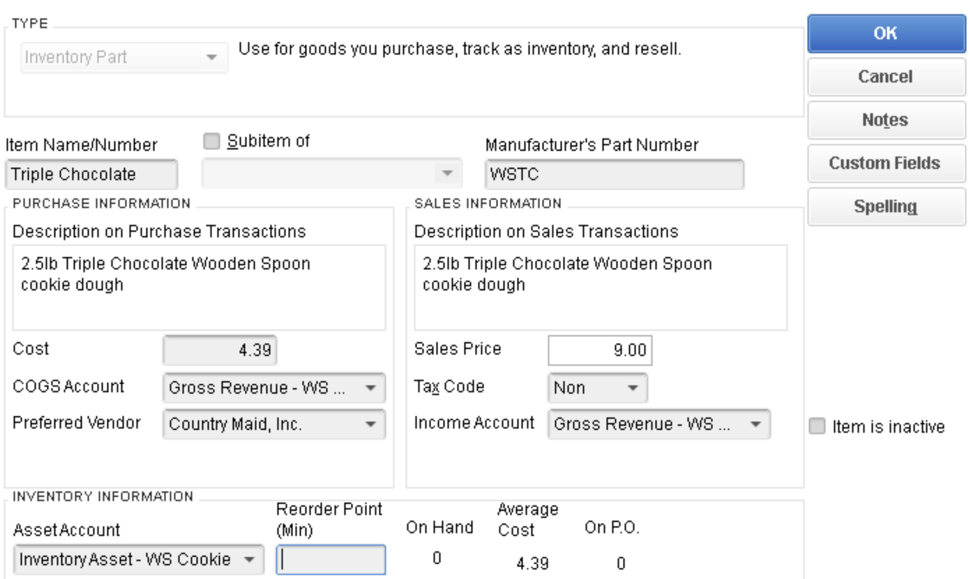


5. If the product does not exist, click on the **Item** button at the bottom of the window
    - Select **New** from the popup menu



- Enter the necessary information for the new flavor (Triple Chocolate used here as an example):

i.	*Type:*	Inventory Part
ii.	*Item Name/Number:*	Triple Chocolate
iii.	*Manufacturer's Part Number:*	WSTC
iv.	*Cost:*	4.39
v.	*COGS Account:*	COGS – WS Cookie
vi.	*Preferred Vendor:*	Country Maid, Inc.
vii.	*Income Account:*	Gross Revenue – WS Cookie
viii.	*Asset Account:*	Inventory Asset – WS Cookie

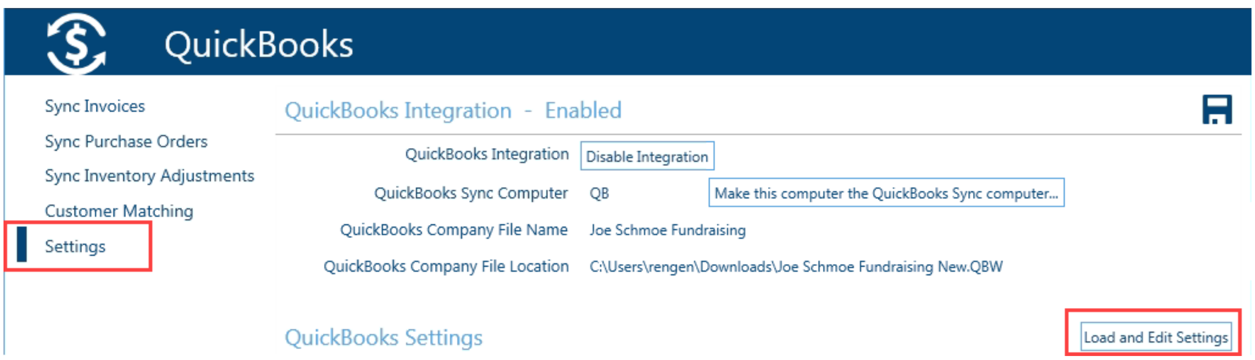


- Click on **OK**

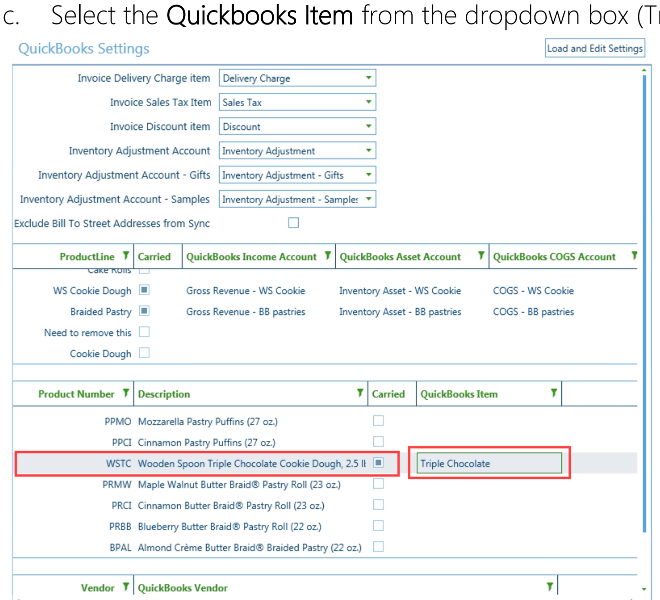
Map the My Fundraising Place item to the Quickbooks item in the Sync Agent:

1. Open the **My Fundraising Place Sync Agent**
2. Sign in

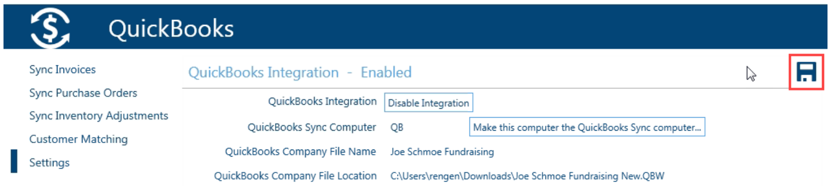
3. Go to the **Settings Tab**
4. Click on the **Load and Edit Settings** button
   a. This will load all current Quickbooks information into the My Fundraising Place Agent



5. Once the loading has finished, find the product from My Fundraising Place on the left side of Product List
   a. Click on the **Product Line** (WSTC)
      i. It should be marked as "carried" but not have a QB name on the right side of the list
   b. Click on the blank area to the right and a dropdown box will appear
   c. Select the **Quickbooks Item** from the dropdown box (Triple Chocolate)



6. Click on the **Save** button (top right corner)



Modify Price List or Create New Price List (if not already created):

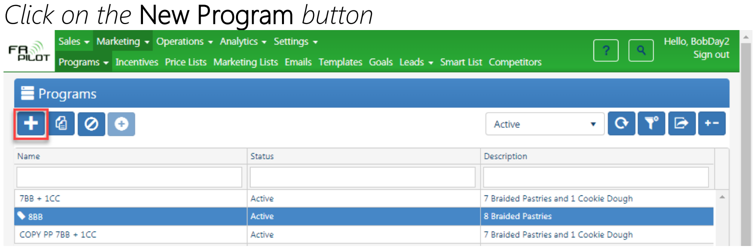
1. When a new flavor is added it is automatically added to existing pricelists but with $0.00 as its price
2. *If the existing pricelists haven't been used in My Fundraising Place:*
    - You can change the price on the new product in the existing pricelist
3. *If the existing pricelists have been used in My Fundraising Place:*
    - Copy an existing Price List to create a new Price List where you can add a price to the new product

Modify Fliers/Prepack Labels (if needed):

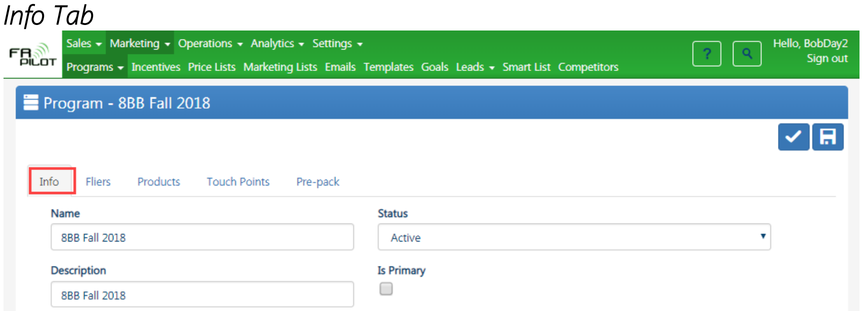
1. If you will have the same number of flavors (just switching flavors):
    - If you currently have a Flier/Prepack Label that has been created with all variables and no hardcoded fields
        i. You should be OK. Please do a test on your flier/label to make sure the new flavor is showing
2. If you are adding a flavor:
    - You will need to create a new Flier/Prepack Label. Please create with all variables and no hardcoded fields in it.
3. We are currently in the process of creating standard prepack labels and fliers. Please feel free to contact dealer.support@countrymaid.net for help if needed with these.

Create a New Program

1. *Go to* ***Marketing*** *>* ***Programs***
2. *Click on the* New Program *button*

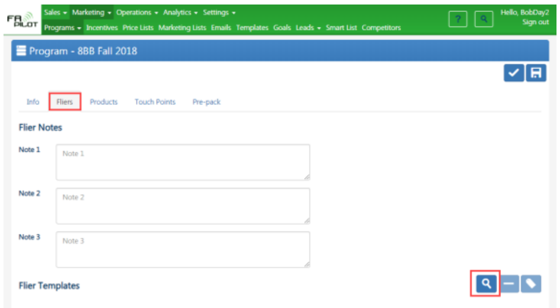


- *Info Tab*

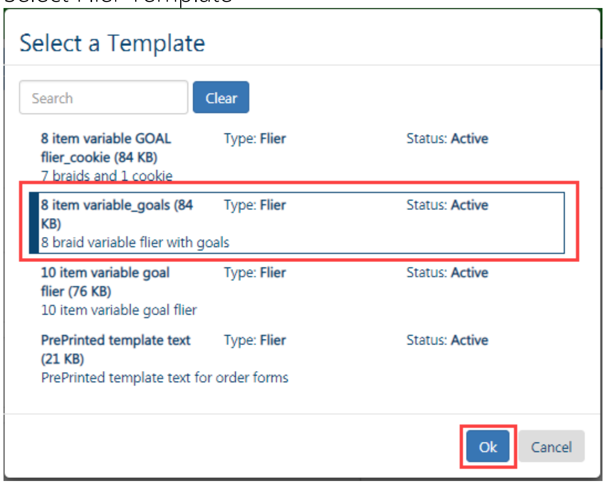


    i. Name/Description: Include the name of the season in the name of the program if possible
    ii. Check Primary if applicable

- *Fliers Tab*

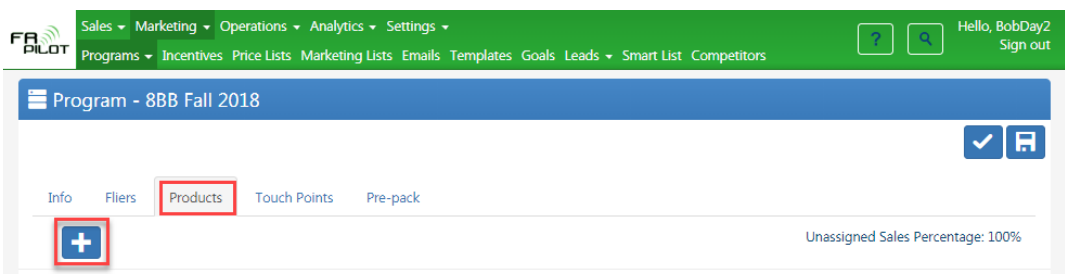


i. Click on the **Add Flier to Program** button
ii. Select Flier Template

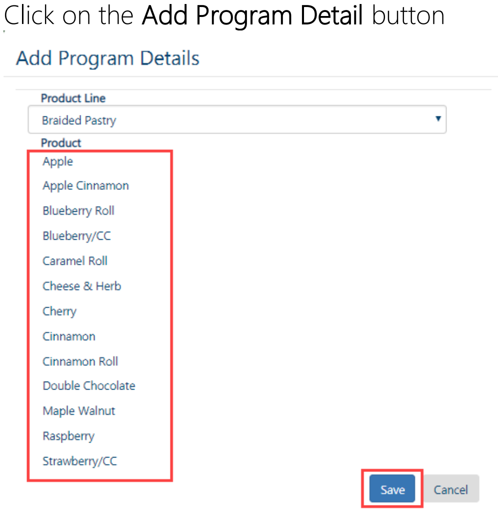


iii. Click **OK**

- *Products Tab*



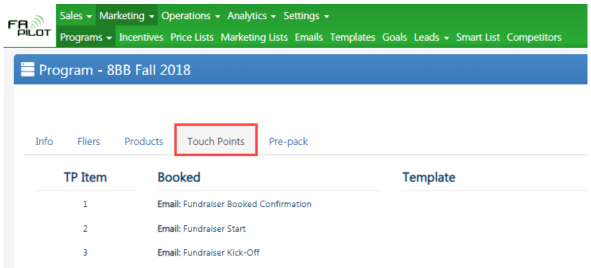
i. Click on the **Add Program Detail** button



ii. Select products

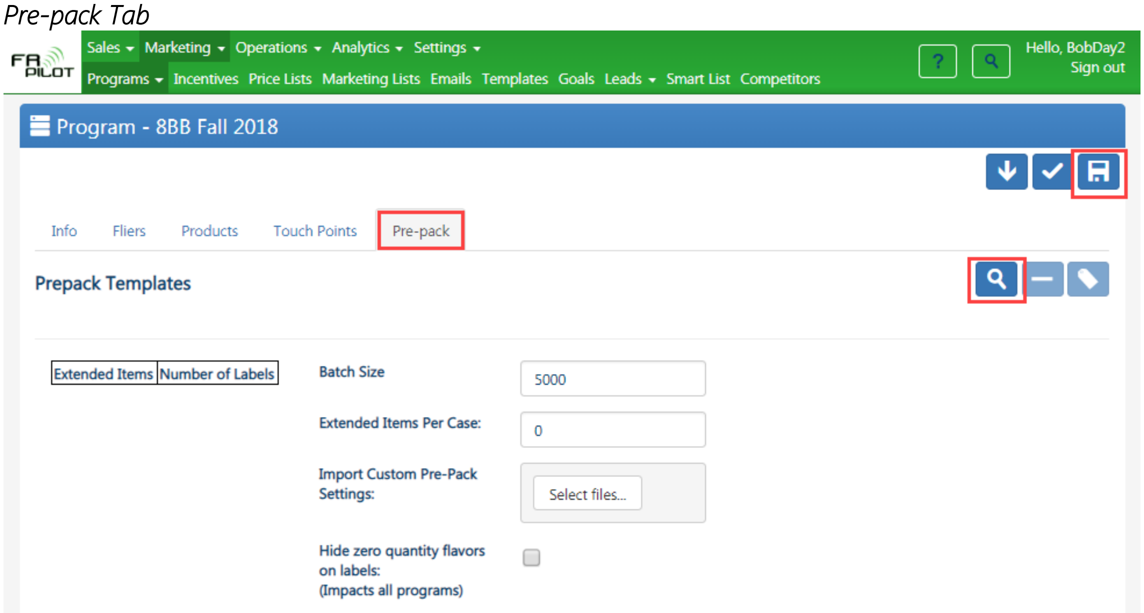
iii. Click **Save**

- *Touchpoints Tab*



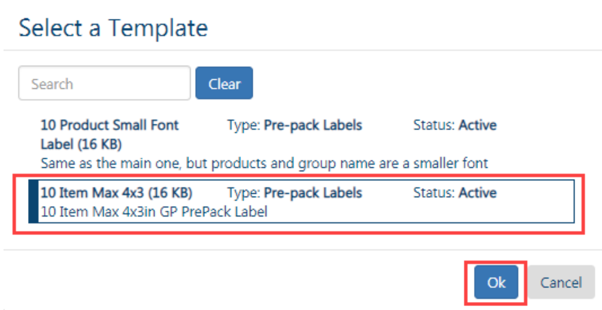
i. Review Touchpoints and make changes if needed

- *Pre-pack Tab*



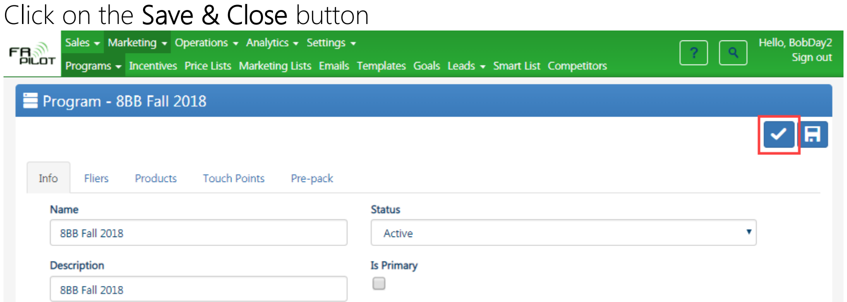
i. Click on **Add Prepack to Program** button

ii. Select Prepack Template



iii. Click **OK**

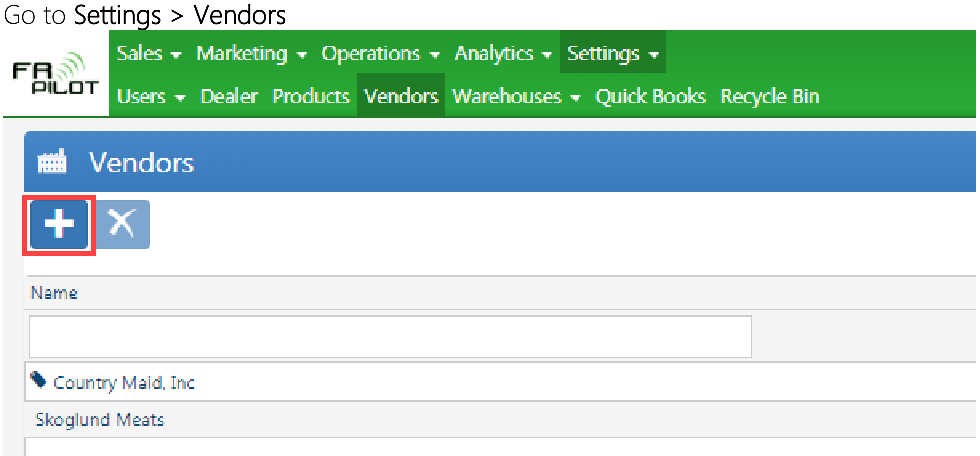
3. Click on the **Save & Close** button



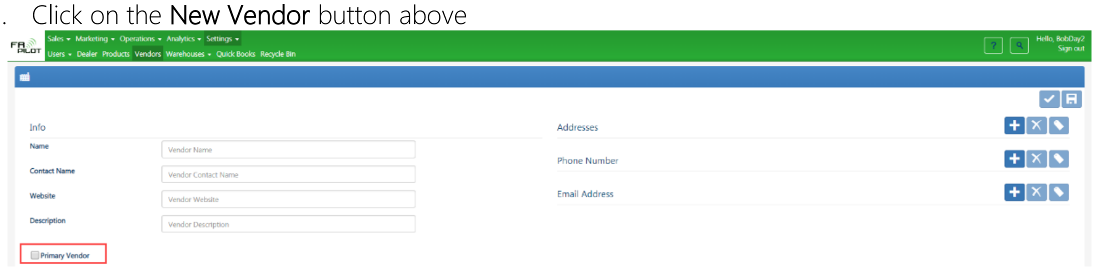
Products Maintenance

Adding a Non-CountryMaid Product Line:

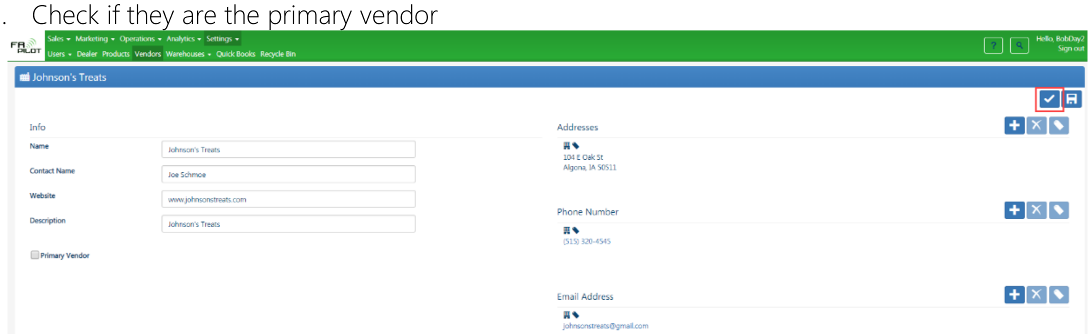
1. Check if vendor is in My Fundraising Place:
    a. Go to Settings > Vendors



    b. If not in system, add vendor:
        i. Click on the New Vendor button above

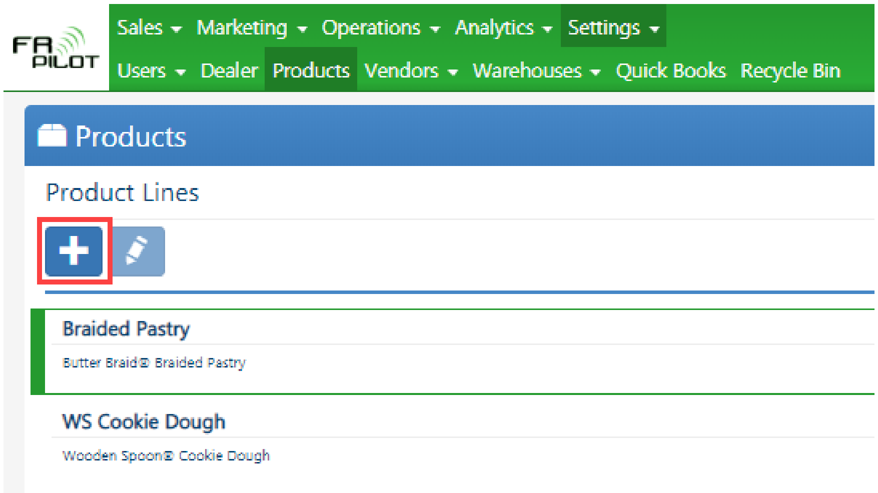


        ii. Enter the name, contact name, website, description, addresses, phone number and email address
        iii. Check if they are the primary vendor

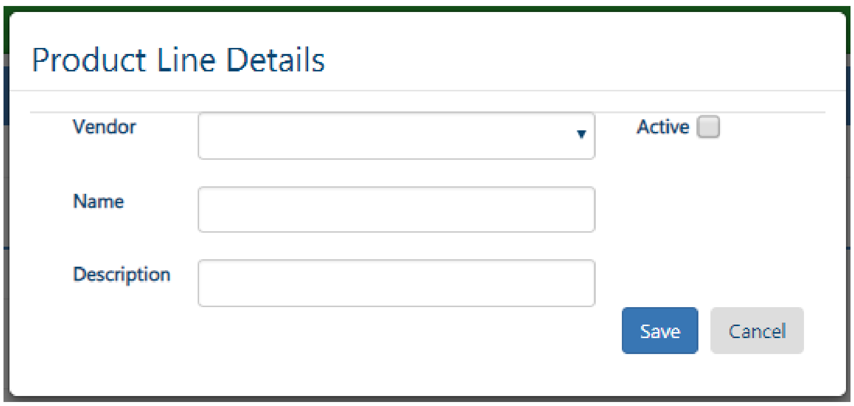


        iv. Click on Save & Close button
2. Go to Settings > Products

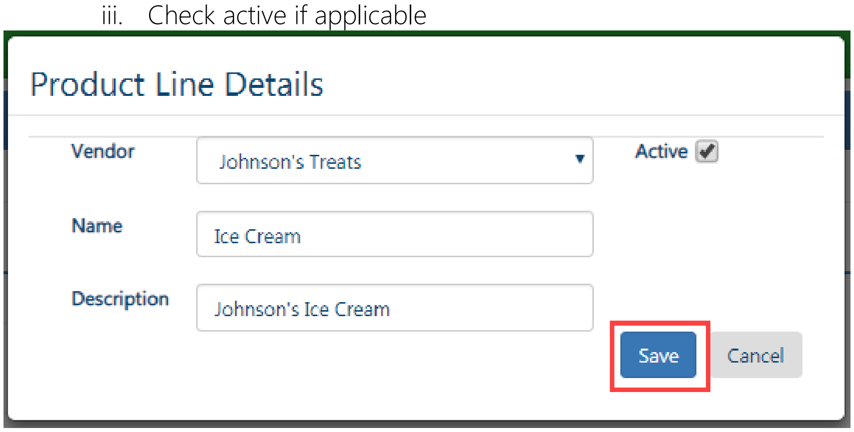
3. Add new Product Line:
   a. Click on Add Product Line button



   b. Enter information for vendor



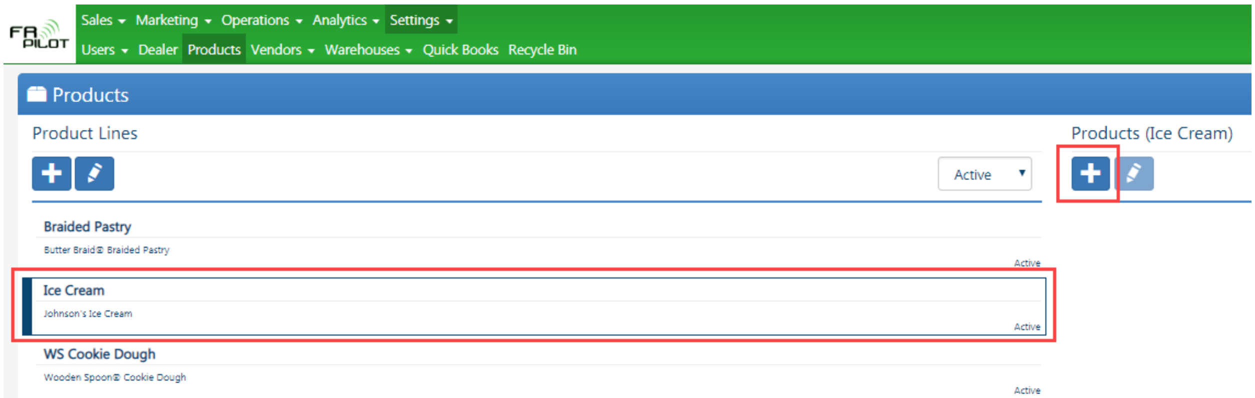
      i. Select vendor from dropdown
      ii. Enter name and description
      iii. Check active if applicable



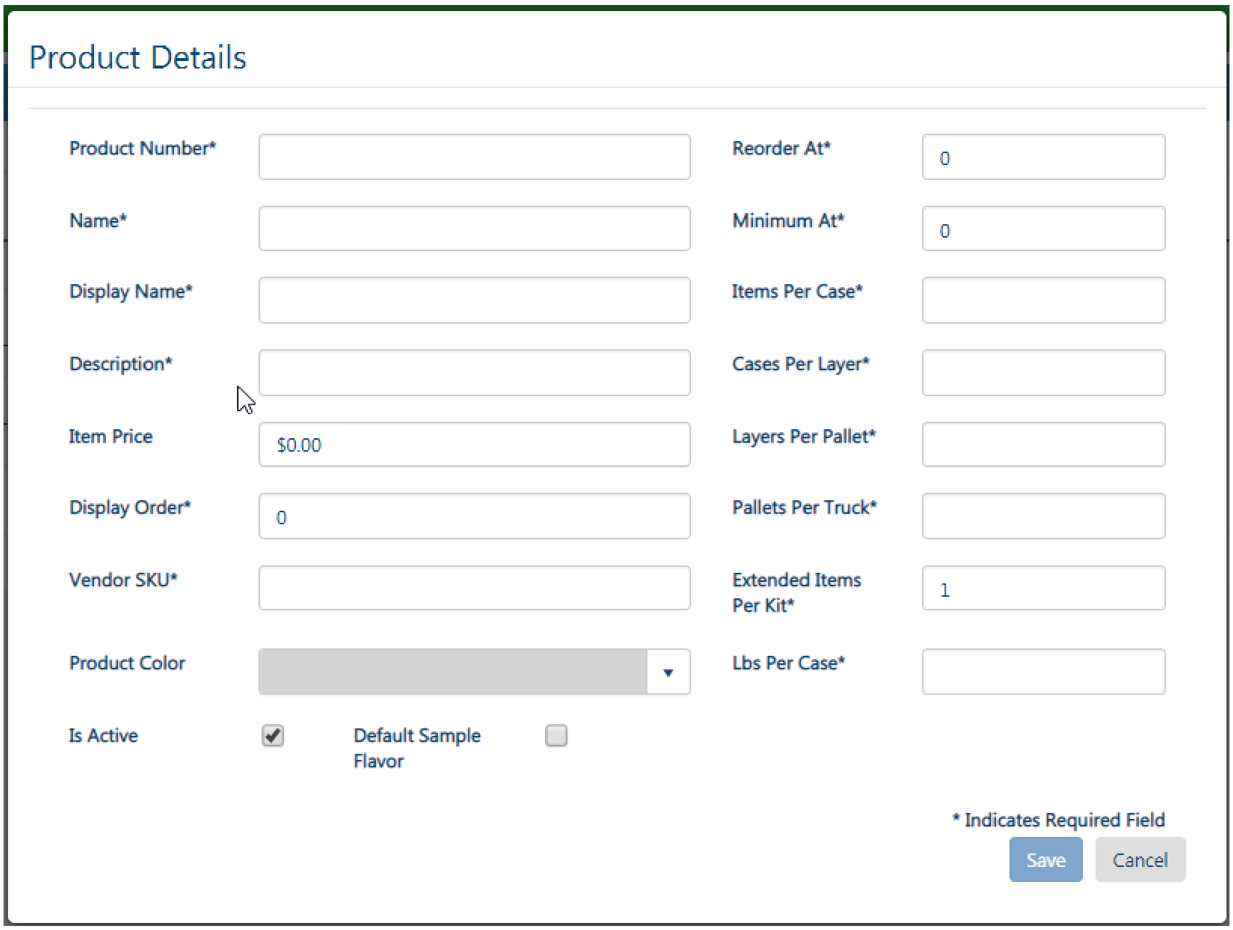
   c. Click on the Save button

Adding a Non-CountryMaid Product:

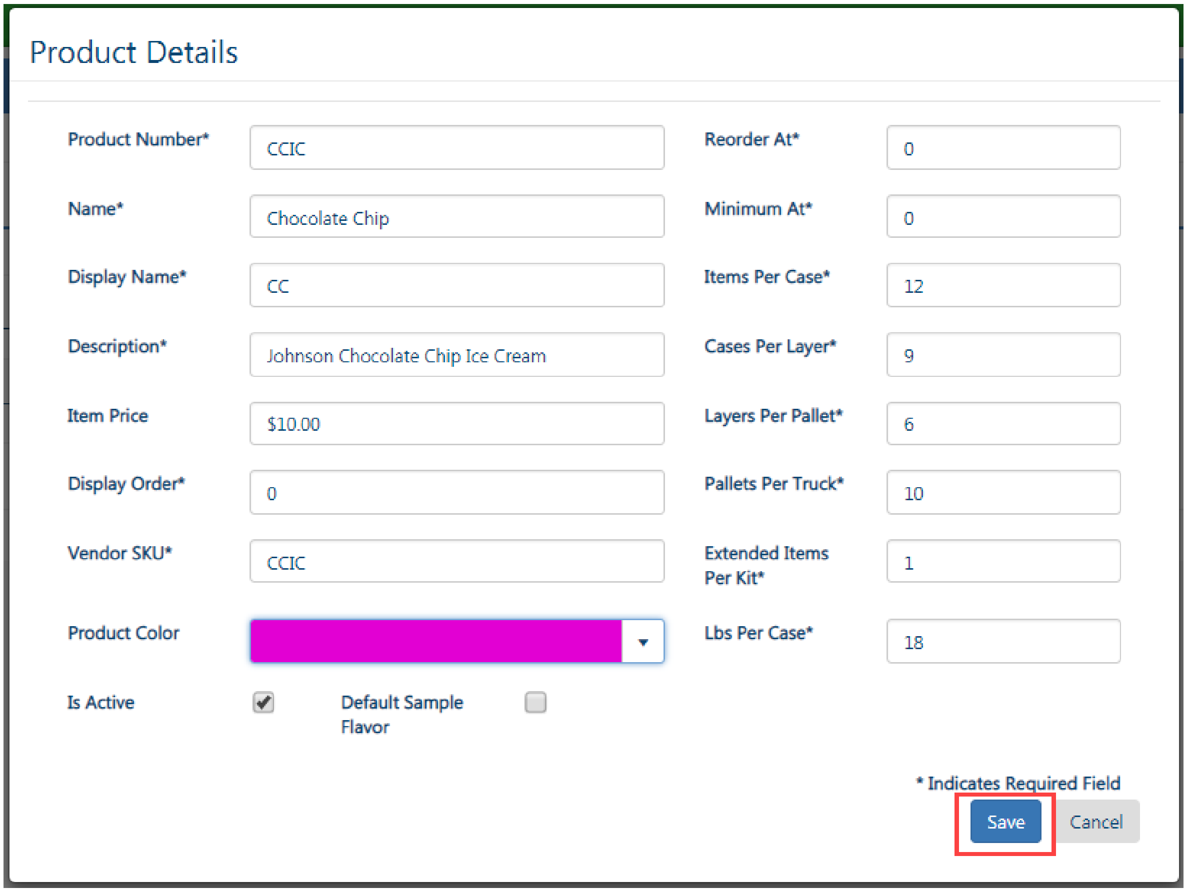
1. Go to Settings > Products
2. Select Product Line the product will be under



3. Click on the Add Product button



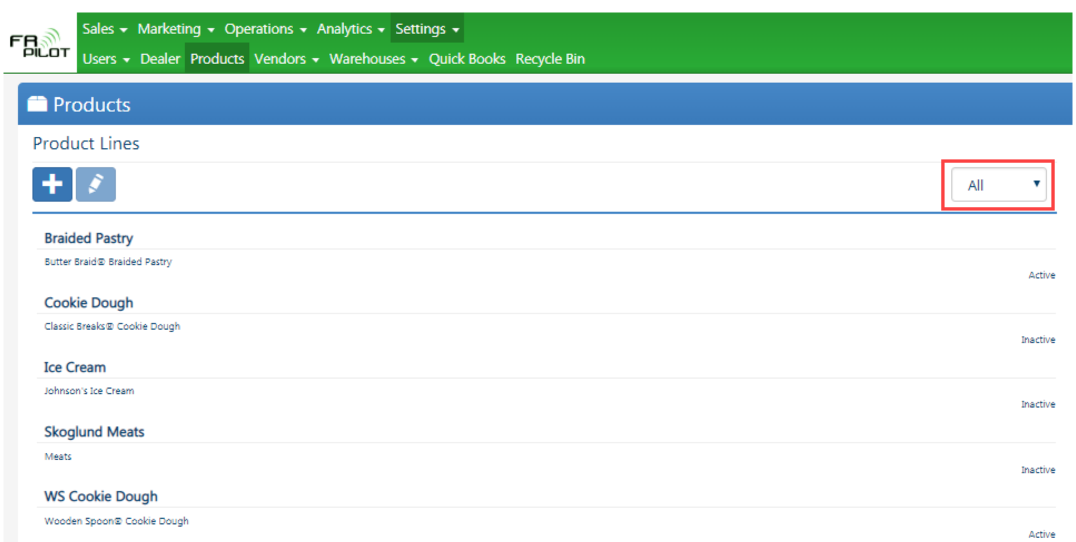
4. Enter all required fields (*)



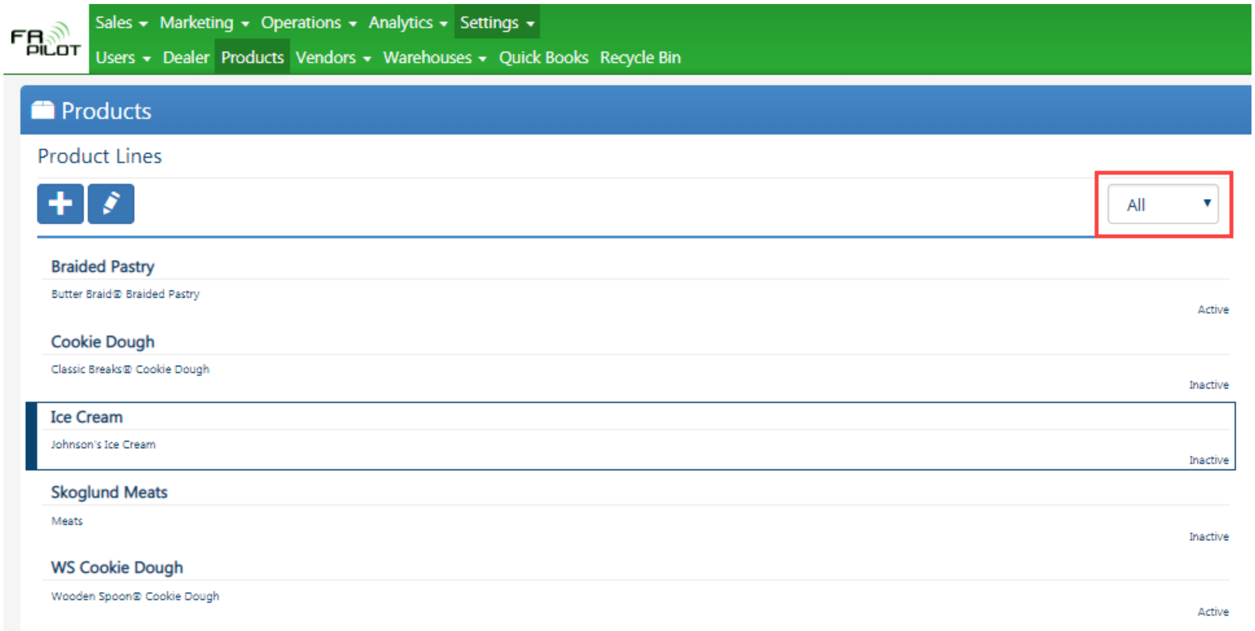
5. Click on the **Save** button

Activating/Deactivating a Product Line:

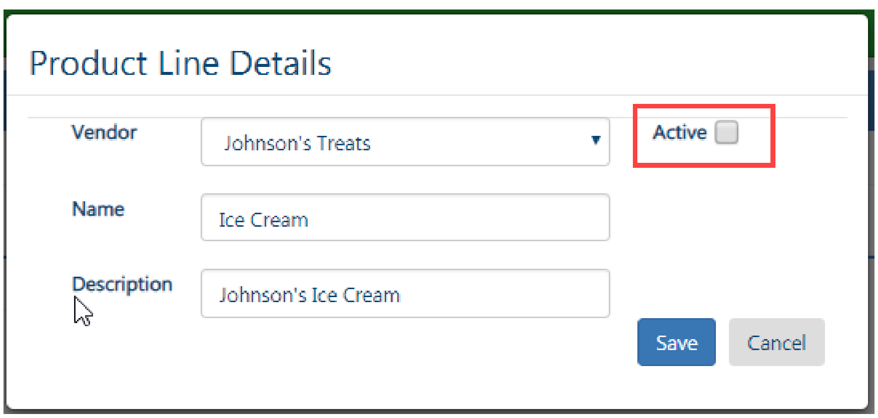
1. Go to **Settings** > **Products**
2. Select **All** in the dropdown for Product Lines. This will show all product lines – both active and inactive.



3. Double-click on the Product Line you want to change



4. Check the Active Checkbox to make active and unchecked to make inactive

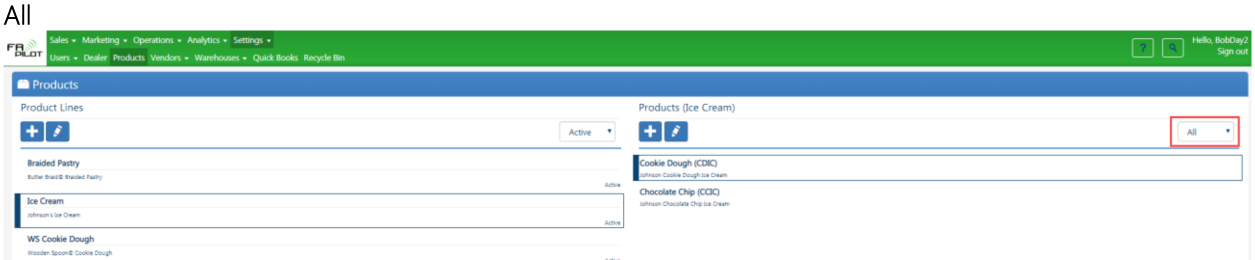


5. Click the Save button

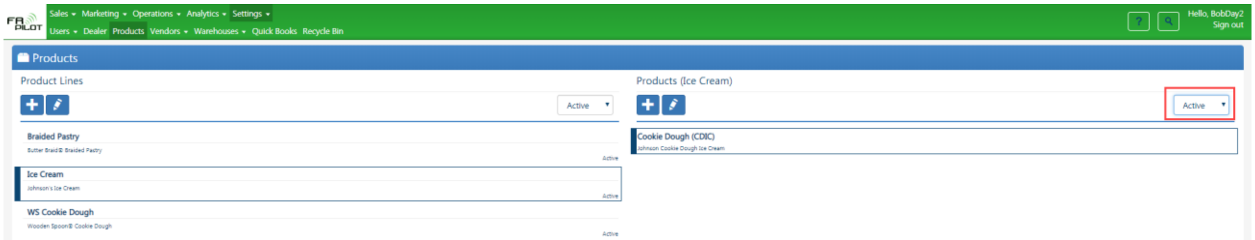
Activating/Deactivating a Product:

1. Go to Settings > Products
2. Select All in the Products dropdown. This will show all products – both active and inactive. You will have to individually select active and inactive to see those products.

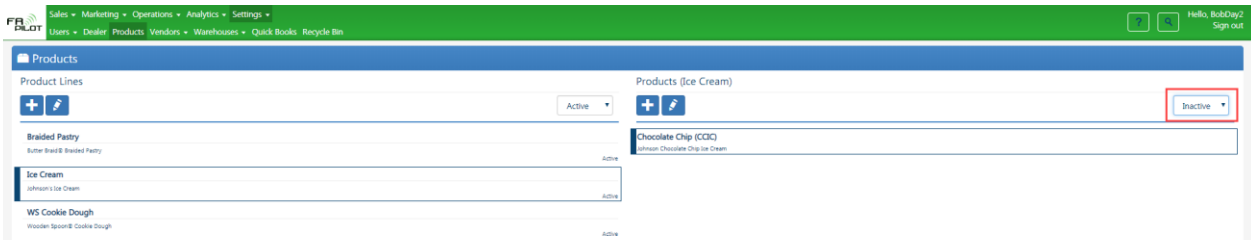
All



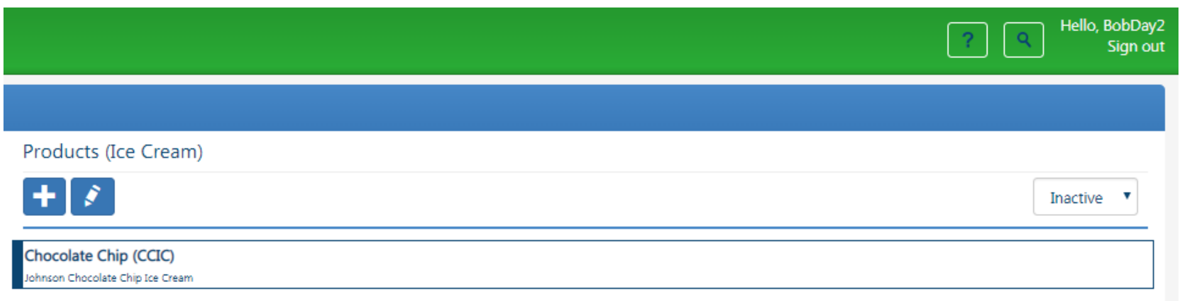
Active



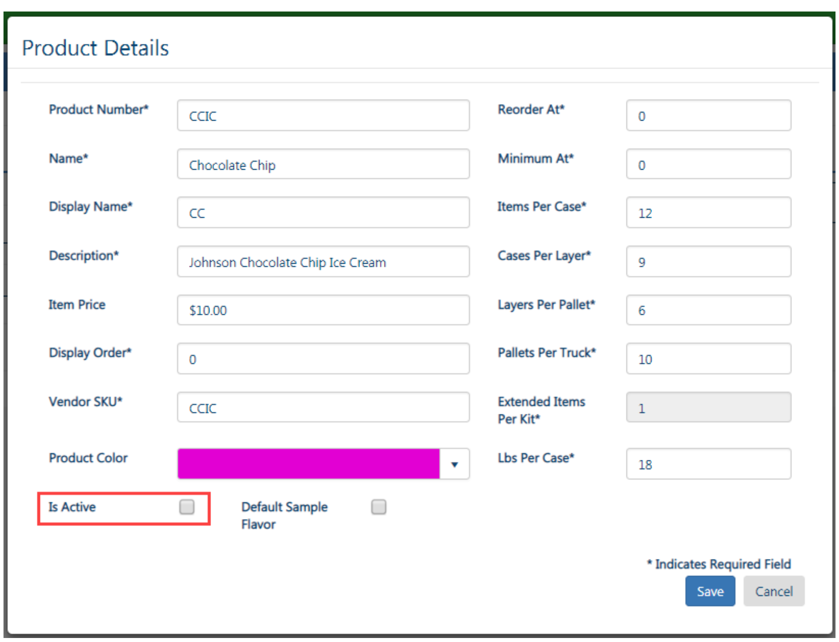
Inactive



3. Double-click on the Product you want to change



4. Check the Active Checkbox to make active and unchecked to make inactive



5. Click the Save button

Setting up Touch Points in My Fundraising Place

Scope of document: This document will provide a user an understanding of how Touch Point were designed to work in My Fundraising Place, and how to configure them for normal use in the fundraising sales process. *This document does NOT help a user design touchpoint documents.*

Objective of Touch Points: To help a dealership provide a high level of service to their customers, without creating an administrative burden during the busiest times of the fundraising sales cycle.

What exactly are Touch Points and how do they impact a dealership? My Fundraising Place Touch Points are a series of automated workflows that pull information together for transmittal (via email) to a customer. Most are fully automatic (see definitions below) and some are manually initiated. My Fundraising Place is configured to only send automatic Touch Point emails from 8 AM to 5 PM. The goal is to pretend that the emails are being sent from a real person during normal working hours.

Most of the work to utilize Touch Points is in planning and setting up the Touch Point process for each fundraising program in My Fundraising Place. This work is typically completed in the off season when a dealership plans their communication strategy for the upcoming fundraising season.

Before this document discusses how to setup Touch Points for use in My Fundraising Place, we will provide a little more background information on Touch Points and how they work.

Definitions / Terms:

- **Workflow** – a computer service that uses logic to analyze My Fundraising Place data to determine when to take an action that is defined by a touchpoint.
- **Manual touchpoint** – a workflow item that is initiated by a manual push of a button by a user. When a user initiates a manual touchpoint, the logic is reviewed and if the logic is satisfied, the touchpoint will execute.
    - Because a user is initiating the event, there is no risk of the workflow being automatically ran multiple times.
- **Automatic touchpoint** – a workflow item that is monitoring the software for the right conditions to execute an event (such as send an email when a date is satisfied)
    - Automatic Touch Points are sent from a workflow engine installed in the SQL Azure environment so that emails and workflow events can be sent if all client computers are off when the conditions are satisfied, and to prevent multiple clients from trying to send the same workflow at the same time.
    - Automatic Touch Points are configured by a dealer to send "XX" days before a triggering event. These triggering events are defined on the Touch Point setup page located on a program.
- **Touch Point enable / disable** – this is an option that allows a user to select if a touchpoint item will be included in a manual or automatic touchpoint event.
- **Merge fields** – a data tag that is inserted into a MS WORD® document that is designed to accept data from a computer process automatically
- **Template for Touch Points** – an MS WORD® document that has a pre-configured message written (including pictures, formatted text) that contains merge fields. The contents of the MS WORD® template ultimately will be merged into an MS Outlook® email for delivery to customer

After creating templates for use in My Fundraising Place (refer to other training resources for help on creating templates using merge fields), there is a simple 3 step process for configuring a program to use your templates. The 3 steps are:

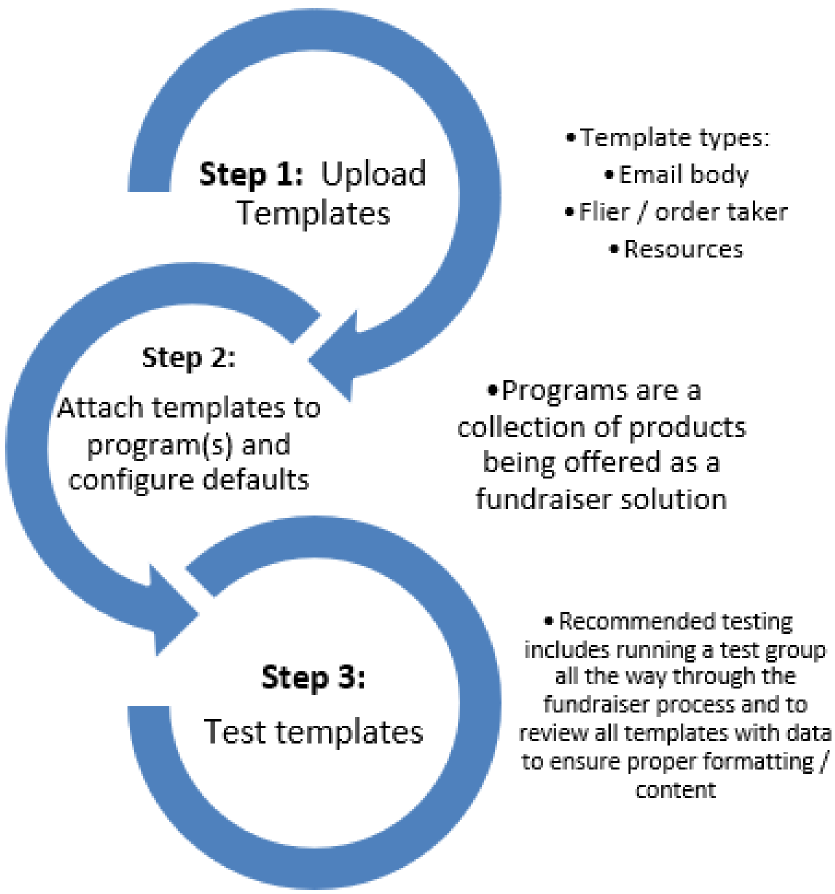


Figure 1 – 3 Step Process for Configuring My Fundraising Place to use the automated Touch Point process

What are the available Touch Points in My Fundraising Place? This question is best answered using table 1 below. Each Touch Point (TP) is named in the first column, and the table is grouped by the fundraiser stage that the TP is expected to be executed. Any of the individual TP steps can be manually "resent" by clicking the icon. This icon with pop open a MS Outlook message with the TP content included for the user. If a TP item was sent automatically, the last column will display the date and time it was sent. In addition, any of the TP steps can be printed from MS WORD® by clicking on the icon found on each TP step on a fundraiser.

The highlighted numbers in table 1 are settings that are defined on each program. The midpoint date is a date that is calculated from the fundraiser start date and the fundraiser Return Order date.

Table 1 – List of Touch Point steps in My Fundraising Place

TP Item	Booked	Actions	Scheduled Run	Completion Date
1	Email: FR Booked Confirmation		FR = Booked	Manual
2	Email: Fundraiser Start		Days Before Start	
3	Email: Reminder Kick-Off		Days Before Kick-Off	
TP Item	**Running**	**Actions**	**Scheduled Run**	**Completion Date**
4	Email: Midpoint Check In		07/08/2018	
5	Email: Reminder Order		Days Before Call In Order Date	
TP Item	**Ordered**	**Actions**	**Scheduled Run**	**Completion Date**
6	Email: Order Confirmation		FR = Ordered	Manual
7	Email: Delivery Confirmation		Days Before Delivery Date	
TP Item	**Delivered**	**Actions**	**Scheduled Run**	**Completion Date**
8	Email: After Delivery		Days After Delivery	
TP Item	**Paid**	**Actions**	**Scheduled Run**	**Completion Date**
9	Email: Thank You		FR = Paid	
10	Email: Follow-up		Days After Paid	
A #	**Attachments**	**Actions**	**Scheduled Run**	
1	Email: Letter To Parents		With TP Item 1	
2	Email: Fundraiser Sales Toolkit		With TP Item 1	
3	Email: Custom Flier		With TP Item 1	
4	Email: Order Tabulator		With TP Item 1	
5	Email: Additional Order Tabulator		With TP Item 5	
6	Email: Additional Attachment		With TP Item 1	
7	Email: Additional Attachment 2		With TP Item 1	

Following is a description of each Touchpoint email

Fundraiser "Booked" Status Emails:

1 – Fundraiser Booked Confirmation Email: This TP is designed to be sent after collecting all the relevant dates and information about a fundraiser. It collects the important information about the fundraiser service cycle into a template that the dealer manually sends to the primary contact to let them verify what the dealership has committed to help their group with to raise the funds they need. Typically, key dates are verified in this email. This email also can have various resources attached that are relevant to the fundraiser service cycle (See attachments 1 through 5).

- Attachment 1 – Letter to parents – this letter is a MS WORD® document that is a dynamically built letter the group leader can use to print a letter for the parents of the kids.
- Attachment 2 – Called the "fundraiser sales toolkit" – it really is just a file that a dealer can upload (PDF, or other format) that is attached to the Touchpoint 1 email. Some possible uses include a copy of the "book of motivation" or other resources for new groups. Many dealers may configure this step with a resource but not

include it by default (by unchecking the "enable" button on the program TP setup page). Then the dealer can choose to include it on just 1 fundraiser by enabling the TP on the fundraiser so that it will pull this resource in.

- Attachment 3 – The custom flier that is selected and customized for this fundraiser
- Attachment 4 – the order tabulator – the excel order tabulator that is setup for the program

2 – Reminder Fundraiser Start Email: This TP is a message to remind the group that their fundraiser start date is approaching and is a good chance to verify that they have everything they need (they got their forms, etc.) so that the fundraiser schedule is not affected.

3 – Reminder Fundraiser Kick-off email: This TP is an email that is sent out prior to a kick off activity reminding the group that a kickoff is planned. Typical data that can be used in the TP includes the date / time and the address.

Fundraiser "Running" Status Emails:

4 – Midpoint Check-in Email: This automated email is an automated email that just reminds them that they should be half way done with their fundraiser. It is a good time to encourage the group leader to check-in with their sellers and ask for updates as to who is achieving their goals. The midpoint date is a date that is calculated from the fundraiser start date and the fundraiser Return Order date.

5 – Reminder Order Email: This automated email is user configurable on a program to be sent out XX days prior to the call in order date.

- Attachment 5 - Order Tabulator Resend: This touchpoint is a good place where the order tabulator resend attachment is best used with a program. It allows the order tabulator to be attached a 2nd time with a selected Touchpoint email (recommended is #5). Some dealers like to send it a 2nd time so that the group leader doesn't need to look for the order tabulator in the email (or they may have deleted it).

Fundraiser "Ordered" Status Emails:

6 – Order Confirmation Email: This email is a manually initiated email that is sent when the dealer wishes to send the invoice to the customer. Information that can be merged into this email includes a profit summary, participation statistics, and delivery information (date, time, address).

7 – Delivery Confirmation Email: This email is an automated email that is sent XX days prior to the delivery date. Information that is typically used for this email includes the total number of items, total profit, delivery details (address/date/arrival time) and also the time that the product is to be picked up by parents.

Fundraiser "Delivered" Status Emails:

8 – After Delivery Email: This email is an automated email that is sent XX days AFTER the delivery date. This is the email step that thanks them for their business and is a good place to include a survey link along with a thank you.

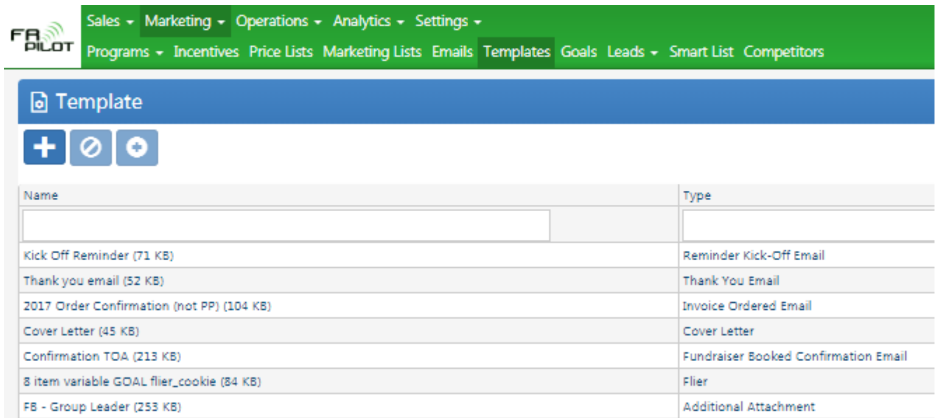
Fundraiser "Paid" Status Emails:

9 – Thank You Email: This is an automated email that will be sent when a fundraiser is marked as paid (which occurs when all invoices associated with it are marked as paid). Some dealers will choose to use this automated email step to send a survey link along with their thank you, and others will not use this as a thank you (because they prefer to use a written thank you note) and they may just use it to encourage the customer to sign up for next year and ask them to take a survey about their opinion of the fundraiser.

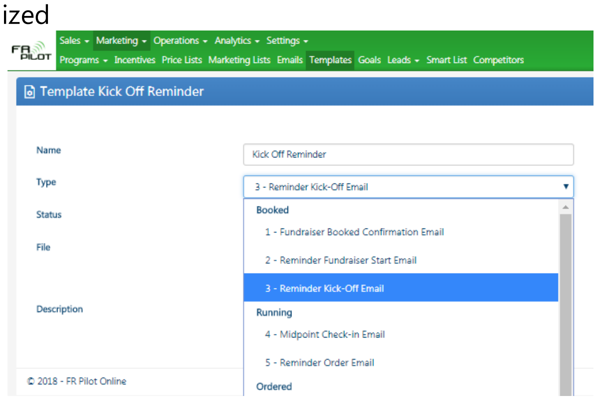
10 – Follow-up Email: This is an automated email that will be sent XX days after a fundraiser is marked as paid. This a good email to ask them for a good time to setup their next fundraiser (if they do not have one already signed up).

Detailed Touch Point Setup instructions: Following are the detailed steps to setting up touchpoint emails. These instructions do not include how to design or edit the templates, just the process used to configure all Touch Points.

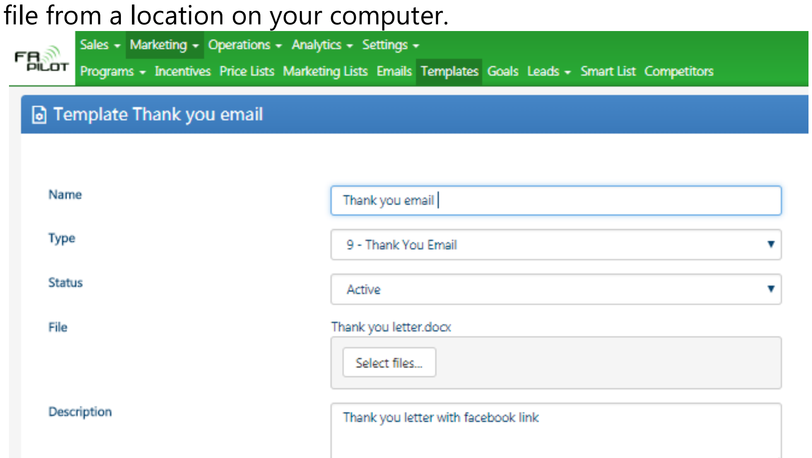
1. Upload templates to the template library. While uploading, you need to identify what type of template you are putting into the library.
   a. Click "+" near top of list to add a new template



   b. Give the template a name that will make it easy to select from a list when you add the template to a program. Then select the file type so My Fundraising Place knows what data to push to the template when it is being utilized

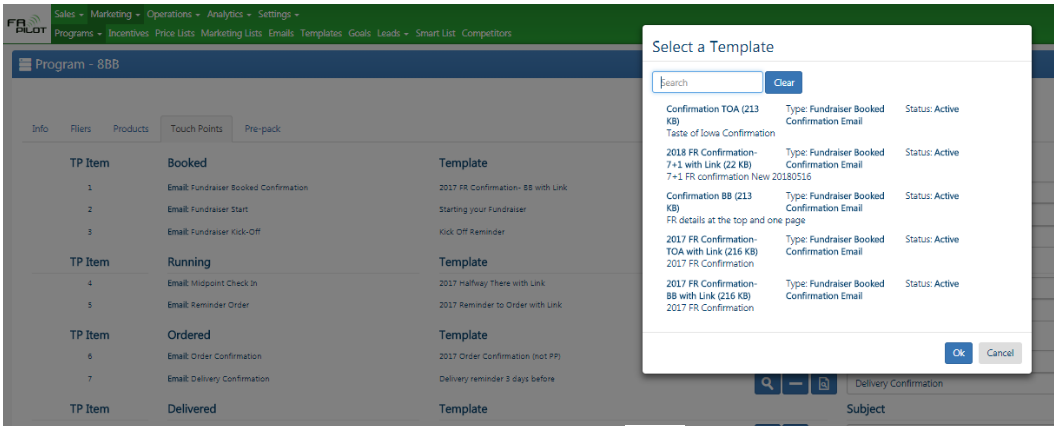


   c. Set the file status to active so it will show up in the template library and make it available for the programs. Also give the file a description to help you choose between the different versions of this document.
   d. Select the file from a location on your computer.



e. Close the form. Repeat the above steps until you have all the templates in your library you wish to use.

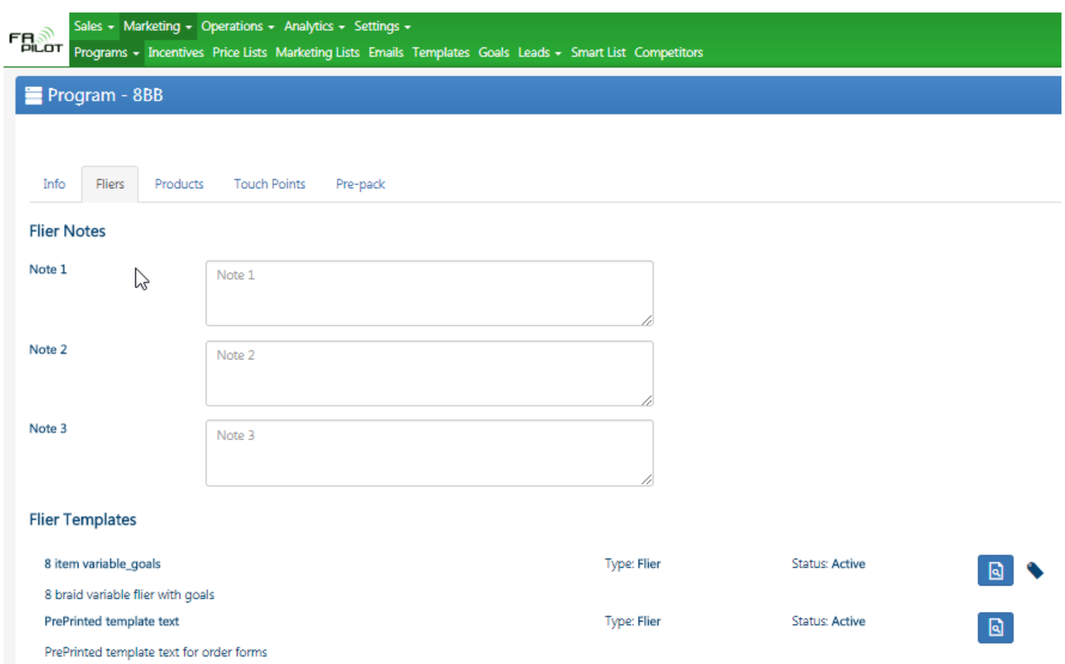
2. The next step is to attach the templates to a program.
   a. Open an existing program and select the Touch Point page. In this example we are going to select the lookup icon located in the TP Item 1 to attach an email template to it.



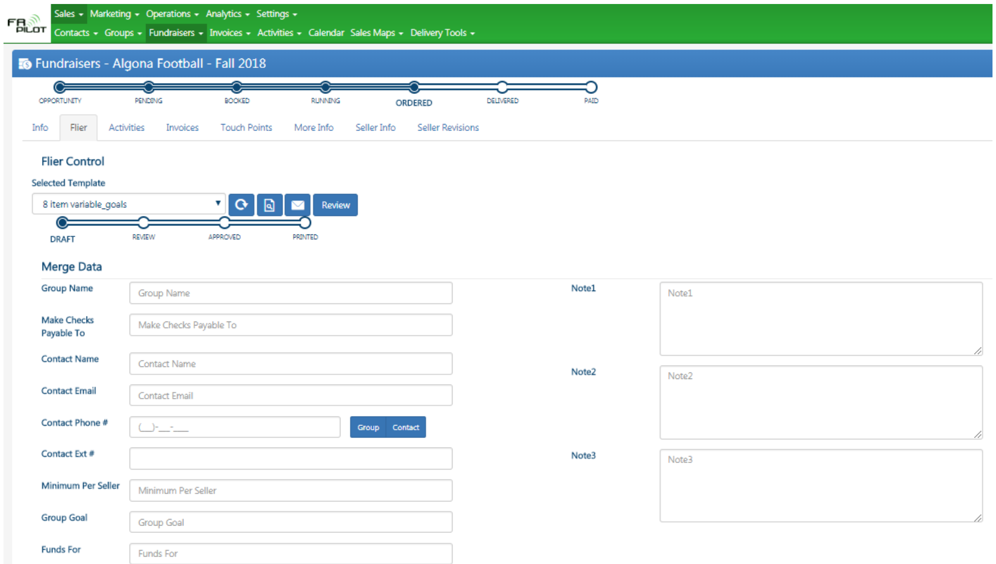
   b. Once attached, the user can click the preview button to look at the template file (without data) and click on the ☑ button to set the default (enable/disabled) for this TP item. If there is no check mark in the box, the TP is not enabled by default and would look like this ☐
   c. Repeat these steps for each Touch Point until the program is configured.

3. The next step is to configure the custom flier templates that will be available to the program. To attach these templates, you will need to navigate to the "flier" page on the program.

   a. Click on the (look up button) in the flier template area and add the appropriate flier template(s) to this program. You can have multiple flier templates associated with the program. It is important that you have all available templates on this view that you expect to use during the fundraiser sales process so that you can quickly choose an alternate flier layout while working with a customer *fundraiser basis.*



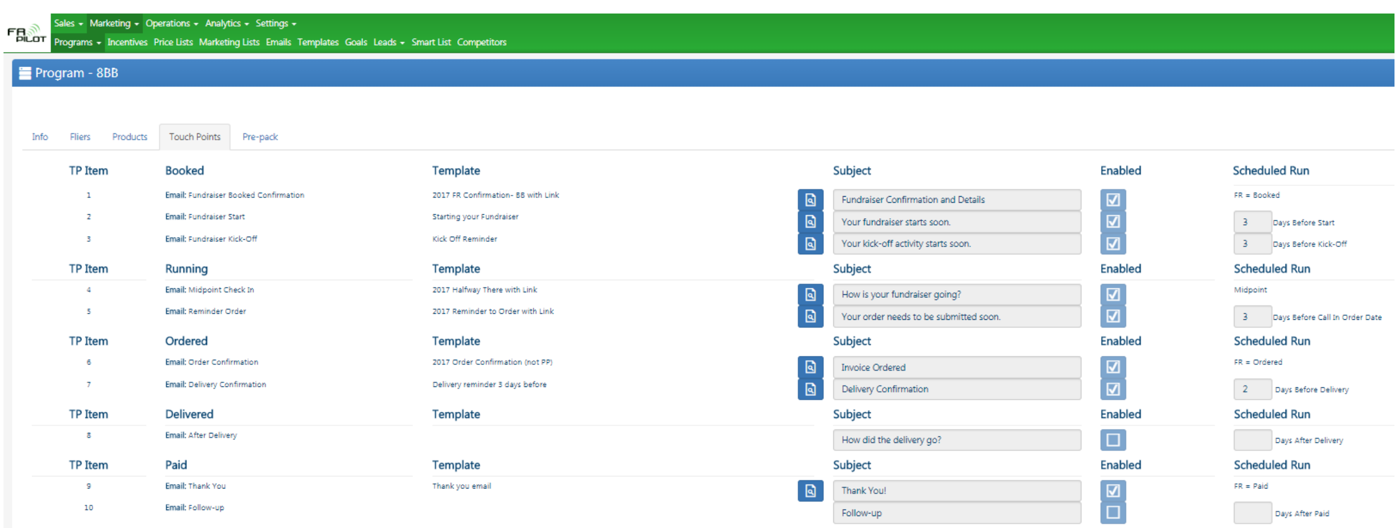
b. The 3 note fields that are provided on a program give you 3 custom fields that will merge to a flier template. These fields can have a program level default, but also be customized on the fundraiser flier page on a fundraiser by editing the fields show below (the proper use of this page is discussed in other training documents



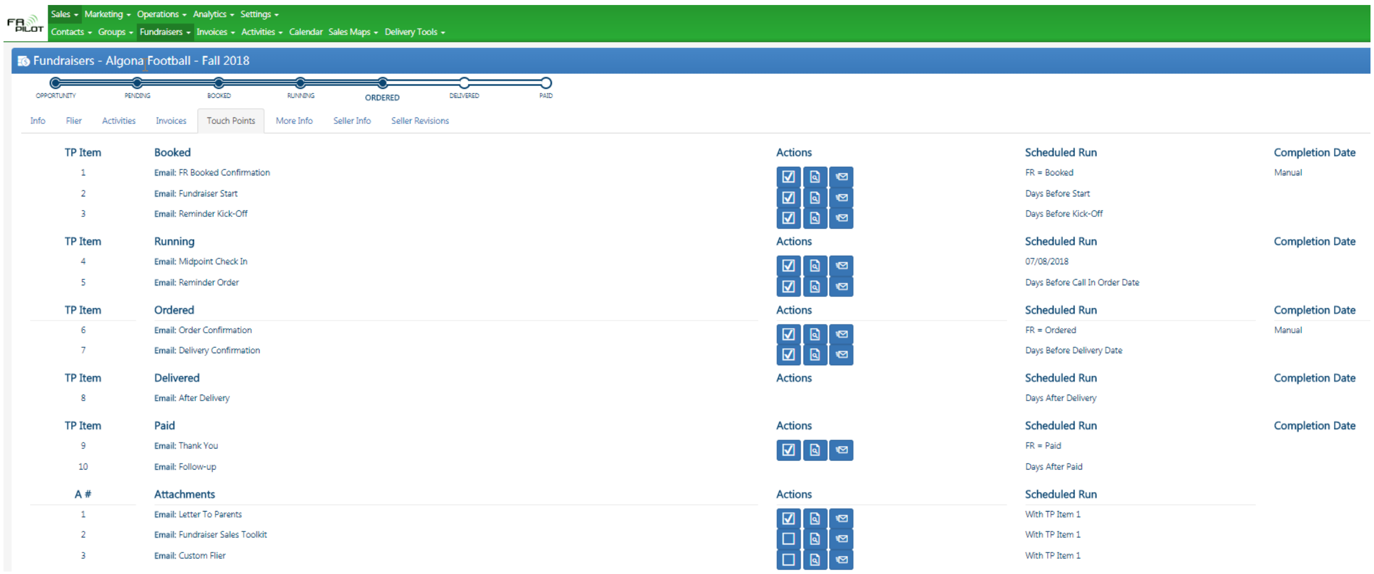
4. The last step is testing the document to see if the template displays data as expected. To test, choose a test group, or create a test group with your own email address as the contact's email address so you can test the entire process if you would like. Create a fundraiser with this group and start working it through the process. You can use the "resend" function on a fundraiser's Touch Point step to see what the test emails would look like. This will pop up in a MS Outlook window with the merged data and files (if applicable).

How to use the enable / disable options on a Touch Point:

To explain how a dealer would use the enable / disable settings, let us consider A Item #1 (the letter to the parents). Some dealers would not want to include this on every fundraiser, so they would configure the program to have a template in #1, but they would "Uncheck" the enable button on the program as shown below. You can see there is a template titled "Parent Letter Test" and it is disabled by default.



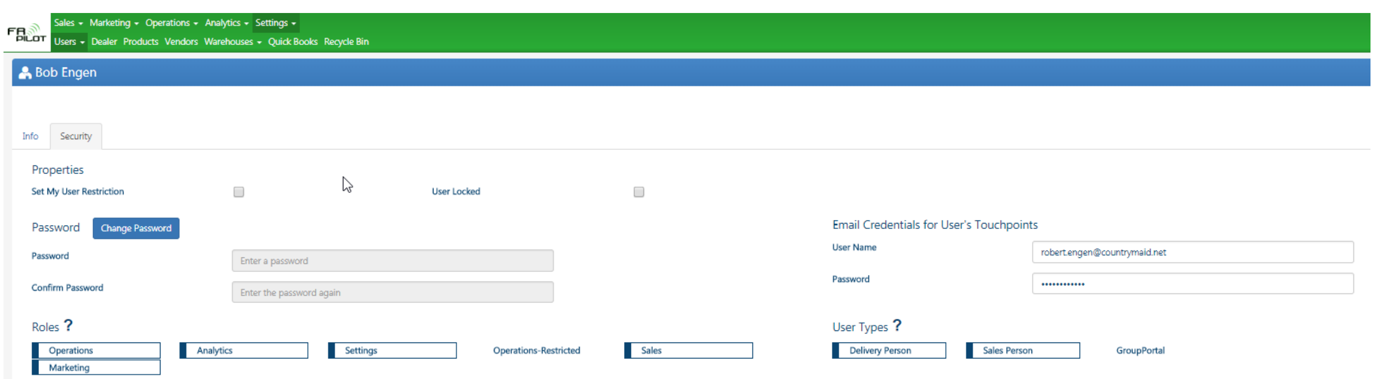
If the user is on fundraiser and wishes to enable the parent letter, they would just need to click the enable box on the A Item #1 [shown below on the **fundraiser's Touch Point page**] prior to sending the TP Item #1 confirmation. If they check that box, when the TP Item #1 Touch Point triggers (in this case manually) the parent letter will be attached to the Fundraiser booked confirmation email Touch Point.



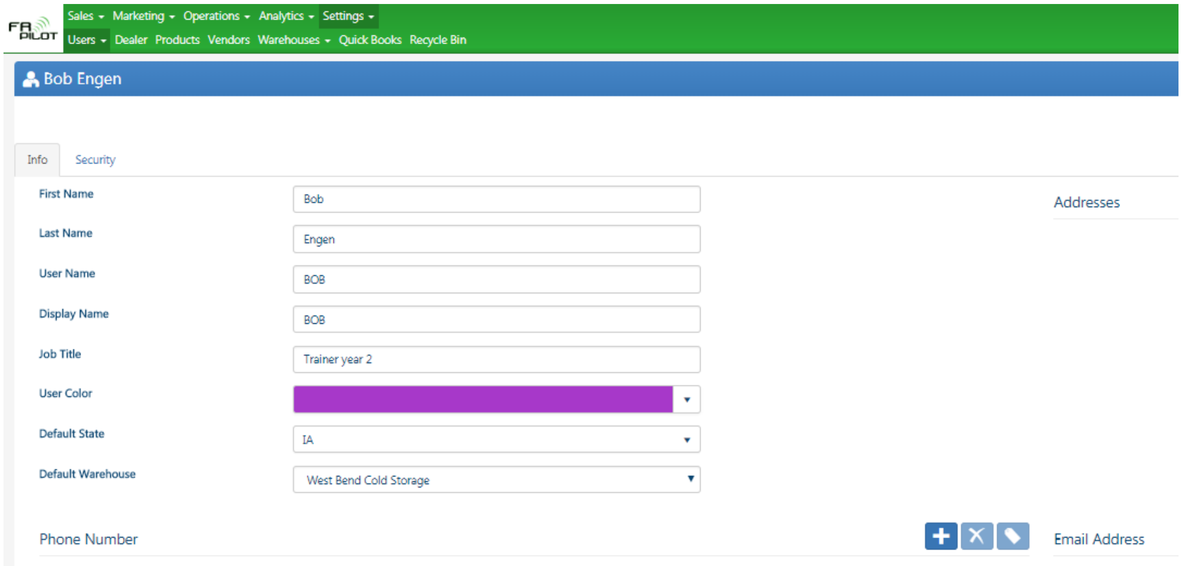
Other Touchpoint Best Practices:

Email Account Configuration: There are 2 typical ways that dealerships will configure their automated emails depending upon their staffing and support model. All dealerships typically start with Method #1 while they are an owner/operator, but then as they grow and have additional resources (multiple salespeople, office administrative help, etc.), they sometimes may migrate to Method #2. Method #1 and Method #2 are explained after a short description of how My Fundraising Place sends automated emails.

My Fundraising Place is configured to **send the automated workflow emails from the fundraiser's owning user.** The email account that is used is **the email credentials that are found on the settings tab** of a user's card (shown below).



The **REPLY ADDRESS** of the automated email will be the primary email address of this user. A workflow email could be sent from one account and have a reply address of another account.

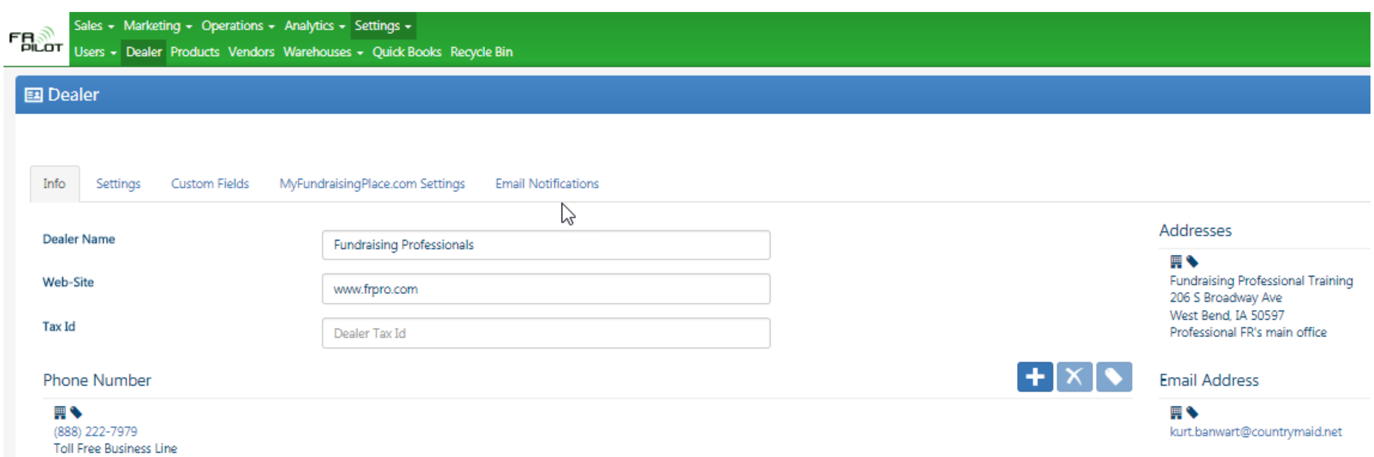


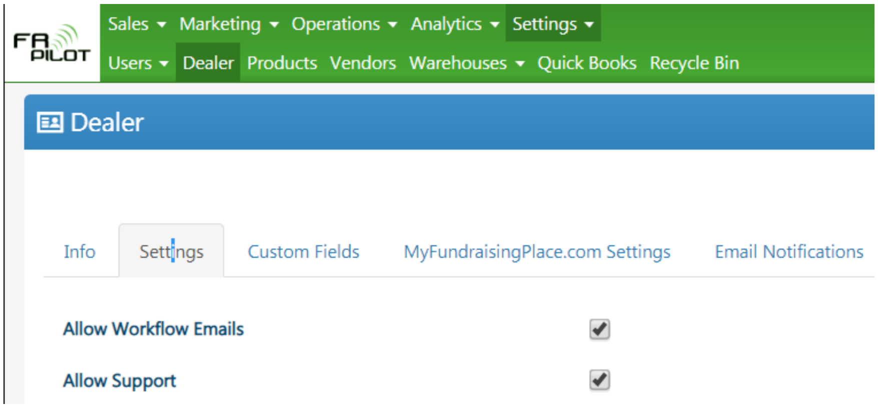
Method #1: The email comes from the owning user (typically the sales person) and the reply address is the same email address. In this scenario, users have their own email account credentials entered into the email settings on their user card, and their own email address is configured as their primary email address.

Method #2: The email settings on the owning user's card is set to a generic company email address (such as info@dealership.com) that is reviewed by an office worker. The reply to can either be to the salesperson's real address, or the reply to could be directed to the same info@dealership.com by setting the user's primary email address to be this email address.

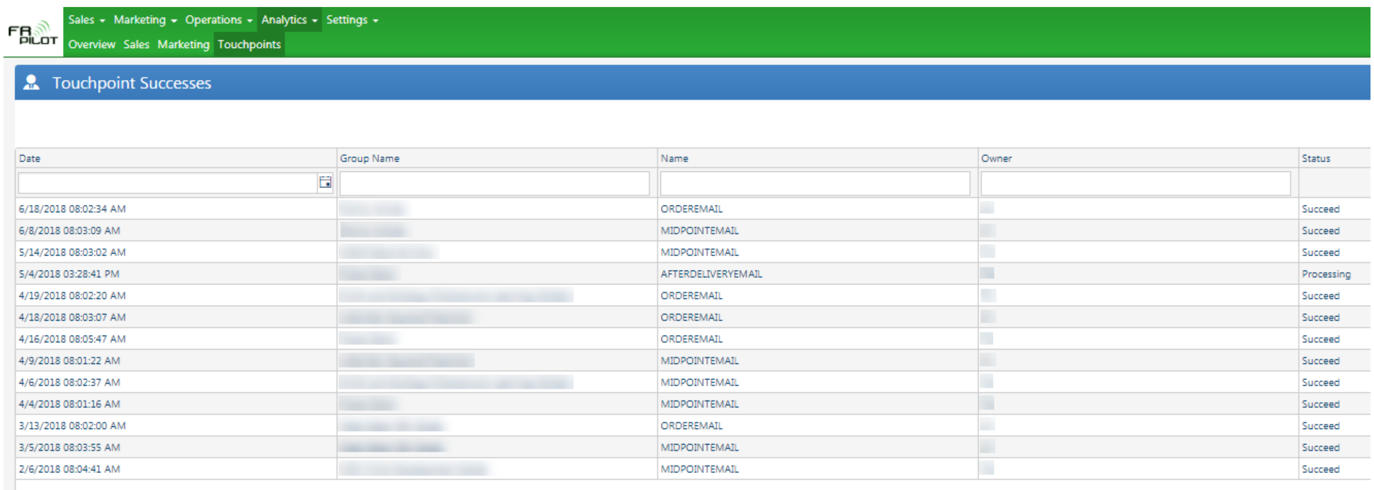
Monitoring Automated Emails: For automated emails to go out, there are a few requirements. These include:

- The owning user of a fundraiser must have an exchange email account setup and enter those credentials on the email settings tab of a user.
- The Owning user of a fundraiser must have a primary email address
- The fundraiser needs to have a primary contact
- The primary contact on a fundraiser must have a valid email address
- The global workflow email setting found in the dealer setting page must be enabled (see picture below)





The Touchpoint Successes screen shows how many automated emails were sent during each week.

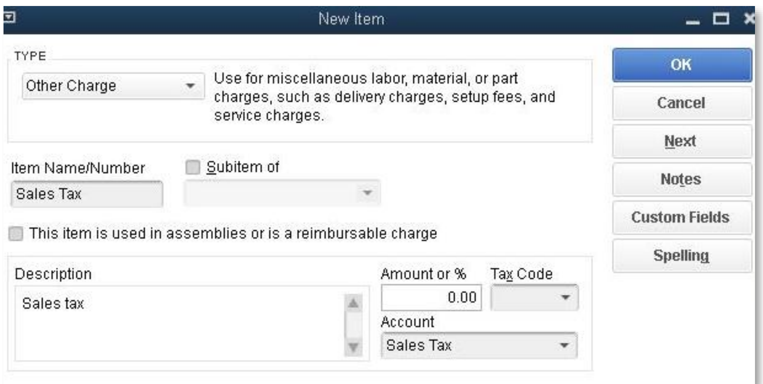


If you want to view an exact copy of the email that was sent, you can look in the sent items of your MS Outlook® email account that corresponds to the owning user's email settings.

Sync Sales Tax from My Fundraising Place to QuickBooks

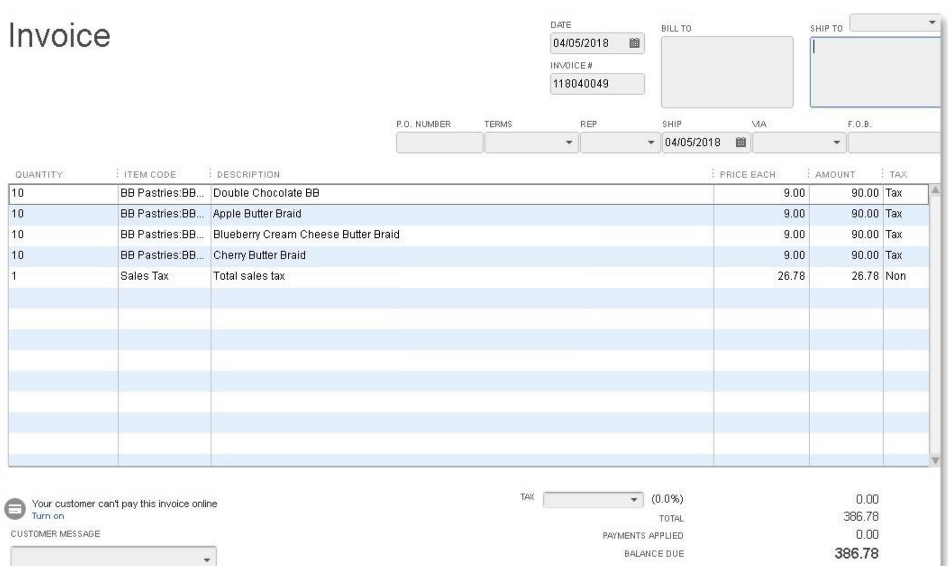
Open QuickBooks

1. Create a **New Item** of type **Other Charge**
2. Under **Account**, select your sales tax account
    1. If you do not already have a sales tax account, create a new account of type **Other Current Liability**



Log in to My Fundraising Place Sync Agent

1. Click the **Settings** tab on the left side of the window
2. Click **Load and Edit Settings**
3. Under **Invoice Sales Tax Item** select your sales tax **Item**
4. Click **Save**
5. Click the **Sync Invoices** tab on the left side of the window
6. **Load** and **Sync** invoices
7. Sales tax will now be shown as a line item on invoices



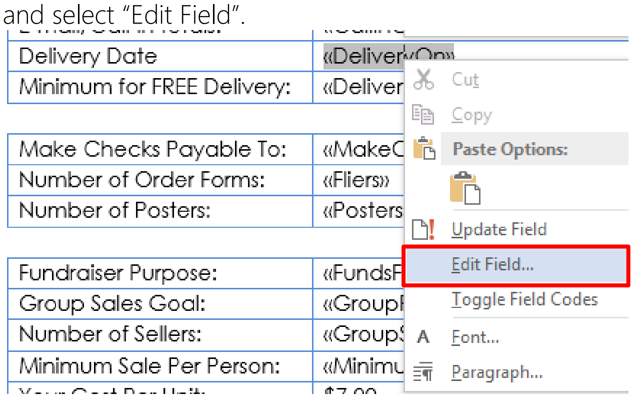
TBD Fields on Templates

In order to see the TBD options on the templates you will need to use the following field names: DeliveryOnFormatted, DeliveryStartAtFormatted and DeliveryPickupAtFormatted. The following instructions must be done on each template that you want to update.

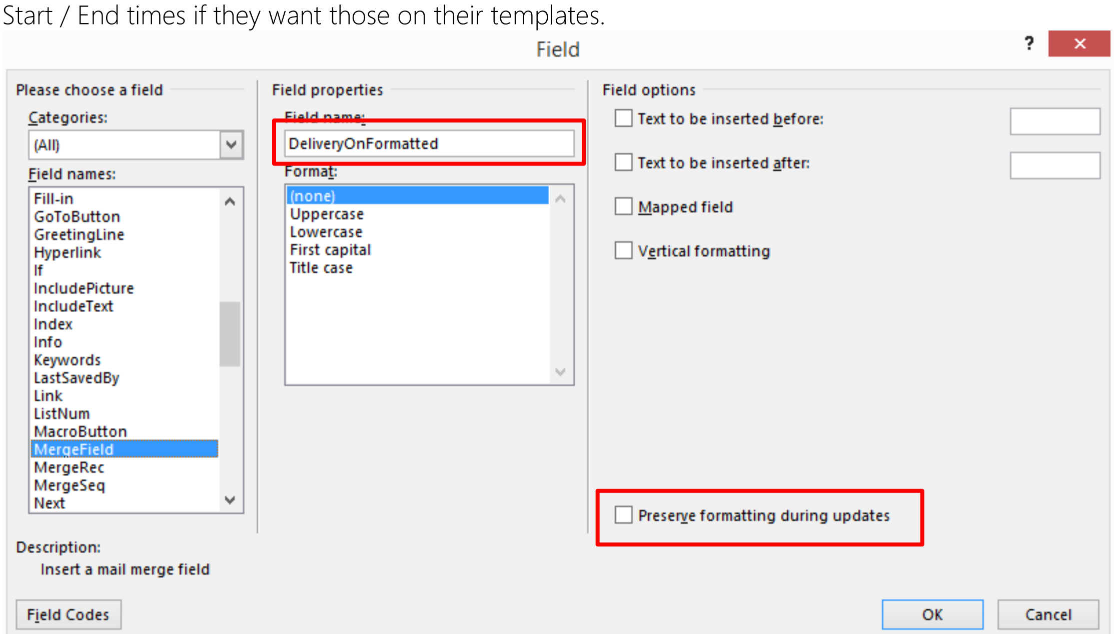
*Notes:

- The TBD fields can't be formatted like other date fields since it has to be passed in as a string value and not a date value.
  - If you used these fields on your template and a delivery date was NOT a TBD then the date would look like this: 07/07/2015. If a dealer wanted their other fields to match that look, they may need to change the formatting on the other date fields to be mm/dd/yyyy.
- The invoice report is already setup to display the TBD options, but in a future release dealers will have the option to customize that.

If a dealer is using another Delivery Date field like DeliveryOn, you will need to edit that field. To do this select the field, right click and select "Edit Field".



A dialog box will open. Change the Field Name to DeliveryOnFormatted and uncheck the Preserve formatting during updates checkbox (in the lower right corner). Then click OK. You would need to do the same steps with the Start / End times and Pickup Start / End times if they want those on their templates.

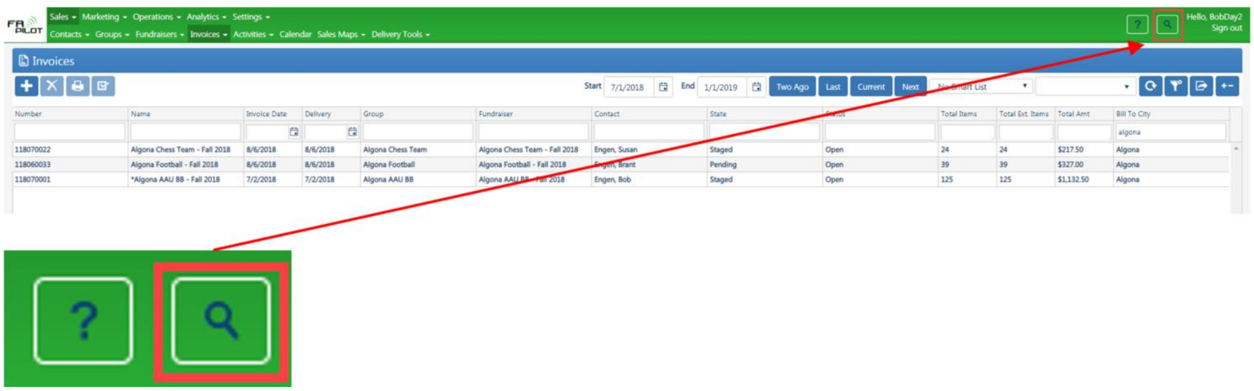


Tips & Tricks in My Fundraising Place

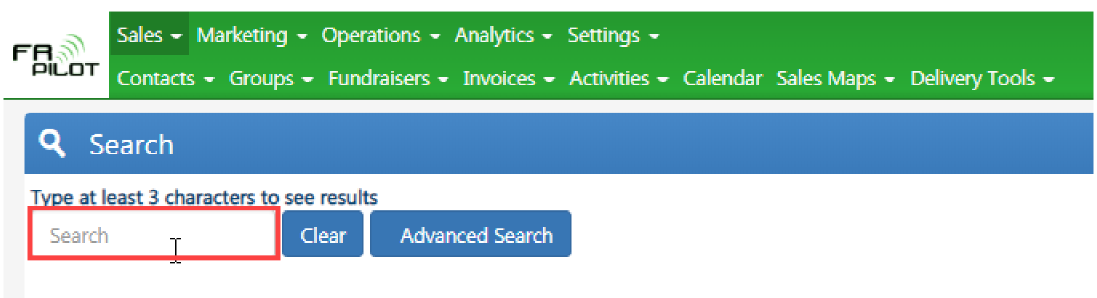
- Global Search Button
- Invoices to be Reprinted Check (Smart List)
- Multiple Selects in My Fundraising Place

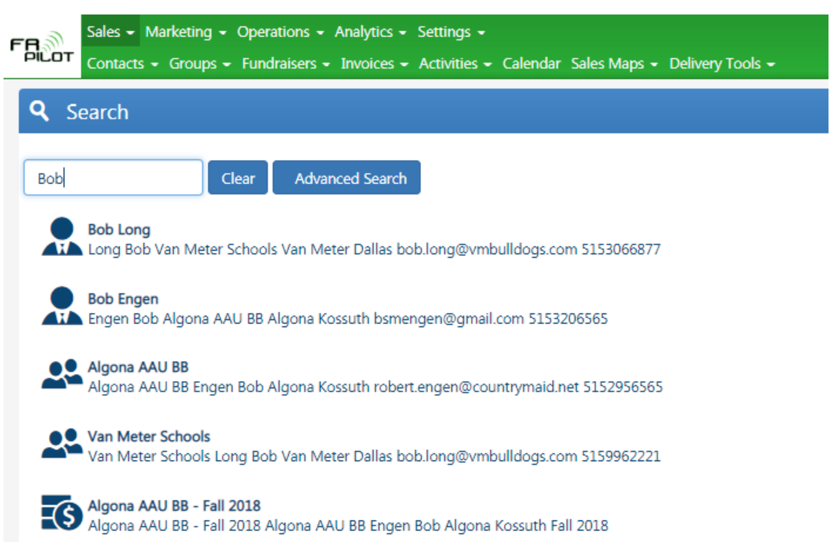
Global Search Button:

1. Location of Global Search button

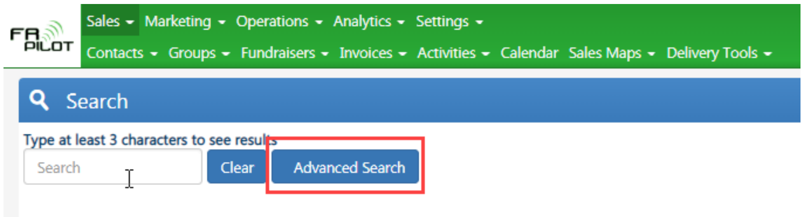


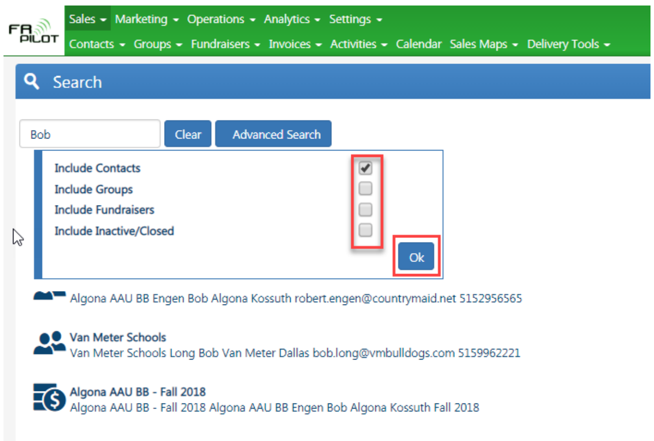
2. Global Search screen

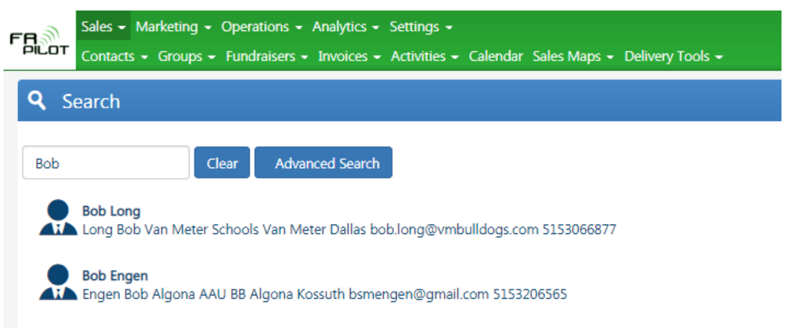




3. Global Advanced Search screen (Select options and click **OK**)

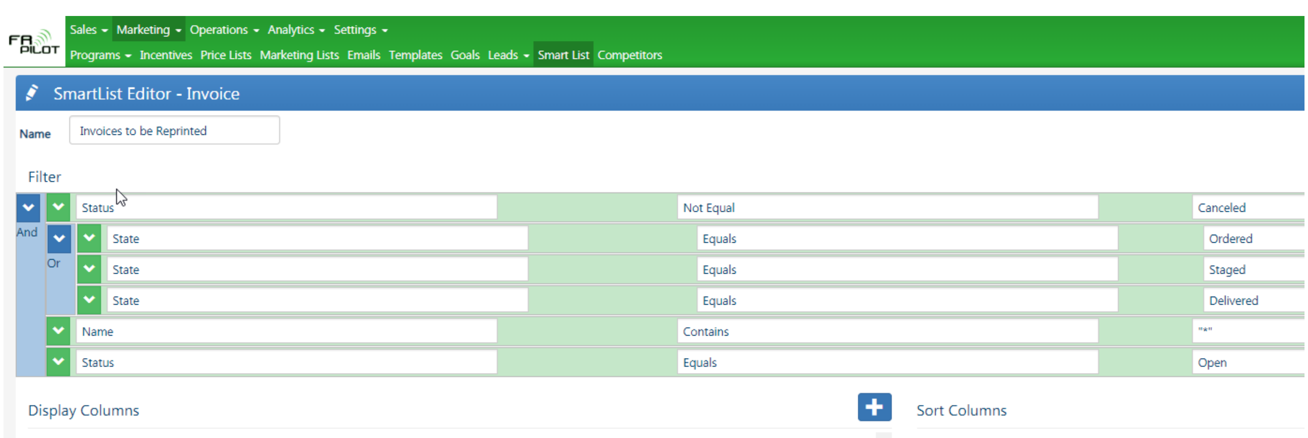




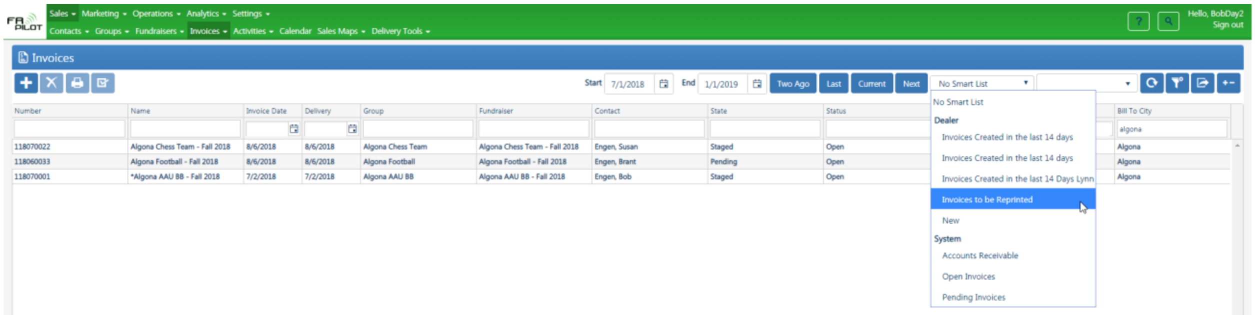


Invoices to be Reprinted Check (Smart List):

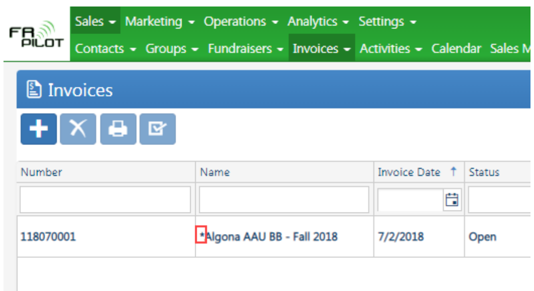
1. Creating Invoices to be Reprinted Check Smart List
   a. Invoices that need to be reprinted will have an * at the beginning of the name



2. Opening Invoices Screen:

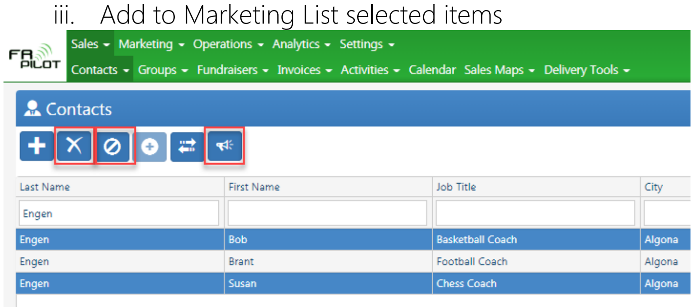


3. After using **Invoices to be Reprinted Smart List**:

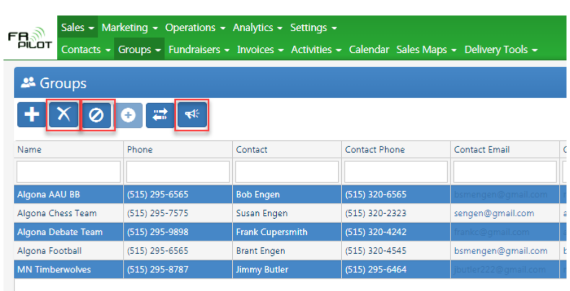


Multiple Selects in My Fundraising Place:

1. Multiple items in My Fundraising Place to make processing more efficient and quick:
    a. **Contacts** (Sales > Contacts):
        i. Delete selected items
        ii. Mark to Inactive selected items
        iii. Add to Marketing List selected items

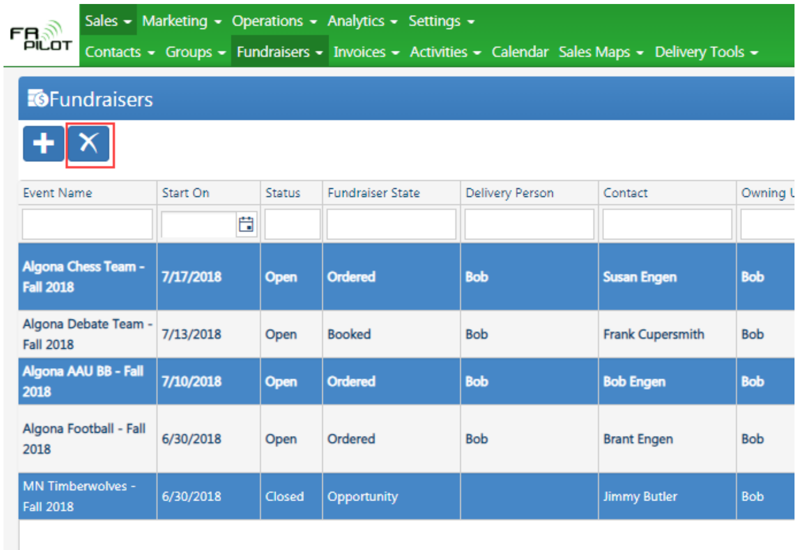


    b. **Groups** (Sales > Groups):
        i. Delete selected items
        ii. Mark to Inactive selected items
        iii. Add to Marketing List selected items



c. Fundraisers (Sales > Fundraisers):

i. Delete selected items

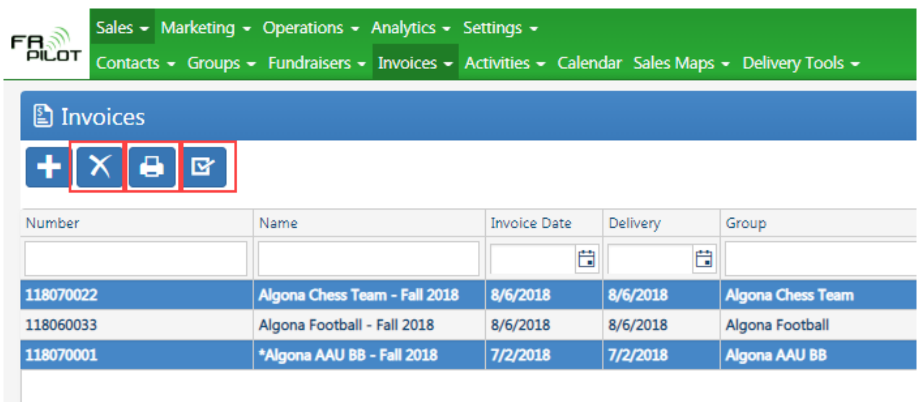


d. Invoices (Sales > Invoices):

i. Delete selected items

ii. Print selected items

iii. Set as Ordered/Staged/Delivered – selected items



e. Activities (Sales > Activities):

i. Delete selected items

ii. Close selected items