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FUNdraising has never been so easy: quick setup, no cost, great chocolates, and LOTS OF PROFIT!

Purdys Seasonal Fundraising is simple, and free to use. Over the years, we've helped thousands of coordinators just like you exceed their goals. Based on the Christmas 2020 results alone, over 88% of campaigns exceed their initial goals.

Our seasonal fundraising program is an excellent way to make lots of profit with chocolates that practically sell themselves. There’s no cost to start, it’s easy to promote, and yields fantastic results.

What do our customers say about our Seasonal Fundraising Program?

Just wanted to say thank you for the great chocolate and support. It was a super easy and fun fundraiser. We raised funds for the fencing arms on the wall in our fencing club in Saskatoon.

Allison, SK

How does it work?

Purdys Seasonal Fundraising Program helps you achieve your fundraising goals faster by selling our chocolates and getting back up to 25% fundraising profit for your cause. As a bonus, you can also earn a rebate up to 5%. Start now by registering at fundraising.purdys.com, create your Campaign, and spread the word by sharing the link with your supporters.

1. Register

Register your organization at fundraising.purdys.com. We have everything you need to get started. Print your catalogues, posters and order form!

2. Create

Follow the simple steps to set up your personalized campaign page. Pick a team name, set your profit goal and select your delivery window.

3. Spread the Word

Send supporters the link from the dashboard to your personalized campaign page and watch your profits climb.
Submit your completed online campaign and sit back and wait for your chocolate delivery.

Grab some volunteers to help sort your supporters’ individual chocolate orders, then distribute them to your supporters.

We’ve raised over $18 million in the last five years for thousands of community groups, sports clubs, schools, and charities across Canada!

How do I determine a fundraising goal?

Setting and meeting fundraising goals can be complex. So, we simplified the process for you.

**Be specific** – Your goal should address a particular performance area.

Ask yourself these questions:

- What are you hoping to achieve with your fundraising?
- What is your overall goal?
- Who will benefit from your fundraising campaign?
  - Example – “We’re hoping to raise $10,000 to support the school renovation.”

**Make it measurable** – The goal should be measurable, not subjective and general.

Setting measurable fundraising goals has many benefits. It helps motivate volunteers, enhances clarity, encourages supporters to give, and paints a clearer picture of where you’re at. This is incredibly helpful for all organizations – big or small.

**Attainable** – The goal should be ambitious but within the realm of possibility.

To understand what's achievable and feasible for your Campaign, consider:

- the success of your previous fundraising campaigns.
- the average number of supporters.
- the time you can commit to the Campaign.
- other resources you have available (e.g., employees, volunteers).

**Relevant** – The goal should be connected to the overall mission and vision of your organization. Get very clear and specific on campaign’s relevance before starting a campaign. This also helps you establish the "why", and when there’s a "why", everything will flow more smoothly.
Time-Based – The goal should have a deadline. Every successful fundraising campaign should have a beginning and an end. A fundraiser that runs between 2 to 4 weeks has great potential to reach its goals and maintain enthusiasm.

The fundraising guidelines above can help you achieve maximum profit for your fundraiser. For example: If you have 20 supporters whose individual orders come to $50, this would be $1,000 in sales which earns you $250 in profit.

Is it easy to run a campaign?
Yes! Fundraising with Purdys is a quick and effortless way to make up to 25% profit with additional rebates available! Whether you want to raise money for your school or local community, Purdys can help make this happen. This guide will help you run a successful campaign with minimum effort.

Purdys Seasonal Fundraising is an entirely free program that allows people to shop online and raise profit for their cause. The total profit can be up to 25% of the campaign, making it one of the most effortless fundraising programs for schools, activity clubs or any charitable organization.

How do I get the most out of my fundraising campaign?
Our job is to help you raise as much as possible for your cause. If you are a coordinator responsible for promoting your campaign, the key to success is to ask as many people as possible to support you. You can do this by sharing your unique campaign link from the dashboard with your supporters.

It is essential to always include this link whenever you communicate with your supporters. It takes them to the registration page where they can join your campaign and shop for their favourite chocolates.

Every time you communicate with your supporters, share your unique campaign link to get the most sign ups and profits towards your fundraiser.

Promote your link on social media to get more exposure. Send it to your groups on Facebook, Instagram, WhatsApp, or any other social media platform you use. Don't forget to email your contacts or add your fundraising campaign link on your social media page.

How long should I run my fundraising campaign for?
The length of a campaign will depend on your goals and motivation.

An effective fundraiser that runs for 2 to 4 weeks can reach its goals and maintain enthusiasm. However, shorter campaigns that run for 1 week can also be effective for raising short term goals.
It is important to have a specific start date and end date for your fundraiser to help track records and to keep the excitement high. The Purdys Christmas Fundraising site will launch on Tuesday, September 7th for purchases and will close on Tuesday, November 30th.

How do I earn the maximum amount of profit?
You only need to sell $1,000 (before taxes & shipping charges) as a team to earn 25% fundraising profit. That is only 20 supporters spending $50 or more.

We have received valuable feedback from our fundraisers over the years, and we made great improvements to help coordinators run their campaigns and see results regardless of how much their campaigns raise.

• Campaign orders* between $100 and $499.99 get a 5% profit cheque
• Campaign orders* between $500 and $749.99 get a 10% profit cheque
• Campaign orders* between $750 and $999.99 get a 20% profit cheque
• Campaign orders* $1,000 and above get a 25% profit cheque

*before taxes and shipping charges

As an added incentive, if your campaign reaches $5,000 before taxes and shipping, you will qualify for an additional 2.5% rebate. You can get a 5% rebate when your campaign exceeds $10,000 before taxes and shipping. Excited yet? Register at fundraising.purdys.com and start your campaign now.

• Campaign orders between $5,000 and $9,999 (before taxes and shipping) receives a 2.5% rebate cheque
• Campaign orders over $10,000 (before taxes and shipping) receives a 5% rebate cheque

FUNdraising Ideas
Whether you’re raising money for a school or activity club, to support your community, or to host a fundraising event of your own, there are so many ways to win with Purdys. We put the FUN in FUNdraising and make a big difference at the same time.

With the help of the Purdys Fundraising website and our free fundraising tools from the 'Support Materials' tab, you’ll have great resources to help you earn more profit for your campaign. And when you get your profit cheque, all you will say is, "SWEET!"

Your fundraising goals may include:

• New equipment & supplies for students who are learning remotely
  o Laptops
  o iPads
  o Textbooks
  o School supplies (crayons, puzzles, books, art materials)
  o New blackboards and any visual equipment for classrooms
• Fitness Equipment
  o Jump ropes

• Dance Team
  o Uniforms
  o Shoes
  o Hair accessories

• Upgrades/ renovations to school playground, gymnasium, classrooms
  o New desks
  o New team jerseys and sports equipment

**Let's get started!**

<table>
<thead>
<tr>
<th>What do our customers say about our Seasonal Fundraising Program?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purdys has been a wonderful partner for all our fundraising needs!</td>
</tr>
<tr>
<td>They look after all the details, supply us with colourful promotional material and check often</td>
</tr>
<tr>
<td>on our progress and how they might make things easier.</td>
</tr>
<tr>
<td>I highly recommend Purdys Chocolatier for a deliciously effective way to raise money for your cause.</td>
</tr>
</tbody>
</table>

*Ellyn, Langley BC*

Now that you understand and have learned how simple, easy, and profitable the Purdys Seasonal Fundraising program is, you are now ready to get started. Register and create your own personalized webpage.

**Register as a new Coordinator**

If you think your school or organization has fundraised with us before, give us a call at **1.888.478.7397 Ext. 1** and we can assist you with the account setup.

If you are a new customer and you are registering for the first time, please follow these simple steps.

**Step 1** - Please go to [fundraising.purdys.com](http://fundraising.purdys.com)
**Step 2** - To register as a coordinator, please select “Start a new Campaign” from the landing page **OR** click on the word register at the top righthand corner of the page
Step 3 – Fill in the details needed in the registration form which will include:

- Organization name
  - **Note:** this name will be used as the payee's name on your profit cheque
- Name of Coordinator
- Phone number
- Address
- Email address
- Your chosen password
  - **Note:** password must be at least 8 characters in length and include at least 1 lowercase, 1 uppercase, 1 number and 1 symbol

Step 4 - Click “Start a Campaign”

Step 5 – Fill out a form with your campaign information

**Campaign name** – the name of your fundraising project (Example: ABC SCHOOL Xmas's Fundraiser)

**Welcome message** – this space is for you to add details of your project – where the proceeds will be going to and how you will be using the funds you will raise. (Example: “We're raising funds to help purchase new outdoor classroom equipment.”)

**Fundraising sales goal** – This is your total sales goal for the campaign
Remember:

- Campaign orders* between $100 and $499.99 get a 5% profit cheque
- Campaign orders* between $500 and $749.99 get a 10% profit cheque
- Campaign orders* between $750 and $999.99 get a 20% profit cheque
- Campaign orders* above $1,000 get a 25% profit cheque

*before taxes and shipping charges

**Step 6** - Fill out the shipping information form and choose your delivery window. The information you provide here will be used by our partner carriers to deliver your order. Please ensure that you have the most up-to-date information here.

**Note:** You can also choose to pick up your orders at the Purdys head office in Vancouver. Just check the corresponding checkbox to do so.

**Step 7** – Fill out the supporter pickup details. The information you type in here will be viewed by all your supporters when they order online. This will allow them to see when and where their orders will be ready for pickup.

**Note:** The Supporter Pickup Date will automatically default to 2 days after the last date of your Delivery Window. Coordinators have the option to change this to 1 day after the Delivery Window. But please make sure you give yourself enough time to pick and pack your supporter’s orders.

**Step 8** – **Review Important Dates field** – Dates are auto-populated based on the chosen delivery window dates and your shipping address. If you would like to change the dates in this section, update your delivery window.

**Step 9** – Click create a campaign and you are now ready to start your fundraising sales!
If you experience any online registration issues, we are available by phone to assist you - **1.888.478.7397 Ext. 1**

**Returning Customers**

Welcome back! We are happy to see you again. And surely you already know the drill. But here is a quick review just in case.
**Step 1** - Please go to the website [fundraising.purdys.com](http://fundraising.purdys.com)

**Step 2** – Click on “Sign in” on the top right corner of the page

**IMPORTANT!** To ensure that you are signed in under coordinator mode, please make sure that you are using the Customer number when signing in and not your email address.

[Sign in page]

**FEEL FREE TO CONTACT US IF YOU HAVE AN EXISTING ACCOUNT.** Call us **1.888.478.7397 Ext. 1**, our call centre is open from 8:00 am – 5:00 pm PST.

**FORGOT YOUR CUSTOMER NUMBER?** Call us **1.888.478.7397 Ext. 1**, our call centre is open from 8:00 am – 5:00 pm PST.

**FORGOT YOUR PASSWORD?** Just click on the forgot password link and follow the prompts to create a new password.

**Step 3** – Confirmation page – Read through the page that says you that you are signed in as the Coordinator of the account. Once you have made note of how to switch between Coordinator and Supporter mode in the website, click the X button to close the window.
Step 4 – Click Start Campaign and fill out a form with your campaign information

Step 5 - Fill out the shipping information form and choose your delivery date window. The information you provide here will be used by our partner carriers to deliver your orders. Please ensure that you have the most accurate information here.

Note: you can also choose to Pick up your orders at the Purdys head office just check the corresponding box to do so.

Step 6 – Fill out the supporter pickup information details. The information you type in here will be viewed by all your supporters when they order online. This will allow them to see when and where their orders will be ready for pick up.

Step 7 – Review Important Dates field – Dates are auto-populated based on the chosen delivery window dates and shipping address. If you would like to change the dates in this section, update your delivery window.

Step 8 – Click “create a campaign” and you are now ready to start your fundraising sales!

Switching roles

As Coordinator you can easily switch from a Coordinator to a Supporter role.
Coordinator mode – allows you to see all functions and order information of your campaign. You can edit the campaign and change details like delivery address, delivery window, Fundraising goal and message.

Supporter mode – Allows supporters to have certain functions related to their orders and their supporters’ orders. Supporters are not able to access detailed campaign information.

To switch from Coordinator to Supporter, just simply click on the “Switch Role” button on the top right corner and then click on the correct option you want.

How can my supporters register and support me?

<table>
<thead>
<tr>
<th>What do our customers say about our Seasonal Fundraising Program?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>I just wanted to thank you for a wonderful fundraiser! It was so easy for people to use and for us to organize all online. It was a hit for our little school, and it is appreciated. Plus, all the support with questions we had was great. Thanks again!</strong></td>
</tr>
<tr>
<td>Aimee, BC</td>
</tr>
</tbody>
</table>

1. **Share Your Link** – Simply share the link provided to you displayed on the Dashboard on your fundraising page. Your supporters can click on it, follow the steps needed and they will be joined automatically!

2. **Registering manually on the website.**
   - Your supporters can simply the steps below:
To register as a supporter/member

To sign in if already registered

Note: You will need to provide your supporter with the customer number of your organization for them to complete their registration.
Welcome to Purdys Fundraising!

If you've previously coordinated or supported a campaign, you can sign into your account.

Register as a Coordinator
If you're a new customer looking to set up and run your 1st campaign, register your organization here & start fundraising now!

Register as a Supporter
Join an active campaign & start supporting what matters to you!

REGISTER AS COORDINATOR

REGISTER AS A SUPPORTER
Once they’re done, your supporters simply click **JOIN A CAMPAIGN**, and they will be routed automatically to the webpage for your organization, and they can start ordering!

Another great way to maximize your fundraising profit is to set the **Teams Feature**. Our Teams Feature will be discussed in the following chapter.

**Important Dates**

Below is a list of the important dates to keep in mind:

**Order Submission Deadline:**
- This is the last day to submit your campaign order.
- Please note: This date cannot be changed as it will affect the chosen delivery window.
- The Fundraising Campaign Submission Deadline for Christmas 2021 is **November 30th, 2021**.
Supporter Deadline:
- This is the last day for your supporters to submit their orders and pay in full.
- This deadline is **one day before the Order Submission Deadline**.

Delivery Window:
- This is the estimated range of dates when your order will be delivered.
- Your delivery window is calculated when you select a delivery date while creating a campaign online.
- Please note that the orders are shipped in bulk and will have to be sorted before supporter pickup.

Supporter Pickup Date:
- This is the date to communicate to your supporters when they can pick up their orders from you.
- We recommend choosing at least 2 days after your last delivery window to allow yourself enough time to sort your campaign order.
- Special Instructions can be added to specify the time/exact location (e.g. *Pick up in the main office’s parking lot between 4-8pm*).

Teams Feature
The Teams Feature is an excellent way:
- To track sales and profits within a group
- To track individual orders

What type of campaign is the best fit for teams?
Usually, the campaigns who get the most out of the Teams Feature are groups from the same organization or community who will benefit from the fundraising profit.

For example:
1. Sports team where each player’s profit goes towards supporting their team events
2. Schools looking to create a competition and track profit per student or classroom.

With our Teams Feature, you can automatically track individual or group profits for your Seasonal Fundraising campaign.

Create friendly competitions by customizing how you track profits: either by each individual participant or by groups that you can set up however you want: grade level, English class vs Chemistry Class, juniors vs seniors, etc.

We’ve done the math, and fundraisers who use our Teams Feature saw a 65% increase in their sales!
How do I set up Teams?

Simply go to our website fundraising.purdys.com, download the excel sheet HERE or from the 'Support Materials' tab, fill in the form and email it to fundraising@purdys.com

Allow up to seven (7) business days for us to complete your request. Once it is done, the PDF of the launch letters and the master list will be attached and emailed back to you. Allow up to five (5) business days for any subsequent changes or modifications to the Teams.

Coordinators are responsible for providing complete and accurate information about their team, including team member/group names. Any incomplete or incorrect information provided will cause a delay in preparing your request.

What are launch letters and master lists?

- **Master list** – will contain the log in ID and default password assigned to each member/class/group. This can be used by the coordinator to check the progress of the team.

- **Launch letter** – to be distributed to each member/class/group. This letter will contain join links for each class, instructions and important dates that parents/supporters should be aware of when ordering.
How do I help my supporters navigate their accounts?

As coordinator, your supporters will contact you to help them use the join links and check if anyone ordered under their names. Below are simple steps to help your supporters navigate their accounts easily.

**Note:** A new Teams Request Form, downloadable in the support material as an excel sheet, needs to be provided at the beginning every new campaign. Fill in the Teams Request From and send it to fundraising@purdys.com.

Please make sure to create your Campaign first, then request a Teams Feature. Please ONLY share the unique links we provide you through the Team feature requests with your Members.

We only need the student's first and last name or The Team's name. It is up to you how you would like to track the profit.

If you decided to remove or add a student's or a team name, please make the changes in the Teams Request Form and email it back to us. In front of that person’s name, simply type the word **DELETE**. Again, please allow up to five (5) business days for any subsequent changes or modifications to the Teams

The email address you provide in the Teams Request Form should match the one attached to the Campaign.

**Note:** Unfortunately, we cannot generate a different pickup address other than the one stated in your Campaign.

Please make sure to let us know if you are willing to accept a cheque from your supporters and what would be the payee's name on the cheque.

**Note:** The supporter’s name you provide will be printed on a cheque. Any processing fees for any cheque re-issuance due to name change and stale-dated will be deducted from the profit amount.

We have 2 options on how you can receive your individual links. You can receive one PDF with the individual links all members or multiple PDFs with 1 link for each member.

The default password and login ID that we provide to you in the Master list, is for a student to see the sales and profit that are connected to themself, it has no other use.

**Success tips:**

- Ask the students to post their link into their social media so more of their friends and family will see their unique link to join to the Campaign.
➢ Consider a gift incentive for students who share their link with people and bring more sales to the Campaign.

How do I promote my fundraising campaign and earn lots of profit?

<table>
<thead>
<tr>
<th>What do our customers say about our Seasonal Fundraising Program?</th>
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</thead>
<tbody>
<tr>
<td>Purdys has been a wonderful partner for all our fundraising needs! They look after all the details, supply us with colourful promotional material and check often on our progress and how they might make things easier. I highly recommend Purdys Chocolatier for a deliciously effective way to raise money for your cause.</td>
</tr>
<tr>
<td>Ellen, AB</td>
</tr>
</tbody>
</table>

Our job is to help you raise as much as possible for your cause. If you’re a coordinator responsible for promoting your Campaign, **the key to success is to ask as many people as possible to help you**. You can do this by **sharing your unique campaign link from the dashboard with your supporters**.

It is essential to always include this link whenever you communicate with your supporters. It takes them to the registration page where they can join your campaign and shop for their favourite chocolates. Including your unique page link every time you write to your supporters is critical to sign up as many as possible and raise as much as possible.

Promote your link on social media to get more exposure. Don't forget to email your contacts or add your fundraising campaign link on your social media page.

- Share fundraiser on your personal social media platforms - Facebook, Instagram, LinkedIn
- Send it to your groups on WhatsApp, Telegram or any other messenger.
- Share your fundraiser link in Facebook groups
- Create a dedicated Facebook page about the fundraiser
- Create Instagram stories and allow others to share the story
- Post a professional update about your fundraiser through LinkedIn
- Allow others to share your post
- Create a specific hashtag for your fundraiser #FUNdraiseWithPurdys
- Get your supporters to tag their chocolate in their social media post or story
• Ask your supporters to share on all their social media platforms
• Engage with those supporters who have shared their support
• Reach out to your local media/newspaper and radio station and try to get your fundraiser featured
• Try to advertise your fundraiser through local events happening in your community
• Find creative ways to promote your fundraiser where people least expect it (wearing pins, on t-shirts and jerseys, or your car window)

Success tips:
• State and highlight the goal of the fundraiser
• Photos tell a story. Try to add photos of what you're fundraising, for example, the school playground.
• Add to the school calendar, monthly newsletter on the front page and post with community news organizations, or local bulletins
• Share your link and ask your supporters to share the link.
• Try to get a local "hero" who could help promote your fundraiser.
• Team up with local businesses to promote your fundraiser.
• Send out weekly reminders about the fundraiser and delivery deadline to create a bit of urgency on why that specific date (for example, The order deadline date is December 23rd so the local shelter can celebrate Xmas with enough food and gifts)
• Send out weekly updates on your campaign performance to your supporters to gain more traction on your fundraiser.
• Utilize the Teams Feature and make it a friendly competition between classes, grades, dance teams, junior to senior teams
• Share the unique link that the Coordinator has sent with all your friends and family members.
• The length of a campaign depends on your goals and motivation. A fundraiser that runs 2 to 4 weeks can reach its goals and maintain enthusiasm.
• It is important to have a specific beginning date and ending date for your fundraiser to help track records and keep the excitement high.

Other digital tools and support materials:
• Posters - use our posters with information about your fundraiser in high traffic locations such as hallways, in front of the school office, on the front door of your local grocery store, dance hall, gymnasium, skating rink
• Advertise the poster on the school website and social media platforms
• Send a link to the digital catalogues to friends, family, and colleagues
• Share the launch letter
• Top sales award certificate

Assessing Campaign's performance
Different website functions and what they do

Visit fundraising.purdys.com and click on SIGN IN on top right corner. Either enter customer number (for Coordinator) or email (for Supporters), then enter password.

FORGOT YOUR CUSTOMER NUMBER? Call us 1.888.478.7397 Ext. 1 and we can help you out!
FORGOT YOUR PASSWORD? Just click on the forgot password link and follow the prompts to create a new password.

- DASHBOARD – The main home page that displays all TABS can access detailed account functions. It provides all campaign/order information such as deadlines, delivery, and supporter/member information. Coordinators have access to the EDIT button to change/update campaign, and the ability to switch between coordinator and supporter/member mode.
- SHOP ONLINE - Coordinators and supporters/members can place orders through our online dashboard. This is an easy and convenient way for them to look at the products we have available and to pay directly on the website.
- PAY FOR ORDERS – This Tab allows customers (coordinators and members) to select the order or orders that they would like to pay for and hit PAY SELECTED ORDERS. If the customer wants to pay all the pending orders, they can hit the Select All box and it will check all the pending orders. They will be directed to the checkout page where they can enter their credit card information and hit CONFIRM.
  ➢ Note: only the Coordinator can pay for the order by cheque at end of submission, they can click on the 'Pay by Cheque' option, and it will give them all the details for sending in a cheque including who to make the cheque out to, the address, and the number of days we require to process the cheque.
- SUBMIT GROUP – Only the Coordinator has access to this tab. It is important to remember that a campaign must still go through the submission process even if all orders have been paid for. Submitting a campaign will prompt us to receive and print their actual order and will then be forwarded to the warehouse for picking, packing and shipping.
- REPORTS - There are several different reports that Coordinators can access through the Reports tab.
  ➢ Fundraising/Group Summary Report - this report is a summary of all orders (without the profit breakdown). Customers can choose from three sub-reports where the information has been organized in a slightly different way to help them find what they need.
  ➢ Products - By All – shows the grand total of all products ordered.
  ➢ Profit - shows the total profit earned by the Campaign (seasonal fundraising program only).
  ➢ Profit Breakdown - displays the profit for the Campaign (grouped by team and member-seasonal fundraising program only)
  ➢ Orders - This will list any orders placed by the individual signed in.
  ➢ Payment - This displays any payments made by the individual signed in.
  ➢ Rebate Cheque Info- displays rebate thresholds and for closed groups, who the rebate was made out to.
➢ Sorting Signs - signs provided list the Line #, SKU, and product name.
  o Note: Please print signs before sorting.

• SUPPORT MATERIALS – Free Online information to promote or advertise your Campaign.

How do I shop online?
Coordinators and Supporters/Members can place orders through our online dashboard. This is an easy and convenient way for them to look at the products we have available and be able to pay directly on the website.

There are two options to order online:

1. Online Order Form – allows coordinators and supporters to view all products in a single page and enter multiple orders efficiently
2. Marketplace – is a product listing page that provides product images and description to view

Coordinators can pay now via credit card OR pay later by cheque.

How do I use the Online Order Form?

Step 1 - Have the Coordinator or Supporter/Member log on to their account at fundraising.purdys.com

Step 2 - On the dashboard click on the SHOP ONLINE button at the top.

Step 3 - Within SHOP ONLINE they will be able to select 'Use Online Order Form'

Step 4 - Once you arrive at the order form, you need to click on ADD ORDER to continue with a new order. The customer needs to fill in their first name, last name, phone number - the system will not allow the customer to save the order without these fields filled in. There is an ADDITIONAL INFO box – please include name of person supporting to link your order to them.
Step 5 - The customer should go line by line and fill in the quantity of each item they would like. Once they move to another item box, the subtotal will populate at the bottom along with the shipping, tax and total.

Step 6 - Customers have the option to SAVE the order and come back to pay for it later OR they can click on PROCEED TO CHECKOUT.

How do I use the Marketplace?

Step 1 - Have the Coordinator or Supporter/Member log in to their account at fundraising.purdys.com

Step 2 - On the dashboard click on the SHOP ONLINE button at the top.

Step 3 - Within SHOP ONLINE they will be able to select ‘Use Marketplace ‘

Step 4 - The customer should increase the quantity depending on the product they would like and click on ADD TO BAG.

Note: Once the item has been successfully added to their bag, a green pop-up box will appear saying that it has been added! If the green box doesn't pop up, the product was not added to the bag successfully and the customer should try again.

Step 5 – Customers can view their bag to ensure that the products they have selected has been added

Step 6 - Customers have the option to continue browsing OR they can click on PROCEED TO CHECKOUT.

How do I fix ordering mistakes from supporters?
Customers can call in to request that we delete a pending or unpaid order.

What can our Customer Service Team delete?

- Order errors before campaign order fulfillment.
- Unwanted orders before group order fulfillment.
  - Orders that the Coordinator do not want anymore and when they have selected “Pay by Cheque” or “Pay when I submit campaign” option

Please note: Customer Service Team can only adjust/delete orders before Coordinators complete and submit a campaign.

Important Considerations

- Only Coordinators can request to delete orders other than their own
• Supporters can only request to have their own orders deleted

**Note:** Any changes must be done a minimum of 3 days before the submission or delivery date is affected.

**Important:** All refunds will be made within 3-5 business days, and customers should see the money back on their credit cards in 3-5 business days.

**How do I "move" an order from one supporter to another?**

If a purchase has been made and the order needs to count under another supporter for easier distribution and profit allocation, you can make the change from the home page. Click on **MOVE** beside the supporter’s name. A pop-up will appear to sort under a specific name.

**Note:** only the Coordinator can make these changes.

**Campaign Submission**

<table>
<thead>
<tr>
<th>What do our customers say about our Seasonal Fundraising Program?</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>I just want to say thanks Purdy’s staff! This order process could not have been easier! I appreciated the extra effort with phone calls to ask if I had questions or needed help and the phone call to remind me, I needed to submit my order was even more appreciated when the staff said they’d do it for me! Glad to purchase from a BC based business and as always, a great customer service experience!</em></td>
</tr>
</tbody>
</table>

Jenna, BC

It is important to remember that a campaign must still be **submitted** even if all orders have been paid. Submitting a campaign will prompt us to receive and print your actual order slip and will then be forwarded to warehouse for packing and shipping.

This process can only be completed by the Coordinator and can be done easily online with the steps below:

**Step 1** - Sign into your account. Ensure that you are in Coordinator’s mode.

**Step 2** - Click the Submit Campaign Button located at the top middle of the screen
You will be directed to the screen that will explain to you what the submission is. Click Continue.

**Step 3** - If you qualify for a rebate, a screen requesting for Rebate information will pop up. Complete this form and once done, click Continue.
Ensure that you use the correct payee and address information here. Any errors will result in a delay of the mailout of your rebate cheque. Any re-issuance due to incorrect Payee or address information will be subjected to a processing fee. Please see Terms & Conditions online for more information.

<table>
<thead>
<tr>
<th>Rebate Levels (Seasonal Fundraising)</th>
<th>2.5% at $5,000-$9,999 (before tax and shipping)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5% at $10,000 or more (before tax and shipping)</td>
</tr>
</tbody>
</table>

**Step 4** – The next window will show you the option to input delivery instructions:
**Note:** The delivery instructions will be communicated to the carrier, and they will try their best to accommodate it. For example, use a buzz code, use side door etc.

**Important:** We are unable to make specific time/date requests for delivery as this will be in the carrier’s control. So please avoid putting a specific date or time in this section.

**Step 5 – Order Review & Payment.** Here you will be asked to review your total sales and payment that you need to make. You can always USE YOUR PROFIT to pay for any outstanding orders not paid via directly online with credit card.

- **Profit Applied towards balance owed option** means that the amount of balance owed will be deducted from total profit. If there is any remaining profit this will be mailed out to customer in a cheque form.

- **Customer to pay Balance owed directly option** means that customer will receive the total profit amount in their cheque and will have to pay the balance owing upfront.

**Step 6 – Select your Payment Method.**

If you’re paying via credit card – You will be requested to provide your credit cards details. Once completed, click Submit and you are all good to go! Just wait for your orders to arrive!

If you’re paying via cheque please allow 5 – 7 transit days for the cheque to get to us plus another 10 business days for processing.

**Important:** We will not be able to process orders until we receive payment from our customers. Only one (1) cheque will be accepted from the Coordinator for order submission and directly approved by a Purdys representative.
When paying via cheque, please write your Customer Number in the MEMO Field and use the following information:

Please make all cheques payable to: R.C. Purdy Chocolates Ltd.
Mailing Address: GROUP AND FUNDRAISING
Purdys Chocolatier, Group Purchase, 8330 Chester St., Vancouver, BC, V5X 3Y7.

Coordinators are responsible for ensuring that we get the cheque payment no later than 10 business days prior to the chosen delivery window. Any delay will push the delivery window to a later date. Please refer to Terms and Conditions online for more information.

**Important:** Now that your Campaign has been submitted, it is important that you verify the Payee name and the address where your Profit Cheque will be issued to. Our Team will automatically use the information that you used during original registration.

Don't remember the account name and address you registered? Or want to use another Payee and address? Please call our Customer Service team at 1.888.478.7397 Ext. 1 and our fundraising specialist will be there to help you!

**Rebates explained**
If your campaign reaches $5,000 before taxes and shipping, you will qualify for an additional 2.5% rebate. If your campaign exceeds $10,000 before taxes and shipping, you will qualify for an additional 5% rebate.

Rebate cheques are issued a minimum of four (4) to six (6) weeks after the Seasonal Program has closed. It is the responsibility of the Coordinator to input the correct name and spelling for the payee at the time of submission, also input the correct mailing address. Any processing fees for any cheque re-issuance due to name change and stale-dated will be deducted from the rebate amount.

Rebates are available for the Seasonal Fundraising Program. Customers with multiple campaigns where the combined order totals have exceeded the minimum rebate threshold will receive 1 rebate cheque for all their Fundraising Campaign sales.

The rebate cheque amount is calculated based on the total product sales of the Seasonal Fundraising campaign. It does not factor in the shipping fee or the provincial tax of the Coordinator’s mailing province.

Purdys reserves the right to modify rebate levels at any time without notice.
Getting ready for delivery

What do our customers say about our Seasonal Fundraising Program?

| A huge shout out to the Purdy’s organization! Received the chocolate yesterday, was perfectly packed, no issues whatsoever! Everything we ordered was there, easy to distinguish between the different products, and lots of fun to sort! Thank you for offering such a superior fundraiser! Everyone was so excited to receive their products (honestly, who doesn’t love Purdy’s!?!)
| I can’t thank you enough, fundraising can be such a stressful thing—but the stress was totally taken away! |
| Madison, AB |

A link with the tracking information will be provided to you in the shipping confirmation email.

**Note:** It is Coordinator’s responsibility to track their order on the carrier's website and communicate with the carrier regarding the delivery status.

Now you can....

- Print Summary report/Individual order report.
- Confirm volunteers. We recommend 2 volunteers for every $1,000 of orders.
- Print "Member Pickup Reports" and "Sorting Signs" under RESOURCES tab
- Confirm availability of delivery location: ideally a secure, large room that will not exceed 20°C
- Have supplies on hand, e.g., scissors, pens, highlighters, staplers
- Pile chocolate of the same type together, then count the inventory to make sure you have received everything.
- Now start sorting and bagging them based on the individual’s summary report.

**Sorting**

**Step 1** - Please ensure you have printed Sorting Signs from here -
Step 2 - Please ensure you have printed your Pickup Report Slip from here:

Step 3 - Check your tracking number to determine the number of cartons you should be receiving (tracking number will appear on the site when the courier has uploaded the tracking information)

Step 4 - Once you receive the order, count the number of cartons before signing for the delivery

Step 5 - Find and open Carton #1 (labelled "Open Me First"), which contains packing slip and bags
Step 6 - Ensure the quantities and SKUs of the items received matches the packing slip

Step 7 - Unpack all cartons and match each SKU to the sorting sign

Step 8 - You are now ready to start packing your orders.

Note: Most cartons contain different products as the same items are not packed together. Products with the same packaging can have the same wrapping paper, so it’s very important to check the SKU of each box.

Success tips:

- Count the number of boxes before signing for them
- Find and open carton #1 (labelled "Open Me First"), which contains packing slip and bags
- Ensure the quantities and items received match the packing slip
- Unpack all boxes – check SKU of EACH chocolate item and place it with the corresponding Sorting Sign

Packing individual orders

Success tips:

- Work in pairs: One person reads the items listed, and the other picks and bags items
  - Another pair of volunteers double-checks each completed order
- Include the listed number of enclosure cards with the order
- Staple the "Member Pickup Report" to the bag once it has been double-checked
- It is recommended to double-check all orders once they have been picked/bagged

Note: if you are short one or more items or have leftover items, an error has been made while picking/packing individual orders. Please review to find the error.

- Place bags in alphabetical order to make it easier to distribute orders to your customers
- If you have customers with multiple orders, you may wish to place their orders in a box for easier distribution

Important: if you find an error after filling all individual orders, please contact Purdys’ fundraising team immediately. Call us at 1-888-478-7397 Ext.1 Our call centre is open from 8:00 am – 5:00 pm PST Monday – Friday.

Add-on orders explained

Once the submission is completed and the order is in progress, only the Coordinator can add an order they have missed when the original Campaign can't be reopened. Coordinators may request an add-on order after the submission of their campaign and before the program deadline only if their campaign is greater than $1,000 (before taxes and shipping charges). Addon orders are eligible for the 25% profit,
Coordinator must associate theiraddon order with a campaign of $1,000 (before taxes and shipping charges) or more. This additional order must meet the current minimum amount for delivery, be paid in full, and be delivered to the same address as the main order.

The minimum order amount should be greater or equal to $100. Add-on orders are subject to their individual delivery range. The Coordinator is responsible for tracking the delivery on the carrier’s website.

**Important:** Campaigns less than $1,000 (before taxes and shipping charges) are not eligible for any add-on orders.

Coordinator may start a new campaign to process any outstanding orders if their original campaign is less than $1,000 (before taxes and shipping charges). The profit for such campaign will be calculated as follows:

- Campaign orders* between $100 and $499.99 get a 5% profit cheque
- Campaign orders* between $500 and $749.99 get a 10% profit cheque
- Campaign orders* between $750 and $999.99 get a 20% profit cheque
- Campaign orders* $1,000 and above get a 25% profit cheque

*before taxes and shipping charges

**Important:** Purdys is not able to combine total product value or profit from multiple campaigns if the original submitted campaign was below $1,000 (before taxes and shipping charges).

**Tax and shipping information**

Please refer to the table below.

<table>
<thead>
<tr>
<th>Province</th>
<th>Estimated Transit Days</th>
<th>Shipping Fee</th>
<th>Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>British Columbia</td>
<td>1-4 business days</td>
<td>FREE</td>
<td>5%</td>
</tr>
<tr>
<td>Alberta</td>
<td>2-6 business days</td>
<td>FREE</td>
<td>5%</td>
</tr>
<tr>
<td>Saskatchewan</td>
<td>2-6 business days</td>
<td>FREE</td>
<td>11%</td>
</tr>
<tr>
<td>Manitoba</td>
<td>3-7 business days</td>
<td>FREE</td>
<td>12%</td>
</tr>
<tr>
<td>Ontario</td>
<td>4-8 business days</td>
<td>FREE</td>
<td>13%</td>
</tr>
<tr>
<td>Quebec</td>
<td>4-8 business days</td>
<td>2%</td>
<td>9.975%</td>
</tr>
<tr>
<td>New Brunswick</td>
<td>5-9 business days</td>
<td>6%</td>
<td>15%</td>
</tr>
<tr>
<td>Nova Scotia</td>
<td>5-9 business days</td>
<td>6%</td>
<td>15%</td>
</tr>
<tr>
<td>PEI</td>
<td>6-10 business days</td>
<td>6%</td>
<td>15%</td>
</tr>
<tr>
<td>Newfoundland</td>
<td>8-12 business days</td>
<td>6%</td>
<td>15%</td>
</tr>
<tr>
<td>Yukon</td>
<td>7-11 business days</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Nunavut</td>
<td>8-12 business days</td>
<td>30%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Returns
As our chocolate is a food product and cannot be re-sold due to Health and Safety reasons, we do not accept returns other than for quality concerns. We want our customers to be confident that when they purchase our products, they are not purchasing products previously sold and returned by other customers. Although we know the product is in the original wrapper (or packaging) and in good condition, it would never be re-offered for sale. We do not compromise on this policy.

Replacements
Any replacement needs to be initiated through the Fundraising contact centre at 1-888-478-7397 Ext. 1. Any issues encountered during the weekend should be addressed through the Fundraising contact centre by the next business day. Fundraising campaign orders will not be resolved through Purdy shop inquiries.

Replacements are the products provided in place of original due to errors in shipping and fulfillment. Replacements are to be substituted with products of equal value if not available.

Any replacements from a shop or from the warehouse will not be eligible to be delivered in the original delivery range during the submission process and will be shipped out separately based on the availability date. The Coordinator understands replacements do not have a guaranteed delivery date and may arrive after season.

Purdys will need to authorize and approve (depending on shop stock levels or availability) any in-shop or warehouse replacements. Purdys reserves the right to authorize replacements at its own discretion. In the case the replacement is not feasible, Purdys has the right to refund any products that cannot be replaced.

- For Christmas Season, any replacements must be requested within five (5) calendar days after Coordinator receives the order.
- For Easter Season, any replacements must be requested within five (5) calendar days after Coordinator receives the order.

Purdys may process the replacement of damaged items for no more than their original value. We reserve the right to honour any future claims against the original order.
Updating Coordinator's information
Any changes to the account information such as Coordinator name update, address, or email change please either call us directly at 1-888-478-7397 Ext.1 or email us at fundraising@purdys.com.

Next Steps
Congratulations on the success of your fundraising campaign! Here are some suggestions of what you should do before your next Fundraising campaign to make sure it is even more successful.

- **Keep your Customer Number and Password somewhere accessible.**
- Keep the contact information of your members or supporters. They may all want to participate in your order for next year.
- Update your contact information if they change.
- Remember who your top supporter/members and contact them as soon as possible as they may be able to provide more support in your next campaign.
- Note how many people and how much time it took to sort your order. This will be a reference guide to preparing enough time and resources to sort your next order and for picking the appropriate member pickup date for your next order.
- Explore our Year-Round Fundraising Programs to start fundraising for any events throughout any time of the year.

Frequently asked questions

- **Where can I find Terms and Conditions for the program?**
  You can find terms and conditions here - [https://fundraising.purdys.com/Terms.aspx](https://fundraising.purdys.com/Terms.aspx)

- **What’s the seasonal program submission deadline this Christmas season?**
  The Purdys Seasonal Program’s final submission deadline is stated below, no orders may be submitted from coordinators or their supporters beyond this deadline.
  ➢ Seasonal Fundraising Order submission deadline: **Nov 30, 2021** (Tue)

- **What is the campaign submission deadline, and why is it important?**
  Your campaign’s submission deadline is based on your chosen delivery window. Each Coordinator must submit their campaign on time to get their order delivered within the given delivery window. If the Coordinator misses their submission date, then the delivery window will no longer apply to that specific campaign.

Once you submit your campaign, we will process and pack your order within three (3) business days and send you tracking information. Please refer to the carrier’s website to get the delivery notifications.

- **How do I change my submission date?**
Your submission date cannot be changed as it will affect your delivery window.

- **When I pay for my whole order, won’t this automatically submit my campaign?**
  No. To submit your campaign you need follow the procedures under the Submit Order tab online.

- **What if I need to change my address after submission?**
  Please either call us directly at 1-888-478-7397 Ext. 1 or email us at fundraising@purdys.com and have your customer number ready.

- **Where do I find support materials (for example, posters, order forms, etc.)?**
  You can find all support materials HERE.

- **I cannot find order forms in the printed catalogue. Where can I find order forms to print?**
  You can find order forms HERE.

Purdys will not accept any paper orders for data entry. It is the responsibility of the Coordinator to enter any paper orders they receive and communicate the payment method to the supporter.

- **Coordinators:** Head to the support materials page online.
- **Supporters:** Reach out to your coordinator to provide the appropriate order form.

- **How can I submit my paper order?**
  All orders should be completed online. Purdys will not accept any paper orders for data entry. It is the responsibility of the Coordinator to enter any paper orders they receive and communicate the payment method to the supporter.

- **Can I pick up the chocolates from Curbside or Factory?**
  Coordinators have the option to directly pick up their orders from the Purdys warehouse in Vancouver, BC. A minimum processing time of 3 business days will still apply. You can change delivery option in your campaign settings.

- **Are the chocolates limited to what is in the catalogue? Can we order items that are not part of the catalogue?**
  The selection is limited to the available chocolates in the provided program catalogues and on the Group and Seasonal Fundraising website.

  **Important:** Products sold on Purdys.com are not included in the program. Purdys will not honour any purchases made outside of the program. This includes transactions done through physical Purdys shops and Purdys.com to count towards purchases against the Coordinator's campaign to earn profits or be eligible for discounts, including but not limited to rebate cheque, profit cheque, and bonus items.

- **Do I receive any bonus items?**
Seasonal Fundraising Coordinators will receive an email with more information after the end of the season. Purdys reserves the right to allocate any bonus items to an order or cancel any bonus items without prior notification.

- **When will my order arrive?**
  When you start your campaign, we provide you with a delivery window based on your location. When your campaign is submitted, you will receive a tracking number once your order is shipped. Please refer to the carrier’s website to get the delivery notifications.

Good luck FUNdraising and we wish you all the success in running the sweetest campaign ever!