

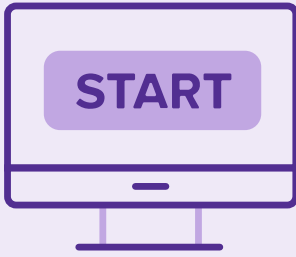


# Seasonal Fundraising Coordinator Success Guide

A handbook that has all you need to create and manage your Fundraising Campaign!

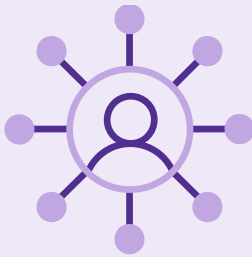


# Contents



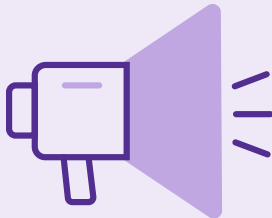
## 1. Register & create your campaign

- Register as a new coordinator
- Log in as a returning customer
- Create your campaign
- Updating coordinator's information
- Tax and shipping information



## 2. Create a friendly competition with the Teams Feature

- Setting up Teams



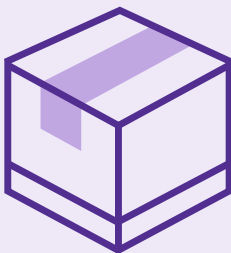
## 3. Spread the word!

- It's time to share your Group Savings Campaign
- Shopping online



## 4. Submit your campaign

- Order submission
- Add-on orders
- Profit
- Rebates



## 5. Sort and distribute

- Get ready for delivery
- Reports
- Returns and replacements
- Important dates

# Let's get started!

## 1. Register and create your campaign

### - Register as a new coordinator

If you are a new customer and registering for the first time, follow the simple steps below:

**Step 1** - Go to [fundraising.purdys.com](https://fundraising.purdys.com).

**Step 2** - Click "Start a New Fundraiser" on the page OR "Register" at the top right corner of the page.

**Step 3** - Fill in the details needed in the registration form:

- Organization name  
(this name will be used as the payee's name for your profit cheque.)
- Name of Coordinator
- Phone number
- Address
- Email address
- Create a password

### - Log in as a returning customer

If you are already a member, welcome back! We are happy to see you again. We're sure you already know the drill, but here's a quick review, just in case:

**Step 1** - Go to [fundraising.purdys.com](https://fundraising.purdys.com).

**Step 2** - Click "Sign in" on the top right corner of the page.



**Step 3** - Please ensure you are signed in as the coordinator on the Confirmation Page and you can view previous seasons. You can also switch your view from coordinator to supporter.

## - Create your campaign

Once you are done registering or signing back into your account, you can move forward and create your Fundraising campaign. Here's a quick video that shows how to create a campaign: [HERE](#)

## How do I qualify for the Seasonal Fundraising Program?

Your order must reach a minimum of \$100 before tax and shipping charges to qualify for the Seasonal Fundraising program.

## What should I do if I experience issues while registering online?

If you experience any online registration issues, reach out to us at [fundraisings@purdys.com](mailto:fundraisings@purdys.com) or call 1.888.478.7397 Ext. 1. We're always happy to help!

## Should I use my email address or my Customer Number for signing in?

Please make sure that you are using the **Customer number** when signing in and not your email address to ensure that you are signed in under coordinator mode.

## What should I do if I forget my Customer Number?

In case you forget your Customer Number, call 1.888.478.7397 Ext. 1 so we can help you out!

## What should I do if I forget my password?

If you forget your password, just click "Forgot password" and follow the prompts to create a new password.

## - Updating coordinator's information

### How do I update my contact 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 [fundraisings@purdys.com](mailto:fundraisings@purdys.com).

### - Tax and shipping information

Supporters ordering chocolates are charged for shipping and taxes according to the table below:

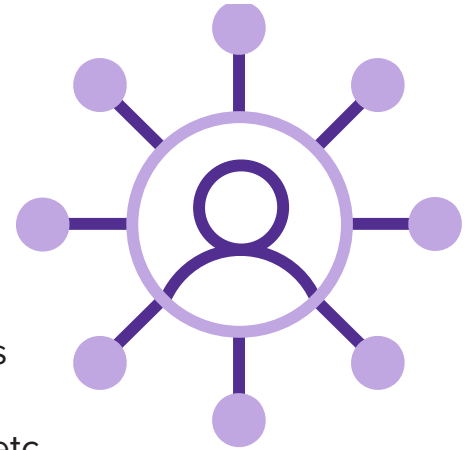
Province	Estimated Transit Days	Shipping Fee	Tax
British Columbia	1-4 business days	FREE	5%
Alberta	2-6 business days	FREE	5%
Saskatchewan	2-6 business days	FREE	11%
Manitoba	3-7 business days	FREE	12%
Ontario	4-8 business days	FREE	13%
Quebec	4-8 business days	4%	9.975%
New Brunswick	5-9 business days	8%	15%
Nova Scotia	5-9 business days	8%	15%
PEI	6-10 business days	8%	15%
Newfoundland	8-12 business days	8%	15%
Yukon	7-11 business days	12%	5%
Nunavut	8-12 business days	35%	5%
Northwest Territories	4-8 business days	12%	5%
BC - VOT	8-12 business days	8%	5%
BC - VOL	4-8 business days	8%	5%



## 2. Create a friendly competition with the Teams Feature

The Teams Feature is an excellent way to track sales and profits within a group and/or individual orders. With this feature, you can automatically track individual or group profits for your Seasonal Fundraising campaign.

You can create friendly competitions by customizing how you track profits. You can either track individual participants or groups that you can set up however you want. Ex: grade level, English class vs. Chemistry class, juniors vs. seniors, etc.



The campaigns that usually get the most out of the Teams Feature are groups from the same organization or community that will benefit from the fundraising profit.

For example:

- Sports team where each player's profit goes towards supporting their team events.
- Schools that are looking to create a competition and track profit per student or classroom.

**We've done the math. Fundraisers who use our Teams Feature see a 65% increase in their sales!**

### TRACK BY INDIVIDUAL

#### CLASSROOM

Everyone gets their own unique link to share with supporters.

You can create one team and reward the fundraiser with the most profits.

Set up multiple teams and give out prizes for top individual contributor and top team.

### TRACK BY GROUP

#### SCHOOL

Each group gets its own link to share with supporters.

Only group contributions are tracked, not individuals.

You can set up groups however you want: by age, interests, classroom and so on.

## - Setting up Teams

To set up your Teams, go to [fundraising.purdys.com](https://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](mailto: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. Under the teams you can find the Master List and the Launch letter.

- **Master list** – will contain the log in ID and default password assigned to each member/class/group.
- **Launch letter** – to be distributed to each member/class/group. This letter will contain a “join” link for each class, instructions and important dates that parents/supporters should be aware of when ordering.

Make sure to create your Campaign first, then request a Teams Feature using the **unique links only**, which we will provide you to share to your supporters. We have 2 options on how you can receive your individual links. You can receive one PDF with the individual links for each member 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 them, it has no other use.

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

If you decide 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.

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

### 3. Spread the word!

#### - It's time to share your Group Savings Campaign!

Share your campaign's link by clicking on "Copy Link" displayed on the campaign page with as many people as you can! Supporters who use this link will go directly to your campaign's page!

To help you spread the word, here are some of our success tips:

1. Email people in your office or post in group forums. Save time by using our templates to create posts for Facebook, Instagram, work email etc.
2. Does your company do Corporate Gifting? Talk to the people in charge of it.
3. Share the catalogue. Leave it in lunchrooms, reception, waiting areas, etc.
4. Talk about your campaign in group meetings (bring catalogues).
5. Get influencers on board (e.g., school principal, social media influencers, local businesses).
6. Ask for help from volunteers.
7. Put up posters in high traffic areas.
8. Share your campaign's link on social media platforms like Facebook, Instagram, LinkedIn and Twitter.
9. Send it to your groups on WhatsApp, Telegram or any other messenger.
10. Create a dedicated Facebook page about your Fundraising Campaign and share the latest updates there.
11. Create Instagram stories and encourage others to share them.
12. Post a professional update about your campaign through LinkedIn.
13. Create a specific hashtag for your campaign e.g., #FundraiseWithPurdys and ask your supporters to use it in their posts & stories.
14. Engage with members by liking, commenting, & sharing their supporting social posts.

#### Where can I find some templates and more useful tips?

You can find free online information to promote or advertise your campaign [HERE](#).



## - How to find your campaign without a link

Your supporters can also find your campaign by logging in or registering manually on the Purdys Fundraising website. They will require either your **unique campaign link** or your **campaign number** to find your campaign.

Please direct your supports to follow these steps to find your campaign:

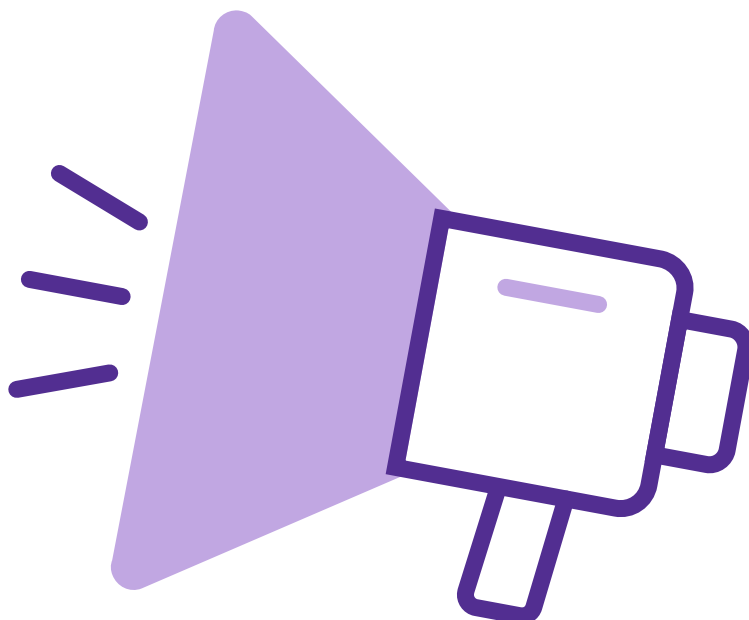
**Step 1:** Supporters should visit [fundraising.purdys.com](https://fundraising.purdys.com).

**Step 2:** If they have registered and ordered with us in the past, they need to click “SIGN IN” at the top right corner of the page and enter their login details.

If it’s their first time, they need to go to “REGISTER” at the top right corner of the page, click “Register as a Supporter” and then fill out the registration form.

**REMINDER: Make sure you provide your supporters with the campaign’s customer number so they can complete their registration.**

**Step 3:** Once they are signed in/registered, they need to click “Join a Campaign” and enter the campaign number you’ve shared with them. This will automatically take them to your personalized campaign’s webpage. Now they can start ordering!



## - Shopping online – Switch roles so you can also shop

Coordinators and supporters can place orders through our online dashboard. This is an easy and convenient way to check out the delicious chocolates available and to pay directly on the website.

There are two ways to order online:

**1. Marketplace** – This is the easiest way to navigate our online shopping site, a product listing page that has pictures and descriptions of the available treats.

**How to use the Marketplace:** [VIDEO HERE](#)

**2. Online Order Form** – It allows both coordinators and supporters to view all products on a single page and enter multiple orders efficiently. If you are placing bulk orders, this may be for you. [VIDEO HERE](#)

## - What's the difference between Coordinator mode & Supporter mode?

- **Coordinator mode** – Allows you to see the entire order of the campaign you are coordinating. You can edit the campaign and change details like delivery address, delivery window and message.
- **Supporter mode** - This is the same screen that your members see and access. It has limited functions. You can only see the orders of the people that you track.

## - How do I switch roles to shop online as a supporter?

Coordinator mode allows you to shop online and use all the features that a Supporter can use. However, if you would like to switch roles to a Supporter you can easily switch from a Coordinator to a Supporter role.

To switch from Coordinator to Supporter mode or vice-versa, just simply click on the switch role button on the top right corner and then click on the option you want.

## 4. Submit your campaign

### - Order submission

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

Follow these easy steps to submit your order: [VIDEO HERE](#)

**How will the carrier find the additional delivery instructions like buzz code, use side door, etc.?**

The delivery instructions will be communicated to the carrier partner, and they will try their best to accommodate it.

**Can I make specific time/date requests for the delivery?**

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

**What do the terms “Profit applied towards balance owed” and “Customer to pay balance owed directly” mean?**

“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 the customer in a cheque form.

“Customer to pay Balance Owed Directly” option means that the customer will receive the profit cheque in total and will have to pay the balance owing upfront.

**Can I pay for my order via cheque?**

If you pay via cheque, please allow 5 – 7 transit days for your 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 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, Fundraising Dept, 8330 Chester St., Vancouver, BC, V5X 3Y7.

Coordinators are responsible for ensuring that we get the cheque payment no later than ten (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.

## - Add-on orders

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 \$1000 (before taxes and shipping charges)**. For add-on orders that are eligible for the 25% profit, Coordinator must associate their add-on order with a campaign of \$1000 or more (before taxes and shipping charges). 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 \$100 or more before taxes and shipping charges. 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 \$1000 (before taxes and shipping charges) are not eligible for any add-on orders.

## - Profit

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 \$100.00 and \$499.99 get a 5% profit cheque
- Campaign orders\* between \$500.00 and \$749.99 get a 10% profit cheque
- Campaign orders\* between \$750.00 and \$999.99 get a 20% profit cheque
- Campaign orders\* \$1000.00 and above get a 25% profit cheque

\*Before taxes and shipping charges.



**Important: Purdys Chocolatier is not able to combine total product value or profit from multiple campaigns if the original submitted campaign was below \$1000 (before taxes and shipping charges).**

## - Rebates

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

### **When should I expect to get my rebate cheque?**

Rebate cheques are issued a minimum of four (4) to six (6) weeks after the Seasonal Program has closed, pending any outstanding issues. It is the responsibility of the Coordinator to provide the correct spelling of name and address of the payee at the time of submission. Any processing fees for any cheque reissuance due to name changes and stale-dated cheques will be deducted from the rebate amount. Customers with multiple Fundraising Campaign orders where the combined order totals have exceeded the minimum rebate threshold will receive one (1) rebate cheque for all their Fundraising Campaign orders.

The rebate cheque amount is calculated based on the product subtotal of the Fundraising Campaign order. It does not factor in the shipping fee or the provincial tax of the Coordinator's mailing province. Purdys Chocolatier reserves the right to modify rebate policies and levels at any time without notice.

## **5. Sort and distribute**

### **- Get ready for delivery**

A link with the tracking information will be provided to you in the shipping confirmation email. A link to tracking information is also available on the Dashboard when you log in as a Coordinator.

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

#### **Step 1: Getting ready for delivery**

- Print Summary report/Individual order report.
- Confirm volunteers. We recommend 2 volunteers for every \$1,000 of orders.
- Print "Member Pickup Reports" [HERE](#).
- and "Sorting Signs" [HERE](#) under RESOURCES tab.
- Confirm availability of delivery location, and ideally a secure, large room that will not exceed 20°C.
- Have supplies on hand, e.g., scissors, pens, highlighters, staplers, etc.

## Step 2: Sorting

- 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)
- Once you receive the order, count the number of cartons before signing for the delivery.
- Find and open carton #1 (labelled “Open Me First”), which contains packing slip and plastic bags.
- Ensure the quantities and SKUs of the items received match the packing slip.
- Unpack all cartons – check the SKU of EACH chocolate item and place it with the corresponding Sorting Sign.
- You are now ready to start packing your individual 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.

## Step 3: Packing individual orders

- 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.
- Staple the “Member Pickup Report” to the bag once it has been double-checked.
- Double-check all orders once they have been picked/bagged. Note: if you are short of 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 Campaign Team immediately. Call us at 1-888-478-7397 Ext.1 Our call center is open from 8:00 am – 5:00 pm PST Monday – Friday.

## - Reports

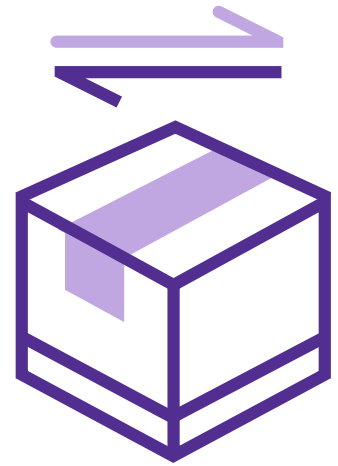
There are several different reports that Coordinators can access through the Reports tab:

Campaign Summary Report - this report is a summary of all orders (without the profit breakdown). You can choose from three sub-reports where the information has been organized in a different way to help you find what you need.

- Products - By All – Shows the grand total of all products ordered.
- 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 that list the Line #, SKU, and product name.  
Note: Please print signs before sorting.
- SUPPORT MATERIALS – free online information to promote or advertise your Campaign.

### - Returns & replacements

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. Even if a product is in the original wrapper (or packaging) and in good condition, it will never be re-offered for sale. We do not compromise on this policy.



Any replacement needs to be initiated through the Fundraising Contact Center within 5 (five) calendar days of order delivery at 1-888-478-7397 Ext. 1 Any issues encountered during the weekend should be addressed through the Fundraising Campaign Contact Center by the next business day. Fundraising Program orders will not be resolved through Purdy shop inquiries.

### **How do replacements work at Purdys Chocolatier?**

Replacements are substituted with products of equal value if not available. Any replacements in a shop or the warehouse will not be eligible to the original delivery range during the submission process and will be shipped out separately based on the availability date. The Coordinator understands this replacement does not have a guaranteed delivery date and may arrive after season.

### **What if there's no replacement available?**

Purdys Chocolatier will need to authorize and approve (depending on shop stock levels or availability) any in-shop or warehouse replacements. Purdys Chocolatier 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 or Easter Season, any replacements need to be requested within five (5) calendar days after Coordinator receives the order.

Purdys Chocolatier may process the replacement of damaged items for no more than their original value. We reserve the right to honor any future claims against the original order.

### - Important dates

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

#### **Order Submission Deadline:**

- This is the last date you can submit your fundraising campaign order to meet your delivery window. Orders submitted after your order submission deadline will not arrive within your delivery window.
- Please note: Changes to the submission deadline or submission of your campaign after the deadline will result in a delayed delivery window. The last date an order can be submitted for processing is December 5th.
- Seasonal Fundraising Submission Deadline for your campaign will be displayed on your dashboard.

#### **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 best estimated range of dates 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. Under the “Reminders” tab on your dashboard you can find e-mails available to send directly to your supporters.
- 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).





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

If you have any other questions,  
please visit our [FAQ](#) or [contact us](#).