Growing Smiles
FUNDRAISING

WINTER 2024

Website Guide

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FUNDRAISING

COORDINATOR LOG-IN

- You will receive an email with a one-time coordinator login link which will allow you backend access to the team website. Click on this link to begin the sign-in process.
  - Once clicked, you will be prompted to choose if you'd like to access your account or go to the team website.
    - **Your Account:** You can edit your contact details, manage subscriptions, and change your password.
    - **Team Website:** You can view the homepage and additional headers to begin the setup process.
- You may be prompted to set a new password by clicking on this link.
- If you cannot log in please reach out to us! An easy way to tell if you are logged in is if you see your name in the top right hand corner of the page and 4 different headers in the banner beside your name.

SHARING THE SITE WITH CUSTOMERS

- Once you have setup your team website, you can start collecting orders by sharing the website with your team/customers. There are a few different ways to share the website:
  - Share your link on Facebook by scrolling down on the homepage and clicking the [f SHARE] button under the 'Help us by sharing on Facebook!' blurb.
    - To see how to change the description/image that appears on the Facebook post, please refer to the 'Advanced Setup' section in your setup guide.
  - Copy and paste the direct link in the search bar of your browser into an email, social post, message, etc. for customers to click and automatically access your team's website.
    - Be sure to copy the link when you are on the homepage of your website.
    - Customers can either sign into their own account, create an account, or visit the website as a guest.
 - Encourage customers to share the website on their end for more potential in sales.

RESETTING YOUR PASSWORD

- You will need to logout of your account if you would like to reset a forgotten password. On the login page, you will need to enter in your email address and password. Click the 'Reset' option beside 'Forgot Password?' and a password reset email will be sent to the address associated with your account. Follow the prompts on the email to create a new password.
- Please reach out to us over email/phone if you have any troubles resetting your password!

BASIC SETUP

![Growing Smiles Fundraising logo]

CUSTOMIZING YOUR HOMEPAGE

Make your team's homepage stand out by personalizing it to engage supporters and showcase your goals. With the latest updates, customizing is now easier than ever:

- **Easy Editing from Your Homepage:** No need to navigate through menus anymore! If you're logged in as a coordinator, simply edit sections right from the homepage. Look for the pencil icon on editable sections.

- **Text Sections:** Click the pencil icon to change the wording in these sections.

- **Image Sections:** Want to change a picture? Click the pencil icon, then upload a new image from your device or drag the file into the pop-up window.

- **Order Now Button:** Your customers can jump straight to plant orders with the new Order Now button at the top of the homepage, saving them from scrolling and helping boost your sales!

- **Customer Order Countdown:** Create urgency with a visual countdown showing your customers how much time is left to place orders! You can set this customer order deadline by navigating to *Settings → Setup Website → Timeline*. Remember, this is for customer orders, not your team's final order deadline.

- **Plant Pickup Schedule:** Let your customers know when and where to pick up their plants by setting up the plant pickup schedule in the same place: *Settings → Setup Website → Timeline.*
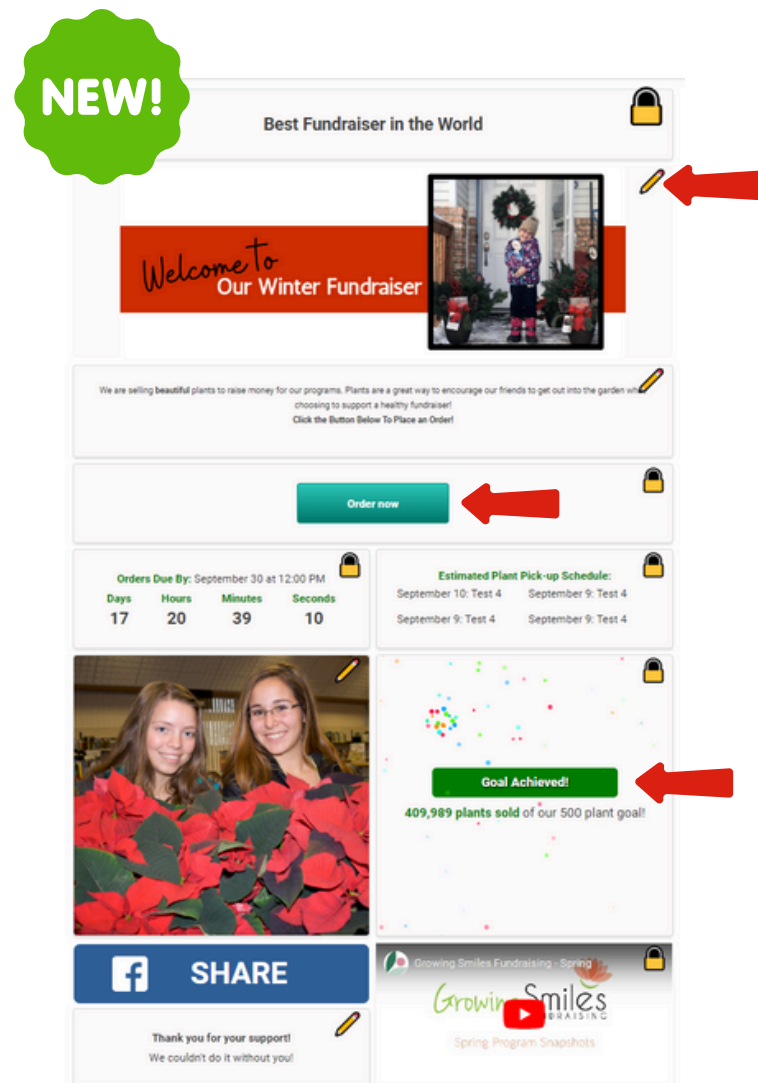
- **Reach Your Team's Fundraising Goal:** Motivate your supporters with a fun goal tracker. The default message says, "Help us reach our goals by purchasing plants," but you can personalize this by setting up your own goal thermometer. Just navigate to *Settings -> Goals & Incentives -> Team Goal Setup*, enter your plant sale goal and toggle the goal thermometer on. And when you hit your goal, enjoy a celebratory fireworks animation.

SETTING UP YOUR WEBSITE

- Before sharing your team website, you will need to make sure you have everything setup first. Under the 'SETTINGS' header, select on the first option in the dropdown menu labeled 'Setup Website'.
    - There will be 5 different tabs to go through to ensure that everything is ready to go before launching your campaign. Please be sure to fill out all required fields and carefully review before saving any changes.
    - Throughout your campaign, you will have access to these tabs. You will be able to make any necessary changes throughout the fundraiser if needed.

SETUP STEP #1 –

GENERAL	TIMELINE	PAYMENT	PRODUCTS	STATUS

CONTACT INFO

- This tab includes contact information that customers can use if they have any questions.
- Click on '+Advanced Options' to make changes to the referrers list and the image/description used when using the share link on the homepage.
- Your team website URL is set by GSF. If you would like the URL to be changed, please reach out to a GSF representative with your new preference.

BASIC SETUP

SETUP STEP #2 –

GENERAL	TIMELINE	PAYMENT	PRODUCTS	STATUS

REQUEST A DELIVERY DATE

- Delivery dates that are available in your area will be bolded on the calendar at the top of this tab. You can request a bolded date by selecting on it. Please remember that these are just requests and will still need to be confirmed manually by a GSF representative.
- If you do not see any bolded dates available on the team website or on the provided delivery calendar, please give us a call or send us an email.
- Please keep in mind that your final team order will need to be placed 14 days before delivery.

DELIVERY DATE CONFIRMATION

- Delivery date request confirmations can take up to 2 days to be processed. If your date has not been confirmed after 48 hours, please feel free to give a GSF representative a call or send us an email.
- Due to popularity and demand, your requested delivery date may be unavailable or already filled up. If this is the case, your region representative will give you a call to discuss options.
- If you need to change your delivery date, you will need to give us a call or send an email. Once a delivery date has been confirmed, we will need to manually change it.

CAMPAIGN TIMELINE

- The Customer Order Deadline is set by you and is directly linked to when the team website will close access to online ordering. You can set this date for the same day as your final team order deadline, or set a few days earlier to ensure all orders are collected and paid for.
- The team Order Deadline is set by Growing Smiles and is auto-set to 14 days before delivery. This deadline cannot be changed on your end.
  - For any approved timeline extensions, a GSF representative will manually change this deadline.

PICKUP TIME/LOCATION

- The pickup time and location is set by you and will be shown to customers when they place their online orders. To ensure you are given enough time to count and separate orders, we recommend scheduling customer pickup for the day after delivery if you have an indoor space to store the plants.
- The 'Order Limit' option can be filled out if you would like to set a limit on the amount of customers picking up their orders at one time. This may be helpful if your team is practicing social-distancing. If you do not mind everyone coming at the same time to grab their orders, please leave this field blank.

SETUP STEP #3 –

GENERAL	TIMELINE	PAYMENT	PRODUCTS	STATUS

CUSTOMER PAYMENT OPTIONS

- There are 5 different payment options to choose from under this tab. For whichever payment methods you wish to enable, slide the corresponding 'No' slider to 'Yes'.
  - **Cash –** Collected by your team directly. Please specify where, when, and who customers can give their cash to.
  - **Cheque –** Collected by your team directly. Please specify cheque details and where customers can drop off their cheques (please do not use GSF's mailing information).
  - **PayPal.me/Credit Card –** Collected by your team directly. Use your/your team's PayPal account to collect payment for customer orders.
  - **Interac e-Transfer –** Collected by your team directly. Use your/your team's e-Transfer account to collect payment for customer orders. If you have an auto-deposit setup, please note this in both the Question/Answer required fields.
  - **Credit Card –** Collected by GSF. No additional fees associated with this option. Any money collected gets applied to your invoice and reduces the total owed for the cost of the plants. If you collect more credit card payments than the invoice total, we will send you a cheque or e-Transfer (depending on what is noted on the final team order) at the end of your fundraiser.

SETUP STEP #4 –

GENERAL	TIMELINE	PAYMENT	PRODUCTS	STATUS

PRODUCTS AND PRICING

- This tab features a list of available products to sell in your area. All products will be set to enabled and will list our recommend retail pricing, however, this can be adjusted based on your teams needs.
- Each product will show a name, description, their multiple requirement, the wholesale cost with and without tax, and the profit made when a retail value has been entered into the 'Sell' field.
- If you enter a custom retail price but would like to use our recommended pricing, please select the **Reset to Default Pricing** button in the top right corner.
- Any product you wish to offer will need to be enabled. Toggle the 'No' slider to 'Yes' on these products.
- You can choose to offer all products to your customers or select only a few - it is completely up to you!
- The profit you make, you keep. GSF only charges you for the wholesale cost and tax of each product ordered on the final team order.

BASIC SETUP

SETUP STEP #5 –

GENERAL	TIMELINE	PAYMENT	PRODUCTS	STATUS

REVIEW INCOMPLETE STEPS

- If you did not complete a required step in the setup process, this tab will what needs to be filled out before going live with the team website.
- At the top of the page, you will see a note indicating if you have completed all steps or if there are some fields missing information. Below this, you will see a checklist of what has been done and a brief description of what is still needing to be done.
- Click on the link of any missing steps to be directed back to the tab affected.
- Before exiting out of the setup page, please be sure to hit the 'Save' button.

REVIEWING THE HOME PAGE

- Once you have completed all steps noted above, we recommend that you take a look over the homepage to confirm that all details are correct.
- If you are unsure where to make changes to details noted on the homepage, please feel free to give us a call or send us an email!
- Plan ahead and make a timeline of when you would like to launch your campaign and share your team website. We recommend having a 2-3 week selling period before your final team order deadline.
- You will see that your website is ready to go when you scroll to the bottom of the homepage and can see products listed with their retail prices. If you see a red banner, you will need to go back into the setup process to complete changes and save.

Hello Team Coordinator!

A payment method must be configured before products can be ordered on this website.

Please click **Team** above and choose <u>Setup</u> to select your products and get started.

Good luck!

Website NOT Ready
Go back to Setup page to complete remaining steps.

Website Ready
Double check the retail prices are set to the correct amounts and start selling!