

COORDINATOR S FUNDRAISING

Complete Guide

STEP-BY-STEP INSTRUCTION MANUAL



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Getting Started!

Now that your fundraiser is live here is some important information you may need to run your fundraiser! You have been assigned a 4-digit organization ID. It is important to keep this ID number handy because it is the best way for us to identify you.

Your 4-digit organization ID is emailed to you once your fundraiser is live. We suggest you look at our new & improved “Coordinator’s Corner” this is available to you from our website, click the link below to go there!

<https://dfscanada.com/coordinators-corner/>

The first thing you will see is the log-in box for your Online Coordinator’s Account. Here you may access everything you need including the online order entry! Click the log-in button to start, your username and password will be emailed to you when your fundraiser is live. Once logged in you may enter your homerooms/groups, view real time reporting, view your contract info and enter your paper orders manually. Please note: You do not have to add the students/sellers - they have the instructions to create their own accounts!



BOOK A FUNDRAISER

ONLINE SHOPPING



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COORDINATOR ACCOUNT LOGIN

Logging in



Application Login

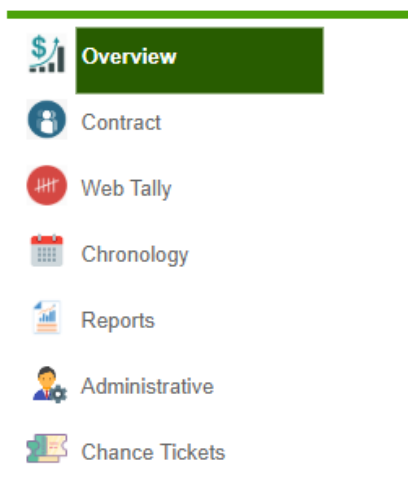
User Name :

Password :

[Login](#) [Forgot Password?](#)

You will receive an email from DFS with your coordinator login information, your username will be your organization ID and we will email you a PIN # for your password. You have many tools available to you in your coordinator dashboard. Check out the navigation below for a list of tools available to you! You may login to your dashboard throughout your sale for up to date reporting on web orders and total sales.

Navigation



1-Overview

Shows your sales at a glance

2-Contract Details

View your organizations details

3-Web Tally

Add your homerooms and enter your orders

4-Chronology

Check the status of your fundraiser

5-Reports

View your sale and profit reports

6-Administrative

Request a password change

7-Chance Tickets

Generate raffle tickets based on sales

- 1- Login
- 2- Web tally from dashboard menu
- 3- TEAMS from left menus
- 4- New Team
- 5- Add your Homeroom, Grade, Teacher Name, & Number of students in the class
- 6- Click DONE and then NEW TEAM again to continue!

*Note: you are required to enter the number of sellers expected for each team, the rest is optional

Team Summary

Teams

Team Leader

Grade

Sellers

New Team

Sellers

First	Last	\$ Sales	Units	\$ Web	Units	Web
(A)dd Seller						

Note: new teams cannot be selected until DONE button is clicked

New Team

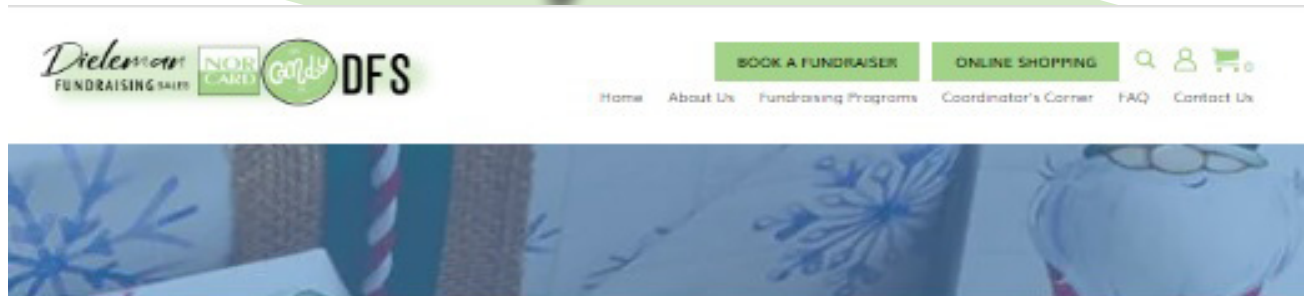
• Team/Room :

• Grade/Group :

• Leader :

• Sellers :

Registration



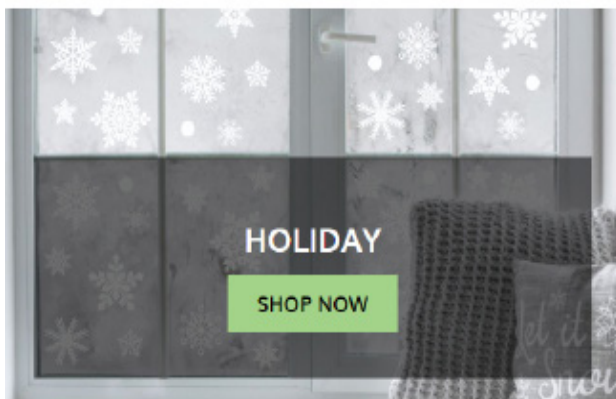
Participant Register / Account Setup

Please create an account for each participant.

Organization ID *	
Team/ Homeroom	Select a Team/ Homeroom 
Password *	
Confirm Password *	
Student First name *	
Student Last name *	
Address *	
City *	
Province *	
Postal Code *	
Email Address *	
* = Required fields REGISTER	

Registration for participants is easy, simply fill out the registration form to create your account, this is the only step! Once your account is created you can share your link, shop, view your orders, add your shipping and billing addresses, save your payments details for easy and fast checkout! If you have previously entered your homerooms they will show up here for your participants to choose from!

Shopping



Our shopping site is easy to navigate, choose from the visual menu options and use the search bar to find products by name or number. When logged into your shoppign account the cart will save your items for you even if you leave the site.

You can checkout and quick and easy by saving your preferred shipping and billing addresses along with saving your payment options!

Reporting

Your dashboard offers real time reporting 24/7. There are many reports to choose from, simply click the report title to generate the desired report.

We offer more reports than previous years so check out everything there is to offer here! You can view the contact onfo, status and tracking of your groups “ship to home” orders now! Claim details will show you any tickets for damaged or missing items within your group. View the tracking to ensure all customers have received their fix-ups!

Tally Details
Tally Group/Customer Variance Review
Friend/Family Email Summary for Group
Web Sales Details for Customer
Claim Details for Customer
Seller Substitution Report

rptWebClaimDetails[0,0] Mon Aug 15
10:54:28
20220815-000175 [Excel XLSX](#)

Look for this Excel link in the corner to download a spreadsheet of your report!

Submitting Orders

There are a number of ways you can submit your fundraising orders. If you have paper order forms you may send them to the DFS Home Office and we will enter them for you. The best method for this is to send by mail: #206-2052 192 Street Surrey, BC V3Z 0N2 Be sure to keep one of the carbon copies for yourself! This is handy if they need to be re-sent, to double check any discrepancies and if a participant loses their copy.

If you prefer to enter the order forms online yourself you can login to your coordinator account and choose the Web Tally section!

Team Summary

Teams

Team Leader Grade Sellers

New Team

Sellers

First	Last	\$ Sales	Units	\$ Web	Units Web
(Add Seller)					

Note: new teams cannot be selected until DONE button is clicked

[illegible]

You can enter your paper orders into your web tally at any time and the system will save your orders until you are ready to submit. If your teams are already in there simply click on your team, enter the seller info and continue to enter the item numbers. Product and price will populate automatically when item code is entered properly. Be sure to hit SAVE before you click NEXT! Once all of your orders have been entered and checked over click the SUBMIT button on the left side of the screen. This will submit your orders to us. We usually accept late orders via order form if you receive any after you have submitted!

*You can view a video tutorial of this process in the coordinator corner. You may choose to enter all of sellers in their correct team/homerooms first then go back and input their orders or do it all at the same time. The system is designed to make it easy for you throughout your campaign! Please don't hesitate to reach out to us if you require assistance any step of the way.

Ending Sale

Your sale will come to an end based on the end date in your contract. Your online site will have a one day grace period. The sale will end automatically on your specified online close date. You should have your order forms submitted to us or entered online by your end date.

Once your sale has ended no more orders can be placed online or on the web tally. If you have a late order that you would like to submit please send it to us in writing via email or fax! We will do our best to add it to your main order, if we can't make it with your main order we can ship it separately for you. If separate shipping is the case we reach out for shipping confirmation as regular shipping charges may apply. It is much quicker in processing if you send your late order on an order form. We have late order forms and extra order forms available to fill and download from our website in the coordinator corner.

All Orders Made Online

When all of your participants placed their orders online and there are no extra orders to submit you don't have any further steps to end your sale. We will close the sale and start processing your orders! If you chose to run an online only campaign but wish to submit an order directly by order form just let us know and submit your order through web tally before the end date or send us your form/s. You can double check your dates in your dashboard by clicking on Contract, Sale Basics, then scrolling down to Important Dates.

Important Dates	
Packets Needed By	2022/09/11
Packets Ship Date	2022/09/09
Start Date	2022/09/23
End Date	2022/10/26
Order Forms Due Date	2022/11/02
Requested Delivery Date	NONE
Ship By Date	NONE

Shipping

You will receive an automated email notification when your order leaves our facility. You may also log-in to your coordinator account online and check the status of your orders and tracking number at any time by clicking on “Chronology”

If your order forms arrives to our facility early your delivery could take place earlier than your expected delivery week. If you order forms arrive to our facility late your delivery could arrive after your expected delivery week.

We use second and sometimes third party delivery companies to deliver our shipments Canada wide, we cannot guarantee a specific delivery day or time. All deliveries are subject to delays depending on variables that are out of our control such as weather and driver related issues.

UPS - It is not uncommon for your boxes to arrive on separate days. Sometimes they get loaded onto separate trucks, if your tracking shows you are missing boxes please wait a few business days for delivery of the rest. If you feel the boxes may be lost in transit please contact us and we will open a claim with UPS for you.

Please inform us at the time of booking if your organization is located in an area that has specific delivery instructions or limitations.

Please note standard delivery is curbside so it is important to have volunteers on hand to help move the boxes inside if distribution doesn't take place right away.

SHIPPING CHARGES: DFS will pay the freight of your delivery only if your group makes a minimum **INVOICED AMOUNT OF \$1500.00** This is NOT the retail amount of sales. This is simply the amount sold once the profit has been deducted. Your online “ship to school” orders will help towards your free freight minimum. Freight charges are based on weight and location.

We do our absolute best ensure your delivery is a smooth and pleasant experience. If you have any issues, concerns, or questions about your delivery or our shipping methods please contact us at customerservice@dfscanada.com. All ship to home orders get shipped via UPS or Canada Post along with automated tracking updates via email. Ship to home orders get shipped in the order in which they are placed, this varies from 1-4 weeks in turnaround. All ship to organization orders have a turnaround period of 1-4 weeks depending on time of submission. We will contact you to discuss delivery options if your order is ready well before your expected delivery week.

Invoice & Payment

Your fundraising statement will be available online when your account sale ends. This will automatically update if you submit any late orders or missing orders. Your statement will be accurate and up to date with any sales tax but it will not include any extra charges incurred from us directly such as shipping or extra material costs. We will send you your final invoice with the total amount owing along your paperwork. Payment is due within 7 days of delivery. In some cases DFS may ask for payment prior to shipping, if this is the case we will contact you directly.

NEW If you require profit funds back from us we will send you a separate cheque in the mail or your direct deposit of funds after your account has been closed. This time frame will be based on your sales deadline which falls approximately 2-3 weeks from claims and late orders due dates.

Ways to pay your invoice:

1- Credit Card. You may submit payment by using our secure online credit authorization form or by calling 1-800-667-1272 ext. Billing & Accounting to pay over the phone. Please have your Organization ID# ready. We accept Visa, MasterCard, and American Express.

2- Etransfer. You may send us an etransfer at billing@dfscanada.com

3- Cheque or Money Order. Remit to Dieleman Fundraising

206-2052 192 Street
Surrey, BC
V3Z 0N2

Damage & Missing

DFS will replace any broken or defective items when reported within 14 days. It's a good idea to encourage your participants to check their orders carefully upon arrival, this way we can get replacements shipped in a timely manner.

If participants have issues from orders that arrive at your facility you can document them on the form we provide. This form can be found on our website www.dfscanada.com in the coordinator's corner. Once your form has been submitted it will be carefully inspected and then processed for re-packing. Please use as much detail as you can when submitting this so we can fix the problem right away for you. We cover the shipping fee for one submitted damage and missing form, any additional forms could be subject to freight charges. We suggest waiting until all orders have been sent home to submit your form. Items that are ordered incorrectly or simply not wanted will need to be shipped back to us before a replacement or refund can be issued. DFS reserves the right to refuse any damage and missing claims after the allotted 14 day period.



Forms

Need an extra order form? Find all the handy forms you may need here

SECURE ONLINE CREDIT AUTHORIZATION FORM

DOWNLOAD FORMS

Customers may also use the form embedded right on our website in the bottom right corner to submit a ticket with their damaged or missing items. This is often used by customers that have their order shipped to their homes but ship to organization works too! If the claim is submitted close to the end of the school year we may ship it directly to their home to ensure it is received for the holidays!

A screenshot of a web browser showing a contact form titled 'Get In Touch!'. The form has a green header with a close button (X). Below the header, there's a section titled 'Contact us' with several input fields: 'Your name', 'Your Email Address *', 'Daytime Contact Number', 'Subject *', 'Organization Name or ID# *', and 'What type of problem are you experiencing? *'. At the bottom right of the form, there's a green button labeled 'Contact Us' and a link for 'Privacy • Terms'.

Backorders, Substitutes etc.

Tally Details
Tally Group/Customer Variance Review
Friend/Family Email Summary for Group
Web Sales Details for Customer
Claim Details for Customer
Seller Substitution Report

In the very rare circumstance that we would need to offer a substitution there is a report you can view to see exactly who has received what.

We may need to substitute a holiday item such a roll of wrap or gift with a similar one. The reason for this is holiday wrapping paper is often purchased for the sole purpose of planning to wrap gifts for the holidays. Offering a similar wrap ensures that the customer can expect to wrap their gifts regardless of the item being out of stock. Often trying to arrange a replacement or refund within the given holiday timeframe would not be possible.

Backordered items are items that are out of stock at time of packing but are on the way to our facility already. We ship backorders in an organized and labelled fashion within 1-2 weeks of the order shipping in most cases. Your customers will see any b/o items reflecting on their receipts in their bag or box.

DFS will provide a voucher/gift card for customers who have purchased something that is out of stock. The gift cards may be redeemed online in conjunction with an online order at the time of checkout as a "coupon code" This ensures the customer receives an item of their choosing.

Terms & Policies

Catalogues and Promotional Material-

DFS sends all of your seller packages to you free charge and we even cover the shipping! You will receive a seller package for the number of participants you have requested. Each seller package is carefully collated just for you and they include your personalized information letter, your catalogues and an order form. Please do not remove or add anything to these packages, they are designed with everything you need to run a successful fundraiser. Please ensure you have ordered the correct number of seller packages for your group. Your seller packages will arrive around the requested date you have signed up for. Should you need to change those dates please contact us right away.

Cancellation Policy-

In the event you need to cancel your fundraiser please contact DFS right away. If your seller packages have not yet been shipped, a simple cancellation can be made. If your catalogues have left our facility you will be responsible for shipping them back to us within 14 days upon delivery, if that is not possible you will be invoiced for them. This invoice will include the charge of \$1.00 per seller package and the freight cost.

Online Sales-

Your online selling site will be already set up and activated once your packages are shipped. Customers may shop on line on behalf of the students who have registered and choose to have their items shipped to the school free of charge or shipped to their home with delivery fee. All ship to home orders will be sent via UPS/Canada Post with personal email and tracking notifications. These orders are shipped as they are received and include a flat rate shipping and handling fee of \$18.95 at time of checkout along with a \$2.75 transaction/processing fee.

Invoice and Payment-

Once we have generated your invoice for the amount owing of your products it will be sent to you via email. Payment is due within 7 days. When payment is being mailed via cheque we would need verification that it has been sent if transit time may exceed 7 days. Failure of payment within the 7 days could result in a loss of terms with DFS and the account will require payment before any and all shipments. DFS currently accepts cheques, credit, direct deposit and etransfers. Any unregistered organizations or private groups may be required to submit payment prior to orders being shipped.

Tax Policy-

Please note that applicable taxes will be added as a charge to your invoice. DFS will charge tax on only the cost of goods that your group is purchasing. The catalogue prices still have the taxes factored in and tax is not charged on the full retail amount to your customers. Your invoice will break down the amount of taxes for your sale. Please note in most cases these taxes may be submitted and claimed back as an input tax credit. If your organization qualifies a tax exemption please send an emailed copy of a Government issued status card affiliated with the organizations member and we will remove the applicable taxes from your invoice. For more information on tax exemption please feel free to contact us at customerservice@dfscanada.com.

Check out our FAQ and Support Documents at <https://support.dfscanada.com/support/solutions>