

# How to Setup Team Website 1

## 1 Login to your Team Website

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 on the top right hand corner of the page and a TEAM drop down menu on the left beside "Home"

## 2 Select "SETUP"

At the very top of the TEAM drop down menu there is the "Setup" page. This menu is very important for not just setting up your site but to maneuver around to the different tools and resources we provide you.

## 3 Go Through Each Tab

At the top of the setup page there are 5 different tabs to complete before opening your website.

*The General Tab* includes contact information and is used by your customers if they have any questions.

- The teamsite URL is the only thing you are not able to change. If the one we provided is too complicated or you feel does not reflect your group/organization please give us a call or email!

*The Timeline Tab* is where you request a delivery date, set a customer order deadline and set up the pickup location and times.

- The delivery dates available in your area will be bolded on the calendar at the top of this tab. You may select any one of the bolded dates to request it. If your request does not get confirmed 48 hours after your request please give us a call or email.
- The Customer Order Deadline is up to you and directly linked to when the team website will close for sales. You can make this date the same as your final order deadline to us is or if you want a day or two to make sure all orders are collected and paid for you are more than welcome to.
- Pick up time and location is the last required field in this tab. GSF recommends next day pick up. Weather and traffic play a part on delivery day and to make sure you have a successful and organized pick up it's best to give your self time to count and separate orders.

*The Payment Tab* takes you through the available payment methods that your customers can use to purchase online.

- There are 5 different payment methods available on your team website to setup. To enable just click the "No" tab to "Yes"
  1. Cash - Collected by you. Specify where and who to give the cash.
  2. Cheque - Collected by you. Specify where and who to make the cheque out to (Not GSF)
  3. PayPal.me/Credit Card - Collected by you. Use you or your organizations PayPal account to collect these orders.
  4. Interac e-Transfer - Collected by you. Use you or your organizations e-transfer account to collect these orders.
  5. Credit Card - Collected by GSF. No extras fee and the total received reduces your invoice total at the end of your campaign.

*The Products Tab* will show you a list of the plants available, their wholesale costs with and without tax and a profit per unit amount when you enter a retail price.

- Each product will need to be enable in order for it to available to purchase.
- The "Set Default Pricing" button will autofill your retail sell price to our suggested retail prices.
- You can offer all to your customers or only offer a select couple of plants - It's up to you!

*The Setup Status Tab* will show you the required steps to complete the team website in order for the site to be open for orders.

- You can click on the link to set up any step you missed.





# How to Setup Team Website 2

## Advanced Options

Along with the required information needed for setting up your team website there are Advanced Options that you can use to customize and make the website your own.

The "Advanced Options" are turned on when you click on the " + Advanced Options " button on the top right hand corner of either the "General" or "Timeline" tab when you go to the Setup page of your TEAM drop down menu.

### Under the General Tab

1. **Addresses** - You can manage your ship to and bill to addresses. We still ask you to confirm your delivery address when you submit your final order.
2. **Referrers** - This option allows you to organize sales by individual seller. You can add a list of students/athletes/participants for your customers to choose from or leave it blank and allow customers to fill out the field.
  - a. The referrers field is a required field when customers go to order.
  - b. You can customize the description if prefer something more specific.
3. **Goal Thermometer** - This is a great tool to help your customers visualize your sales goal. The goal thermometer will calculate how much profit in dollars you have made compared to your goal or calculate the amount of plants you have sold compared to your goal.
  - a. If a customer sees you are \$30 away from hitting your target they are more likely to by more so you can hit the goal!
4. **Sharing Image/Text** - When you share your team website URL to Facebook there is a photo that is associated with the site as well as a basic description. You can now customize the supporting text and photo that anyone sees when you share the site.

### Under the Timeline Tab

1. Under Campaign Timeline there is an optional field to fill in a "Launch Date"
  - a. This date can help you plan your campaign and keep dates in one location on the team website.
2. Close the Website - You are able to close the website whenever you like. And open it for that matter. Use this tool to accept late orders or even early orders!

### Other Notes

- **SAVE** - Make sure you hit the "Save" button after you make any changes to your site.
- You can customize the Homepage too! Look for our in depth video tutorial on your resources page.
- There are many different pages on the team website to help you manage your fundraiser.
  - The Customer Orders page will show you all orders placed online
  - The Summary page will show you an estimated cost and profit breakdown
  - The Resources page has links and downloads to advertising tools and sales tips

If you need help setting your team website up feel free to call or email anytime!

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