Chapter 9:
Entering Fundraiser Orders & Payments

A Fundraiser order is an order associated with a fundraiser. You can include both Exclusive and Full Line items in a Fundraiser order.

Setting Up The Fundraiser

Once you've collected the orders and payments, you're ready to set up the fundraiser to allow you to begin entering orders. There are 3 steps you'll need to follow:

1. Set up the Fundraiser

2. Set up the Organizations

3. Confirm the Shipping Information

Step 1. Set Up the Fundraiser

Follow the steps below to set up a fundraiser:

1. Click on the **Fundraiser Order** button at the bottom of the Welcome Page. (The Fundraiser Party Setup page—shown below—will then display in your browser.)

2. Enter a brief description of the fundraiser in the Description field.

3. Enter the date in the Party Date field.

4. Click the **Partial Party** check box if you want these orders linked to another set of fundraiser orders you'll enter at a later time. (If this is not a Partial Party, then skip this step and move on to Step 5.)

> **Important!** If you do not choose the **Partial Party** option, then when you submit this set of orders, the Fundraiser will be closed. When you do close a Fundraiser, a check payable to the Organization will be sent by Tupperware to you for presentation. Checks are processed and sent during the sales week following the sales week the Fundraiser was closed.

5. Select where you'd like the orders shipped by clicking on the appropriate circle - **Consultant** or **Fundraiser** (except for customer direct orders). Consultant is the default choice.

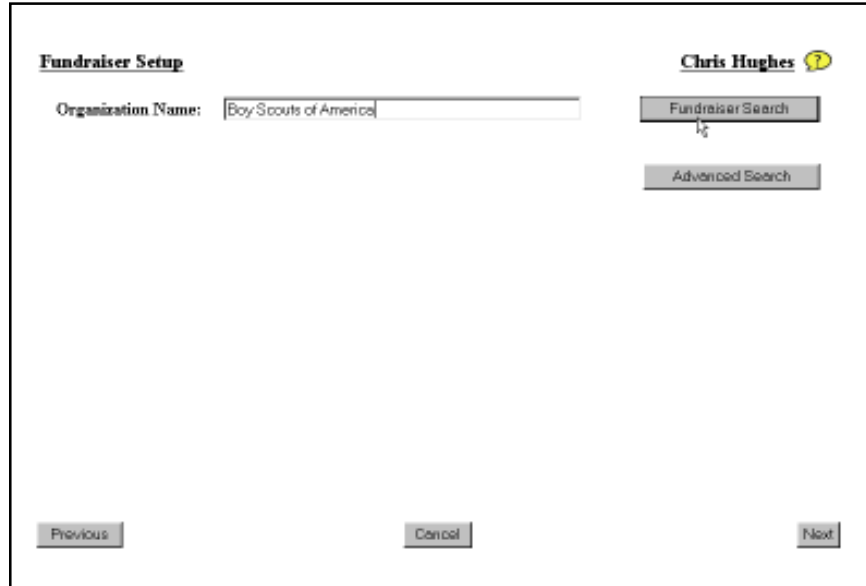6. Click the **Setup Fundraiser** button on the Fundraiser Party Setup screen.

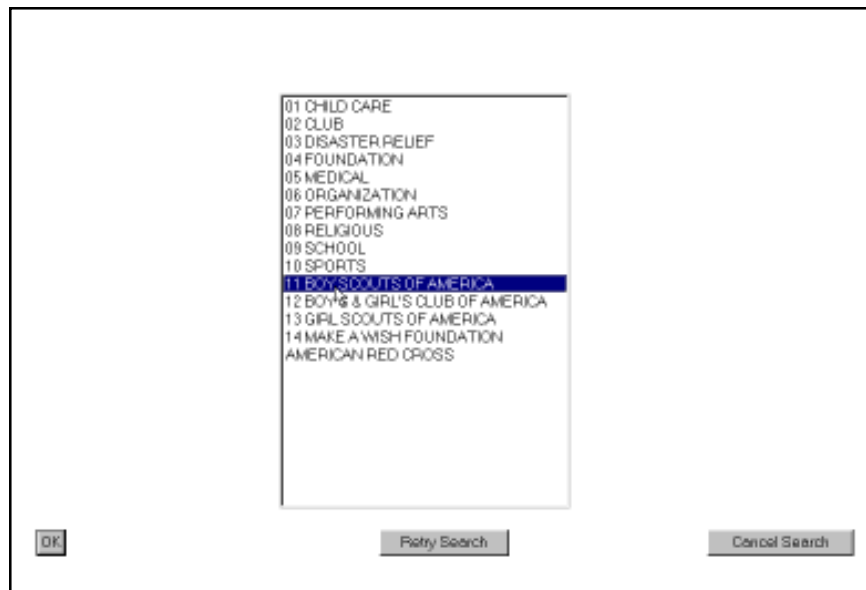## Step 2. Set up the Organizations

When setting up a Fundraiser, you'll need to identify and set up the "parent" and "local" parts of the Fundraiser Organization. For example, if you're doing a fundraiser for *Girl Scouts of America - Troop 656*, then *Girl Scouts of America* is the parent organization and *Troop 656* is the local organization.

You'll first need to set up the information associated with the "parent" Organization for your Fundraiser.

1. Type in the name of the Organization you're searching for in the **Organization Name** field. (Or, you can just click the **Fundraiser Search** button to display all the parent Organizations that are available.)

2. Click the **Fundraiser Search** button.

Fundraiser Setup   **Chris Hughes** ⑦

Organization Name: | Boy Scouts of America | [Fundraiser Search]

[Advanced Search]

[Previous]   [Cancel]   [Next]

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01 CHILD CARE
02 CLUB
03 DISASTER RELIEF
04 FOUNDATION
05 MEDICAL
06 ORGANIZATION
07 PERFORMING ARTS
08 RELIGIOUS
09 SCHOOL
10 SPORTS
11 BOY SCOUTS OF AMERICA
12 BOY'S & GIRL'S CLUB OF AMERICA
13 GIRL SCOUTS OF AMERICA
14 MAKE A WISH FOUNDATION
AMERICAN RED CROSS

[OK]   [Retry Search]   [Cancel Search]

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3. If the Organization is on the list, then choose the Organization and click the **OK** button. If the Organization is not on the list, then you'll need to call Customer Care to set up the Organization information.

> Call Customer Care at 1-888-921-7395 to request that a parent Organization be set up. Be sure you have all of the appropriate address and contact information for the parent Organization.
> **Note:** You'll only have to set up an organization through Customer Care the first time. After that, if you have another fundraiser for that parent organization, simply perform a Search to find the Organization.

4. You'll now need to set up the local part of your organization. On the Fundraiser Setup screen, you'll now choose a Local Fundraiser from the **Fundraisers** drop-down list.

   ■ If your local fundraiser is *not* listed, then you can click the **Advanced Search** button to try to search for it. Or, if it's the first time you're handling a fundraiser for this local organization, then click the **Click to Add Address** option and type in the Local Fundraiser information in the fields provided.

   ■ If your local fundraiser is on the **Fundraisers** list, then choose it and the information fields will populate with the information that was previously entered in the system. You can then update this information by clicking the **Click to Modify Address** option and updating the information in the fields.

   ■ When you add or make changes to an address for a local organization, click the **Save Address** button at the bottom of the Fundraiser Setup screen.

> ☑ **Note:** The profit check will be made payable to the name that appears in the Local Fundraiser field. Please verify with your organization that you have the correct information to place in this field.

5. After you click **Save Address**, you'll be directed back to the main Fundraiser Party Setup screen. Your Organization information will appear in the Fundraiser section of your screen.

6. Click the **Next** button.

☑ Only you can view local organization information that you enter. The parent organization information is available to anyone using Web Order Entry, however, the local information is stored in a personal database accessible only by you.

Step 3. Confirm the Shipping Information

Except for Customer-Direct orders, products will be shipped directly to the Fundraiser Organization or to you.

- If the address information is correct, then click on the **Next** button to continue to the Fundraiser Shipping page.

- If you need to change the address information, then click on the **New Address** button and make your changes. Next, click on the **Next** button to go to the Customer Order page.

Entering Fundraiser Orders and Payments

Once you've established your fundraiser information in the system, you may begin entering orders. There are four steps you must complete:

1. Set up the order.

2. Enter items (Regular, Parts and Sales Specials).

3. Record the customer's payment.

4. Print the order.

☑ If you are ever on another page, and wish to go to the Customer Order page, you can access it by doing the following:

1. Return to the Welcome Page of the Web Order Entry Web site. (If you are already in the system, you can simply click on the Welcome Page link found in the top left corner of the browser screen.)

2. On the Welcome Page, click on the **Party Type** column heading to sort and find the desired fundraiser.

3. Click the **Ref #** for the fundraiser you want to display. (The Party Setup page will then display in your browser.)

4. Click on the **Party Orders** button to load the Party Orders page.

5. Click on the **New Order** button to load a new Customer Order.

Step 1. Set Up the Order

Follow these steps to set up the Fundraiser order:

1. Click in the New Order button at the bottom of the Party Orders page.

2. The system defaults to a Customer order. You can change the selection by clicking on the desired option (Customer or Fundraiser). You'll choose the Fundraiser type if the organization is ordering items.

3. If your customer wishes to have the order shipped directly to her/him, and has paid the delivery charge, click inside the box so a checkmark appears.

    This is a direct-ship order: ☑

4. Type the customer's name, address, phone numbers, etc. into the corresponding fields, then click the **Next** button to begin entering items.

    > Once you've entered this information, it will be stored for future use.

Note: All orders, including Customer-Direct orders, are taxed based on the address of the local Organization.

Step 2. Enter Items

You can enter all your items for a Fundraiser Order on the Item Entry page. For a Fundraiser, you can enter Regular, Parts, and Sales Specials item types. It's important that you order items from the item type classification so the system can correctly determine your cost and that of your customer.

> ☑ **Important!** You'll enter Exclusive Fundraiser products using the Sales Specials item type.

1. Choose the item type from the **Item Type** drop-down list. You can also choose the item type by clicking in the Item Type box and typing the number that precedes the item type. (For example, type "1" for 1-Regular items, "2" for 2-Parts, and "8" for 8-Sales Specials.)

2. Type in the item number in the **Item #** field. Hit the Tab key and type in the quantity in the **Qty** field.

3. Click the **Next** button. (If you click the **Verify** button, the descriptions, prices, and totals will then appear on your screen. See below.)

4. When you're finished entering your items, click on the **Next** button to check the Customer Order Summary. The item and cost information on the summary should match the information on the customer's order form.

- If the amount in the Total row matches the total on the order form, click on the **Next** button to proceed to the Customer Payment Information page.

- If the amount in the **Total** row does not match the total on the order form, first check that the total on the form is added correctly. If the total on the form is correct, review the items you've ordered by clicking on the **Previous** button to go back and review the entered items. (See **Chapter 5: Making Changes** for additional information.)

Step 3. Record the Customer's Payment

On the Customer Payment Information page, you'll now record the customer's method of payment.

1. Click inside the applicable Payment Amount field(s)—Cash, Check, and/or Credit Card—and type in the amount of each payment. In most cases, the customer will pay using one method. (The total of the payment amount(s) that you enter should equal the figure in the Amount Due field.)

If the customer paid with a credit/debit card (Visa®, MasterCard®, or Discover®), click on the Payment Type drop-down list and select the card type. Also, enter the correct billing address information in the applicable fields of the Billing Address section.

Step 4. Print the Order.

Follow these steps to print a copy of the order:

1. On the Customer Payment Information page, click on the **Print Order** button. (The Print Customer Order page will then display in your browser.)

2. If necessary, click on the vertical scroll bar at the right until you can see the **Print** button at the bottom of the page. Next, click on the **Print** button to print a copy of the order. (You'll want to keep this copy, along with the order form, as a record of the ordered items.)

Step 4. Print the Order.

3. Upon printing a copy of the order, click on the **Next** button to return to the Party Orders page. You can enter another customer order by clicking on the **New Order** button.

4. When all orders have been entered, click the **Party Summary** button to view the summary information then proceed with submitting your fundraiser for confirmation. (Refer to **Chapter 6: Submitting Your Party For Confirmation**.)

Important! If you created a Partial Party Fundraiser, you'll need to Close and Link your last set of orders to the previous set of submitted orders when you close the Fundraiser.

When you close a Fundraiser, a check payable to the Organization will be sent by Tupperware to you for presentation. Checks are processed and sent during the sales week following the sales week the Fundraiser was closed.

About Shipping and Handling Fees

If the fundraiser order is shipped to the Consultant or the Fundraiser organization, Consultants are responsible for shipping and handling charges which are based on the total retail value of all the orders in the party (partial or final party). The maximum amount charged to the Consultant for the party is $20. See a current order form for the shipping charges (Host/Consultant Direct Shipping).

Review the Consultant Cost Summary, S + H area, to determine your shipping and handling costs for the Fundraiser order.

Customers who select the Customer Direct Shipping option will be responsible for paying the appropriate shipping and handling charge which is based on the retail value of the order. The maximum charge is $30 per order. See a current order form for the shipping charges (Customer Direct Shipping).