



***TUMoney™***



## Event Fundraising Admin

What you'll learn in this Section:

- ✓ How to setup your fundraising system
- ✓ How do you set up your Incentive Levels

## Event Fundraising Admin

The screenshot shows the 'Event Fundraising Admin' interface. At the top, there are tabs for 'Summary' and 'Results'. Below this is a search bar with a 'Search' button and a 'Display ALL' button. A 'Help Video' button is located in the top right corner. The main content area displays two summary boxes: 'Active Event Fundraising Results' and 'Lifetime Fundraising Results', both showing a total of \$17,647.24. Below these are buttons for 'Add New', 'Set as CURRENT', and 'Delete'. A table lists fundraising events, with the first row highlighted in red. The table columns are Title, Status, Start, Goal, Participants, and Donors. The first row is for a '2013 Swim a thon (Swim-A-Thon)' event, which is currently 'ON' and has a goal of \$20,000.00, 97 participants, and 103 donors. At the bottom of the table row, there are links for 'Report', 'Lap Tracker', and 'Promote'.



### Tips and Tricks

Using the **promote** tool is a rich set of email functionality designed to help your team raise money. Use the pretemplated emails to instantly help you to generate excitement for your fundraiser.

- 1 **Filters** - Set your filters Title and Event type to generate the information below.
- 2 **Help Video** - The TeamUnify Help videos can be found throughout the fundraising system. Select this button to watch a short tutorial on how to administer this module.
- 3 **Active & Lifetime Fundraising Results** - Financial information showing the Active event's total fundraising dollars and Lifetime Fundraising results (all dollars generating across all events).
- 4 **Add New** - Select this button to begin creating your fundraising event.
- 5 **Set as Current** - Place a check mark to the left of your event that you have setup and select the 'Set as Current' button to ensure that event is the only active fundraising event. Only one fundraising event can be turned on.
- 6 **Event Information** - Title of all fundraising events with the current one noted in red. Status confirms if your event is currently on or off/start date is the date set by the administer to begin, Goal and participating donors shows the team goal set and how many donors are currently participating in this event.
- 7 **Report | Lap Tracker | Promote** - Select the Report tool to generate a series of reports including your USA Swim-A-Thon (tm) report for submission. Lap Tracker will allow you to easily update your athletes laps swum. Promote gives you the tools to promote this event fundraiser to your team.

The screenshot shows the 'Event Fundraising Setup' interface. It has two tabs: 'Event Fundraising Setup' (active) and 'Incentives Setup'. A 'Help Video' button is in the top right. The main area is titled 'Event Basics' and contains several sections:

- Event Type:** Radio buttons for 'USA Swimming Foundation Swim-A-Thon' (selected), 'About Swim-A-Thon | Download Swim-A-Thon Blue', and 'Other Fundraising Event'. A 'Turn Campaign' toggle is on the right.
- \*Event Title:** Text field with '2013 Swim a thon'. A '\*Event Short Title (For used in billing):' field has 'SAT'. A 'Lap Tracker' toggle is on the right.
- \*Event Date:** Date picker set to '11/30/2012'. 'Event Time' is '12:00' with 'AM' and 'PM' radio buttons.
- Event Location:** Text field with '123 Test Dr. Bend, OR 97701'.
- Event Tag Line:** Text field with 'Raising Money for Much Needed Team Gear'.
- Event Message:** A text area with a 'Pick Template' dropdown and a 'Choose File' button. The message content includes: 'and friends together for some great outdoor fun while supporting our team.' and '<b>What is this Fundraiser All About?</b> All of our swimmers will swim for 2 hours and swim as'.
- Event Image:** Radio buttons for 'Upload New Image (300 x 300)', 'From Library', and 'Delete Image'. A 'Choose File' button is present.
- Event Promotion:** A 'Home Page Header' checkbox and a 'Side Column Promo' checkbox. Three text fields for 'First Line', 'Second Line', and 'Third Line' contain 'Help Our Cause!', 'Click Here to', and 'Donate Today!' respectively.
- \*Goal Amount:** Text field with '\$ 20000.00'. '\*Goal Date:' is a date picker set to '03/01/2012'.
- Participating Roster Groups:** Radio buttons for 'ALL Roster Groups' (selected) and 'Selected Roster Groups'.
- Other options:** 'Total Participants', 'Top Location', 'Top Roster', 'Sponsors', 'Incentive Tracking', and 'Multi-Member Donation' each have an 'On'/'Off' toggle.



## Tips and Tricks

It is critical that you spend time to setup this piece accurately. All of the tools are here to implement your TUMoney system quickly and professionally. Use a tag line, decide on a great Event Message or pick a template to help you get your fundraising system up and running. Upload images to help your branding and add your promo lines to build a theme.

- 1 **Event Basics** - Enter in the necessary details to begin your setup. It's critical to select whether this is a USA Swimming Swim-A-Thon or team sponsored. If USA Swim-A-Thon is selected, the fundraising module will have additional functions which include a different waiver/agreement and different USA specific reporting tools and incentive programs.
- 2 **Help Video** - The TeamUnify Help videos can be found throughout the fundraising system. Select this button to watch a short tutorial on how to administer this module.
- 3 **Turn Campaign/Lap Tracker** - Ensure you have turned on your current campaign when you are ready to release it to your accounts and potential donors and off when it's complete. The lap tracker is turned on/off depending on how you are running your fundraising event.
- 4 **Event Information** - This information will appear on the fundraising home page. You have the option of selecting a TeamUnify pretemplated message for the event message that the admin can edit or simply click into the edit box to create your own.
- 5 **Event Image** - Chose your own 300x300 sized image or from the TeamUnify library. This picture will appear on the fundraising home page when you select the "Click for more information on the Event Title" option.
- 6 **Event Promotion** - Make your checkbox selections to place your First/Second/Third line information in the designated areas.
- 7 **Goal Information** - Place your Goal Amount and Goal date into these fields. This information will propagate throughout the system from the lane progression bar to promotional e-mails. Enter in carefully.
- 8 **Event Additional Information** - Decide what additional information will be publicly viewable. You have the option to show/hide the total participants, sponsors center, Incentive Tracking tab, top location and roster groups as set in your membership database.

## Event Fundraising Admin

The screenshot shows the 'Event Fundraising Admin' interface with seven numbered callouts:

- 1** Donation Level Setup: A table with columns 'Donation Level Name' and 'Amount'. It lists Bronze (\$30.00), Silver (\$50.00), and Gold (\$100.00). There are 'Add' and 'Remove' buttons.
- 2** TeamUnify On-line Donor Processing Fee: Radio buttons for 'Team', 'Donor \$ 3.95', and 'Let Donor Choose'. The 'Donor \$ 3.95' option is selected.
- 3** Accounting: Fields for 'Charity Organization Name' (TeamUnify, LLC Test), 'EIN Number' (45-548659), 'Address 1' (123 Testing Dr.), 'City' (Bend), 'State' (OR), and 'Zip Code' (97701). There are also fields for 'Chart of Account' and 'Donation Collected'.
- 4** Event Contact Information: Fields for 'First Name' (John), 'Last Name' (Volunteer), 'Phone Number' (888-888-8888), and 'Email Address' (email@email.com). There is a checkbox for 'Hide Phone# from public view'.
- 5** Upload Event Documents: Two 'Choose File' buttons for 'SwimaThon.pdf' and 'TUNews.pdf'.
- 6** TeamUnify Event Fundraising Agreement: A scrollable text area containing legal terms and a checkbox for 'I have read the above statement and indicate my agreement by checking the box.'.
- 7** USA Swimming Foundation Swim-A-Thon Agreement: A scrollable text area containing legal terms and a checkbox for 'I have read the above statement and indicate my agreement by checking the box.'.

At the bottom of the form, there are buttons for 'Save to a New Fundraising Event (Clone)', 'Cancel', and 'Save Changes'.



### Tip and Tricks

Don't be shy to add Donation levels! Try using names that represent your team like, "Olympic Level". When donors aren't sure what to donate or what amounts are expected, this helps to provide them with a denomination that fits their budget.

Don't forget to really look at whether you will pay the processing fee, let the donor or let the donor choose. It's important to make this a business decision.

- 1** **Donation Level Setup** - Use the Add button to add donation levels. Donation level are viewable to donors and offer a predefined dollar amount.
- 2** **TeamUnify On-Line Donor Processing Fee** - TeamUnify charges a \$3.95 online donor processing fee and a \$1.00 offline fee if you do not have the gear store on. The team needs to make a business decision whether the team will be responsible for this fee or the donor exclusively or if the donor can make the decision.
- 3** **Accounting** - Populate the fields with the important accounting information to be viewable to the donor and to propagate through your Chart of Accounts correctly.
- 4** **Event Contact Information** - This information will appear to the donor for event contact purposes. Ensure you populate these fields with the necessary information. Check the box, "Hide Phone# from public" view if you do not want to offer this information.
- 5** **Upload Event Documentation** - Upload any documentation that if important to this event. All documentation will be available to both logged in and not logged in users.
- 6** **TeamUnify Event Fundraising Agreement** - You must agree by selecting the box to use the TUMoney platform. If this is a certified USA Swim-A-Thon fundraiser you will also be required to electronically sign their agreement.
- 7** **Save to a New Fundraising Event (clone)** - Make any necessary updates and select this button to clone the current fundraising platform.

## ★ Incentive Setup

### 💡 Tip and Tricks

Incentives are a great way to build excitement and competition within your team. Fundraising can be difficult but offering rewards helps your athletes have a goal to obtain and a tangible object for their hard efforts. Use the different levels to ensure you can give each athlete something to work towards.

- 1 **Incentive Setup** - Use the Add New within each incentive to add your level description, giveaway description and upload an image if applicable. The incentive levels will appear for your participants showing both what they have achieved and how far away they are from the next level.
- 2 **Help Video** - Select the red Help Video to watch a short tutorial on setup of this piece of the TUMoney module.
- 3 **Summary View** - Viewable breakdown of levels that have been setup.
- 4 **Incentive Options** - Place a check mark in any incentive level you wish to offer. This will allow you to setup, add images and descriptions.
- 5 **USA Swimming Foundation Swim-A-Thon** - This will be prefilled with all Swim-a-Thon incentives.

## Tracking & Management

**Manage Event Fundraising**

Summary **Results**

2 Help Video

1 Add Offline Donor Search Display ALL

Please click the [Search] button after each filter selection change.

3 Donor Last Name: Donor Email: From: Member Last Name: Account To: Event: 2013 Swim a thon Donor Type: --ALL-- Pay Type: --ALL-- Billing Group: --ALL-- Roster: --ALL-- Location: --ALL--

4

	Online	Offline (Approved)	Total Paid	Offline (Not Approved)	Total
Amount	\$17,142.24	\$505.00	\$17,647.24	\$464.00	\$18,111.24
Donors	94	9	103	11	114

5 Approve Offline Delete Not Approved Email Receipt Email Donor Email Account Export

6 Pay Type Amount Phone

7 Email

Donor	Member	Account	Pay Type	Amount	Phone	Email
<input type="checkbox"/> Dave WQens TUM-DEMO-C.2.14	Lindsay Alamillo	Ernie & Lyndi Alamillo	Offline Approved	Chk \$100.00 wet9weiogd		dave@teamunify.com



### Tip and Tricks

Don't forget to thank your donors for their generous donation and let them know how the money has helped your organization. Use the filters, select your donors and press the email button to send a free form thank you email.

- 1 **Add Offline Donor** - Select this button to add an offline donor.
- 2 **Help Video** - The TeamUnify Help videos can be found throughout the fundraising system. Select this button to watch a short tutorial on how to administer this module.
- 3 **Filters** - Use the filters to narrow down your search. Select Search to implement the filter set.
- 4 **Financial Summary** - Based on your filter set, this summary will show the admin the resulting financials.
- 5 **Approve Offline** - All offline donations must be approved by the admin before they are calculated towards the participant and applied to the team donor financials.
- 6 **Selections** - Place a check mark next to one or many donors and select the corresponding button to perform your action. The buttons will no work without first making a selection.
- 7 **Export** - The Excel Export will generate a spreadsheet with all Donor/Account/Member information.





## Gear Bucks Fundraising Admin

What you'll learn in this Section:



How to setup your fundraising system



How to set up your Incentive Levels



Management & Tracking



*Tutorial*

[Gear Bucks Overview](#)



*Tutorial*

[Redemption Center](#)

## Gear Bucks Admin

The screenshot shows the Gear Bucks Admin interface. At the top, there are tabs for 'Summary', 'Results', and 'Redemption Center'. A 'Help Video' button is in the top right. The main area features a 'GEAR BUCKS TRACKING' section with a progress bar (callout 2) and summary statistics (callout 1): Total Sales This Year: \$9,104.94, Current % Earned: 12%, Available Credit: \$932.59, Dollars to Next % Threshold: \$896.06, Credit Earned: \$932.59, and Credit Redeemed: \$0.00. Below this is a search bar (callout 5) and a section for 'Active GearBucks Fundraising Sales' (callout 3) with a 'Click to Redeem' button for \$932.59 and 'Lifetime Fundraising Results' showing Total Sales: \$9,104.94 and Credit Earned: \$932.59. At the bottom, there is an 'Add New' button (callout 4) and a table of fundraising events (callout 6) with columns for Event Title, Status, Start, Goal, Participants, Active Pts., and Buyers. The current event is 'Gear Bucks Fundraiser (Summer 2012)' with a goal of \$10,000.00 and 97 participants. A 'Report | Promote' button (callout 7) is next to the event name.



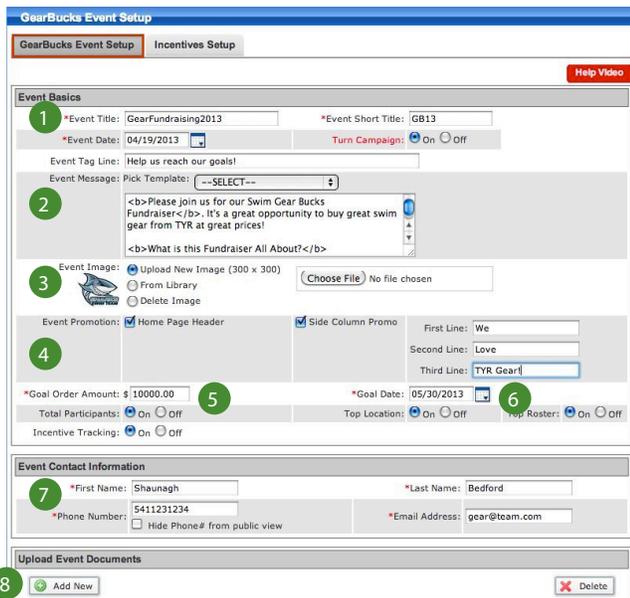
### Tips and Tricks

The promote tool contains a rich set of email functionality specifically designed to help your team get your members involved! Use the pre-templated emails to instantly help you to generate excitement for your fundraiser.

- 1 **Gear Bucks Tracking** - This will give you your summary of your Gear Bucks account including your total sales, what it will take to meet your next threshold, credits earned and redeemed, etc.
- 2 **Lane Line Progression Meter** - Your team is initially set at a percentage of Gear Bucks that you will earn on each purchase. This will adjust as you reach your next dollar threshold. The lane line is your indicator of where you are and where you could be.
- 3 **Active Gear Bucks Information** - Select the Red "Click to Redeem" to take you to the Gear Bucks gear redemption module. Lifetime Fundraising results keeps you informed of your total lifetime sales and credits earned.
- 4 **Add New** - Select this button to begin your campaign.
- 5 **Set as Current** - Place a check mark to the left of your event that you have setup and select the 'Set as Current' button to ensure that event is the only active fundraising event. Only one Gear Bucks fundraising event can be turned on at any given time.
- 6 **Event Information** - Title of all fundraising events with the current one noted in red. Each column gives you dynamic, viewable reporting functionality on your event and its activity.
- 7 **Report | Promote** - Select the Report tool to generate a series of reports. Promote gives you the tools to promote this event fundraiser to your team.



## Gear Bucks Setup



The screenshot shows the 'GearBucks Event Setup' interface. It is divided into several sections: 'Event Basics', 'Event Contact Information', and 'Upload Event Documents'. The 'Event Basics' section contains fields for Event Title, Event Date, Event Short Title, Event Tag Line, Event Message, Event Image, Event Promotion, Goal Order Amount, and Goal Date. The 'Event Contact Information' section contains fields for First Name, Last Name, Phone Number, and Email Address. The 'Upload Event Documents' section has an 'Add New' button. Eight numbered callouts (1-8) are placed over various fields and buttons to indicate key setup steps.

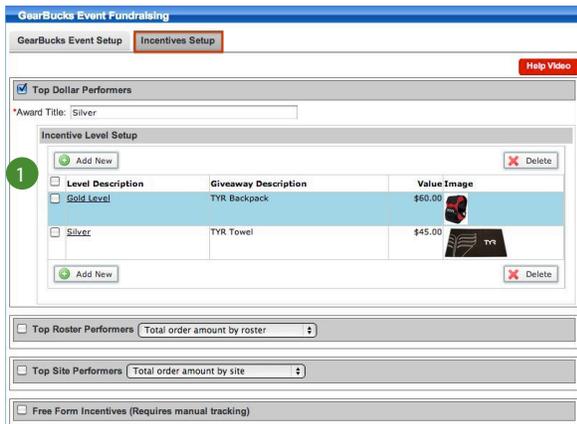


### Tips and Tricks

It is critical that you spend time to setup this piece accurately. All of the tools are here to implement your Gear Bucks system quickly and professionally. Use a tag line, decide on a great event message or pick a template to help you get your fundraising system up and running. Upload images to help your branding and add your promo lines to build a theme.

- 1 **Event Basics** - Enter in the necessary details to begin your setup. All of these options will show to the public view so think about what you would like your Event Title to be and ensure you turn your Campaign ON.
- 2 **Event Message** - This information will appear on the fundraising home page. You have the option of selecting a TeamUnify pretemplated message for the event message that the admin can edit or simply click into the edit box to create your own.
- 3 **Event Image** - Chose your own 300x300 sized image or select one from the TeamUnify library. This picture will appear on the fundraising home page when you select the "Click for more information on the Event Title" option.
- 4 **Event Promotion** - Make your checkbox selections to place your First/Second/Third line information in the designated areas.
- 5 **Goal Order Amount-** Place your Goal Amount and Goal date into these fields.
- 6 **Event Additional Information** - Decide what additional information will be publicly viewable. You have the option to show/hide the total participants, Incentive Tracking tab, top location and roster groups as set in your membership database.
- 7 **Event Contact Information** - This information will be viewable so ensure it's the person that will be responding to fundraising questions.
- 8 **Upload Event Documents** - Select 'Add New' if you have documents that your membership needs to download that pertain to this campaign.

# ★ Gear Bucks Incentive Setup



## Tips and Tricks

Incentives breed competition so see if you can come up with some great prizes. Kids love to compete for the next level and the sense of accomplishment when it's reached is priceless.

- 1 Incentive Setup** - Place a checkmark in the box to the left of the type of incentive level to open up the admin functionality. You have the option of how you wish to track; Total order amount by Roster or Average order amount by participant. Decide on an Award title and then select Add New to setup the different incentives your members can receive.

Below is the Participant View relating to the incentives.

**Sharks Gear Fundraiser 2012**

About | **Participants** | Incentives

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**Sharks Gear Fundraiser 2012**

Progress bar: \$0 | Current: **\$4127** | Goal: **\$10000**

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Top Sales Performers			
Level Description	Image	Give Away Description	Current Winner
1st Place		GoPro cameras are used by more professional athletes, sports filmmakers and core enthusiasts than any other camera in the world. The HD HERO2: Outdoor Edition is the most advanced GoPro camera yet. Wearable and gear mountable, waterproof to 197' (60m), capable of capturing professional full 170° wide angle 1080p video and 11 megapixel photos at a rate of 10 photos per second, the HD HERO2 is the world's most versatile camera. Whether your goal is to capture a great day out with friends or you're gunning for the cover of a magazine, the HD HERO2: Outdoor Edition can help you nail it and look like a HERO	\$299.00 <b>Megan Flannery</b>
2nd Place		iPod touch takes fun to the next level. It now comes in two colors: black and white. It includes iOS 5, which gives you over 200 exciting new features. And with iCloud, whatever's on your iPod touch is automatically on your other devices, too.	\$219.00 <b>Leanne Dugan</b>
3rd Prize		Padded sleeve fits most 15" laptops Vertical board carry straps Fleece lined goggle pocket Organizer pocket Fleece lined sunglass pocket Padded waist belt Adjustable, padded shoulder straps Material: 600D polyester Height: 53cm, Width: 28cm, Depth: 20cm Volume: 25 litre capacity	\$59.95 <b>Bella Diaz</b>

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<p><b>Participants</b></p> <table border="0"> <tr><td>\$1,137.50</td><td>Megan Flannery</td></tr> <tr><td>\$812.50</td><td>Leanne Dugan</td></tr> <tr><td>\$541.20</td><td>Bella Diaz</td></tr> <tr><td>\$525.50</td><td>Jaclyn</td></tr> <tr><td>\$405.00</td><td>Connor Aiello</td></tr> </table> <p style="text-align: right;"><a href="#">View All</a></p>	\$1,137.50	Megan Flannery	\$812.50	Leanne Dugan	\$541.20	Bella Diaz	\$525.50	Jaclyn	\$405.00	Connor Aiello	<p><b>Top Roster (amount)</b></p> <table border="0"> <tr><td>\$2,153.10</td><td>Guppies</td></tr> <tr><td>\$1,189.45</td><td>Cascade</td></tr> <tr><td>\$541.20</td><td>Senior</td></tr> <tr><td>\$242.95</td><td>13 and 14</td></tr> </table> <p style="text-align: right;"><a href="#">View All</a></p>	\$2,153.10	Guppies	\$1,189.45	Cascade	\$541.20	Senior	\$242.95	13 and 14	<p><b>Top Locations (amount)</b></p> <table border="0"> <tr><td>\$2,694.30</td><td>Torrey Pines</td></tr> <tr><td>\$930.50</td><td>San Diego</td></tr> <tr><td>\$258.95</td><td>Redmond</td></tr> <tr><td>\$242.95</td><td>Unassigned</td></tr> </table> <p style="text-align: right;"><a href="#">View All</a></p>	\$2,694.30	Torrey Pines	\$930.50	San Diego	\$258.95	Redmond	\$242.95	Unassigned
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\$242.95	Unassigned																											

# Gear Bucks Tracking & Management

The screenshot shows the GearBucks interface with the following elements:

- 1 Filter:** Search and Display ALL buttons at the top. Below are input fields for Purchaser Last Name, Member Last Name, Purchaser Email, and Account Last Name. There are also dropdown menus for Event (Gear Bucks Fundraiser (Summ)), Roster (--ALL--), and Location (--ALL--).
- 2 Order Status Summary:** A table showing:
 

Order Status	Order Amount	# of Orders
Shipped	\$9,104.94	6
Not Shipped	\$0.00	0
- 3 Email Functionality:** Checkboxes for 'Email Purchaser' and 'Email Account', and an 'Export' button.
- 4 Export:** A table with columns: Order Date, Order #, Purchaser, Order Amount, Order Type, Order Status, Event, Member, and Account. One row is visible for order # T62005D.
- 5 Store Order Edit:** A checkbox next to the first order in the list.



## Tips and Tricks

Don't forget to thank your purchasers for helping your team reach its goals. Let them know what the Gear Bucks will help to purchase. Use the filters, select your purchasers and press the email purchasers to send a free form thank you email.

- 1 Filter** - Adjust your filters to locate specific purchasers and select 'Search' to apply or Display All to view all.
- 2 Order Status Summary** - This order summary will update with Not Shipped upon purchase and update accordingly once they are shipped by the software. This is automatically updated and cannot be adjusted by admin.
- 3 Email Functionality** - Place a check mark in the box to the left of the Purchaser/Account line and either select 'Email Purchaser' to email the purchaser of the items or select Email Account to email the account that the fundraising dollars are associated with.
- 4 Export** - This Export generates a spreadsheet that will contain Purchaser information, Account/Member Information, Order History, Order Status and Event Information.
- 5 Store Order Edit** - Select the Order # to Edit the account that the purchase has been applied to.

The screenshot shows the 'Store Order Edit' form with the following sections:

- GearBucks Fundraising Participant:** Supporting this participant: **Bill Laroche** (with a dropdown arrow) and a link 'Assign this Store Order to Member'. Below is the Event Title: **Gear Bucks Fundraiser (Summer 2012)**.
- Store Order Information:** Order #: **T62005D**, Order Date: **09/18/2012**, Order Status: **Shipped**, Customer Name: **Tom Fristoe**, Order Amount: **\$45.00**.
- At the bottom right is a button: **Cancel and Return to Previous Page**.

- 6 Participant Support** - Select 'Assign this Store Order to Member' to re-assign this order if it's incorrect. Use the 'Select' to find your member and place into the field. Select 'Assign Now' to apply. If you have made an error, select 'Cancel and Return to Previous Page' to release assignment.

# ★ Gear Bucks Redemption Center



## Tips and Tricks

If you aren't too sure what to purchase, think about buying items and selling to your members for real dollars. Real dollars are always needed for swim teams and can be put towards other costs like travel, pool maintenance etc.

- 1 Redemption Credit Summary** - This is a summary of your Gear Bucks. Don't forget you are purchasing at MSRP prices and not the discounted cost you may receive if purchasing without Gear Bucks through your store.
- 2 Store Filters** - You must set your filter to bring up available products. The products must be in stock to order. Select Add to Cart to update your redemption summary area and place in your shopping cart view.
- 3 Shopping Cart** - View of your current selection for purchase with your Gear Bucks. Select Edit under the Qty column to update.
- 4 Shopping Cart Edit** - Select 'Empty Shopping Cart' to clear all selections or 'Checkout Now' to apply your redemption Gear Bucks and place your order.



## Tips and Tricks

To generate even more money you could use your gear as a raffle option and sell tickets for your redeemed products. There are so many options for using your GearBucks redemption dollars..get CREATIVE!

- 1 Checkout** - Confirm your order and select 'Place Order Now' to finalize your Gear Bucks purchase. If you have money owing after you have applied your redemption credits, you will be asked for credit card details within this screen.



 **SpiritWear™**

What you'll learn in this section



How to setup your SpiritWear



How to setup your three different stores; Main, Event, & Registration



Bulk Ordering and Administration



Promote! Promote! Promote!



Order Fulfillment



[Configuration & Main Store Setup](#)

*Tutorial*



[Creating your Special Event/Registration Store](#)

*Tutorial*



[Store Management & Bulk Order Release](#)

*Tutorial*



[Promote! Promote! Promote!](#)

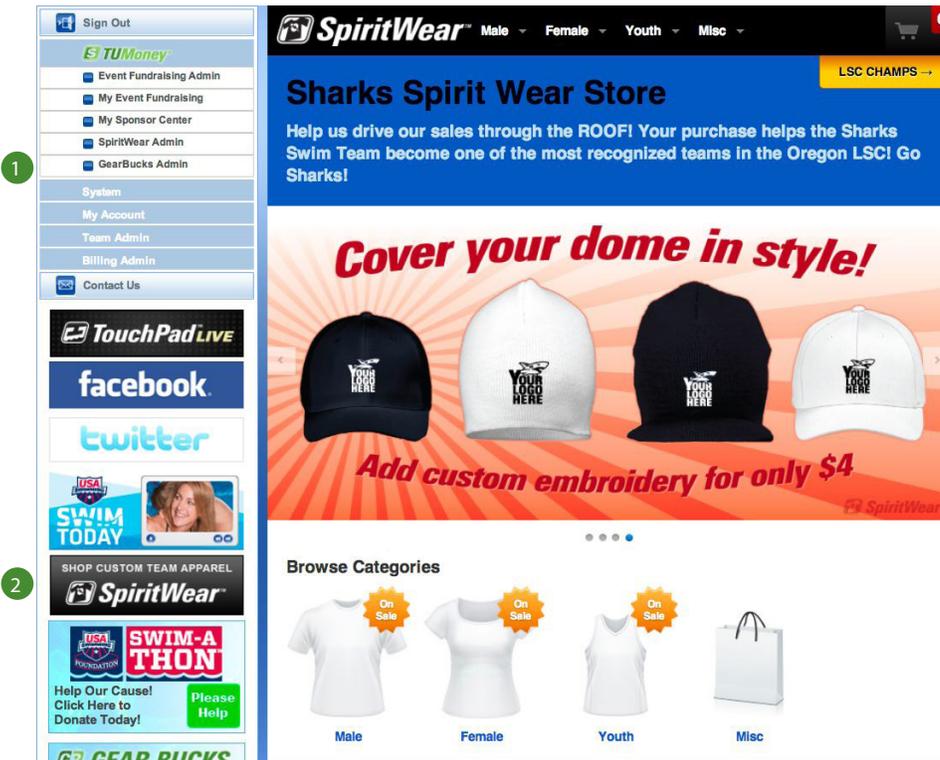
*Tutorial*



[Bulk Ordering - Fundraising with Ease](#)

*Tutorial*

# SpiritWear Getting Started



## Tips and Tricks

You are going to a Championship Meet? Send TeamUnify the Championship logo or tag line to load into your SpiritWear store. Now create a special events store to sell all of the products to celebrate your team's hard work!

- 1 SpiritWear Admin - You will setup your SpiritWear configuration including banner colors, % commission and product line for the main store.
- 2 SpiritWear Portal - This will appear once the store is open and will allow the public to access either your main store or your special event store.
- 3 Banner - Your banner including text, background and font color is controlled by the admin in the setup.
- 4 SpiritWear Main Store - Your main SpiritWear store that will sell all of your SpiritWear gear which you setup in the SpiritWear admin area.
- 5 SpiritWear Event Store - The Event Store can be setup for special inventory events for instance LSC or League Champs.
- 6 Event Reg - Once you create an event for your registration system, you will apply it in the actual registration setup. Simply toggle the SpiritWear option to the correct event registration you created.

Tips and Tricks

Check this screen frequently to see how well your fundraiser is progressing and watch your commission check grow quickly!

- 1 SpiritWear System - Your first tab once you select SpiritWear Admin. This is where you will setup your main store and commission information.
- 2 SpiritWear summary - All store financial information will be viewable in this summary including your total sales, total earned and if you have received any commission checks from TeamUnify.
- 3 Edit SpiritWear System Configuration - Select this button to setup your main store. See screenshot below for further setup instructions.
- 4 Setup Summary - The summary will show you what you setup in your system configuration.

Tips and Tricks

Remember your commission percentage is what drives your rebate check. Discuss with your team where to set the percentage. Every dollar you earn is a great way to fund-raise for something specific. Perhaps make a list of what it is that your team requires and then make a business decision as to what will not only drive customers but will also raise the required \$ amount.

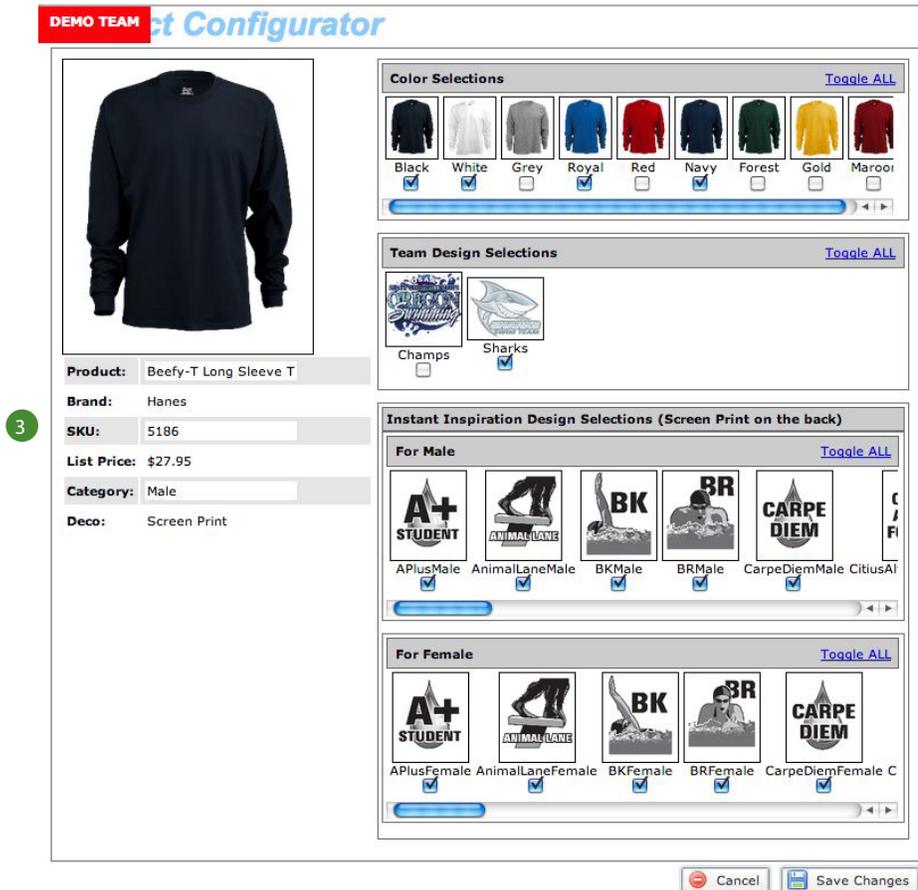
- 1 Main Setup -
  - *Commission* - Select the commission percentage you will receive for the team. This will mark the cost up on the products by the same percentage you control. For example the product list price is \$15, your commission is set to 20% you resale at \$18 and receive \$3 back as a rebate check.
  - *Visibility* - SuperUser Admins only until you are ready to make it public
  - *Banner* - Select the store background color, text and sub text for the public view.
- 2 Team Store Products - **NOTE** All products, colors, and logos will be defaulted ON. Select Add Product (see figure A) to add the products. Use Remove Selected Product(s) to remove from the main store. Select the product to **edit (select/deselect)** product color and logos you will offer.

## SpiritWear Product Selection

Figure A



- 1 Filter - Use your filters to locate specific merchandise. All merchandise is loaded by TeamUnify. You cannot add your own logo gear. This is SpiritWear specific.
- 2 Product Selection - Place a check mark to the left of an individual product and click select to configure as shown below.



### Tips and Tricks

Your team design selection is part of the SpiritWear package. TeamUnify will ensure your logo is of the highest quality and will offer you different options and selections of the same logo. You will find them all here to offer for the product. What a great way to offer gear specific to not only your team but what about special meets or feats that you have achieved! The sky is the limit so let TeamUnify's in house designers make your team stand OUT!

- 3 SpiritWear Product Configuration - What you select in this area will result in the product selection on the public side. Chose only the colors you would like to be made available. Next select the logo(s) which TeamUnify has loaded for selection. We also offer an inspiration logo collection that can be placed on the back of the product. Toggle all or just specific selections to be available

Save Changes - Once you have saved changes make another product selection until they are all loaded.

## Event Store Creation (Reg/Event)

**SpiritWear Store Setup**

**Event Store Basics**

\*Store Name: 2013 State Champs! \*Store Short Name: SS \*Store Status: On

\*Store Type:  Site  Reg \*Goal Amount: \$ 2500.00

\*Open Store (Pacific Time): 03/17/2013 12AM \*Close Store (Pacific Time): 03/25/2013 12AM

\*Shipping Target:  Individual Purchaser  Bulk Ship to Team Contact \*Description: Congratulations State Champs 2013!

**Event Store Products**

<input type="checkbox"/>	Product Name	Category	List Price	Deco	Custom	Brand
<input type="checkbox"/>	20oz Water Bottle	Misc	\$7.95	Screen Print	No	
<input type="checkbox"/>	Beefy-T T-Shirt	Male	\$19.95	Screen Print and	Yes	Hanes
<input type="checkbox"/>	Full Zip Hooded Sweatshirt	Male, Female	\$49.95	Screen Print and	Yes	Gildan
<input type="checkbox"/>	Heavy Long Sleeve Cotton T-Shirt	Male	\$26.95	Screen Print and	Yes	Gildan

- 1 **Event Store Basics - The event store is for logged in users only!**
  - **Store Name** - This is what your logged in team members will see within your SpiritWear Store if it's store type 'Site' or they will see this name in the registration system if type, 'Reg'.
  - **Store Short Name** - This will appear to the admin
  - **Store Status** - On/Off or Stage. Stage will allow you to view it before making it live to your members.
  - **Store Type** - Site/Reg. Site means it will appear in your SpiritWear store (a store within a store) and Reg means you will attach it to your registration module to be implemented during registration.
  - **Goal Amount** - The fundraising dollar amount you would like to reach for this event.
  - **Open Store/Close Store** - This event store will not open or close until the dates/times you set. NOTE this is Pacific Time. Use your filters to show your stores based on this parameter.
- 2 **Shipping Target - NOTE** once you have made this selection and saved changes, it cannot be updated - Individual Purchaser means all orders are sent to the purchaser. Bulk Ship to Team Contact means that all orders will be bulk shipped to the team for distribution to the individual purchaser on store close date. Admin must release this bulk order (see page 8 on releasing bulk orders.)
- 3 **Add Product** - Select this to add your product into this event. See previous setup instructions.
- 4 **Event Store Products** - Select product name to **EDIT** or view summary detail of product.
- 5 **Save to a New Event Store (Clone) - MAKE ANY CHANGES FIRST** and then select Clone to create an identical event with current loaded products and new updated information.
- 6 **Save Changes** - Don't forget to select Save Changes or your event will not be created or updated.

## Bulk Ordering

**SpiritWear Bulk Ordering**

SpiritWear System | Event Stores | **Bulk Ordering** 1

Products in Shopping Cart	Quantity	Price	Total
X DELETE  35" X 60" 100% Cotton Twill Hemmed Beach Towel Color: <i>Burgandy</i> Size: 35" X 60" Preview	5	\$22.95	\$114.75
X DELETE  Heavy Cotton T-Shirt Color: <i>Black</i> Size: <i>L</i> Preview	5	\$17.95	\$89.75
X DELETE  Heavy Cotton T-Shirt Color: <i>Black</i> Size: <i>M</i> Preview	5	\$17.95	\$89.75

Subtotal: \$294.25 Savings: \$29.50 Tax: \$0.00 Total: \$264.75

2 Add Product 4 Proceed to Checkout

### Tips and Tricks

The bulk order tab is a great way to sell SpiritWear gear at a meet for instance. Order it online, have it ready for the meet and watch as you generate more fundraising dollars for your club.

The bulk order functionality has no limit to how you can use it. Be creative!

- 1 **Bulk Ordering\*\*** - You can easily add bulk order gear from this module. This works well for manual order forms that you might have distributed. Remember you will pay for the entire order including shipping at time of checkout. It will be up to your team's process to invoice, collect monies and distribute the gear ordered.
- 2 **Add Product** - Select Add Product to select the product to place in your shopping cart. Once you select the product from the product selector area, you will be able to select color, size etc.
- 3 **Product Detail** - Once you add a bulk order into this module, you will be able to update the quantity and view all other details including price, discounts and total cost of item.
- 4 **Proceed to Checkout** - When your bulk order is complete, select proceed to checkout to enter payment details and send to the SpiritWear distribution center.

\*\* Bulk ordering is not part of the commission functionality. You will receive the lowest price available on all bulk orders.

# Event Stores Admin

- 1 **Filter** - Use your filters to locate specific event systems. Make your selections and search for results.
- 2 **Add New** - Select Add New to create your event store or your store to connect to online registration.
- 3 **Set as CURRENT** - Place a check mark to the left of the **Event** store you want to be set as current in your SpiritWear store. This does not pertain to a **Reg** SpiritWear store. You will connect your individual reg stores to your registration system within the online registration module on the setup screen.
- 4 **Orders/Accounts Not Ordered** - For orders select the number to open up the orders screen (see figure A below). For Not Ordered select the number (which denotes how many accounts have not ordered) to open up the **Promotion and Marketing Tools!** See page 9 for instructions on how to get started.
- 5 **Open/Close** - Within the setup of each store you can denote when it will open and close
- 6 **Ship To** - (See Page 8 on releasing your bulk order) - You need to setup each event store to either have the gear mailed directly to the individual purchaser or Bulk Ship to single address. If you select individual purchaser the shipping will be charged directly to the individual at checkout. **If you select Bulk ship then the shipping will be charged to your team Credit Card at checkout.** Bulk Ship Details - When you use bulk ship the system will give you an Excel report from this screen and a View Orders function. Simply select the link to give you details.

Figure A

Account	Order #	Products Ordered	Subtotal
Bedford, Shaunagh	SW1071D	[2] Heavy Long Sleeve Cotton T-Shirt [2] Beefy-T T-Shirt	\$93.80

Figure B

SPIRITWEAR ORDER (Send to Printer)			
<b>Billing Information</b>		<b>Shipping Information</b>	
Order Number: SW1071D		Shaunagh Bedford	
Credit Card: xxxxxx-0015		123 Juniper Way	
Shaunagh Bedford		Bend, OR 97701	
123 Juniper Way			
Bend, OR 97701			
<b>Heavy Long Sleeve Cotton T-Shirt</b>	2	\$26.95	\$53.90
Color/Size: Black/S			
Front Logo: Champs			
<b>Beefy-T T-Shirt</b>	2	\$19.95	\$39.90
Color/Size: Black/S			
Front Logo: Champs			
Subtotal:			\$93.80
Shipping:			\$13.81
Total Charged:			\$107.61

- 7 **Order#** - When you select the number under the Orders column you will receive a summary. Select the order# to be shown the invoice (printer friendly) as in Figure B.
- 8 **SpiritWear Order** - This is the breakdown, by account, for all products ordered. You can reprint this invoice by selecting, 'Send to Printer'.

## Event Bulk Order Release

SpiritWear System | Event Stores | Bulk Ordering

Search | Display ALL

Please click the [Search] button after each filter selection change.

Store Name:  Status: --ALL-- Store Type: --ALL-- Open/Closed: Closed Only

Add New | Set as CURRENT | Delete

Event Store	Type	Status	Sales	Orders	Accounts Not Ordered	Open/Close	Ship To
2013 State Champs!	Site	On	\$1,315.75	3	88	03/11/2013 03/15/2013	Bulk Ship to Team Contact Excel Report   Orders released on 03/15/2013
* 2013 Season Gear	Site	On	\$838.00	1	88	03/11/2013 03/15/2013	Bulk Ship to Team Contact Excel Report   Release Orders Now

Add New | Set as CURRENT | Delete

- 1 Open Closed Filter - Set your filter to **Closed Only or All** to see your Bulk Shipment Event which is now ready to be released.
- 2 Open/Closed DATE - Once your event reaches the close date it will be ready to have the bulk order shipped.
- 3 Excel Report - The Excel report contains the individual orders and the details by line item.
- 4 Release Orders Now - When you are ready to send the bulk order to the SpiritWear distributor select this option. You will be required to pay the shipping costs when you go through the process below.

2013 Season Gear Orders Release

Congratulations State Champs 2013!

Account	Order #	Product	Monogram	Qty	Unit Price	Subtotal	Tax	Total
	SW1075D 03/15/2013					\$838.00	\$0.00	\$838.00
		Heavy Long Sleeve Cotton T-Shirt - Black, S		10	26.95			
		Beely-T T-Shirt - Black, S		10	19.95			
		Full Zip Hooded Sweatshirt - Black, S		5	49.95			
		20oz Water Bottle - Purple, 20oz		15	7.95			

Total Orders: 1

Bulk Shipping Estimate: \$46.75

Shipping Estimate (Optional)  
Zip Code: 97701

Go Back | PROCEED TO CHECKOUT

- 1 Order Release - Breakdown of the bulk order by account.
- 2 Bulk Shipping Estimate - Enter in your zip code for your gear delivery and the system will generate a bulk shipping estimate.
- 3 Proceed to Checkout - Once you proceed to checkout you will be required to pick a shipping option and pay using your CC for the shipping fee generated. Once you have paid, the order will be sent to the distributor for fulfillment.

# Promote! Promote! Promote!

The screenshot shows the 'Promote Event Store' interface for 'LSC CHAMPS'. It includes a 'Help Video' button, a 'Recipients' section with a dropdown menu for filtering accounts (e.g., 'All Accounts', 'Accounts with Orders'), and two options for email distribution: 'OPTION 1: E-Mail Groups/Billing Groups/Individual Active Accounts' and 'OPTION 2: Roster Groups/Locations'. Below these are lists of account names and email addresses, with 'Select All' and 'Clear All' buttons. A 'Pick Template' dropdown is set to 'Intro Email for SpiritWear Event Store. Direct-to-Customer Delivery.' The email body is pre-filled with a promotional message about SpiritWear gear, including a reminder to purchase and a URL.



## Tips and Tricks

### Promote! Promote! Promote!

TeamUnify has given you direct marketing tools right at your fingertips! Before you do anything, you need to promote your fundraising event to your team! This email will let you select all of your accounts without orders, select the launch email that contains all of your fundraising event information and by simply selecting the button, Email NOW! you are quickly on your way to a successful campaign! IT'S THAT EASY!

- 1 Accounts Not Ordered - All accounts that have not made a purchase through this event store.
- 2 Option 1 - This is the default selected by Email Groups/Billing Groups/Individual Accounts - Use the Select All or Ctrl-Click/Command Click to select/deselect individual accounts to send either a free from email or pretemplated email as shown in step 4.
- 3 Option 2 - This will allow you to select by Roster Group/Location.
- 4 Pick a Template - Select SpiritWear Launch e-mail to have the e-mail contents pre filled with all of the event information. Simply hit send to market to all of your accounts that have not ordered gear from your SpiritWear event store.
- 5 Email Body - This will be pre filled with your template if selected in step 4 but you can select and edit or add any content as you deem necessary. If you don't use the template simply type directly into the body.

Email Now! - Select the Email Now button in the bottom right to quickly get your team involved in your SpiritWear event fundraiser!

## Public View of SpiritWear Store

- 1 **Store Name** - When you select the main store, event store, or reg store this will denote which store you're in.
- 2 **Product Information** - This area includes a detail and size chart link, your color & size options as well as a preview of what your product will look like based on your selections.
- 3 **Upsale Options** - Optional items will be listed here. These can include embroidery text/font/thread color, different logo options and inspirational logos to be placed on the back of the product.
- 4 **Logo Options** - Front of product logo. Use the right/left arrows to view other logo options. Select to preview.
- 5 **Logo Options (Inspirational)** - Back of product logo. Use the right/left arrows to view other logo options. Select to preview.
- 6 **Add to Cart** - Enter in your Quantity (cost will update) and Add to Cart.
- 7 **Proceed to Shopping Cart** - Once all products have been selected proceed to your shopping cart and checkout! EASY!