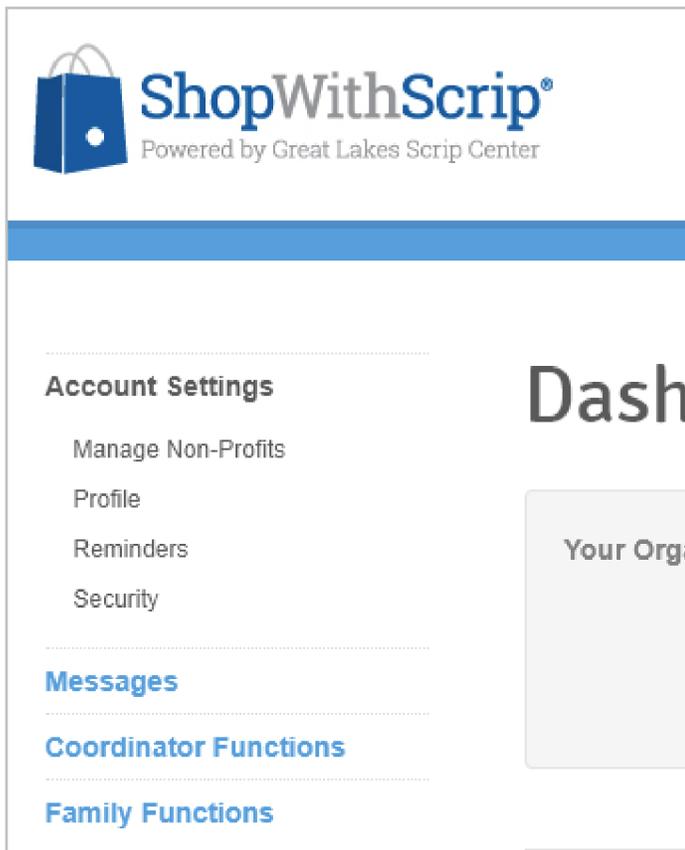# ShopWithScrip®

THE SHOPWITHSCRIP COORDINATOR DASHBOARD
CHEAT SHEET

You will find all of the tools and functions you need to place orders for your organization, manage your scrip program, and place your personal family orders on your Dashboard. This cheat sheet goes section by section, so you'll understand all of your capabilities.

First, let's talk about the navigation menu on the left side of the Dashboard.

From here, you can go into:

- Account Settings, which is where you can manage your non-profits, update your profile, set reminders, and change your password and update your account verification

- Messages, where you can send messages to a family's ShopWithScrip account

- Coordinator Functions, which houses everything you need to run your program

- Family Functions, where you manage your personal family account

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Now, let's scroll down the Dashboard

ORGANIZATION INFORMATION

If you work with multiple organizations, you'll be able to select one to access at the top of the page, using the drop-down menu.
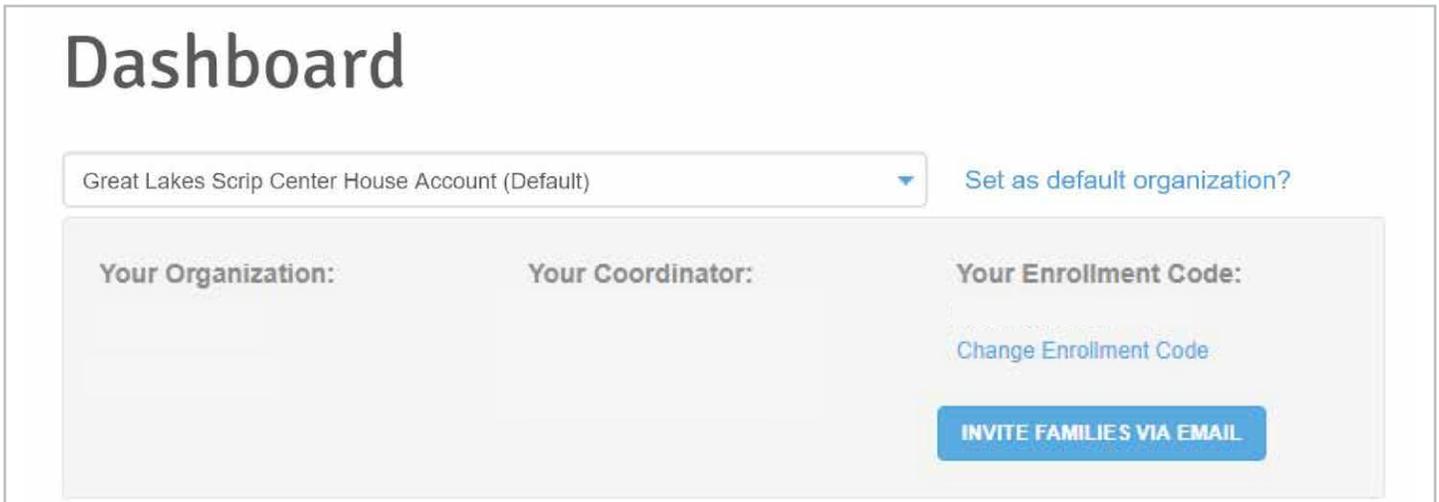
Here you'll find your organization information and your enrollment code. Your enrollment code is unique to your organization, and your families can use this code to create their accounts on ShopWithScrip.com.

You can also use the 'Invite Families via Email' tool. With the tool, you can quickly add families to a list and send them an email with information about scrip and a link to join your program. You'll be notified when a family enrolls in your program.

> **Note:** If you choose to share your enrollment code, please don't post it online or list it in newsletters or bulletins that will be posted on your organization's website. It should be emailed or distributed to families in person.

ANNOUNCEMENTS

You can use announcements to send a message to everyone in your organization at one time. The message will appear right on each family's dashboard.

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COORDINATOR FUNCTIONS

Now that you are familiar with the Dashboard let's dive into the Coordinator Functions.

There are three buttons on the Dashboard: Enter Orders, Order Queue, and Packing Slips. The rest of the Coordinator Functions are listed below. The **Order Queue** button will be highlighted with an exclamation point in a red bubble if you have pending family orders.

Coordinator Functions

Enter Orders	Order Queue	Packing Slips

Manage

Manage families and local suppliers

Coordinator Roles   Payment Change Form

Family Accounts   PO Manager

Family Order Form   Payment Types

Local Suppliers   Promotional Tools

Notifications   Reports

Organization Profile   SCRIPWARE

Invite Families

Coordinator Roles

Don't do it all on your own, round up volunteers to help you run your program! Assign Assistants who can use their own ShopWithScrip account to help with things like generating packing slips for family orders, creating family order forms, and sending messages to families.

Coordinator

[CHANGE COORDINATOR]

Assistants

Assistants can create ads, release orders, and collect payments.

Add an Assistant:

[ ]

What can an Assistant do?

These activities can only be performed by the Coordinator, Assistants can do everything else.

- Change Coordinator roles
- Submit organization orders
- Manage PrestoPay
- Change organization's payment
- Subscribe to SCRIPWARE

Coordinator Roles

- This is where you go to pass off the Coordinator role to someone else. Just click the **Change Coordinator Role** button and fill out the required information.

- You can also assign assistant coordinators here. They can help with tasks like running reports, printing promotional tools, and managing family orders from their own account.

Note: Only the Coordinator can place organization orders and make any financial decisions.

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Enter Orders

- Enter bulk orders for your organization and proxy orders for families here. All **organization ordering** must start from the **Enter Orders** button in the Coordinator Functions area on your Dashboard (you'll use the Shop page for your personal ordering).

Enter Orders

| Proxy Order | Bulk Order |

Start typing the family's name:

Product name: Loading... ✳   **Quantity**   Add to Order

Summary

Product	Qty.	Rebate	$ Value	$ Total
Order Total				$0.00

ADD TO QUEUE

Family Accounts

- Add new families who want to order online to your program by clicking **New Family Account.** Fill out their information and click **Save**. Make sure you give the family their username and password, then they will be able to place their orders online.

  *Only do this for families that aren't going to set up their own ShopWithScrip account.

Family Accounts /

New Family

Step 1: Enter the family's username

Username:* [ ]

Any unique identifier, such as a name or email address

Step 2: Create and confirm the family's password

- Must be at least 8 characters long
- Must contain at least 1 Upper Case letter
- Must contain at least 1 Lower Case letter
- Must contain at least 1 Number
- Must contain at least 1 Special character
- Cannot be your username or email address

Password:* [ ]

- You also have the option to edit details, disable a member's PrestoPay account, and disable family accounts for families that have left your organization from the Family Accounts tab.

Family Accounts

Organization: NEW FAMILY ACCOUNT

DOWNLOAD SUMMARY REPORT   Per Page: 24 ▾   Filter: Active Families ▾   Any ▾

Family Name ▲	Register Date	Status	Presto Pay	
	5/24/2016	Active	N/A	Edit
	6/13/2016	Active	N/A	Edit / Disable

< 1 >

Family Order Form

- Click **Family Order Form** to create a custom order form for families that won't be ordering online.

- To move a product to your family order form, highlight the product name under **Available Brands** and click the arrow pointing to the right. To make this easier, hold down the shift key to select multiple products at once. If you want to remove a brand, simply select the product under **Selected Brands** and click the arrow pointing left.

- Once you have added all the products you want to include on your order form, click **Save.** You can check the box next to "Group by category" at the bottom of the page, so families can easily shop for what they need. Then you have the option to open it up in Microsoft Excel or a PDF.

Family Order Form

Use this page to create a custom order form for families that won't be ordering online. Complete the custom header section with your organization name and other helpful information.

Organization Name: *

Checks Payable To: *

Message (Optional):

☐ Include GLSC Rebate on Order Form?

The box on the lower left contains a list of every store or brand that scrip is currently available for, and the denominations. Select the products you'd like to appear on your order form and use the arrow to move them to Selected Brands.

Available Brands

1-800-Baskets $50.00
1-800-Flowers $50.00
76 Gas $100.00
76 Gas $25.00
8th Street Grille $25.00
99 Restaurants $25.00
A-Plus Convenience Store $250.00
A-Plus Convenience Store $50.00

→

←

Selected Brands

Hold down the "ctrl" key to pick multiple items in the list

SAVE

The family order form can be opened as a PDF for simple viewing and printing.

The Excel version produces a single column Excel spreadsheet that gives you the freedom to further personalize the order form.

OPEN EXCEL FORM   **OPEN PDF FORM**
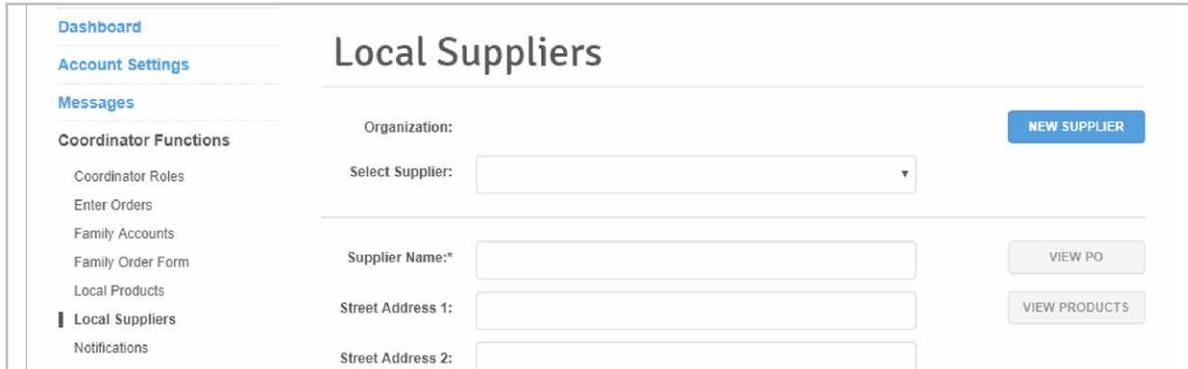
☐ Group by category

*Example of Excel Spreadsheet

Name		Customer #	
Check #		Order Date	

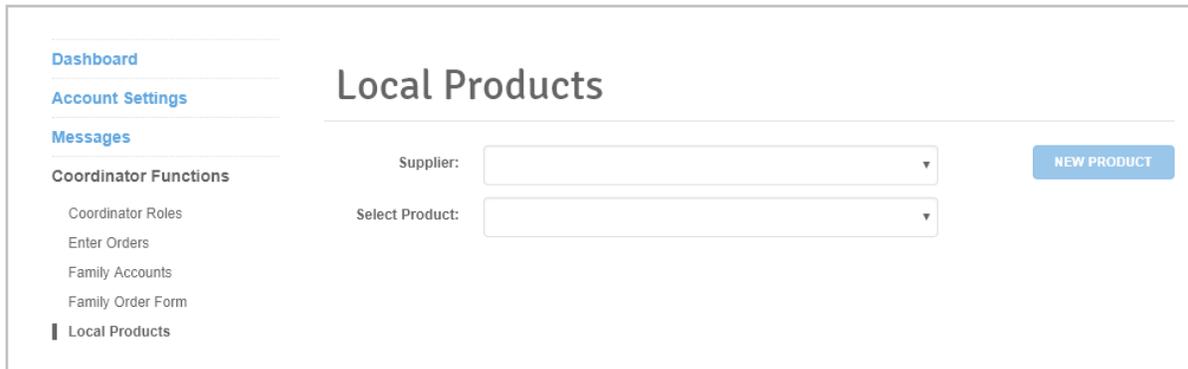| Product	QTY	Total
1-800-Baskets $50.00		$
8th Street Grille $25.00		$
99 Restaurants $25.00		$
Aquarium $25.00		$
ARCO $250.00		$
Beauty Bar $25.00		$
Bed Bath & Beyond $100.00		$
Beechwood Inn & Coyote Cafe'		$
Bel-Air $100.00		$

Local Suppliers and Local Products

Want to add your local pizza place to your scrip program? With ShopWithScrip, you can add local suppliers to your available products. First, ask the local pizza place if they will offer you a discounted price on $25 gift cards to support your organization. If they say yes, you're ready to make them a local supplier. Here's how to do that:

- Click on **Local Supplier** and then select **New Supplier**. Fill out the supplier's information and click **Save**.

- Next, add the supplier's product by clicking on the **Local Products** link.

- Select the Supplier from the drop-down menu and click **New Product**. Then enter the product name including the denomination (i.e. "Pizza House $25"). Then enter the face value, the discount, and the category. Click the box next to **Active** to make the product available for your families to order.

Notifications

You can choose whether or not you want us to send you email notifications about pending orders, automatic orders, and new family registrations.

- **Automatic orders** refer to family orders for ScripNow, Reload, and ReloadNow products paid for with PrestoPay.

- **Pending orders** are family orders waiting to be processed.

Organization /
Notifications

Let us send you an email on the day(s) you choose when you have ShopWithScrip family orders waiting to be processed. You can also receive daily notifications for PrestoPay orders containing ScripNow, Reload, or ReloadNow that are processed automatically. Want to know when a new family registers on ShopWithScrip through your organization? We can do that!

Days to receive notifications

Pending Orders
- ☐ Sunday
- ☐ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday

Automatic Orders
- ☐ Receive Automatic Order notifications

Email Alerts on Family Registration
- ☐ Received an email when a family registers through your organization

[SUBMIT] [CANCEL]

Order Queue

View all paid and unpaid family orders, PrestoPay orders, and bulk orders placed for your organization here. Bulk orders are for your organization and are unattached to families.

Order Queue

[PRINT SELECTED ORDERS] [ADD TO PO]

Unpaid Family Check Orders

[SELECT ▾] [MARK AS PAID]

	Family Name	Order Number	Order Date	$ Amount	Status	
☐		21851670	10/27/2017	$25.00	Unpaid	Edit
	Unpaid Family Check Order Total			$25.00		

Paid Family Check Orders

[SELECT ▾] [MARK AS UNPAID]

Family Name	Order Number	Order Date	$ Amount	Status

There are no pending paid family check orders

Family PrestoPay Orders

[SELECT ▾]

Family Name	Order Number	Order Date	$ Amount	Status

There are no pending Presto Pay orders

Organization Bulk Orders

[SELECT ▾]

Family Name	Order Number	Order Date	$ Amount	Status

There are no pending bulk orders

[ADD TO PO] [PRINT SELECTED ORDERS]

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Organization Profile

View and edit details for your organization, including organization information and address, coordinator details, and shipping address. The default shipping address will be used each time you place an order, and it can be changed on this page.

Note: You can ship to a place of business or a residence.

Packing Slips

Generate packing slips to include when you distribute family orders. Packing slips are one-page reports for family orders including product details and totals. You can print these out and include them when you distribute family orders.

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Payment Change Form

If your organization's banking information changes, this is where you update your information. Click **Payment Change Form** and fill out your new banking information. Next, click **Generate Form**, fill in bank routing number and account number, sign and date, and mail or fax this form to GLSC. You can find our mailing address on the form, and our fax number is 888.865.9655.

PO Manager

PO stands for purchase orders. Any PO that you create and do not submit to GLSC will be stored here. You will also be able to view your order history, check the status of your order, and view tracking information once your order ships.

PO's that haven't been submitted yet are listed at the top of the page. Both local and GLSC PO's will be displayed on this page, but tracking information is only available for GLSC orders.

Your submitted orders will have one of three statuses:

- **Pending** — this order is waiting to be processed.

- **In-process** — we are currently processing the order.

- **Shipped** — the order has been shipped, and a tracking number is available.

Online Payments (PrestoPay™)

ShopWithScrip offers a convenient online payment system that allows families to link their bank account to their ShopWithScrip account to easily pay for their orders online. It is available to any organization that pays for GLSC orders through ACH electronic debit.

With online payments, GLSC accepts the family's payment on behalf of the organization and debits the family's bank account at the time they place their order. The family will be charged a small convenience fee of $0.15 per order.

Add a Bank Account for Online Payments

Scrip is even more convenient when you pay online. In addition to not writing and dropping off a check, with Online Payments (PrestoPay™), you'll receive eGift cards and funds will be added to your ReloadNow cards instantly. Each order you place and pay for with Online Payments will have a small $0.15 convenience fee.

Online Payments are made to ShopWithScrip on behalf of your nonprofit organization. If you place your order with Online Payments and your payment is returned or rejected for any reason, one of two outcomes will occur:

- If your family order has not been released by your organization, ShopWithScrip will cancel the order and charge your nonprofit organization a fee of $30.00, which you will pay your organization.

- If your family order has been released by your organization, ShopWithScrip will charge your organization for the face value of your order, plus a bank fee of $30.00. You will pay your organization the total for the order and the fee.

SECURITY OF ONLINE PAYMENTS

Instantly Link a Bank Account

Set up Online Payments (PrestoPay) easily by searching for and selecting your bank from a list. Then, you'll enter your online banking credentials, choose which account you'd like to link, and create a PIN.

I have read and agree to the terms and conditions and privacy policy.

YES AND I AGREE

Manually Enter Account Numbers

Enter your banking information to enroll. We'll add two small deposits (ex: $0.52) to your account, which you'll need to verify, then you'll create a PIN. Depending on your bank, this process will take 1 to 2 days to complete.

I have read and agree to the terms and conditions and privacy policy.

YES AND I AGREE

Reports

ShopWithScrip offers several valuable reports so you can track all of the financial details you need to run your program. You can generate detailed reports for family and organization order history, rebate summaries, packing slips for family orders, and more, plus you can pull data from any timeframe you want.

To view a sample report and see what information is included, click **Preview**.

To generate a report, click **Run Report** next to the desired report, fill in the required information, and click **Run Report** at the bottom.

Organization /
Reports

Report Name

Family Summary and Email List	Preview · Run Report
Family Order Packing Slip by PO	Preview · Run Report
Family Order Packing Slip with Rebate by PO	Preview · Run Report
Order History by Family	Preview · Run Report
Order History by Family and Product	Preview · Run Report
Organization Enrollment Cards	Preview · Run Report
Organization PO Details by Product and Family	Preview · Run Report
Organization PO History by Date	Preview · Run Report
Organization Sales Summary by Product	Preview · Run Report
Organization Sales Summary by Product and Teacher	Preview · Run Report
Rebate Summary by Family	Preview · Run Report
Rebate Summary by Family and PO	Preview · Run Report
Unreleased Family Order Checklist	Preview · Run Report
Family Mail Merge Summary	Preview · Run Report
PrestoPay Auto Order Deposit Slip	Preview · Run Report

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SCRIPWARE

SCRIPWARE is ShopWithScrip's optional inventory management upgrade. It offers all of the features you automatically get with your free ShopWithScrip account like convenient online access, full family order tracking, order aggregation, and optional PrestoPay service. But with SCRIPWARE, you also get these powerful features:

- **Complete inventory management.** Keep track of all gift cards and certificates you have on hand with full inventory reporting.

- **"Scrip to Go" sales support.** You can designate orders as "scheduled" for later delivery, or you can sell gift cards out of an inventory immediately. SCRIPWARE keeps track of everything.

- **Customizable rebate sharing and distribution.** Share all or some of the rebates with your families. Set a minimum earning amount or allow families to accumulate rebates for use in the future. SCRIPWARE can accommodate any scrip program.

- **Full financial reporting.** SCRIPWARE does inventory valuation, profit reporting, cost tracking, and more.

SCRIPWARE™

Give Your Scrip Program A Profitable Boost with GLSC's Full-Featured SCRIPWARE™

Great Lakes Scrip Center is proud to offer SCRIPWARE™, the powerful, optional add-on to already popular basic free ShopWithScrip.com service.

MONTHLY SUBSCRIPTION $7.75/MO	ANNUAL SUBSCRIPTION $79.00/YR

SCRIPWARE™ was developed after an exhaustive examination of all commercially available scrip management programs and the extensive involvement of real scrip coordinators. It offers all of the features you automatically get with your free ShopWithScrip online solution, including convenient online access, reloadable gift cards, full family order tracking, order aggregation and optional PrestoPay™ service.

- Plus, with your upgrade to SCRIPWARE™, you get these powerful features:
- Full inventory management - Keep track of all gift cards and certificates on hand with full inventory reporting.
- "Scrip To Go" sales support - You can designate orders as "scheduled" for delivery later, or if you have inventory on hand, sell it out of inventory immediately. SCRIPWARE™ keeps track of everything.
- Customizable rebate sharing and distribution - Share all or some of the rebates with your families. Set a minimum earning amount if you want. SCRIPWARE™ offers the flexibility to accomodate any scrip program.
- Full financial reporting - SCRIPWARE™ does inventory valuation, profit reporting, cost tracking and more.
- Many more powerful features - check out our benefit comparison chart for details.

Start your free trial today*

SCRIPWARE™ is available to try free with no obligation for 60 days. If not fully satisfied, unenroll from SCRIPWARE™ any time during your 60 day trial and you will not be charged. At the end of your sixty day trial period, Great Lakes Scrip Center will bill your NPO account for SCRIPWARE™ service according to the billing plan you choose.

*Please note, only one 60 day free trial is available per GLSC customer. You may unenroll and re-enroll at any time, however the free 60 day free trial is only available for your first use.

FAMILY FUNCTIONS

There are also three buttons under Family Functions: Express Order (quickly add products to your cart from a search bar), Wallet, and Shopping Lists. The rest of the family functions are listed below.
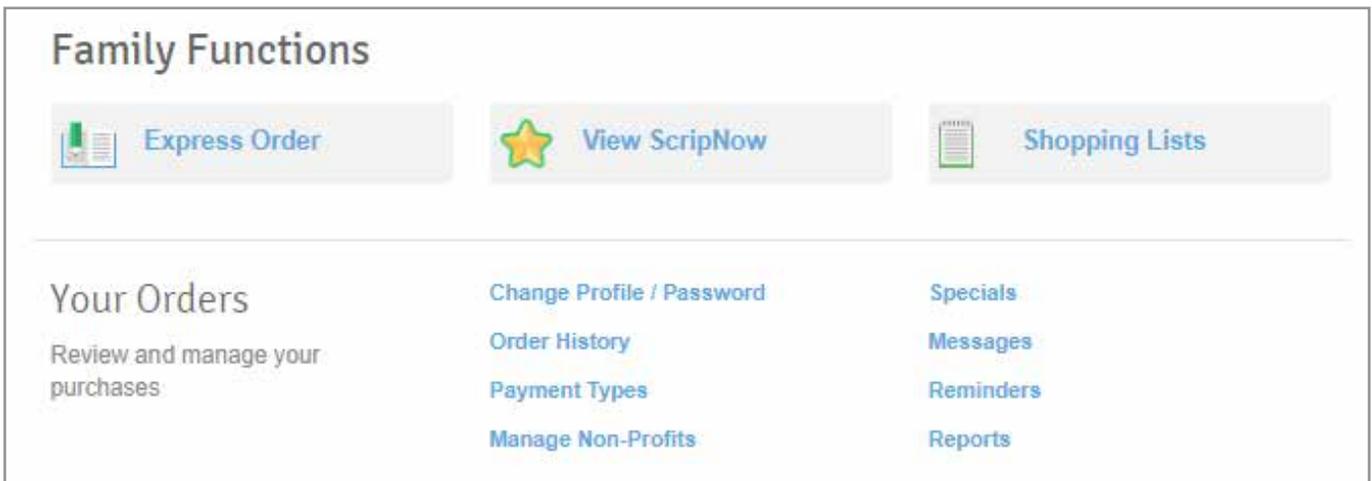
These pages are for your personal ShopWithScrip orders and payment. These are the same pages members of your organization will have available to them when they register on ShopWithScrip. From here, you can navigate to your:

- **Order History.** View a full history of your personal family orders.

- **Payment Types.** Sign up to use online payments for your own orders if you have enabled it for your organization.

- **Reports.** Generate reports for your personal family order history.

- **Shopping Lists.** Create lists to easily add groups of products you regularly order to your cart when placing your personal orders.

- **Wallet.** View all of your purchased ScripNow eGift cards and details for your registered Reload cards.
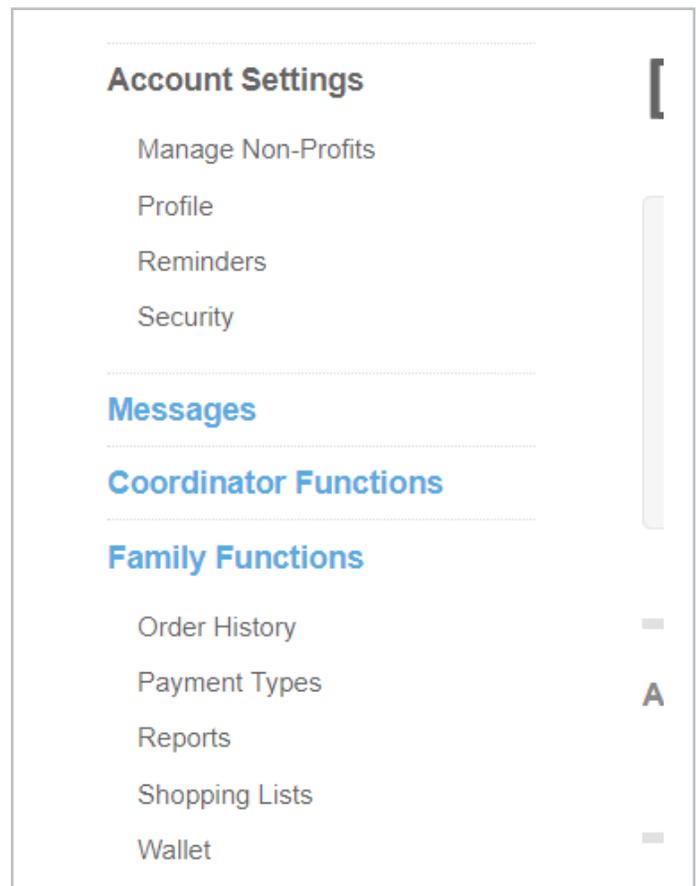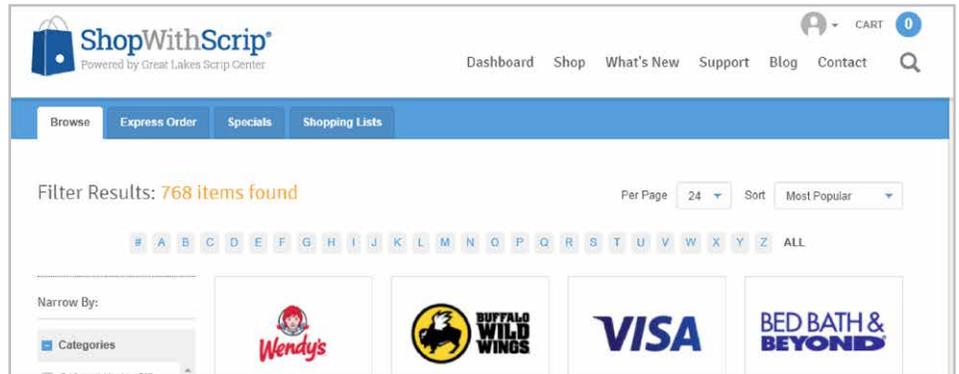
NAVIGATING SHOPWITHSCRIP

There are a few other important areas on ShopWithScrip for you to know about

Shop

Use the Shop tab to access the family shopping experience and place all of your personal orders. You can browse all of our available retailers and sort them alphabetically, or look under the "Narrow By" heading for more filtering options.

What's New

You'll find all of the latest scrip news like new product announcements, bonus rebates, and special promotions on our What's New page. Check in regularly to stay on top of scrip updates and changes.
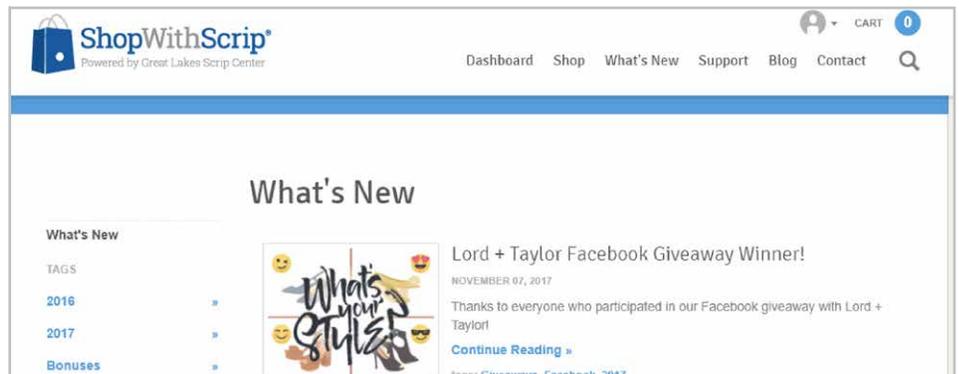
Specials

Here you'll find all of the retailers that are on bonus at any given time so you can maximize your earning!