

WWW.SCRIPZONE.COM



Group Administrators Users Guide

Brought to you by

UnitedScrip

Your Fundraising Partner

Welcome to UnitedScrip!

We are excited about the opportunity to help you build a program for your organization that will change the way you fundraise, hopefully forever! Our goal is to partner alongside you as you work to make a difference for your organization and we are honored to have the opportunity to play a small part in making that difference a reality for your non-profit organization!

Each section of this manual that will explain and provide you with the information and the tools you will need to run your scrip program efficiently and effectively. As you read through and look over the information, give us a call or drop us an email if you have any questions. We will be happy to help you get your scrip program not only up and running, but make it the best it can be, because helping you is 'why we do what we do!'

The UnitedScrip Team!

Table of Contents

- Welcome to UnitedScrip! i
- Introduction to UnitedScrip 1
- Understanding ScripZone.com (*Foundations for Record-keeping*)..... 2
- Chapter One: Getting Started-Campaigns, Splits, & Teams** 3
 - Set-Up for ScripZone Group Admin Site..... 4
 - Getting Started 5
 - Step One - *Establishing Campaigns* 6
 - Step Two - *Defining Your Splits*..... 7
 - Step Three - *Entering Team Information* 13
 - Manage your Accounts 16
 - Download Library..... 18
- Chapter Two: Members** 19
 - Entering Members 20
 - Message Center – (*Emailing Members*)..... 23
- Chapter Three: Payment Methods** 25
 - Payment Options 26
 - Shipping Information 33
 - About Security 34
- Chapter Four: Ordering** 35
 - Processing Online Orders 36
 - 1. Start Compilation Process..... 40
 - Step One* – Compiling an Order 40
 - Step Two* - Confirm Order 41
 - 2. UnitedScrip Summary..... 42
 - 3. Preview All Orders..... 43
 - 4. Local Certificates Summary 44
 - 5. Deposit Slip 44
 - 6. 8160 Labels..... 46
 - 7. Order Details 46
 - 8. Editing Orders..... 48
 - 9. Edit Payments 50
 - 10. Orders with Family Profit 51
 - 11. Orders by Team Profit 53
 - Entering Member Orders 54
- Chapter Five: Direct Ordering** 45

| | |
|--|-----------|
| Direct Ordering | 46 |
| Chapter Six: Reports | 22 |
| Report Tools | 48 |
| Report Center | 48 |
| Chapter Seven: Local Suppliers & Certificates | 52 |
| Adding Local Suppliers and Certificates..... | 53 |
| Chapter Eight: How to Create an Order Form | 55 |
| Concept Form Creator | 56 |
| Chapter Nine: Disbursements & Credits | 59 |
| Disbursement/Credit Center | 60 |
| Setting up Your Account/Causes | 60 |
| Recording a Member Disbursement..... | 61 |
| Record a Member Credit..... | 63 |
| Disbursement Reports | 63 |
| Chapter Ten: Inventory | 64 |
| Inventory Center | 65 |
| Adding the Initial Inventory Numbers | 67 |
| Placing an Inventory Order to UnitedScrip | 69 |
| Record an Adjustment | 69 |
| Inventory Adjustments | 70 |
| Recording Member Orders from Inventory | 70 |
| Inventory Summary Report..... | 71 |
| Glossary..... | 69 |

Introduction to UnitedScrip

For many years, the scrip industry has been an important partner with non-profit organizations. This partnership has enabled organizations to reach and for many, even surpass their fundraising goals. Without question this concept has helped to change and refocus the direction of traditional fundraising activities.

With every worthwhile program comes the responsibility of accurate record keeping. The potential profits generated by Scrip's revenue require exceptional record keeping that reflects the participation of individual families, profit levels and ordering. This effort can be laborious and time consuming.

In 2003 UnitedScrip offered the first online software package for organizations to download and to utilize free of charge. What we realized that most fundraising companies seem to have missed is that most non-profit organizations just don't have the money or the paid support staff to run a program effectively without volunteers.

www.ScripZone.com

In 2010, our commitment remains the same - to give you the best opportunity to support your organization with minimum or no cost. This new ScripZone site is our effort to broaden your reach to individuals that would support you given the right circumstances. ScripZone will deliver new options for members and supporters that have never been offered by Scrip, and we are excited to bring them to you.

ScripZone.com is designed from the users' viewpoint. It is simple yet highly efficient in pertinent record keeping. This program will drastically reduce volunteer hours, volumes of paperwork and streamline your operation and effectiveness. We are committed to supporting your program by striving for excellence with this website, creating new tools to further ease and support those whose vision and commitment include expanding the education (mind, body and spirit) for children everywhere.

Welcome to www.ScripZone.com, we look forward to your input as we refine the site, and welcome your suggestions. We appreciate the opportunity to be a small part of making a difference for your organization.

www.ScripZone.com

UnitedScrip, Inc.

Phone (864) 886.9701 • Fax (864) 886.9704

© 2010 All Rights Reserved

Understanding ScripZone.com *(Foundations for Record-keeping)*

Before we begin explaining how to set-up and utilize the website for your program, we want to review the following principals of program structure and how this online software utilizes that structure to generate information and reports for your program.

Like our software, *UnitedScrip2006*, www.ScripZone.com is structured in four-tier architecture (see Figure 1). Your organization is the Non-Profit that establishes a site for fundraising using www.scripzone.com as the base of operation.

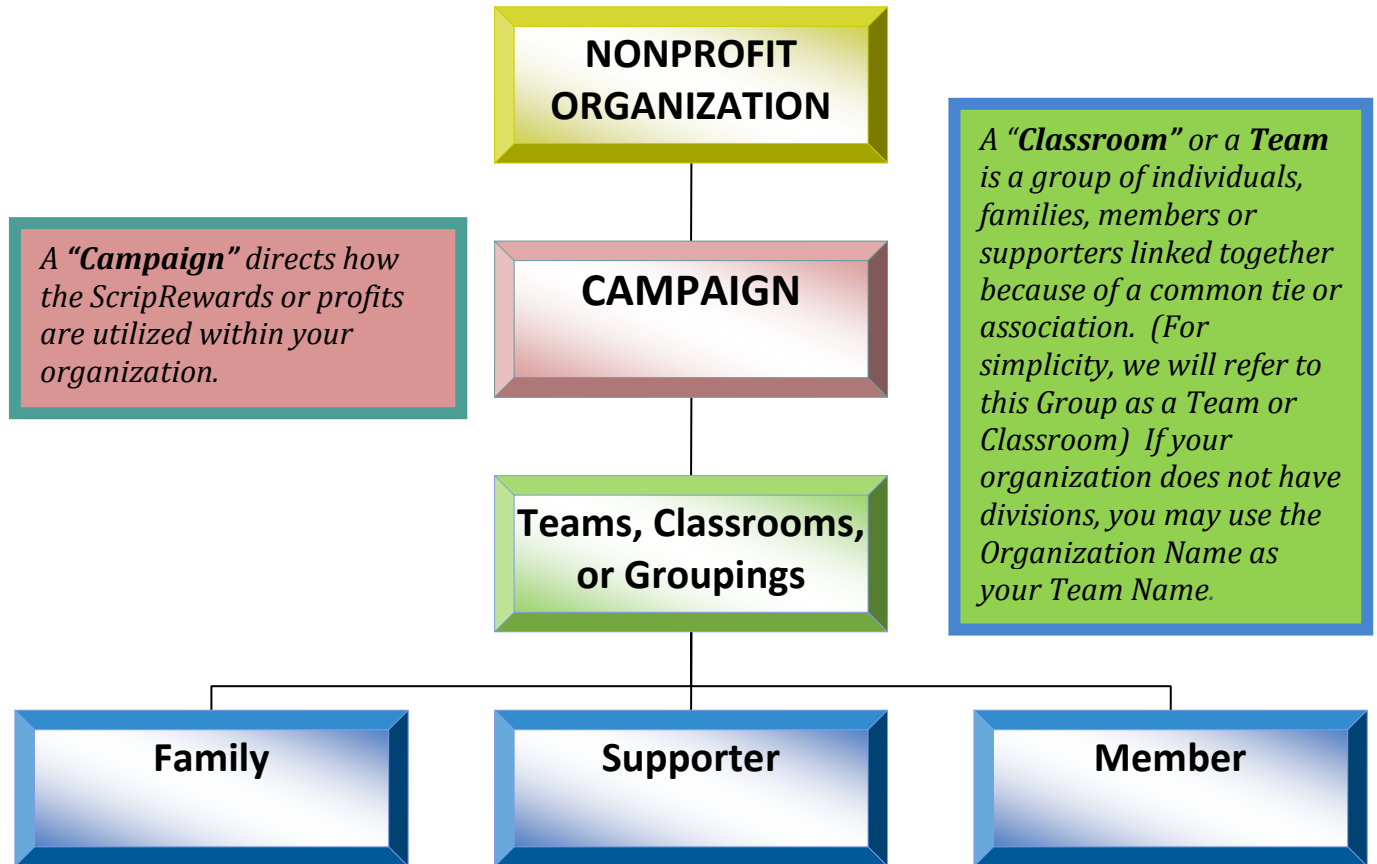


Figure 1

****Individual Families, Members, or Supporters Placing Orders** (that may belong to a Classroom, Team, or Grouping) Your Organizations may not need to utilize all the aspects of this structure for your non-profit.

A Family, Supporter or Member is the individual placing orders and generating profits from their purchases. For more definitions of commonly used terms, please see the Glossary.

Chapter One: Getting Started

Campaigns, Splits, & Teams



UnitedScrip and www.ScripZone.com

Set-Up for ScripZone Group Admin Site

Complete the ScripZone Enrollment form and email to info@scripzone.com or Fax to: 1.864.886.9704.

A Group or Organization must designate the Group Administrator/Program Administrator for ScripZone prior to requesting the establishment of your ScripZone.com site. **That individual must register as a New User before the setup process can begin.** The Group Administrator's Login will be the only access into the Admin Level and will be necessary for the initial site setup.

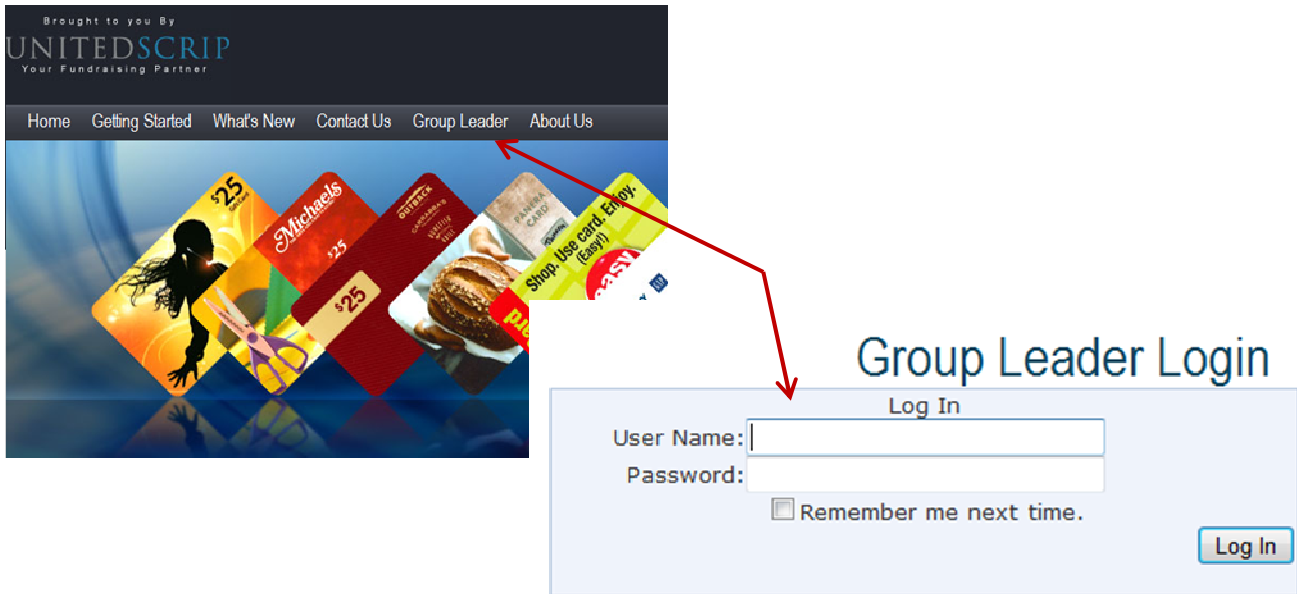


Figure 2

You will receive notification from UnitedScrip that your site is ready to access. To enter the Group Admin level, go to www.scripzone.com and click on the Group Leader tab (Figure 2). Enter the same User Name and Password that you created as a New User. Only the individual who is registered and is designated as the Group Administrator on ScripZone will have access to the Admin level. Currently only one Administrator is allowed access to the Group Level.

Question: What if I (the Group Coordinator) only want to use ScripZone.com to create paper order forms to hand out to my members?

Answer: If your organization already has a system in place, or if it is run from a strictly offline standpoint, then you are welcome to use the ScripZone.com site to create paper order forms. See Chapter 8 for more on this task.

Getting Started (Entering Group Information)

When you login to the Group Admin Home Page (Figure 3), it is important to follow these simple steps to insure that your orders and reports are accurate.

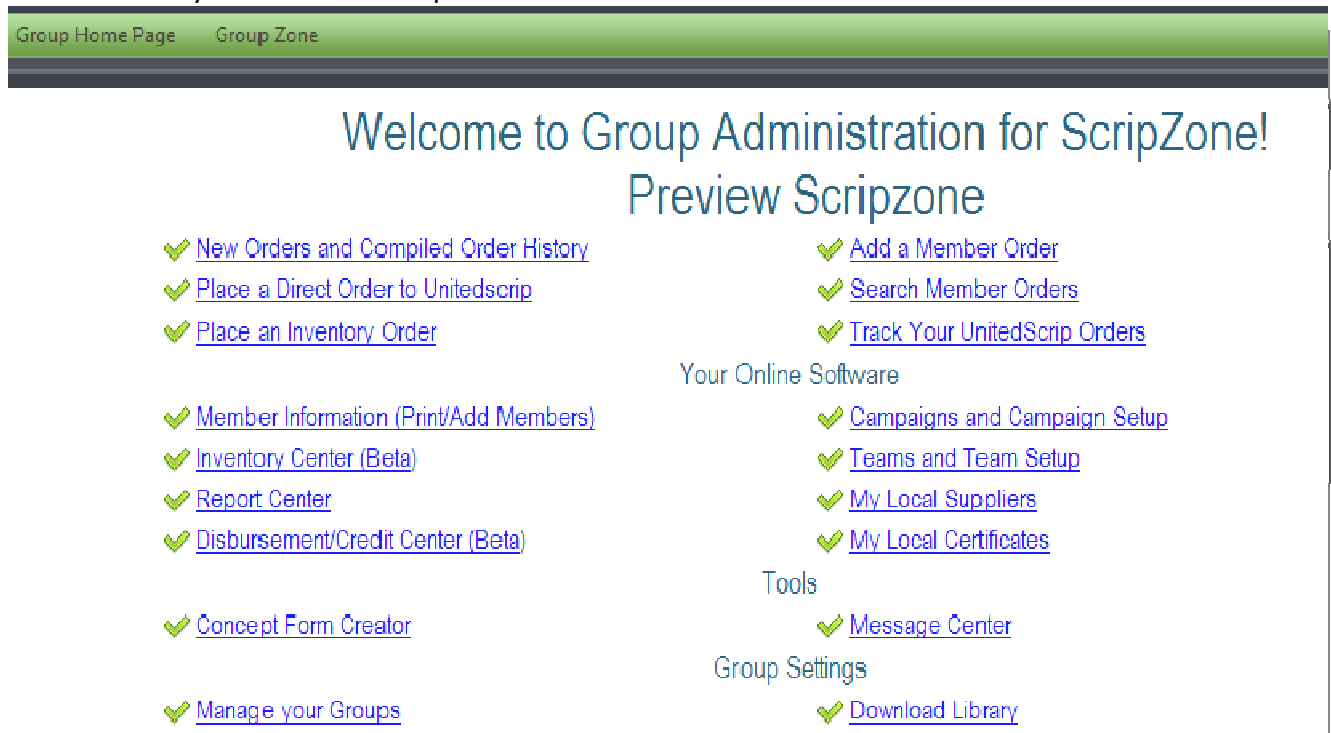


Figure 3

Currently, we automatically create one Campaign and one Team for your organization from the information requested in your ScripZone Enrollment. Detailed instructions for creating campaigns and teams follow. You may edit the initial campaign if needed.

Please establish any additional Campaigns and Teams in the following Order:

- Step 1. Enter your Campaign(s) Information
- Step 2. Define your Campaign(s) Splits
- Step 3. Enter your Team(s) information and link to Campaign

Step One - Establishing Campaigns

The concept of a **Campaign** is central for establishing the record-keeping of profits generated from orders. A campaign describes the purpose of your fundraising efforts. A campaign basically helps you divide profits between family members, families, teams and your organization.

To enter a **New Campaign**, click “Campaigns and Campaign Setup” on the Home Page or “Campaign Setup” on the Group Zone tab and enter the information for the campaign.

1. **Name your Campaign.** A Campaign name that is reflective of your goals will keep members focused on your purpose. If the Campaign will run between certain dates, include those dates in the title. There should be a campaign already listed as “Default Campaign;” this and all other campaign names can be changed by selecting the “Edit Campaign Info” link, as shown in Figure 4.

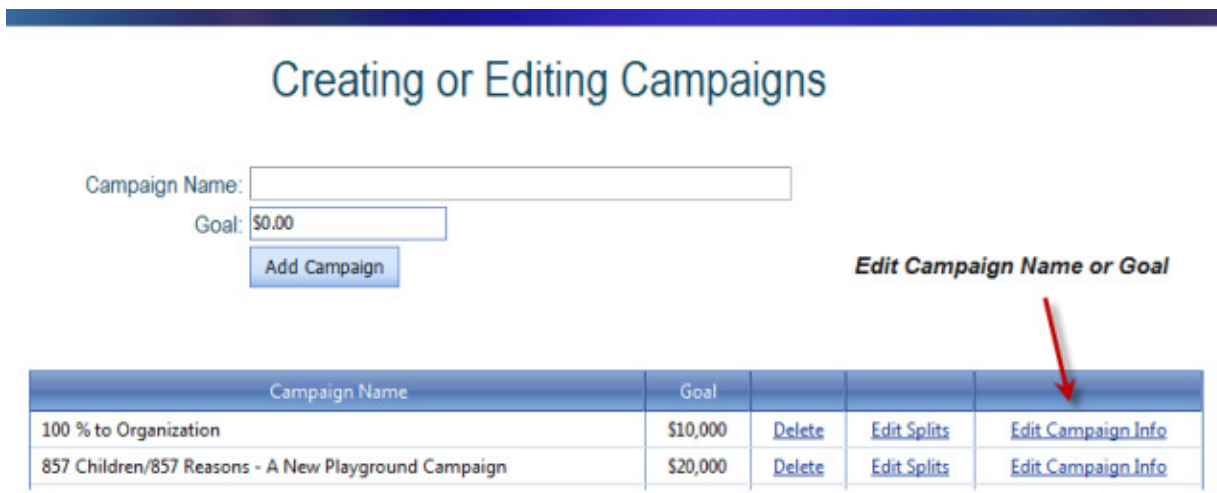


Figure 4

2. Add **Goal in Dollars**, if applicable, to remind supporters and members the goal you are trying to reach.
3. Click **Add Campaign** (Figure 5). Your Campaign will appear below.

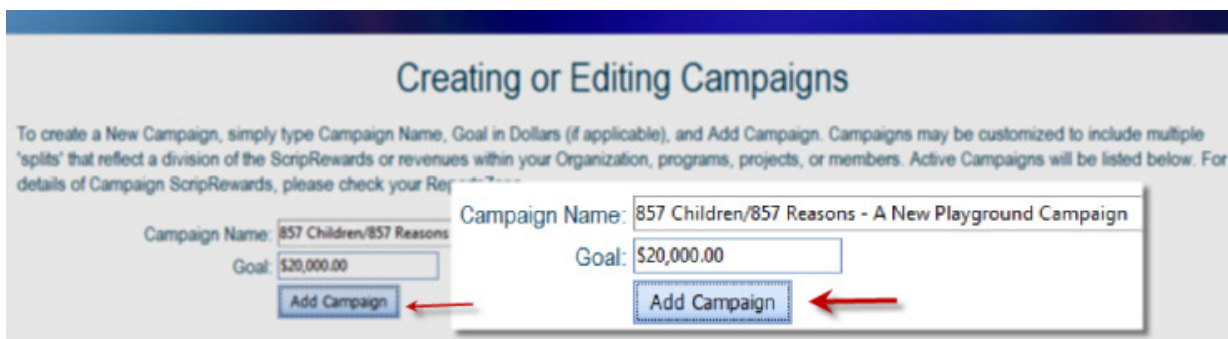


Figure 5

The website has a Default Campaign directing 100% of profit to the Nonprofit, and a Default Team.

Step Two - Defining Your Splits

Editing your 'Campaign Split' designates how the profits generated will be applied to your organization, your teams or your families. If your organization does not split the profits or incorporate any reimbursements with its members, classrooms or teams, simply Name your Campaign and leave the splits at the default setting.

Example 1 – Organization receives 100% of the profit (charted in Figure 6):
Figure 7 shows the breakdown as it appears on the webpage.

- **100%** of profits generated by orders are directed to **School or Organization**.
- **0%** of profits generated by orders are directed to **Teams**.
- **0%** of profits generated by orders are directed to **Families**.

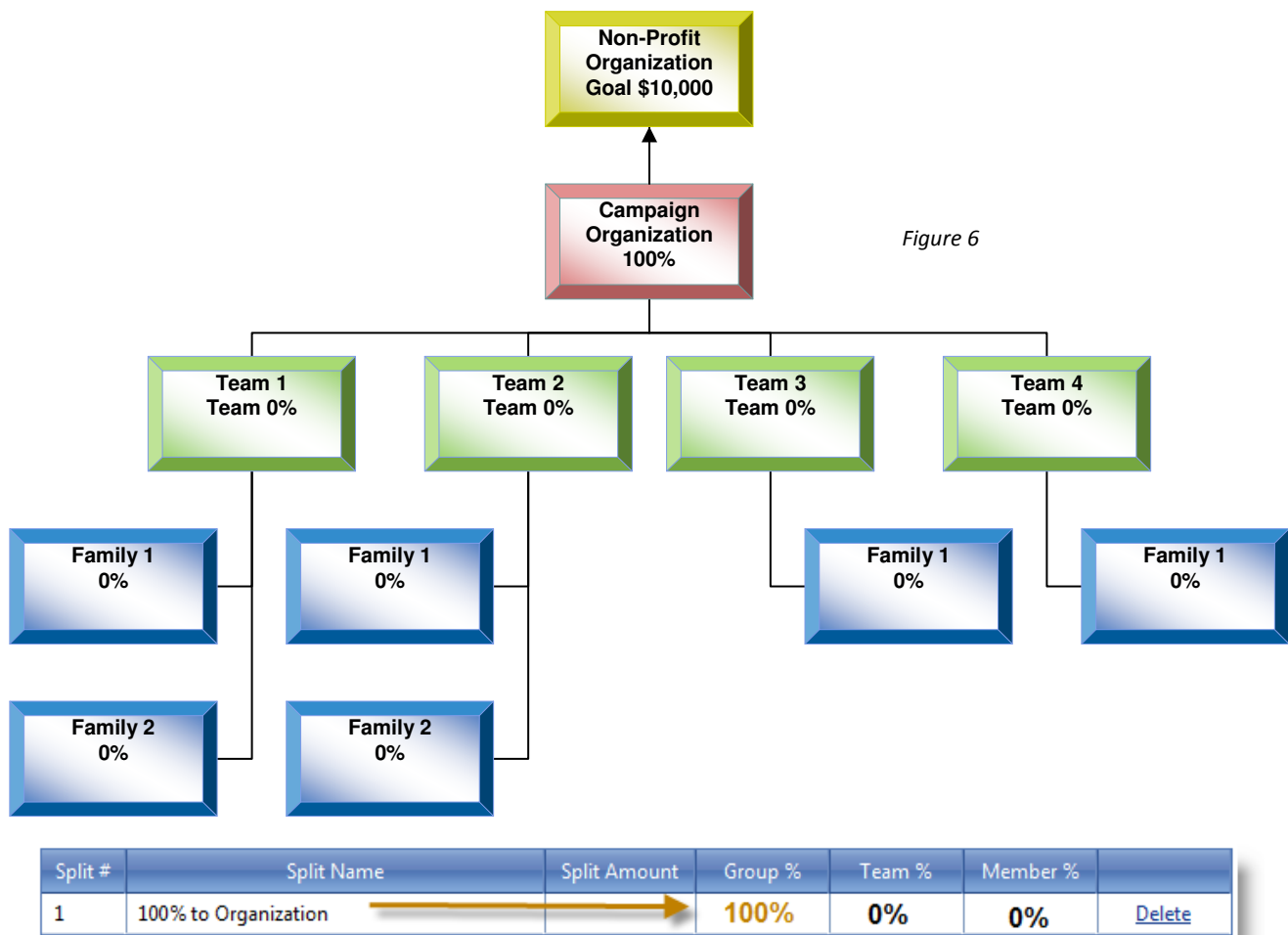


Figure 7

The Organization has used the Campaign to direct 100% of the profits to the Organization. The Family/Member places their orders under their Classroom or Team.

Step Two: Defining Your Splits (continued)

If you are splitting the profit in any way, you will need to enter the split information. Click on “Edit Splits” and enter the percentages in each of the three sections. The split totals must add up to 100%. If you are unsure of how your campaign needs to be set up, please call 864.886.9701 for help.

**Campaign splits can be changed at any time; however changes will affect any reports generated prior to the change. Once disbursements have been made, changes cannot be made to Campaign or Splits applied to the Campaign. A New Campaign is the best option for accurate record keeping.*

Example 2 – Organization has two (2) campaigns (charted in Figure 8):

- **Teacher Classroom Funds** in which teachers receive all of the profit that they personally generate with their orders that can be used to purchase items for their classroom.
- **School/Classroom Campaign** in which 20% of the profit generated by a family or member goes to the teacher’s classroom and 80% is kept by the organization.

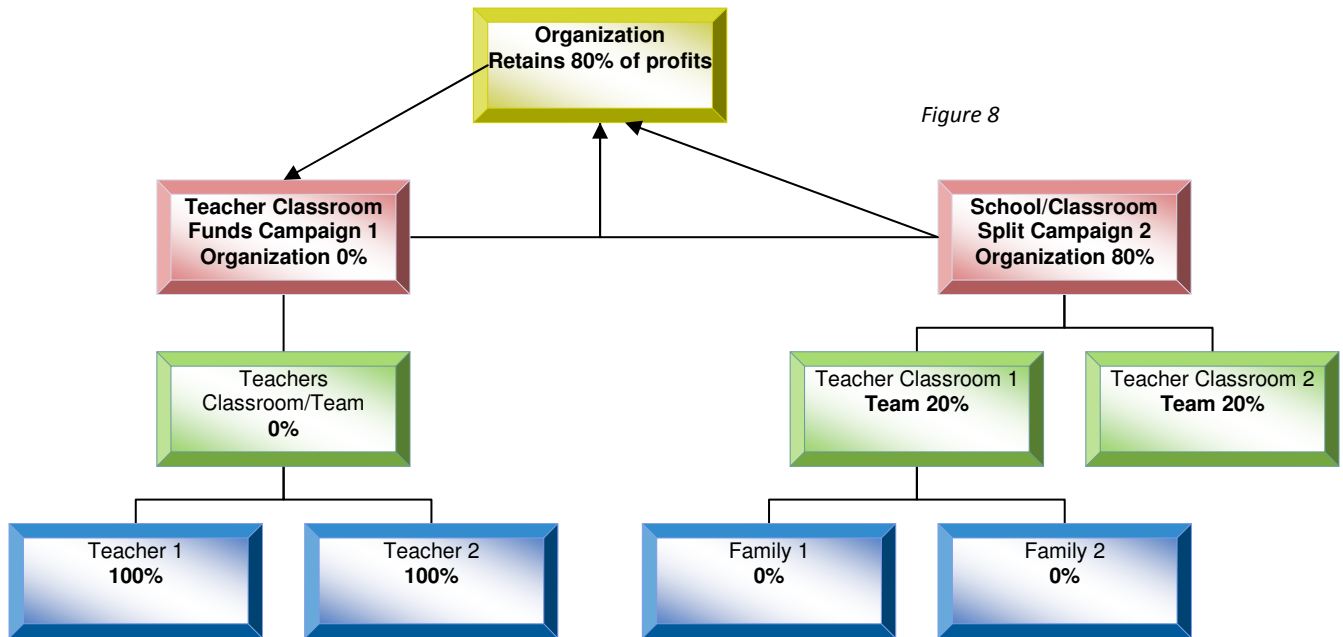


Figure 8

| Split # | Split Name | Split Amount | Group % | Team % | Member % | |
|---------|---------------------------|--------------|---------|--------|----------|--------|
| 1 | Teacher's Classroom Funds | 0.0000 | 0% | 0% | 100% | Delete |

Figure 9

In the **Teacher Classroom Funds Campaign 1** (Figure 9, above), all Teachers are part of a Group or Team (Teachers). The orders flow through their Teachers Team and the profits are designated to the Individual Team Member, in this case the individual Teachers’ Classroom Fund.

In the **School/Classroom Split Campaign 2** (Figure 10, below) example below, the Campaign directs **20%** of profits to remain in the Classroom. The order is placed under/through and **80%** is directed to the Organization, and **0%** to the Family or Member.

| Split # | Split Name | Split Amount | Group % | Team % | Member % | |
|---------|--------------------------------|--------------|---------|--------|----------|--------|
| 2 | 80% School/20% Classroom Funds | 0.0000 | 80% | 20% | 0% | Delete |

Figure 10

Step Two: Defining Your Splits (continued)

Example 3 – Organization shares profit with the participants (charted in Figure 11):

Figure 12 shows the breakdown as it appears on the webpage.

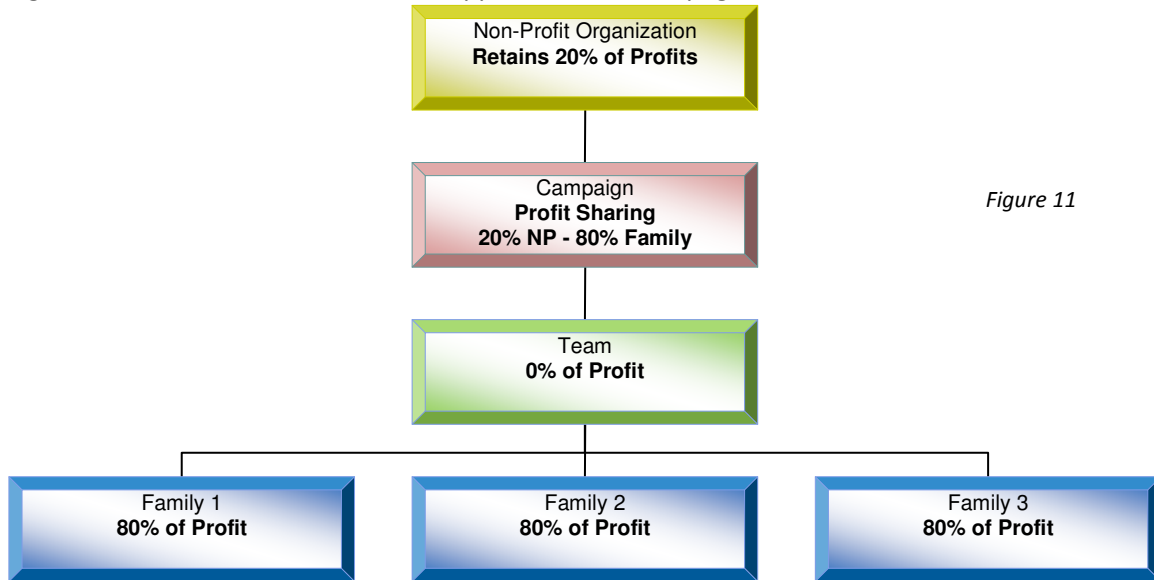


Figure 11

| Split # | Split Name | Split Amount | Group % | Team % | Member % | |
|---------|-----------------------------------|--------------|---------|--------|----------|--------|
| 1 | 20% to Organization 80% to Family | 0.0000 | 20% | 0% | 80% | Delete |

Figure 12

In the example above the Organization has directed profits to:

- **20%** of profits generated by member/parent order remain with the **Organization**.
- **0%** of profits generated by parent is directed to the **Team**.
- **80%** to be utilized by **Family/Member** for activities within the organization (such as field trips, tuition, competitions, etc.)

Step Two: Defining Your Splits (continued)

(Campaign Splits that Require Minimums)

Example 4 – Organization retains 100% until a minimum profit is generated

Many organizations require that the participants generate a minimum profit before the profit is shared with the participant. This situation must be addressed when setting up a campaign. For example, one of our groups requires that \$50 of profit be generated before any profits are shared. Once that tier is reached, any profits are divided equally, up to \$300 profit. After the \$300 profit tier is reached the family retains 75% of the profit with the remainder going to the school. This campaign would be set up in the following manner: enter your campaign and then click on “Edit Splits.”

| Split # | Split Name | Split Amount | Group % | Team % | Member % | |
|---------|-------------------------------|--------------|---------|--------|----------|------------------------|
| 1 | Generating the Minimum Profit | \$0 | 100% | 0% | 0% | Delete |
| 2 | From \$50 to \$300 | \$50 | 50% | 0% | 50% | Delete |
| 3 | \$300 and more | \$300 | 25% | 0% | 75% | Delete |

Figure 13

1. Title the Split; in Figure 13, we have named it “Generating the Minimum Profit.”
2. The initial split will always need to have a \$0 amount. (From the first profit generated until you reach your next tier.)
3. Enter the split that will occur before the profit minimum is met. In this example it will be **100% to the Organization/Group** and 0% to the family. Click “Add Split.”
4. Title the Second Split; in the example, it is “From \$50 to \$300.”
5. Enter the amount of profit to be generated before the second split occurs (**\$50**).
6. Enter the split that will occur after the amount (**\$50**) is met. In this example it will be **50% to the Group/Organization** and **50% to the Member/Family**. Click “Add Split.”
7. Title the Third Split; in the example, “\$300 and more.”
8. Enter the amount of profit to be generated before the next split occurs (**\$300**).
9. Enter the split that will occur after the amount (**\$300**) is met. In this example it will be **25% to the Group/Organization** and **75% to the Member/Family**. Click “Add Split.”

(*This split is charted in Figure 14 on the following page)

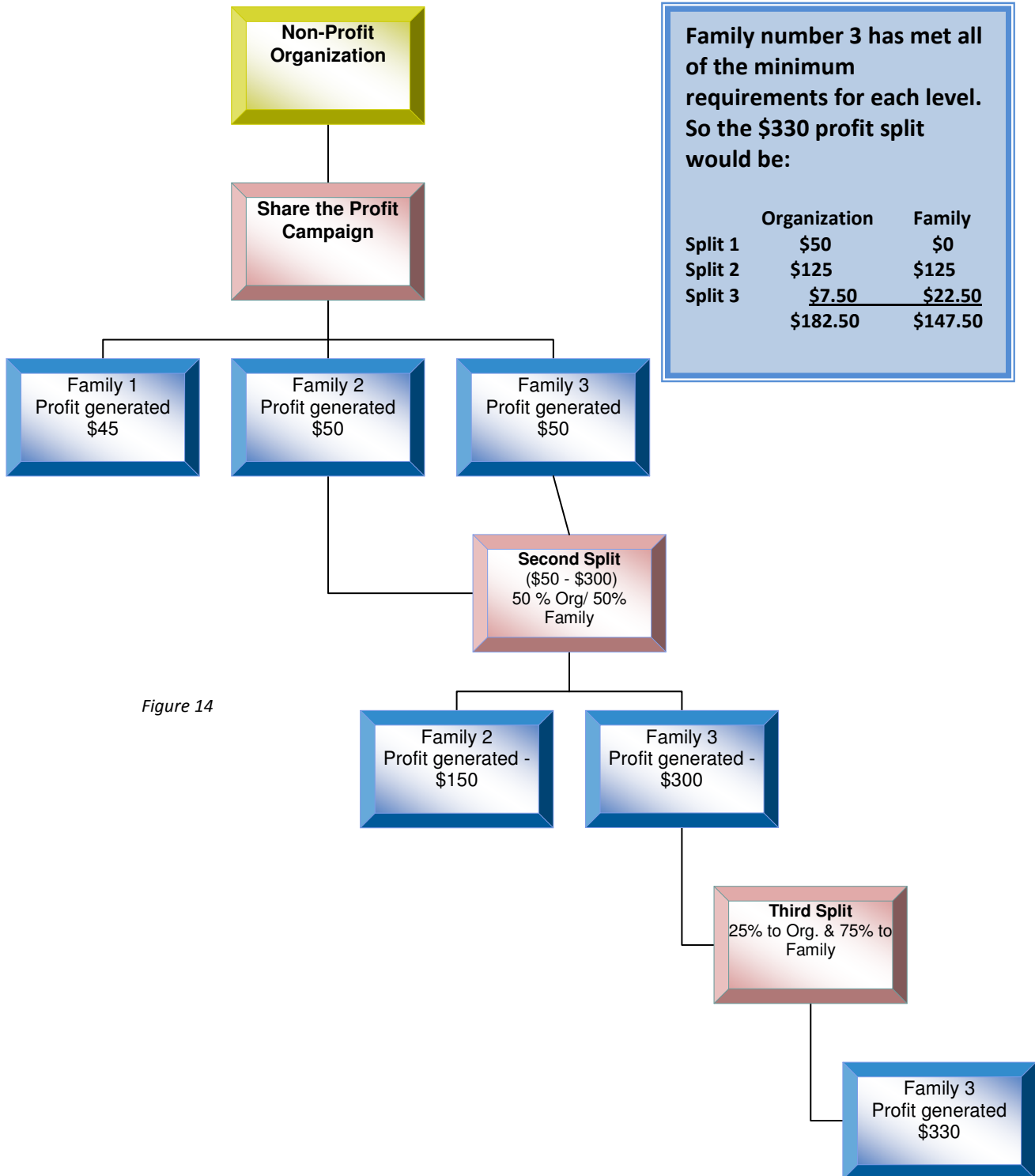


Figure 14

**If you are unsure of how your campaign needs to be set up, please call 864.886.9701 for help.*

Step Two: Defining Your Splits (continued)

Below is a Diagram of an Organization with several Campaigns. Families, supporters, or members may choose which Campaign to place their order under.

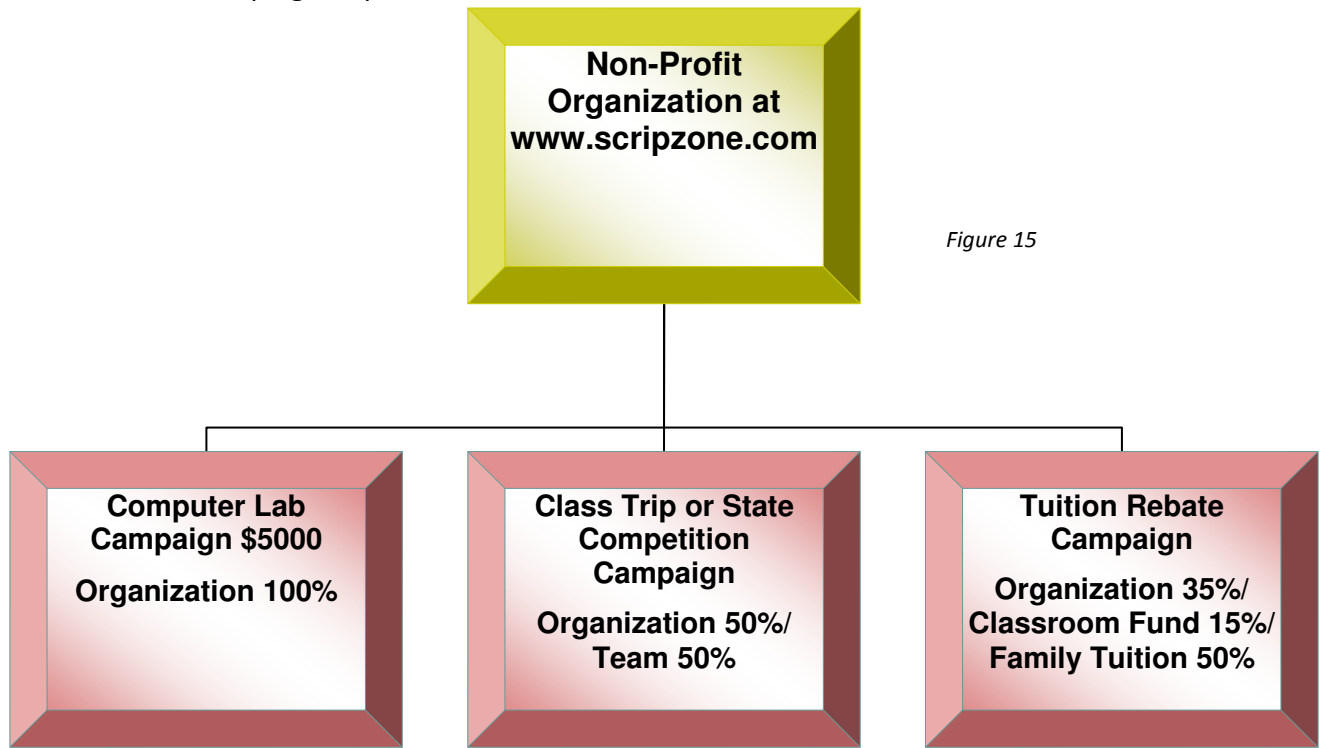


Figure 15

Computer Lab Campaign

- 100% of Profit is directed to the Computer Lab at the Organization.

Class Trip or State Competition Campaign

- 50% of Profit is directed to the Organization.
- 50% of Profit is kept by the Team for the Competition.

Tuition Rebate Campaign

- 35% of Profit is directed to the School or Organization.
- 15% of Profit is directed to the Classroom or Team.
- 50% of Profit is directed to Families or Members to be utilized by parents for activities within the organization (such as field trips, tuition, competitions, etc.)

Step Three - Entering Team Information

After establishing your campaigns and defining your splits, entering your Team information is the next step in setting up your organization's www.ScripZone.com account.

Follow the "Teams and Team Setup" link from your Home Page or the Menu bar. (See Figure 16 below)



Figure 16

- A new window will appear that looks like Figure 17.
- Type your **Classroom/Team** information.
- Select the Campaign that directs this Team.

Establishing Teams and Setup

Enter your New Team Information and then click the Add Team Button. A 'Team' is the term use to designate the division of your members by classrooms, clubs, or any grouping utilized by your organization. If you do not have divisions within your Organization, use Organization Name as your Team. Each Team must be linked to a Campaign that establishes distribution of ScripRewards. Individuals are linked to these Teams and thus to the Campaign.

| | | | |
|---|---|---------------------|---|
| Team Name: | <input type="text" value="New Team Name"/> | Contact Last Name: | <input type="text" value="Smith"/> |
| Default Campaign: | <ul style="list-style-type: none"> <input type="radio"/> \$50 increments <input type="radio"/> 100 % to Organization <input type="radio"/> 857 Children/857 Reasons - A New Playground Campaign <input type="radio"/> Boy Scout <input type="radio"/> Missions 2012 <input type="radio"/> School/Classroom Campaign <input type="radio"/> Share Profit with Participants <input type="radio"/> Teachers Classroom Fund <input type="radio"/> Tuition Reimbursement | Contact First Name: | <input type="text" value="John"/> |
| | | Phone: | <input type="text" value="(555) 555-5555"/> |
| | | Email: | <input type="text" value="john@nonprofit.org"/> |
| | | City: | <input type="text" value="Johnson"/> |
| | | Zip: | <input type="text" value="555555"/> |
| | | State: | <input type="text" value="South Carolina"/> |
| <input type="button" value="Add Team"/> | | | |

Figure 17

****For example, if you have five classrooms, you will enter each classroom as a Team and include the information about these classrooms. Examples of the Team Name might be:**

- **Teacher's Name (Mrs. Smith K-5),**
- **Classroom Number (Classroom K-5, Hall – A),**

- *Soccer Team Name, (U12 Girls or U14B – Coach Austin).*

Please include the contact person (teacher, coach, room mom), etc and their contact information.

Step Three: Entering Team Information (continued)

If you are not interested in keeping track of how much each Classroom/Team brings to your Scrip program, just enter your Team as follows:

- Group/Organization Name as your Classroom/Team. (If you do this, you will only keep track of the sales, profit, etc. for the Organization.)
- Campaign will direct 100% to Organization.
- All Families/Members orders are placed under the single Classroom/Team (See Figure 19).

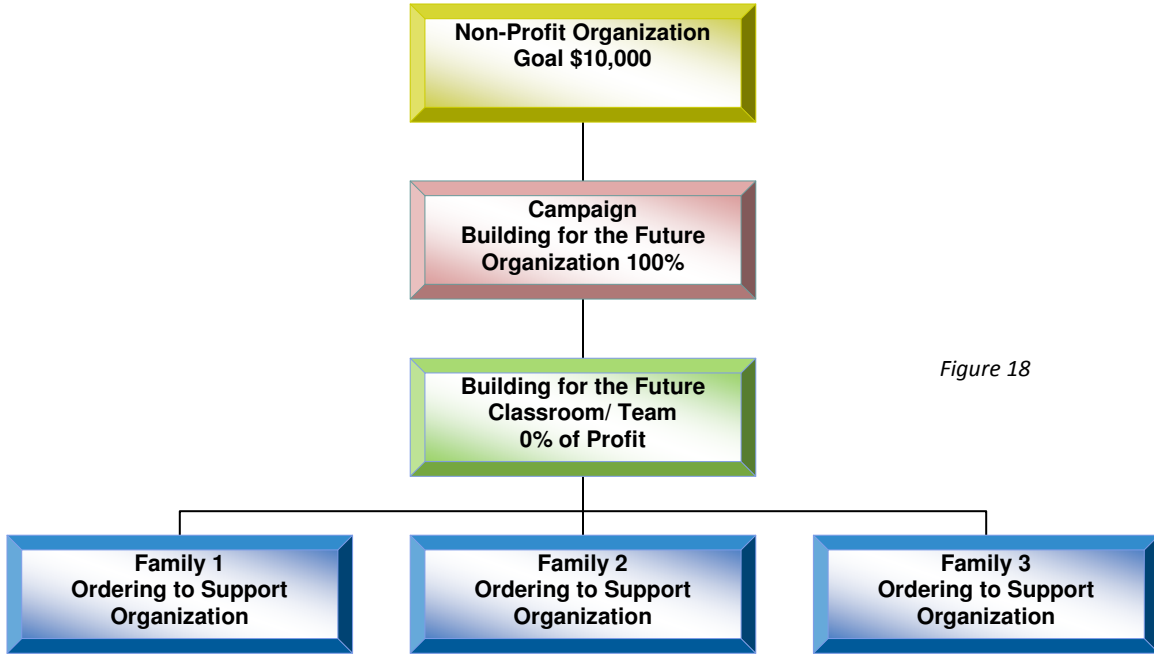


Figure 18

Manage your Accounts

If you choose to login as a regular User, the following screen will appear (Figure 19). You will have the option to access your group’s account, place your own personal order, or navigate your personal account.

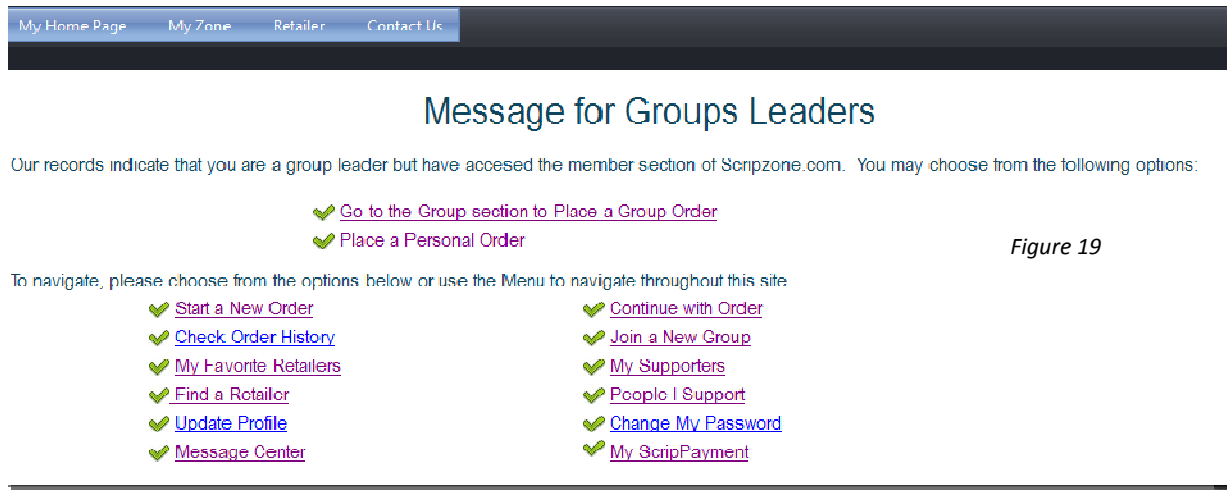


Figure 19

If you are the group leader for more than one organization, you can switch between groups by clicking on “Manage your Groups” (Figure 20).

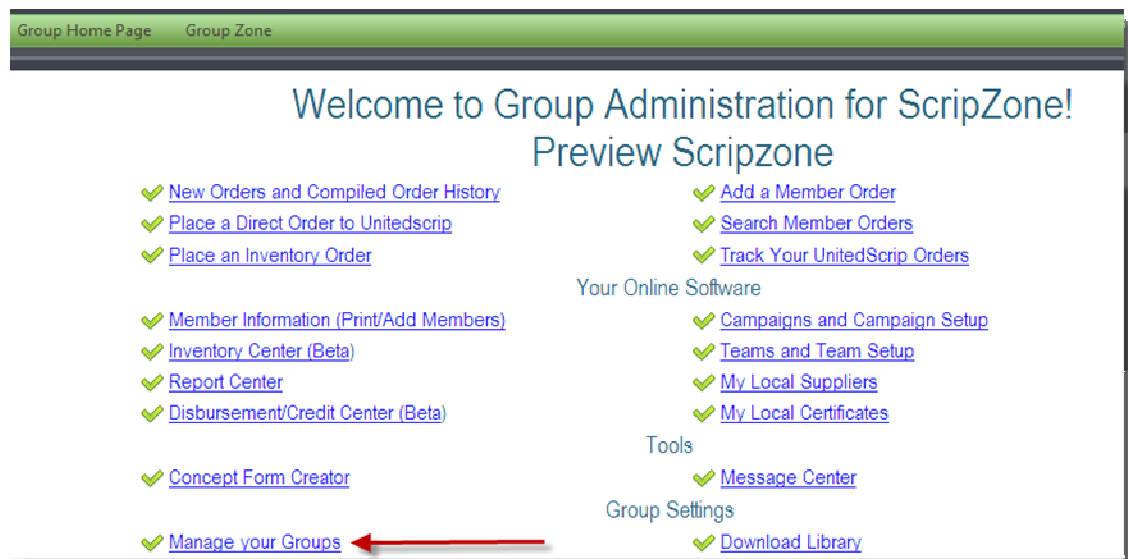


Figure 20

At the next screen (Figure 21), you can choose the drop-down menu to select the group that you would like and click on “Set this group as my Default Admin Group.” Come to this page every time you need to change between groups.

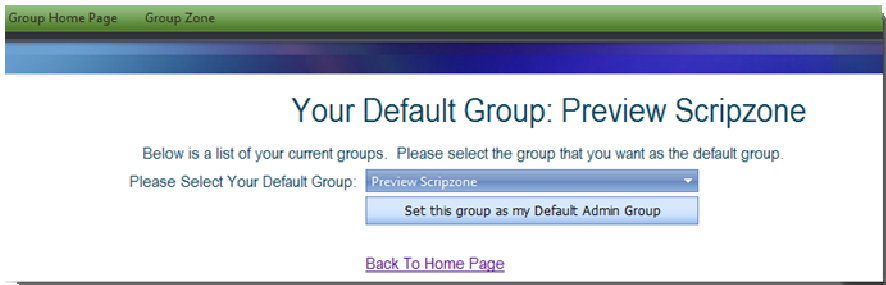


Figure 21

Download Library

The “Download Library” link located in the bottom right of the Group Home Page (Figure 22) provides several useful documents for your organization’s Scrip program such as flyers.

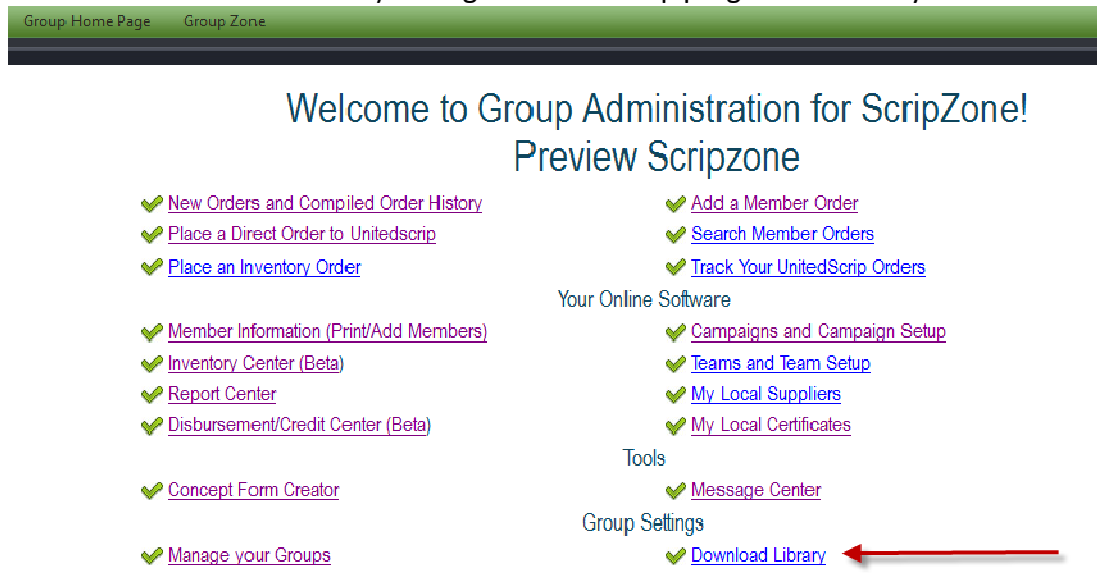


Figure 22

Figure 23 shows all the available materials. This is a revolving source for support materials. Check back occasionally for new resources.

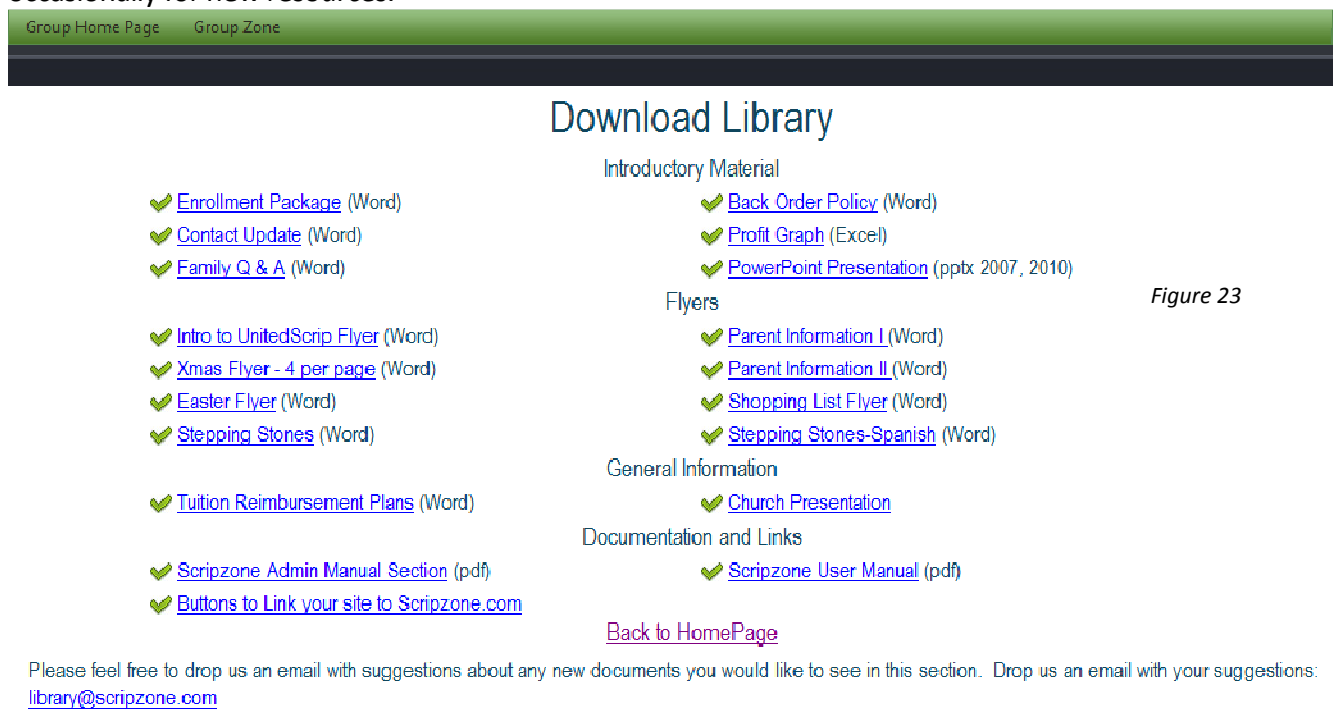


Figure 23

Chapter Two: Members



UnitedScrip and www.ScripZone.com

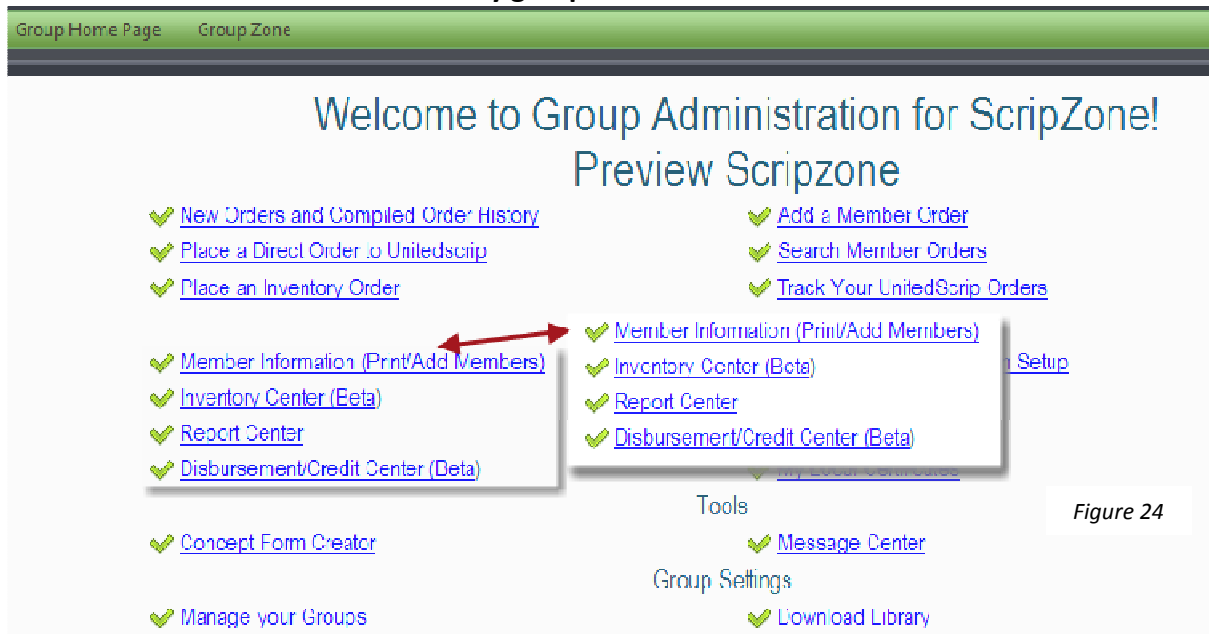
Entering Members

There are two methods for entering members into your Group Scripzone site. Members may enter their own information or the Group Coordinator may enter member information from the admin section. ScripZone was created to help the Group Coordinator minimize the amount of time spent with this fundraiser. We recommend that you encourage members to register and order online. As the Coordinator, you will receive email notification of each order and the orders will stay in your group cart until you compile them to be sent for fulfillment.

Method 1: Members register online

After you have set up your campaigns and teams, you will need to send your members instructions for registering online, your group ID, and information about the payment methods that your organization has chosen. We have flyers with this information in the appendix of this manual or in the download library section on the group home page of ScripZone. You will need to add your group ID and remove any payment methods that you are not offering before printing or emailing the flyer. If you have any questions about modifying a flyer, please call UnitedScrip for help.

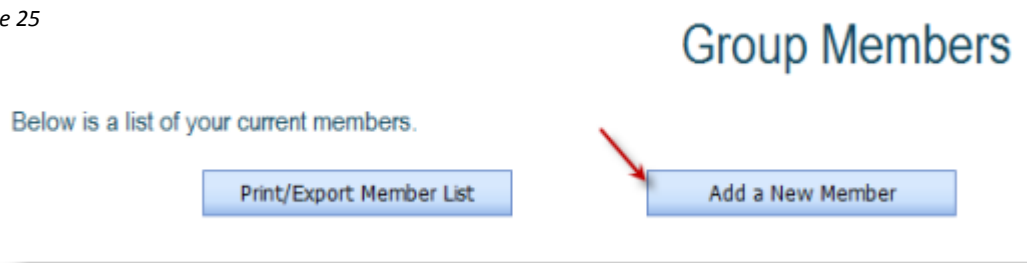
Method 2: Member Information entered by group coordinator



At the Group Home Page, click on “Member Information (Print/Add Members)” as seen in Figure 24.

A new screen will appear and you will need to click on “Add a New Member” (Figure

Figure 25



25).

Entering Members (continued)

Fill in the member information and click “Add Member” as Figure 26 shows. Only four of the fields below are required to add a member:

- Email
- First Name
- Last Name
- Default Team

Figure 26

You may add more members or choose to “Close Window.”

Important information about the email field:

The email field is required and must be unique for every user of ScripZone. If the Coordinator does not have a member’s email address, a fake email, the organization’s initials followed by a number, the member’s first and last name or anything unique to your organization may be entered as a substitute. *The information that is entered in the email field the first time becomes that member’s User Name.*

What happens if a member entered by the Coordinator wants to order online?

If a member that has been added by the Group Coordinator ever wants to activate his/her own ScripZone account, s/he should not register as a New User because two accounts would be listed for the same member. The member should give the Coordinator a current email address so that the

member information can be updated. Once the address has been corrected, the Coordinator should give the member the information previously entered in the email field as the member's User Name. The member will log on to www.scripzone.com and click on Login, then select "Forgot My Password" and enter their User Name. The password will be emailed to the member's provided email address.

The member can obtain all of their login information by going to www.scripzone.com, selecting Login and then selecting "Forgot My User Name" and entering their email address. The User Name will be emailed to them. Go back to www.scripzone.com and click on "Forgot My Password" and enter the User Name so that the password will also be sent via email.

Message Center – (Emailing Members)

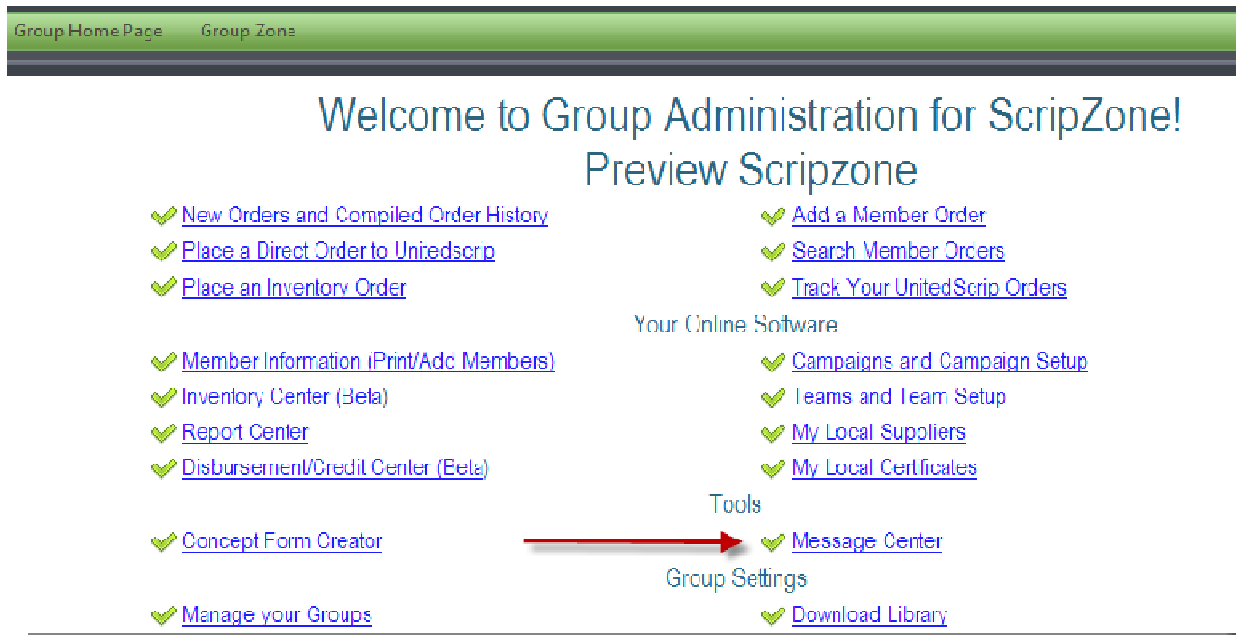


Figure 27

The message center (as pointed out in Figure 27) is a great way to communicate with your members. You may create an email that is sent to all of your members or an individual member. The email that you create is sent to their message center on ScripZone as well as the email address that is in our files for the member. Note: Members that are added via the group site do not receive emails from the message center.

To begin click on “Message Center” and new screen appears (Figure 28).



Figure 28

Click on “New Message” and then choose if you would like your email to be sent to everybody or one member. Type your message and hit “Send Email.”

Message Center (continued)

Email Everybody
 Email a Member

Subject:

Normal ▼ Arial ▼ 2 (10pt) ▼ **B** *I* U ~~S~~ ▼

▼

Don't forget all orders must be submitted no later than 12 noon Wednesday, Oct. 1. We will compile and send the orders to UnitedScrip on the Friday, Oct 3rd.

If you are Paying to the Group, **All payments must be received in the Office by Wednesday.**

Online Payments made thru the Direct ScripPayment Gateway must be placed by the Oct.1.

Any unpaid orders or orders placed after 12 noon Oct 1, will be moved tot he next order on October 15th.

Please pickup your cards on Wednesday in the office.

Remember a signature is required for all orders sent home with children.

Thank you for Supporting our Group with your Scrip Purchase!

Megan

Figure 29

The emails that you send will be listed on the screen (Figure 29). Your members will receive their email in their normal email box and their ScripZone box. Please note: Your members may only reply to your message via the ScripZone message center and cannot respond from their private email accounts.

Chapter Three: Payment Methods



UnitedScrip and www.ScripZone.com

Payment Options

This section is included in the Family Manual as well, and it outlines the payment options available to your group; members may give payment directly to the Group Leader, set up their own ACH account, or use a credit card from their personal Scripzone account. Your group will more than likely have already selected which of these options are possible for your members, but these can be altered or corrected at any time. Each option is more fully outlined below, with special attention paid to the ScripPayment Gateway option.

Payment to Group Coordinator

Orders are placed online and the member pays via cash or check to your Organization.

- Once an order is placed, a confirmation of that order is emailed to your email account and to your Group's Scrip Coordinator (Figure 30).
- Your order will be held in the queue pending payment to the Group or Organization.
- Once payment is confirmed, your Scrip Program Administrator will submit your order for compilation with the entire group order.
- All orders are shipped directly to the address of record for the organization.
- Please email or contact your Group Scrip Coordinator for delivery dates, pick-up, and details.
- If payment is not received prior to compilation of orders, all unpaid orders are held until payment is received and next order compiled and sent to UnitedScrip for shipment.

Thank You for your Order

This order will be sent directly to your Group Scrip Coordinator.

For information or details relating to pick-up or delivery of your order, contact your Group Scrip Coordinator.

Page 1 of 1 Pdf

Details For Order

Order #: 87
Date: 9/10/2009
Ship Via: Order Sent To Group Leader. Please check with your group leader
Bill To: Carol Rampey
304 Deer Trail
Send To: Carol Rampey
304 Deer Trail
Payment: Paid to Group Leader

This order benefits: Daniel High School

| Certificate | Quantity | Profit Brought | Total |
|---------------------------------|----------|----------------|----------|
| A.J. Wright | 2 | \$3.50 | \$50.00 |
| Amoco | 2 | \$4.00 | \$200.00 |
| L.L. Bean | 4 | \$18.00 | \$100.00 |
| Sub Total: | | | \$350.00 |
| Shipping & Handling: | | | \$0.00 |
| Grand Total: | | | \$350.00 |

ScripRewards generated by this Order: \$25.50

In Partnership with www.UnitedScrip.com

Thursday, September 10, 2009 Page 1 of 1

Page 1 of 1 Pdf

Figure 30

ScripPayment Gateway

Orders are placed online and the member pays through the member's electronic banking account. This account is established by the member. This type of payment incurs a \$0.50 fee for each transaction.

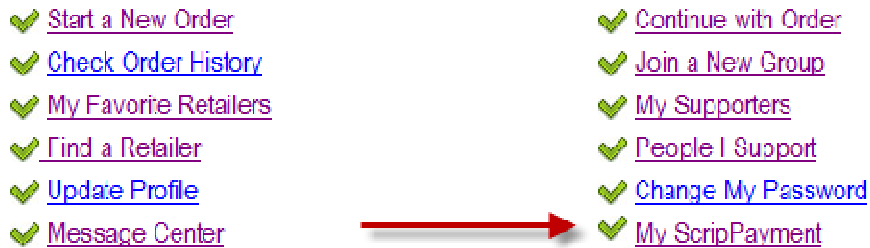
How a member establishes a Direct Electronic ACH via ScripZone.com's ScripPayment Gateway

Your Group must have chosen this as a payment option.

- From the User Home Page, click on My ScripPayment to begin the applications process (Figure 31).

To navigate, please choose from the options below or use the Menu to navigate throughout this site.

Figure 31



Complete the ScripPayment ACH Account Information (Figure 32). Be sure to indicate if the account is a Checking or a Savings Account, and then create your PIN.

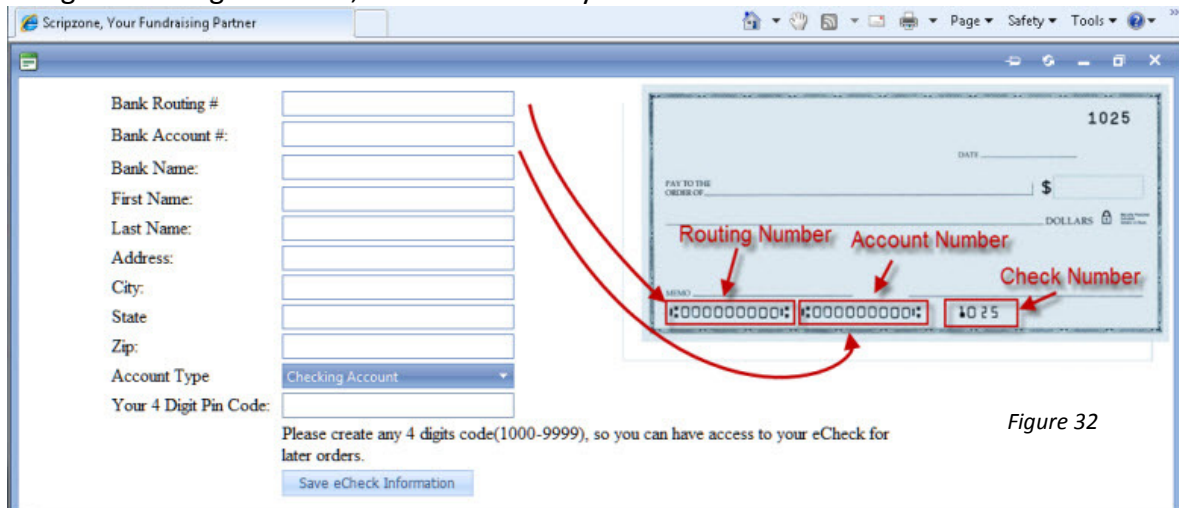


Figure 32

- Accept the Terms and Conditions and you are on your way to a secure payment option for your Scrip orders.
- The progress of your application can be noted from the User Home Page of your www.scripzone.com site.

- Once you submit the Banking Information required, our Gateway will verify your accounts by depositing a small amount **INTO** your account. Login back into your ScripZone.com site to check the status of your Application (Figure 33). This process requires 3 – 5 business days.

✔ [My ScripPayment](#) [\(Waiting for your Approval\)](#)

Watch for your Application Status to change!

Figure 33

- Once Status has changed to **Waiting for Your Approval**, please contact your Bank and request the amount deposited. If you bank online, check your bank account for the transaction and note the amount deposited. Amounts will vary with each verification process. See Figure 34 below:

Statement Period as of 07/17/2010

| | | | |
|------------|---|--------|------------|
| 07/16/2010 | UNITEDSCRIP, INC DES:ACH ID:(864) 886-9702 INDN H.SMITH CO ID:1000 | \$0.06 | \$7,467.49 |
|------------|---|--------|------------|

Check your account for amount deposited from UnitedScrip, Inc.

Figure 34

After UnitedScrip has deposited the amount into your account,

- Login into your secure www.scripzone.com site.
- From Home Page, Click on **“My ScripPayment (Waiting for Your Approval)”** and follow the instructions given in Figures 35 and 36:

*If you would like to apply for a new account, follow the **Add New ePay** to begin enrollment process. You may request up to three (3) checking accounts in our Scrip Payment Gateway.*

Add New ePay

*Below is a list of your current or pending eCheck Accounts. To complete the verification of your eCheck Account, please follow the **Click Here to Verify Link** below.*

| | Bank Name | Account | Status | |
|---|-----------------|-----------|---------------------------|---|
| 1 | First Citizens | *****6209 | Waiting for Your Approval | Click Here to Verify your Account |
| 2 | Bank Of America | *****9437 | Waiting for Your Approval | Click Here to Verify your Account |

Figure 35

Account to be Approved:

Bank Name:

Enter Amount:

Number of Attempts:

Note: Please check your bank account for a small deposit from UnitedScrip, note the amount and return to www.ScripZone.com and verify the amount by entering deposit and Click Approve eCheck.

Figure 36

- Enter the amount deposited into your account and click **Approve ScripPayment**. You are now approved to electronically process payment for your Scrip Orders, as Figure 37 shows.

| | Bank Name | Account | Status |
|---|-----------------|-----------|----------|
| 1 | First Citizens | *****6209 | Approved |
| 2 | Bank Of America | *****9437 | Approved |

Figure 37

Please note that by approving and establishing this account you understand and agree to the Terms and conditions of www.scripzone.com.

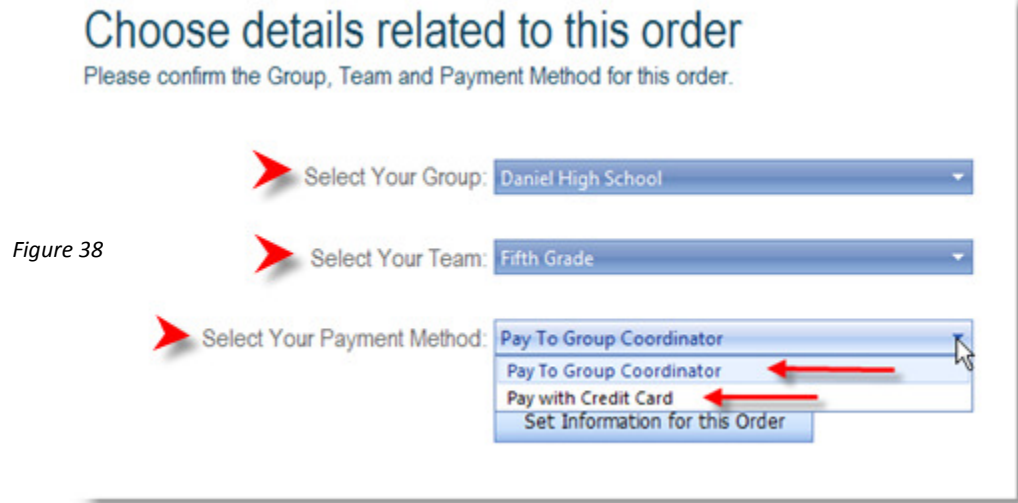
- ✓ A \$0.50 fee will be added to your total order and processed with each payment. This charge applies to each transaction.
- ✓ I authorize UnitedScrip to electronically transfer funds from my account for payments due. Furthermore, if any such electronic debit(s) should be returned by my financial institution as unpaid (Non-Sufficient or Uncollected Funds), I understand that my nonprofit will be charged the amount of order in full, plus a banking fee of \$25.00. Your order will be cancelled if not yet released for fulfillment by your Group Coordinator. If the order has shipped, the Group Coordinator will be notified to hold order until payment is received to organization. If the order has been released to you, you are responsible to pay the organization in full, plus any banking charges.

Credit Card Payment

Your Group must have established the availability of this payment option.

Visa/Mastercard only

If Credit Card Payment is permitted, prior to beginning order you must set order details and select Pay with Credit Card (Figure 38).



Continue with normal order selection process.

If your Group has elected to offer the optional payment method using Credit Cards (**Master Card/Visa only**), please note that when choosing the **Pay with Credit Card** Option, the List of Available Retailers and the ScripRewards for each Retailer will change. If a Retailers Discount Structure is 3% or below, that Retailer's Gift Cards are not available for purchase with Credit Cards. Please return to Choose Details for Order, and select Payment to Group Coordinator, for the Payment Method, to proceed to a full listing of Retailers and the percentage discounts or ScripRewards. To purchase Retailer's Gift Cards whose percentage discounts are 3% or below, payment must be made to the Group.

Payment Options (continued)

If you are paying with a Credit Card, please complete and confirm Billing and Shipping Information (Figure 39), and fill in the necessary Credit Card information and shipping Options (Figure 40).

Figure 39

Figure 40

- Shipping Options are available only for those orders that are paid by Credit Card (Figure 41). Shipping Charges will apply. To avoid additional charges, orders may be shipped directly to Group Coordinators with their next order. Orders shipped to Organization are compiled with their regular orders. Please consult with your Coordinator for shipping details and delivery options. All orders placed and paid to the Organization are compiled together as one order and shipped directly to the address of record for the organization.

Figure 41

| Shipping Method | Cost |
|-----------------------------|-----------------------------|
| Certificate | Ship To Group Leader \$0.00 |
| L.L. Bean | US Priority Mail \$5.00 |
| | UPS Ground \$8.00 |
| | UPS Second Day \$10.50 |
| Sub Total: | \$250.00 |
| Shipping and Handling Cost: | \$0.00 |
| Total Cost: | \$250.00 |

Shipping Information for Groups

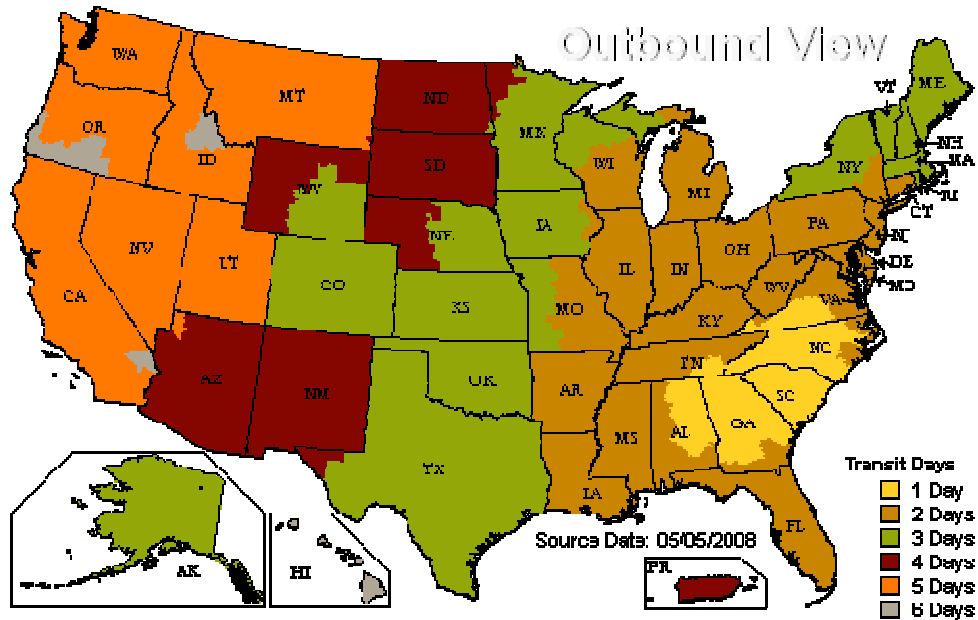


Figure ?

UnitedScrip Shipping Schedule

UnitedScrip is located in South Carolina (Gold Area) and ships UPS. Please refer to chart for the expected shipping times and to determine how you would like your packages shipped to your Group or Organization. Special Rates may apply for Next Day Service. Orders are shipped in order received and under normal circumstances are **shipped the same day**.*

(*Exceptions may occur during the busy holiday season from November 20 – December 20. Please plan for one additional day to receive your order.)

| | |
|---|--|
| ▪ Regular Mail (orders under 8 cards only) | \$1.25 |
| ▪ Priority Mail USPS | \$5.25 |
| FedEx or UPS Rates | |
| ▪ Ground – Residential | \$9.50 (Signature Required) |
| ▪ Ground – Business/School | \$7.50 (Signature Required) |
| ▪ 2nd Day Air AM | By quote (not available in all areas) |
| ▪ 2nd Day Air – Residential | \$13.50 (Signature Required) |
| ▪ 2nd Day Air - Business/School | \$11.00 (Signature Required) |
| ▪ Next Day Air - Residential | \$14.00 (Signature Required) |
| ▪ Next Day Air - Business/School | \$11.50 (Signature Required) |
| ▪ Next Day by noon- Residential | \$16.00 (Signature Required) |
| ▪ Next Day by noon - Business/School | \$13.50 (Signature Required) |

*Waiver must be signed for packages left without signature. UnitedScrip cannot be responsible for lost or stolen gift cards left without signatures!

*****Please note that rates reflect shipping costs that include partial payment of costs paid by UnitedScrip. It is not our intention to profit from shipping; we will gladly adjust if possible!***

About Security

We take your security seriously.

Communications with your browser is completed over an encrypted communication platform for security reasons, as you can see in Figure 42. Most modern browsers will allow you to use encrypted communications when you navigate our site. You may not be able to access our site if you are using an old browser (5 years old or more). If you have a problem accessing our secure site, please send an email to: support@scripzone.com.

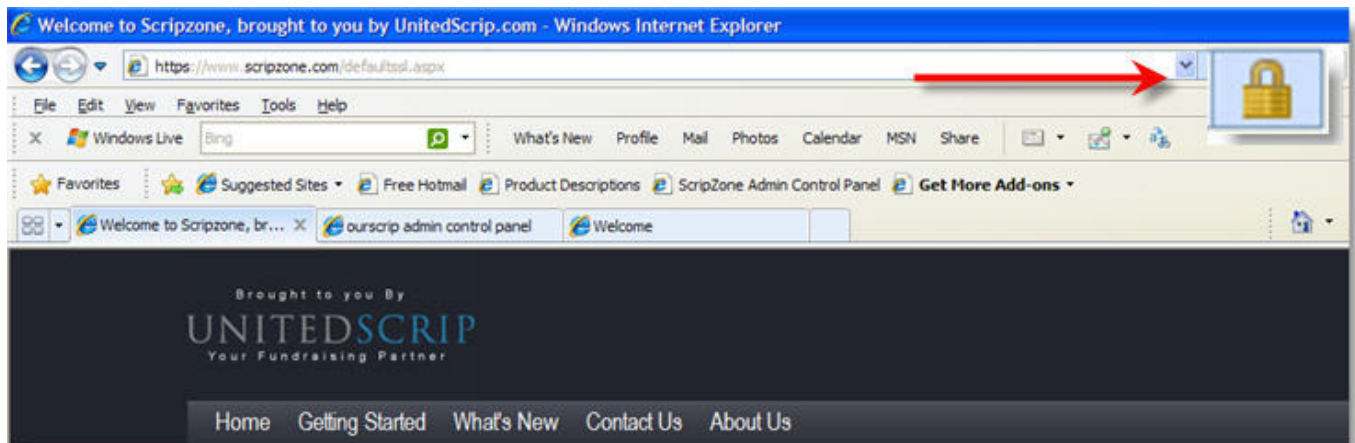


Figure 42

Chapter Four: Ordering



UnitedScrip and www.ScripZone.com

Processing Online Orders

What do we mean by compiling an order?

Compiling orders is the process of consolidating or batching together all the orders from a specific time period into one order. For example, you can compile once a week, twice a month, or monthly. Once compiled, the orders in that time period are consolidated into a single order via the compilation process to send to UnitedScrip.

To compile your orders or review previous compilations, just click:

- **New Orders and Compiled Order History** from Home Page (Figure 43), or from the Group Zone drop down, **Your Group Orders**.

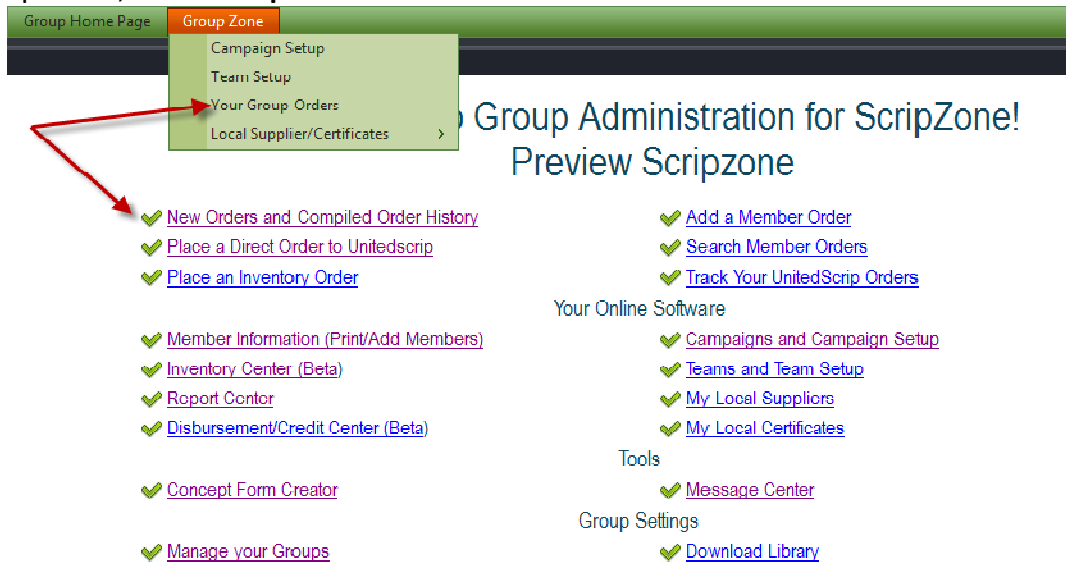


Figure 43

The list of compiled orders will appear, with the latest **Order Summary** at the top. Orders that are not yet Compiled WILL NOT HAVE A DATE in the “Order Compiled On” column as Figure 44 shows. This undated Summary will continue to build as your members’ continue to order, and will end once you begin the ‘**Compilation**’ process. If an order needs to be changed, you will need to edit the order before compilation of the batch.

Summary of your Compilations Preview Scripzone

| Compilation # | # of Orders in Compilation | Order Compiled On | Total for Compilation (Without S&H) | |
|---------------|----------------------------|-------------------|-------------------------------------|---|
| 56 | 5 | 07/27/11 | \$860.00 | Check Compilation Details |
| 55 | 11 | 06/13/11 | \$2,405.00 | Check Compilation Details |
| 54 | 8 | 06/03/11 | \$1,675.00 | Check Compilation Details |
| 53 | 12 | 03/25/11 | \$11,705.00 | Check Compilation Details |
| 52 | 4 | 03/02/11 | \$1,075.00 | Check Compilation Details |

Figure 44

Processing Online Orders (continued)

After selecting “Check Compilation Details,” you will be taken to a management center for that particular compilation. What follows is a summary of all the possible functions of this page. Note that none of these functions reflect campaign information pertinent to profit disbursement.

To access the page represented in Figure 45, select “New Order and Compiled Order History” on the Home Page, select a particular compilation number, and “Check Compilation Details.”

Order Compile On: Invoice:

Tracking Info:

1. Start Compilation Process 3. Preview All Orders 5. Deposit Slip

2. UnitedScrip Summary 4. Local Certificates Summary 6. 8160 Labels

Drag a column header and drop it here to group by that column

| Order # | Date | Placed By | Place For | Team | Payment | Total | Payments | Profit | Inv | Move | 7. | 8. | 9. |
|---------|----------|-------------------------|--------------|--------------|---------------|----------|----------|---------|--------------------------|--------------------------|-------------------------------|----------------------------|-------------------------------|
| 31323 | 06/15/11 | Leader Scripzone | Glenn Scott | General Fund | Paid to Group | \$50.00 | \$.00 | \$4.50 | <input type="checkbox"/> | <input type="checkbox"/> | Order Details | Edit Order | Edit Payments |
| 31311 | 06/15/11 | Rampey Carol (By Admin) | Rampey Carol | \$50 | Paid to Group | \$100.00 | \$.00 | \$14.00 | <input type="checkbox"/> | <input type="checkbox"/> | Order Details | Edit Order | Edit Payments |

The following reports should only be used if your campaigns only have one split:

10. [Orders with Family Profit](#) [Orders by Team Profit](#) 11.

Figure 45

****The order above has not been compiled. Please note that on the Order Details there is no date listed. When you compile the order a date is present in the circled area.**

From the new screen, you will have access to the following items:

1. Option to Compile (Start Compilation Process)
2. Summary of all orders placed and to be filled by UnitedScrip (UnitedScrip Summary)
3. Preview of All Orders currently placed online (Preview All Orders)
4. Summary of Orders placed for Local Gift Cards (local inventory or retailers) (Local Certificate Summary)
5. List of Payments made to Group (Deposit Slip)
6. Label to print for distribution of orders (8160 Labels)
7. Link to Details of Individual Order (Order Details)
8. Option to Edit Individual Order (Edit Order)
9. Option to Edit Payment of Individual Order (Edit Payments)
10. Order statement including family profit (Orders with Family Profit)
11. Order statement including team profit (Order by Team Profit)

Each of these functions will be described over the next set of pages.

Question: What happens when I delete the only gift card in an order?

Answer: *The whole order will be voided, and once voided; you will not be able to add more gift cards to the order. Note: this only occurs if your order only has one gift card. If you delete a gift card from an order containing multiple gift cards, only the selected gift card will be deleted.*

1. Start Compilation Process

Step One – Compiling an Order

To begin the compilation process, follow link to **Start Compilation Process** (see #3, Figure 33 on the previous page) and review Order Summary (Figure 46).

Scripzone.com will show you the summary of all retailer orders by your members that are **Not Credit Card, Individual ACH, Local Gift Cards or Inventory Orders**. Your credit card and individual ACH orders in this compilation will be shipped with this order as well, but the summary will not appear here. If your compilation contains any credit cards or individual ACH orders you will receive in the **same** shipment a package for each type of order (One shipping cost to you):

You are about to Compile your latest Order

Here is the summary of your compiled order. Please note that this summary only includes UnitedScrip's certificates that were paid with a check to the group coordinator. Credit card orders are processed and invoiced separately. We will ship credit card orders placed by your members to you only if requested by your member during the checkout process.

[Verify Order](#) [Group Address](#)

[Go To Confirm Your Address](#)

| UnitedScrip ID | Retailer Concept | # of Gift Cards | Main Retailer | Profit | Your Total |
|----------------|---------------------------------|-----------------|---------------|---------|------------|
| 583 | 1-800-Baskets \$20.00 | 10 | Fresh Gift | \$28.00 | \$172.00 |
| 782 | Lowe's Home Improvement \$25.00 | 1 | Lowe's | \$1.00 | \$24.00 |

[Go To Confirm Your Address](#)

[Back To Compile Orders](#)

Figure 46

- One package with Credit orders. You don't have to collect this money because these orders are already paid. Each member order is packaged separately. All you have to do is hand them out.
- One package with Individual ACH orders. These orders were paid when placed.
- One package with orders paid to group.

Remember, your local gift cards will not appear here, since these are filled from your inventory. You may access them by clicking on "Local Certificates Summary."

Step Two - Confirm Order

The last step of the compilation process is to confirm your address, add any comments and select your shipping method (Figure 47). Please note that UnitedScrip allows the orders to be shipped to an alternative address other than the address in our records, but this may delay your order.

You are about to Compile your latest Order

Note: After compiling, you will not be able to edit your order. If you need any changes, just use the comments sections of your orders.

Verify Order Group Address

| | | |
|----------------------------|---|---|
| Contact First Name: | <input type="text" value="Scripzone"/> | <input type="checkbox"/> Ship To Alternative Address |
| Contact Last Name: | <input type="text" value="Leader"/> | <input type="text"/> |
| Address Line 1: | <input type="text" value="305 Catawba Circle"/> | <input type="text"/> |
| Address Line 2: | <input type="text"/> | <input type="text"/> |
| City: | <input type="text" value="Seneca"/> | <input type="text"/> |
| State: | <input type="text" value="SC"/> | <input type="text"/> |
| Zip: | <input type="text" value="29672"/> | <input type="text"/> |
| Phone: | <input type="text" value="(864) ___-____"/> | <input type="text" value="___-____"/> |

Comments:

Choose Shipping Method: Choose your desired Shipping Method

Choose your desired Shipping Method

Pickup

UPS Ground to School or Business (\$7.50)

UPS Residential (\$8.50)

UPS 2nd Day End of Day (Business) Air Letter/Pac (\$10.50)

2nd Day End of Day (Residence)

UPS 2nd Day A.M. Air Letter/Pac by quote

UPS Next Day Air Saver UPS (actual UPS charge will appear on invoice)

Priority Mail

[Back To Verify Order](#) [Back to All Compile Order](#)

Figure 47

Question: What happens after an order is compiled?

Answer: After an order is compiled, we start our fulfillment process. Normally, we ship your compilations the same day, unless you compile after 3:00 PM ET. Orders have to leave our fulfillment facilities by 5:00 PM ET, so it is difficult to process your order after 3:00 PM ET, but we do our best to fill almost any order that we feel we can ship the same the day.

2. UnitedScrip Summary

This report gives you a summary of the UnitedScrip certificates ordered by your members. The report divides the summary by Check Orders and Credit Card Orders; Figure 48 provides an example of this screen.

UnitedScrip Order Summary for Compile #: 24
Monday, October 05, 2009

Payment Method: Paid to Group Leader
Shipping Method: Group Leader Pickup

| Certificate | Qty | Profit | Subtotal |
|--------------------------------------|-----|---------|-------------------|
| Academy Sports and Outdoors \$25.00 | 2 | \$2.00 | \$48.00 |
| Ace Hardware \$100.00 | 1 | \$4.00 | \$96.00 |
| ACME \$50.00 | 3 | \$6.00 | \$144.00 |
| Allposters.com \$25.00 | 3 | \$6.00 | \$69.00 |
| Bahama Breeze \$10.00 | 10 | \$9.00 | \$91.00 |
| Brenner's Steakhouse \$20.00 | 3 | \$4.80 | \$55.20 |
| iTunes \$25.00 | 20 | \$22.50 | \$477.50 |
| Kohl's \$100.00 | 4 | \$16.00 | \$384.00 |
| Landry's Seafood House \$20.00 | 1 | \$1.60 | \$18.40 |
| Lane Bryant \$25.00 | 2 | \$3.50 | \$46.50 |
| Lee Roy Selmon's \$25.00 | 1 | \$1.25 | \$23.75 |
| Loews Cineplex Entertainment \$25.00 | 23 | \$40.25 | \$534.75 |
| Logan's Roadhouse \$25.00 | 5 | \$10.00 | \$115.00 |
| Long John Silver's \$5.00 | 1 | \$0.45 | \$4.55 |
| Starbucks \$5.00 | 1 | \$0.35 | \$4.65 |
| Starbucks \$25.00 | 4 | \$7.00 | \$93.00 |
| Total: | | | \$2,205.30 |

Payment Method: Paid with Credit Card
Shipping Method: Directly Sent to Family by UnitedScrip

| Certificate | Qty | Profit | Subtotal |
|--|-----|--------|----------------|
| Baskin Robbins \$2.00 | 1 | \$0.10 | \$1.90 |
| Blockbuster Single Movie Rental \$4.00 | 1 | \$0.48 | \$3.52 |
| Cascading Gift Card Holder \$2.50 | 2 | \$1.35 | \$3.65 |
| Starbucks \$5.00 | 1 | \$0.20 | \$4.80 |
| Total: | | | \$13.87 |

You may also print the Summary, Save the Summary to your files or export to a PDF file as indicated by arrows.

Figure 48

3. Preview All Orders

This report gives you details of every single order placed under that compilation. Please note that at the moment shipping and handling cost are not incorporate in the report. We offer this report to help you distribute your certificates. Note that this report may be used as individual invoices by cutting at lines and including in orders. Figure 49 is an example of such a report.

Page 2 of 5 Pdf

Order Placed By: Hector Him Order Placed On: 9/22/2009 8:47:34 AM
 Order Number: 206 Payment Method: Paid with Credit Card

| Certificate | Qty | Profit | Subtotal |
|---|-----|--------|---------------|
| 1.- Starbucks \$5.00 | 1 | \$0.20 | \$5.00 |
| Total order cost for this order: | | | \$5.00 |

Order Placed By: Hector Him Order Placed On: 9/22/2009 9:17:58 AM
 Order Number: 207 Payment Method: Paid to Group Leader

| Certificate | Qty | Profit | Subtotal |
|--|-----|---------|-----------------|
| 1.- Loews Cineplex Entertainment \$25.00 | 21 | \$36.75 | \$525.00 |
| Total order cost for this order: | | | \$525.00 |

Order Placed By: Hector Him Order Placed On: 9/22/2009 9:20:08 AM
 Order Number: 208 Payment Method: Paid to Group Leader

| Certificate | Qty | Profit | Subtotal |
|---|-----|--------|-----------------|
| 1.- Bahama Breeze \$10.00 | 10 | \$9.00 | \$100.00 |
| 2.- Starbucks \$25.00 | 4 | \$7.00 | \$100.00 |
| Total order cost for this order: | | | \$200.00 |

Order Placed By: Hector Him Order Placed On: 9/22/2009 9:32:39 AM
 Order Number: 211 Payment Method: Paid to Group Leader

| Certificate | Qty | Profit | Subtotal |
|--|-----|--------|-----------------|
| 1.- Allposters.com \$25.00 | 3 | \$6.00 | \$75.00 |
| 2.- Brenner's Steakhouse \$20.00 | 3 | \$4.80 | \$60.00 |
| 3.- Loews Cineplex Entertainment \$25.00 | 2 | \$3.50 | \$50.00 |
| Total order cost for this order: | | | \$185.00 |

Figure 49

4. Local Certificates Summary

This summary will show you what local certificates were included in an individual compilation. Figure 50 shows what this summary will look like.

Local Certificates for Compile #: 53
Tuesday, June 21, 2011

| Certificate | Qty | Profit | Subtotal |
|------------------------------|-----|---------|-----------------|
| bushel Navel Oranges \$30.00 | 2 | \$30.00 | \$30.00 |
| Grocery Store \$25.00 | 4 | \$5.00 | \$95.00 |
| Kroger \$100.00 | 2 | \$10.00 | \$190.00 |
| Publix \$25.00 | 4 | \$3.00 | \$97.00 |
| Total: | | | \$412.00 |

Figure 50

5. Deposit Slip

The deposit slip feature shows all of the payments made on this compilation. It separates the different payment methods: check, cash, etc. Figure 51 is an example of a deposit slip.

Preview Scripzone
Deposit Slip for Compile #: 53
Tuesday, June 21, 2011

| Order # | Name | Date | Payment Details | Amount |
|--|----------------|------------|-----------------|------------------|
| 23278 | Richard Brooks | 03/03/2011 | | \$1150.00 |
| 24636 | Chris Mitchell | 03/18/2011 | 1236 | \$400.00 |
| Summary for Payment Method: Check | | | | \$1550.00 |
| Grand Total. | | | | \$1550.00 |

1/1

Figure 51

6.8160 Labels

The labels function is useful when orders arrive to your organization and each person's order needs to be identified in some way. We have provided labels for you to print and attach to orders according to member name. Figure 52 is an example.

| Order #: | Date: | Placed By: | Total: | Rewards: |
|----------|------------|---------------------------|-----------|----------|
| 25105 | 03/25/2011 | Leader Scripzone | \$60.00 | \$30.00 |
| 24636 | 03/18/2011 | Mitchell Chris (By Admin) | \$230.00 | \$18.40 |
| 24631 | 03/18/2011 | Mitchell Chris (By Admin) | \$60.00 | \$6.00 |
| 24174 | 03/14/2011 | Leader Scripzone | \$150.00 | \$9.75 |
| 24161 | 03/14/2011 | Brooks Richard (By Admin) | \$50.00 | \$4.50 |
| 24144 | 03/14/2011 | Brooks Richard (By Admin) | \$625.00 | \$31.25 |
| 23838 | 03/09/2011 | Hendrix Greg (By Admin) | \$500.00 | \$20.00 |
| 23700 | 03/08/2011 | Kohanik Joseph (By Admin) | \$1000.00 | \$20.00 |
| 23281 | 03/03/2011 | Leader Scripzone | \$3875.00 | \$103.75 |

Figure 52

7. Order Details

This report is the same report that your members receive by email and is available in their order history. Follow link pointed out in Figure 53 to view Order Details. Figure 54 provides an example of this report which can also be used as a receipt.

| Order # | Order Placed On | Placed By | Order Benefits | Payment | Total | Profit | | |
|---------|-----------------|--------------|----------------|----------------------|----------|---------|-------------------------------|----------------------------|
| 193 | 09/21/09 | Hector Him | Hector Him | Paid to Group Leader | \$125.00 | \$11.00 | Order Details | Edit Order |
| 192 | 09/21/09 | Hector Him | Hector Him | Paid to Group Leader | \$810.00 | \$40.85 | Order Details | Edit Order |
| 190 | 09/21/09 | Carol Rampey | Carol Rampey | Paid to Group Leader | \$675.00 | \$26.25 | Order Details | Edit Order |
| 189 | 09/21/09 | Carol Rampey | Carol Rampey | Paid to Group Leader | \$245.00 | \$27.25 | Order Details | Edit Order |

Figure 53

Figure 54

Page 1 of 1 Pdf

Details For Order

Order #: 215
Date: 9/22/2009
Ship Via: Order Sent To Group Leader, Please check with your group leader
Bill To: Hector Him
305 Catawba Circle
Seneca, SC 29672
Send To: Hector Him
305 Catawba Circle
Seneca, SC 29672
Payment: Paid to Group Leader

This order benefits: Daniel High School

| Certificate | Quantity | Profit Brought | Total |
|---------------------|----------|---------------------------------|----------|
| Lane Bryant \$25.00 | 2 | \$3.50 | \$50.00 |
| ACME \$50.00 | 3 | \$6.00 | \$150.00 |
| | | Sub Total: | \$200.00 |
| | | Shipping & Handling: | \$0.00 |
| | | Grand Total: | \$200.00 |

ScripRewards generated by this Order: \$9.50

8. Editing Orders

To edit an order, go to the Group Home Page and click on “New Orders and Compiled Order History,” then click on “Compilation Details” of the compilation that contains the order that you need to edit. Then click the “Edit Order” link next to the member’s order as pointed out in Figure 55:

| Order # | Order Placed On | Placed By | Order Benefits | Payment | Total | Profit | | |
|---------|-----------------|------------|----------------|----------------------|---------|--------|-------------------------------|----------------------------|
| 324 | 10/05/09 | Hector Him | Hector Him | Paid to Group Leader | \$5.00 | \$0.35 | Order Details | Edit Order |
| 309 | 10/03/09 | Hector Him | Hector Him | Paid to Group Leader | \$25.00 | \$2.00 | Order Details | Edit Order |

Figure 55

How to edit an individual’s order (numbered in Figure 56):

- 1. Benefits, Team, and Campaign:** Click on the drop down box next to the item you want to edit. Change to correct name, team, or campaign and then click on “Update Order Beneficiary/ Team/ Campaign Info.”
- 2. Certificate Quantity:** Highlight the quantity that needs to be changed and enter the correct quantity. Click on “Update Items in Order.”
- 3. Incorrect Certificate (or denomination):** Click on delete next to the incorrect card (whether the item or denomination is incorrect) and then above the cart listing, enter the correct gift card in the area next to “Select a Retailer to be added to Order,” enter the quantity, and then click on “Add to Shopping Cart.”

****Please do not add gift cards that have yet to be ordered/need to be ordered to previously compiled orders. Any changes to compiled orders will not be seen by UnitedScrip and you will not receive the gift cards.**

The screenshot shows the 'Editing your Order' window for Order Number 31113. The order was placed by Charisie Lemos on 6/10/2011. The current beneficiary is Lemos, Charisie, from the Charisie team, under the Default Campaign. A checkbox labeled 'To be moved to next compile' is present. Below this is a section for 'Select a Retailer to be added to Order' with a text input field 'Type your Certificate Here' and a 'Quantity' field. A table lists certificates, with one entry for '1-800-Baskets \$20.00' having a quantity of 12 and a subtotal of \$240.00. At the bottom, there is a 'Total Amount' of \$240.00 and buttons for 'Update Items in Order' and 'Close Window'.

Figure 56

Question: What happens if someone hasn’t paid for their order?

Answer: Before compiling the order, the group coordinator has the ability to remove an order. This action causes the order to be held for the next compilation. Simply follow the instructions for editing an order and then check the box that says “To be moved to next compilation” as shown in Figure 56. Click “Update Order Beneficiary/Team/Campaign” and close the window. The order will show in the window but will not compile.

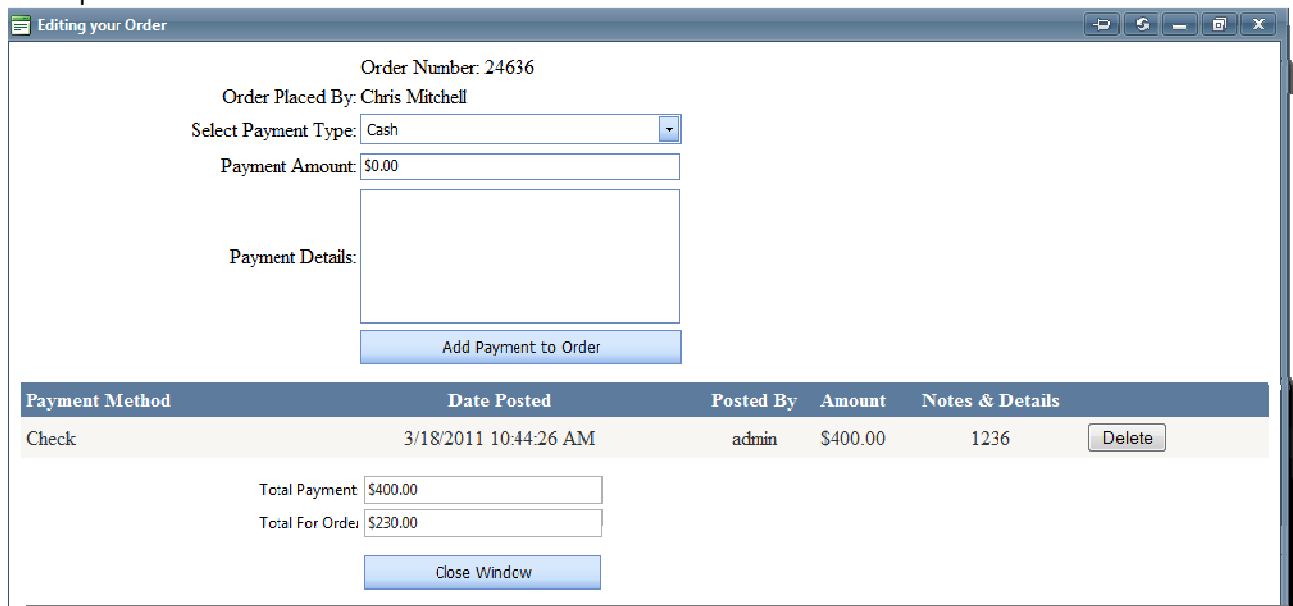
The order will be moved when the compilation process begins.

9. Edit Payments

This feature is useful for your organization’s record-keeping. To confirm your members’ methods of payment, follow the “Edit Payments” link on the “Check Compilation Details” screen. Select the method of payment between Cash, Check, Credit Card, or PayPal.

Note: *PayPal is only available as a method of payment if your group has this set up as an option. You will not need to handle any Credit Card transactions conducted on www.scripzone.com, but if your organization can personally handle credit card payments, they should be recorded here.*

In the Payment Details box, you may document the Check Number or Credit Card number. Don’t forget to enter the amount of the payment in the correct box. When you are finished with a particular order, select “Close Window” and the changes will be saved automatically. Figure 57 shows an example of this screen.



The screenshot shows a web application window titled "Editing your Order". The window contains the following elements:

- Order Number: 24636
- Order Placed By: Chris Mitchell
- Select Payment Type: Cash (dropdown menu)
- Payment Amount: \$0.00 (text input)
- Payment Details: (empty text area)
- Add Payment to Order (button)
- Table of Payment Methods:

| Payment Method | Date Posted | Posted By | Amount | Notes & Details |
|----------------|-----------------------|-----------|----------|--|
| Check | 3/18/2011 10:44:26 AM | admin | \$400.00 | 1236 <input type="button" value="Delete"/> |

Below the table, there are two text input fields:

- Total Payment: \$400.00
- Total For Order: \$230.00

At the bottom of the window is a "Close Window" button.

Figure 57

10. Orders with Family Profit

This order summary looks similar to the “Preview All Orders” function. This summary would be needed when your organization splits the profit with your members. The summary shows the actual profit that each member will earn. The summary only works for campaigns that contain one split. Figure 58 provides a screenshot.

Details For Order Compile: 53

Figure 58

Tuesday, June 21, 2011

| | |
|-----------------------------------|--------------------------------------|
| Order Placed By: Scripzone Leader | Order Placed On: 3/3/2011 8:52:08 AM |
| Order Number: 23276 | Payment Method: Paid to Group |
| Notes: Online Order | Phone: 864386 |
| Team: \$50 | |

| Certificate | Qty | Family Profit | Subtotal |
|------------------------------|-----|--------------------------|------------|
| 1- BP Gas Stations \$50.00 | 3 | \$0.74 | \$150.00 |
| 2- Grocery Store \$25.00 | 4 | \$1.65 | \$100.00 |
| 3- Home Depot \$100.00 | 1 | \$1.32 | \$100.00 |
| 4- Walmart \$250.00 | 12 | \$19.80 | \$3,000.00 |
| Total Profit: \$23.51 | | Total: \$3,350.00 | |

| | |
|---------------------------------|--------------------------------------|
| Order Placed By: Richard Brooks | Order Placed On: 3/3/2011 8:56:25 AM |
| Order Number: 23278 | Payment Method: Paid to Group |
| Notes: Entered By Group Leader | Phone: |
| Team: LLA | |

| Certificate | Qty | Family Profit | Subtotal |
|------------------------------|-----|--------------------------|----------|
| 1- A Pea in the Pod \$25.00 | 10 | \$15.75 | \$250.00 |
| 2- ACME \$100.00 | 4 | \$11.20 | \$400.00 |
| 3- Walmart \$100.00 | 5 | \$7.00 | \$500.00 |
| Total Profit: \$33.95 | | Total: \$1,150.00 | |

| | |
|-----------------------------------|--------------------------------------|
| Order Placed By: Scripzone Leader | Order Placed On: 3/3/2011 9:23:48 AM |
| Order Number: 23279 | Payment Method: Paid to Group |
| Notes: Online Order | Phone: 864386 |
| Team: \$50 | |

| Certificate | Qty | Family Profit | Subtotal |
|--------------------------------------|-----|------------------------|----------|
| 1- Advance Auto Parts \$25.00 | 1 | \$0.58 | \$25.00 |
| 2- Aeropostale \$25.00 | 1 | \$0.66 | \$25.00 |
| 3- Barnes & Noble Bookstores \$25.00 | 1 | \$0.74 | \$25.00 |
| 4- CVS Pharmacy \$25.00 | 1 | \$0.33 | \$25.00 |
| 5- Dick's Sporting Goods \$25.00 | 1 | \$0.41 | \$25.00 |
| 6- Jo Ann Fabrics \$20.00 | 1 | \$0.40 | \$20.00 |
| 7- Kroger \$100.00 | 2 | \$3.30 | \$200.00 |
| 8- Marathon \$100.00 | 1 | \$0.99 | \$100.00 |
| 9- Michael's \$25.00 | 1 | \$0.33 | \$25.00 |
| 10- Publix \$25.00 | 4 | \$0.99 | \$100.00 |
| 11- Subway \$10.00 | 1 | \$0.10 | \$10.00 |
| Total Profit: \$10.89 | | Total: \$655.00 | |

11. Orders by Team Profit

This final order summary parallels the “Orders with Family Profit” function; as Figure 59 shows, the total profit and total for each order is listed according to Team.

| Details For Order Compile: 50 | | | |
|-------------------------------|-----------------|------------------------|-----------------------|
| Team: | | Tuesday, June 21, 2011 | |
| <hr/> | | | |
| Order Placed By: | Richard Brooks | Order Placed On: | 1/19/2011 10:38:45 AM |
| Order Number: | 19518 | Payment Method: | Paid to Group |
| Total Profit: | \$0.74 | Total: | \$25.00 |
| Order Placed By: | Any Name | Order Placed On: | 1/26/2011 7:29:54 AM |
| Order Number: | 20160 | Payment Method: | Paid to Group |
| Total Profit: | \$6.60 | Total: | \$500.00 |
| <hr/> | | | |
| Team: | | 1st Grade | |
| <hr/> | | | |
| Order Placed By: | John Doe | Order Placed On: | 1/19/2011 10:37:45 AM |
| Order Number: | 19517 | Payment Method: | Paid to Group |
| Total Profit: | \$0.00 | Total: | \$550.00 |
| <hr/> | | | |
| Team: | | Boy Scout Troop | |
| <hr/> | | | |
| Order Placed By: | Chris Mitchel | Order Placed On: | 1/19/2011 10:40:07 AM |
| Order Number: | 19519 | Payment Method: | Paid to Group |
| Total Profit: | \$80.24 | Total: | \$2,100.00 |
| Order Placed By: | Chris Mitchel | Order Placed On: | 1/19/2011 10:42:04 AM |
| Order Number: | 19522 | Payment Method: | Paid to Group |
| Total Profit: | \$143.28 | Total: | \$7,500.00 |
| <hr/> | | | |
| Team: | | LLA | |
| <hr/> | | | |
| Order Placed By: | Richard Brooks | Order Placed On: | 1/19/2011 12:00:00 AM |
| Order Number: | 19465 | Payment Method: | Paid to Group |
| Total Profit: | \$12.25 | Total: | \$250.00 |
| Order Placed By: | Richard Brooks | Order Placed On: | 1/19/2011 7:42:06 AM |
| Order Number: | 19468 | Payment Method: | Paid to Group |
| Total Profit: | \$28.00 | Total: | \$500.00 |
| Order Placed By: | Richard Brooks | Order Placed On: | 1/19/2011 10:40:57 AM |
| Order Number: | 19521 | Payment Method: | Paid to Group |
| Total Profit: | \$15.75 | Total: | \$250.00 |
| Order Placed By: | Richard Brooks | Order Placed On: | 2/3/2011 7:33:22 AM |
| Order Number: | 20768 | Payment Method: | Paid to Group |
| Total Profit: | \$56.53 | Total: | \$925.00 |

Figure 59

Entering Member Orders

To enter Family/Member orders:

- Go to the Group Home Page.
- Click “Add a Member Order” as pointed out in Figure 60.

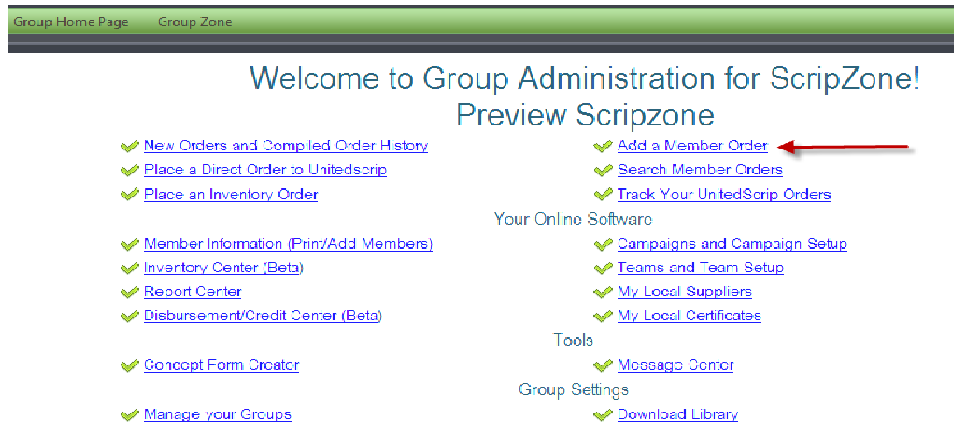


Figure 60

A new screen will appear, to begin placing orders:

1. Select a **Member Name**
2. Select a **Team**
3. Select **Retailer Gift Card**
4. Enter **Quantity**
5. Add to **Cart**
6. **To Edit Quantity**, Click in Quantity Box, delete and enter correct number
7. **To Delete Item**, Click on “Delete”
8. Leave notes or **Comments** in Box
9. **Update Cart** to refresh order
10. **Create and Add New Order** to add additional orders
11. **Create Order** to complete ordering
***Numbers correspond with numbers in Figure 61*

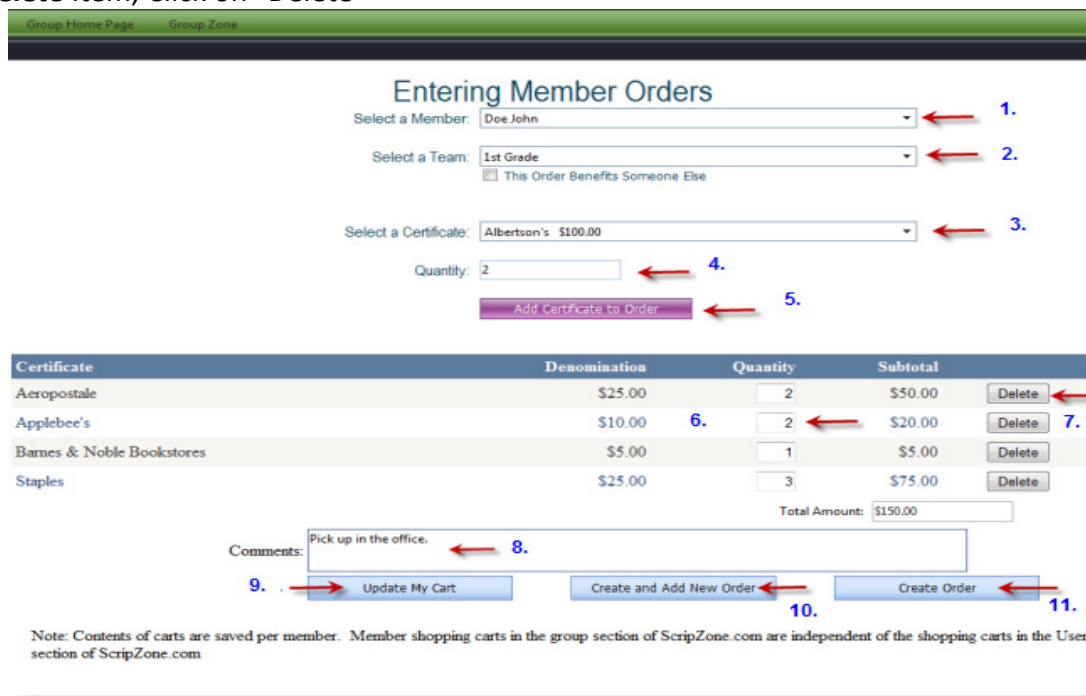


Figure 61

Note: Contents of carts are saved per member. Member shopping carts in the group section of ScripZone.com are independent of the shopping carts in the User section of ScripZone.com

Chapter Five: Direct Ordering



UnitedScrip and www.ScripZone.com

Direct Ordering

Direct Ordering allows Group Coordinators to place an order that is for the entire organization and not for a particular individual; this is useful if your organization is not concerned about tracking the participation of individual members for example. If your organization uses a book-keeping software, or alternative Scrip Software, use this option for your ordering process. Therefore, this is not the most effective method of ordering for your group if you would like to utilize the Scripzone website. Orders placed using Direct Ordering are not reflected or received into our online inventory system. Figure 62 shows where this option can be found on the main page.

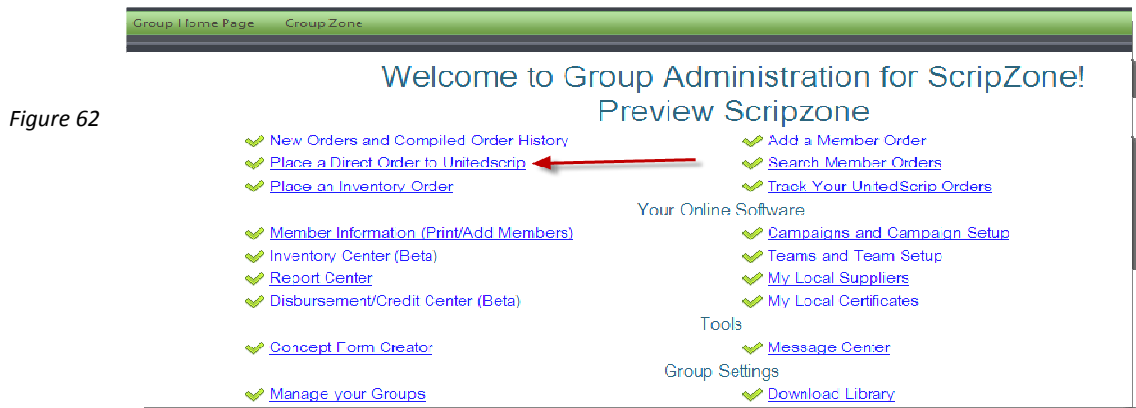


Figure 62

From the Group Home Page, click on: “Place a Direct Order to UnitedScrip” (See Figure 63).

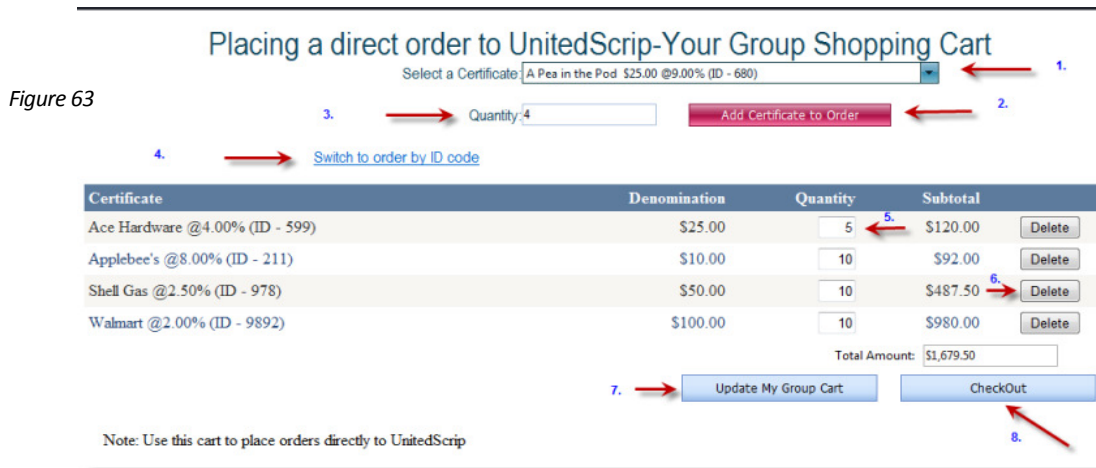


Figure 63

The following options are available on the current screen, as Figure 30 shows:

1. Order by Typing Retailer or use Drop Down Scroll
2. Enter Quantity
3. Add Certificate to Order
4. Switch to Order by ID Codes
5. Correct Quantity in Cart if incorrect
6. Delete Items in Cart if incorrect
7. Update Cart
8. Checkout

After you have added the last item, click on “CheckOut” and follow the same procedure as compiling Member orders, a process explained on the following pages.

NOTE: In order to reduce your shipping charges, you will want to compile this order on the same day that you compile your ScripZone orders so that the two will ship together. ****Please note that as you verify the order and shipping address, it is the responsibility of the Group Leader or Group Admin to make a note in the **Comments Box** to send the Direct Order with your Compiled ScripZone order.**

Chapter Six: Reports



UnitedScrip and www.ScripZone.com

Report Tools

We offer several reports to help you distribute and manage your orders. We are working on many other types of reports, so please feel free to drop us any ideas for a report at: ideas@scripzone.com.

Before we begin to explain the available reports, we want to emphasize the tools available to use for your reports. The image in Figure 64 is the toolbar seen at the top of each report.

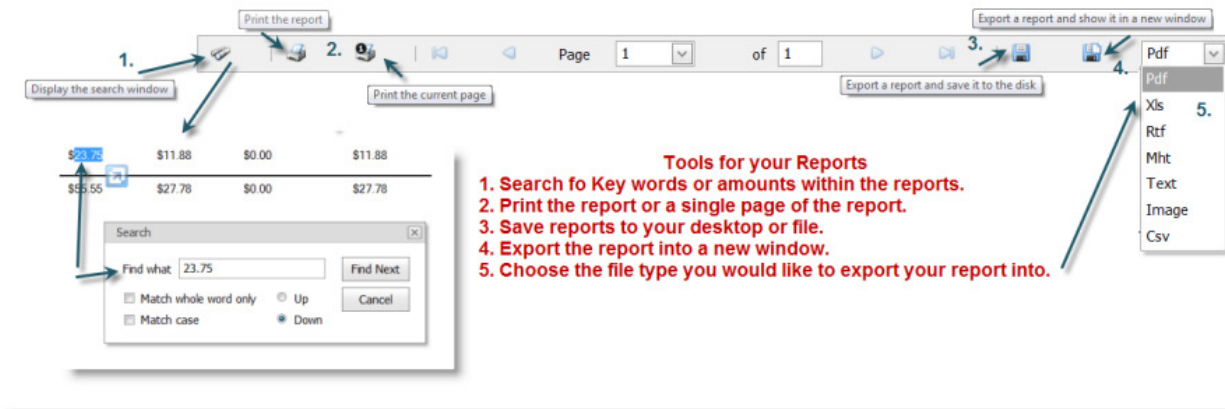


Figure 64

Here are some of the current reports that Scripzone.com offers you to manage your compilations:

Report Center

ScripZone.com may be used as your organization’s accounting software. The Report Center offers reports that show profit generated by families, teams, and the group. If your organization utilizes the Disbursement and Credit capabilities, ScripZone will also allow you to run reports that total the entire profit earned and distributed for a member’s account.

There are several different Campaign Reports in the Report Center. Figure 65 shows where to locate it on the main page.

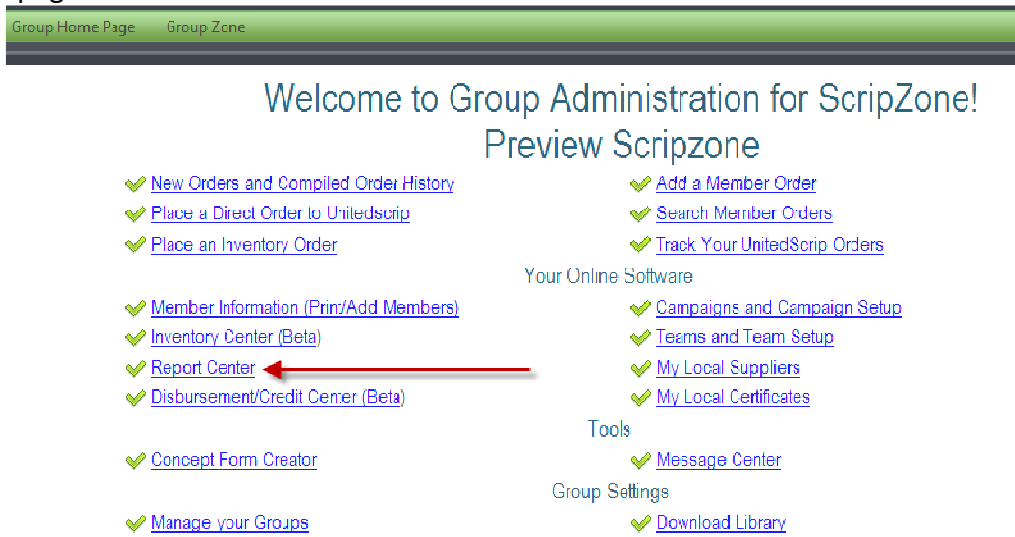


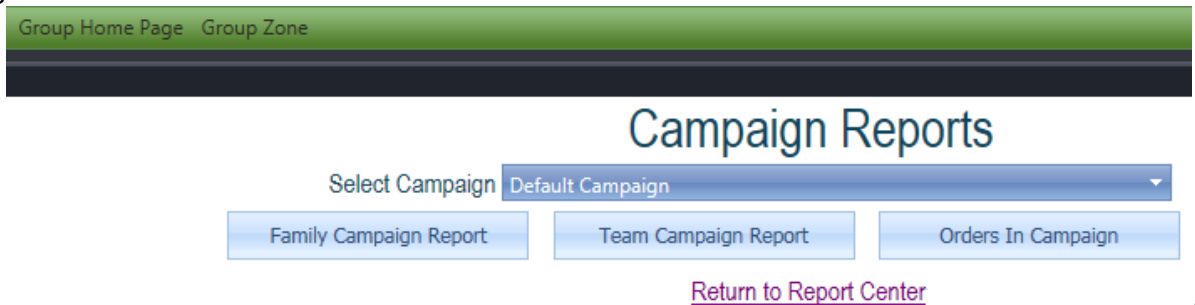
Figure 65

- From the Group Home Page, click on “Report Center.” Select the campaign and choose from three different reports. A new Screen will appear that looks like Figure 66.



At the Report Center, you will find three different links for reports.

1. Full Campaign Reports – These reports summarize the entire date range of your campaign. Figure 67 shows what the screen will appear if you select “Full Campaign Reports” on the Report Center page.



67

Figure

- a. Family Campaign Report – lists each family, their total sales, total profit, and then a breakdown of the profit split for that campaign. You can use this report to recognize the top selling family or to let everyone know how much they generated for the organization. Figure 68 shows this report.

Family Campaign Report
Share Profit with Participants

| Last Name | First Name | Total Sales | Total Profit | Group Profit | Team Profit | Family Profit |
|----------------|------------|-------------|--------------|--------------|-------------|---------------|
| Kohanik | Joseph | \$200.00 | \$18.00 | \$9.00 | \$0.00 | \$9.00 |
| Mitchell | Caleb | \$20.00 | \$5.00 | \$2.50 | \$0.00 | \$2.50 |
| Mitchell | Freda | \$310.00 | \$8.80 | \$4.40 | \$0.00 | \$4.40 |
| Rigsby | Lynda | \$750.00 | \$23.75 | \$11.88 | \$0.00 | \$11.88 |
| Totals: | | \$1,280.00 | \$55.55 | \$27.78 | \$0.00 | \$27.78 |

Figure 68

- b. Team Campaign Report – totals the profit by group, family and team and lists that profit according to each team. (Figure

69)

| Team Campaign Report | | | | |
|-----------------------------|---------------------|----------------------|--------------------|--------------------|
| General Fund | | | | |
| Team Name | Group Profit | Family Profit | Team Profit | Total Sales |
| General Fund | \$684.95 | \$547.96 | \$136.99 | \$27,040.00 |
| | \$684.95 | \$547.96 | \$136.99 | \$27,040.00 |

Figure 69

- c. Orders in Campaign – a list of the order numbers, families, and profit.

- 2. Member Reports by Dates – allows the group coordinator to enter a date range for needed information. Figure 70 shows what this screen will look like.

Figure 70

- a. Family Campaign – lists each family, their total sales, total profit, and then a breakdown of the profit split for that campaign within a chosen date range.
- b. Family Disbursements – allows the group coordinator to enter any monies that have been taken from a member’s profit.
- c. Family Campaign with Net – includes the net value of orders placed.
- d. Family Credits/Disbs – This report shows sales, profit earned, any credits that have been added to an account, any disbursements and the total amount of profit remaining in a member account.

- 3. Member Reports – This section allows you to find reports for a specific member (Figure

71).

Figure 71

- a. Family Campaign - shows the total sales, net value, profit for family and profit for group in the designated date range.
- b. Family Transaction Details – lists all transactions (purchases, credits, and disbursements) in the selected date range. Clicking on the Transaction ID of a purchase allows you to view the details of the purchase. Clicking on the Transaction ID of a credit or disbursement allows you to view and/or edit the transaction. See Figure 72.

All Transactions for Family By Dates

From: 5/2/2010 To: 6/22/2011

| Member Name | | Beg Balance | Profit | Disbursement | Credits | End Balance |
|-------------|----------|-------------|----------|--------------|---------|-------------|
| Chris | Mitchell | \$0.00 | \$244.00 | \$122.00 | \$50.00 | \$172.00 |

| Transaction | Date | Tran ID | Credit | Purchase | Disbursement | Disbursement Account |
|----------------|-----------|---------|---------|-------------|--------------|----------------------|
| Tran #1 | 8/11/2010 | 3445 | \$0.00 | \$16,500.00 | \$0.00 | |
| Tran #2 | 2/21/2011 | 3 | \$0.00 | \$0.00 | \$122.00 | Class Account |
| Tran #3 | 3/24/2011 | 2 | \$25.00 | \$0.00 | \$0.00 | |
| Tran #4 | 3/24/2011 | 3 | \$25.00 | \$0.00 | \$0.00 | |
| Totals: | | | \$50.00 | \$16,500.00 | \$122.00 | |

Figure 72

Chapter Seven: Local Suppliers & Certificates



UnitedScrip and www.ScripZone.com

Adding Local Suppliers and Certificates

The first step in offering local certificates is to add your local suppliers. From Group Admin Home Page, click on either “My Local Certificates” or “My Local Suppliers” (Figure 73).

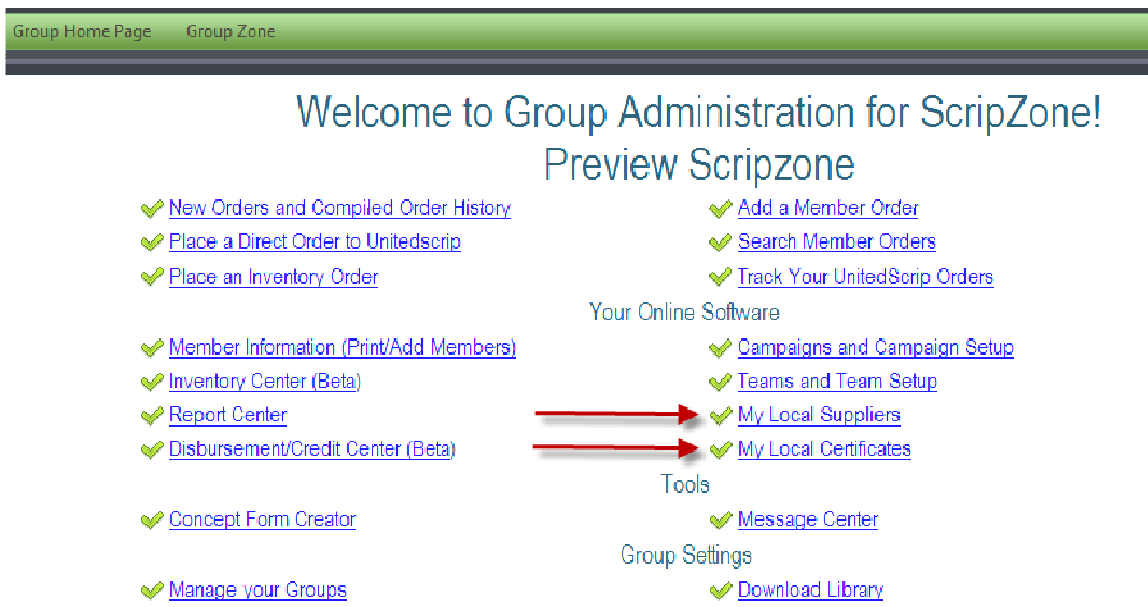


Figure 73

A new screen will appear. If you clicked on “My Local Certificates” and are adding a certificate for a new Retailer, you will need to click on the link “Click here to enter your local supplies” (Figure 74) to add your **New Supplier** information (Figure 75) first. Include your contact information for ordering.



Figure 74

Your Local Suppliers

To Enter a New Supplier, just enter your supplier information and click Add Local Supplier. To check your [Local Certificate List, click here](#)

Supplier Name: Contact First Name:
 Contact Last Name: Address Line:
 City: State:
 Zip: Phone:
 Notes:

Below are your Current Local Suppliers:

| Supplier | Contact | Phone | | |
|--------------------|---------|-------|--------|---------------|
| Kroger | | | Delete | Edit Supplier |
| Local Dry Cleaners | | | Delete | Edit Supplier |

Return to **Adding Local Certificates** once you complete information from Local Certificate Link. (See Figure 76).

Figure 75

Adding Local Suppliers and Certificates (continued)

Once you have entered your Suppliers, click on the link to go back to the screen to add your local certificates. The certificate name does not need to include the denomination of the certificate.

Adding your Local Certificates

Enter your New Local Certificate Information and then click the Add Local Certificate Button. [Click here to enter your local suppliers.](#)

Certificate Name: ←
 Local Supplier: ←
 Denomination: ←
 Percentage: ←

Below is the list of your current local certificates

| Certificate | Denomination | Percentage | Local Supplier | | |
|---------------|--------------|------------|--------------------------|--------|------------------|
| Dry Cleaners | \$10.00 | 9.00 | Local Dry Cleaners | Delete | Edit Certificate |
| Grocery Store | \$25.00 | 5.00 | Your Local Grocery Store | Delete | Edit Certificate |
| Grocery Store | \$100.00 | 5.00 | Your Local Grocery Store | Delete | Edit Certificate |

Figure 76

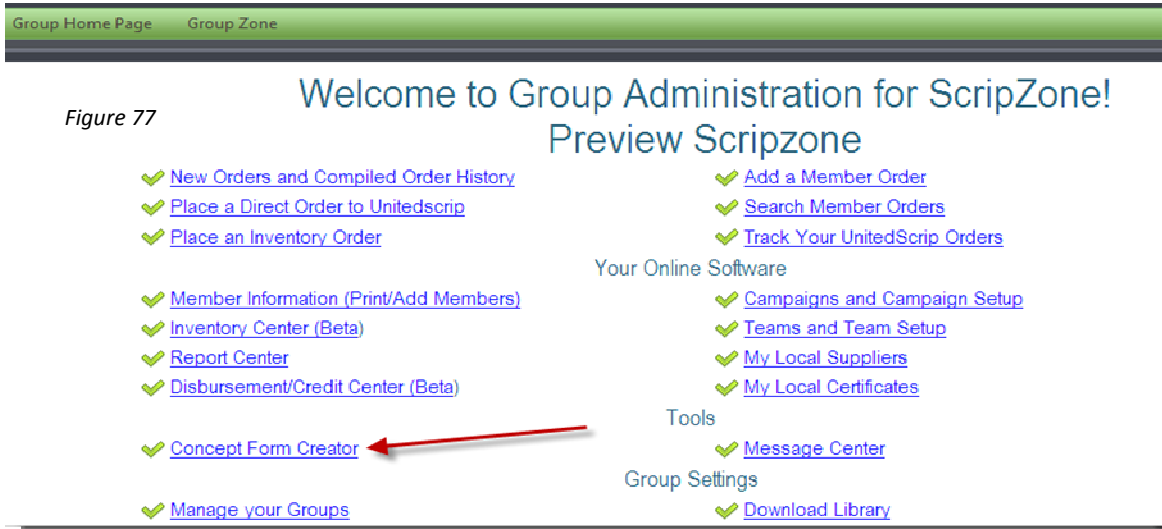
Chapter Eight: How to Create an Order Form



UnitedScrip and www.ScripZone.com

Concept Form Creator

Some of your participants may not have the ability to order online and they may need to give you a paper order form. To create a paper order form, click on “Concept Form Creator” (Figure 77).



At the new screen (Figure 78), select all of the concepts that you would like to appear on your order form and click on “Add Selected Concepts to Your List.” Please note that all denominations of a concept are automatically added to your form.

Your Concept Form Creator

The screenshot shows the 'Your Concept Form Creator' interface. At the top, there are two tabs: 'Add/Remove Concepts' and 'Select a Concept Template'. Below the tabs, there are two radio buttons: 'Display UnSelected Concepts' (which is selected) and 'Display Selected Concepts'. A button labeled 'Remove Selected Concepts From Your List' is positioned above a list of concepts. The list is as follows:

| <input type="checkbox"/> | Concept |
|--------------------------|-----------------------------|
| <input type="checkbox"/> | Academy Sports and Outdoors |
| <input type="checkbox"/> | Ace Hardware |
| <input type="checkbox"/> | Albertson's |
| <input type="checkbox"/> | Amazon.com |
| <input type="checkbox"/> | AMC Theatres/Loew's |
| <input type="checkbox"/> | American Eagle Outfitters |
| <input type="checkbox"/> | Applebee's |
| <input type="checkbox"/> | Arby's National |
| <input type="checkbox"/> | AutoZone |
| <input type="checkbox"/> | B. Dalton Books |
| <input type="checkbox"/> | Banana Republic |
| <input type="checkbox"/> | Barnes & Noble Bookstores |
| <input type="checkbox"/> | Baskin Robbins |
| <input type="checkbox"/> | Bass Pro Shops |
| <input type="checkbox"/> | Bath & Body Works |
| <input type="checkbox"/> | Bealls |
| <input type="checkbox"/> | Bed, Bath & Beyond |
| <input type="checkbox"/> | Belk Department Store |

Figure 78

Concept Form Creator (continued)

The screenshot shows the 'Your Concept Form Creator' interface with the 'Select a Concept Template' tab selected. At the top, there are two tabs: 'Add/Remove Concepts' and 'Select a Concept Template'. Below the tabs, there are six buttons arranged in a 3x2 grid, each representing a different template:

- Template One (Concept List)
- Template Two (Concept with Guidelines)
- Template Three (With Total)
- Template Four (By Category)
- Template Five (With Percentage)
- Template Six (By Denomination)

Figure 79

After choosing and adding all of the desired concepts, click on the “Select a Concept Template” tab (Figure 79). You now have six templates from which to choose:

1. Concept List – a simple list of concepts with no denominations or percentages.

2. Concept List with Guidelines- a list of the concepts, their discounts, denominations, and guidelines for redemption.
3. With Total – This is an alphabetical list of gift cards with discounts and denominations. This may be used as an order form.
4. By Category – Same as Template Three with the gift cards listed according to their category.
5. With Percentages- This order form divides the gift cards by the discount that they offer.
6. By Denomination – This order form divides the gift cards by denomination.

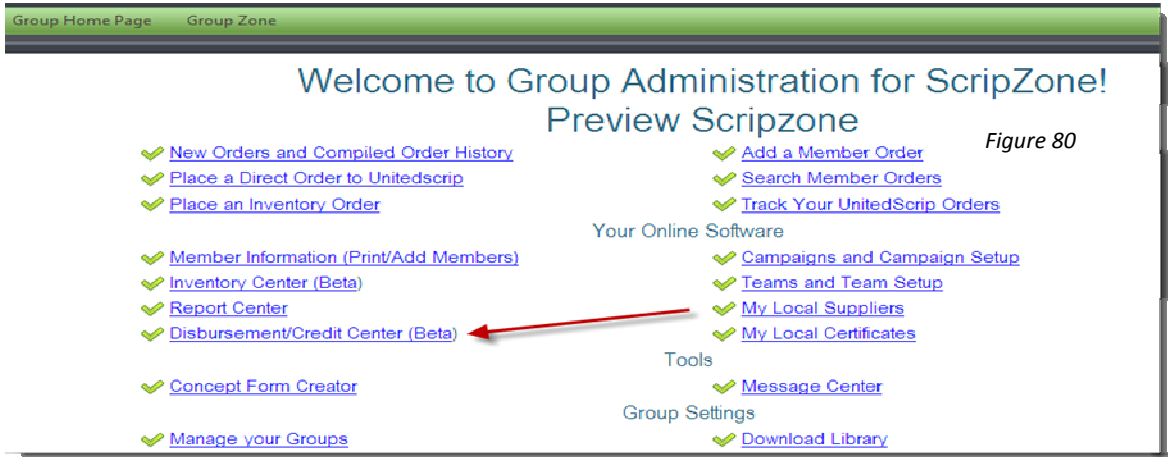
Chapter Nine: Disbursements & Credits



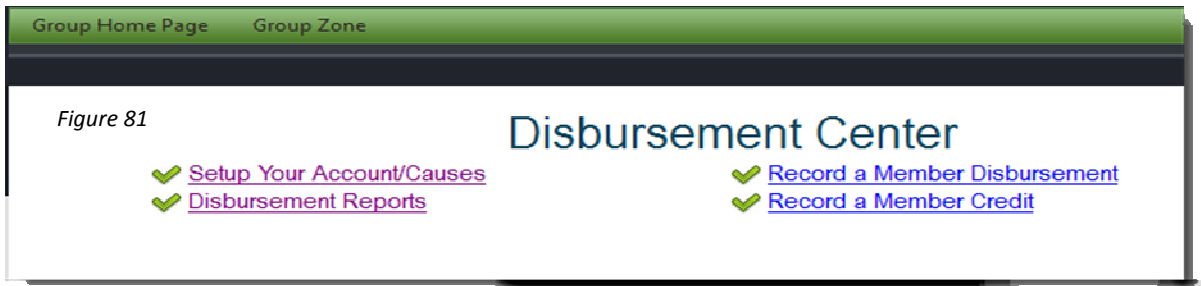
UnitedScrip and www.ScripZone.com

Disbursement/Credit Center

Disbursements allow you to track the profit that has been credited toward a member’s account(s). For example, there may be a member with a student in band, another one going on a field trip, and a third in cheerleading. ScripZone also allows your group to keep track of the money your participants raise from various fundraisers by means of Credits. If your band members earned money from a car wash, you could enter the individual amounts earned using the credit center. Figure 80 shows where it is located on the main page.



At the Group Home Page, click “Disbursement/Credit Center.” The new screen will look like Figure 81.



Setting up Your Account/Causes

The first step is to setup the accounts for which the funds will be disbursed. Click on “Setup Your Account/Causes”. The new screen will look like Figure 82.

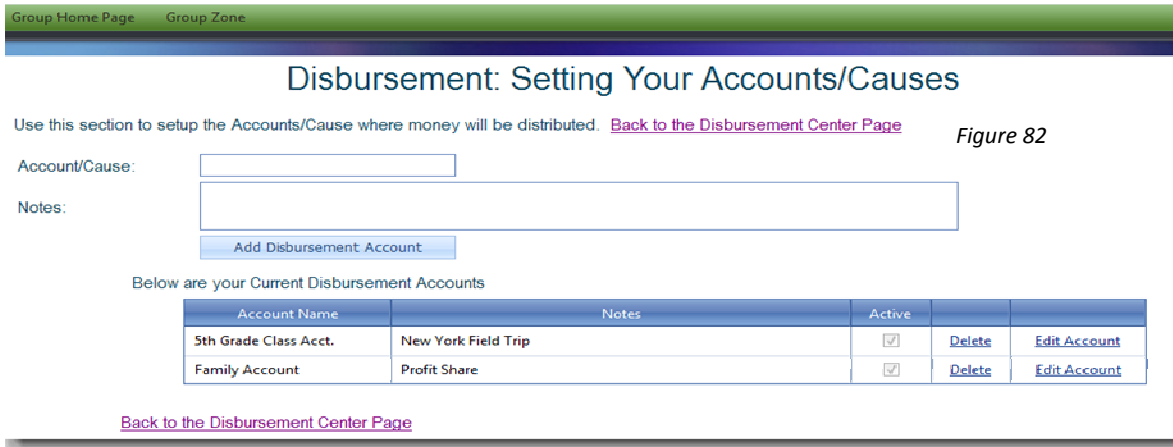


Figure 82

You will need to name the Account – examples, 3rd grade Field Trip, Band, Book Fees, etc. The notes section allows you to add details of the account name. Click “Add Disbursement Account” and when all accounts are added, you should go “Back to the Disbursement Center Page.”

Before entering member disbursements, generate a Family Credit/Disbursement/Profit Report. Click on Disbursement Reports- Select a date range – Family Credit/Disbs. The beginning date should be the first date of the campaign if you would like to see all profit generated and any disbursements that were previously given toward the accounts.

Recording a Member Disbursement

Once you have the report, go back to the Disbursement Center and click on Record a Member Disbursement. A screen will appear like Figure 83.

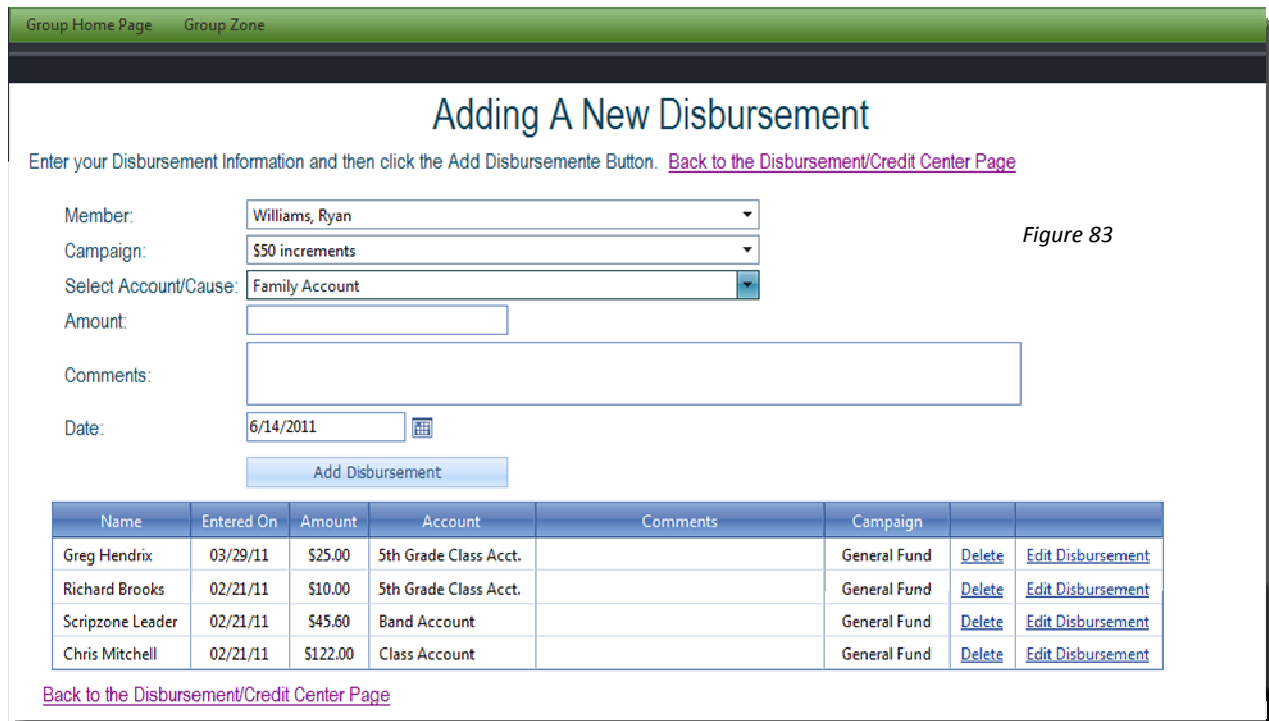


Figure 83

You will enter the

1. Member Name
2. Campaign
3. Account/Cause
4. Amount - of the disbursement (not necessarily all of the profit the family has earned)
5. Comments – exactly to what area the disbursement is applied
6. Date of disbursement

Click on Add Disbursement and follow the steps for each member that you need to enter.

Record a Member Credit

The member credit area allows you to add profit that is not generated by gift card purchases to a participant's account. For instance, your organization may have held a car wash. The money earned by each participant can be entered here. A supporter might give a cash donation for a member. That donation could be entered as a credit. After selecting this option in the Disbursement/ Credit Center, the new screen will look like Figure 84.

The screenshot shows a web interface for adding a new family credit. At the top, there is a green navigation bar with 'Group Home Page' and 'Group Zone'. Below this is a title 'Adding A New Family Credit'. A line of text reads: 'Enter your Credit Information and then click the Add Credit Button. [Back to the Disbursement/Credit Center Page](#)'. The form contains the following fields: 'Member:' with a dropdown menu showing 'Leader, Scripszone'; 'Campaign:' with a dropdown menu showing 'Campaign 1'; 'Amount:' with an empty text input field; 'Comments:' with a large empty text area; and 'Date:' with a date picker showing '3/29/2011'. At the bottom of the form is a blue button labeled 'Add Credit'.

Figure 84

To enter a credit:

1. Click on **Record a Member Credit**
2. Choose the **Member**
3. Choose the **Campaign**
4. Enter the **Amount** to be credited
5. **Comments** box should be used to note reason for credit
6. Enter **Date** of credit
7. Click on **Add Credit**

Disbursement Reports

This link under the Disbursement Center will redirect you to the Campaigns by Dates function in the Report Center. Here you may create a report tracking Family Credits and Disbursements according to your designated dates.

Chapter Ten: Inventory



UnitedScrip and www.ScripZone.com

Inventory Center

ScripZone will track inventory for all of the certificates that you purchase from UnitedScrip and any other Local Certificates that you stock. The arrow in Figure 85 shows how to access this feature from the main page.

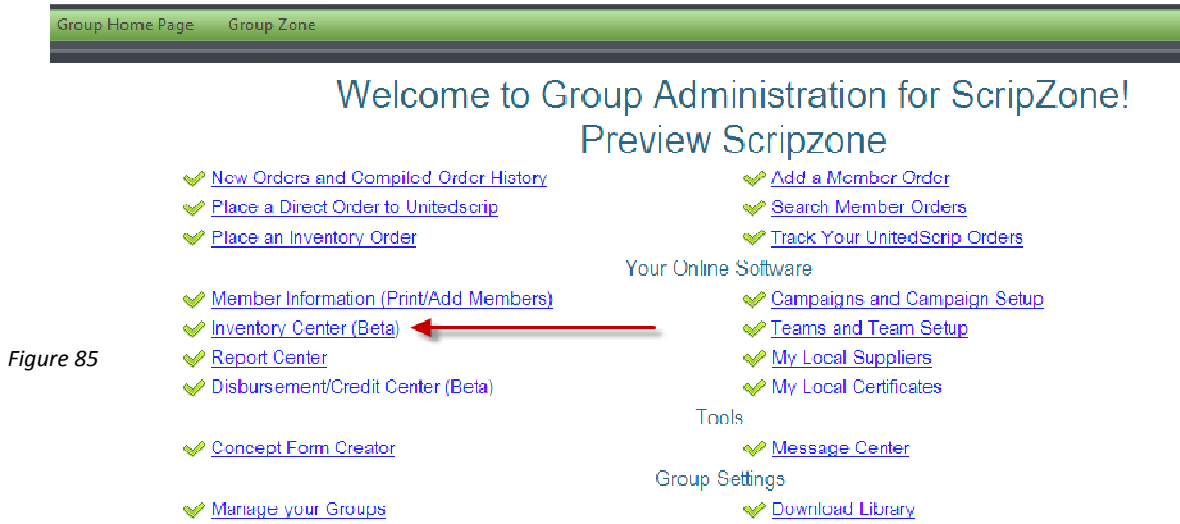


Figure 85

This link will take you to the screen shown in the figure below. To begin the record keeping process, you will need to click on “Setup Your Inventory” (Figure 86).

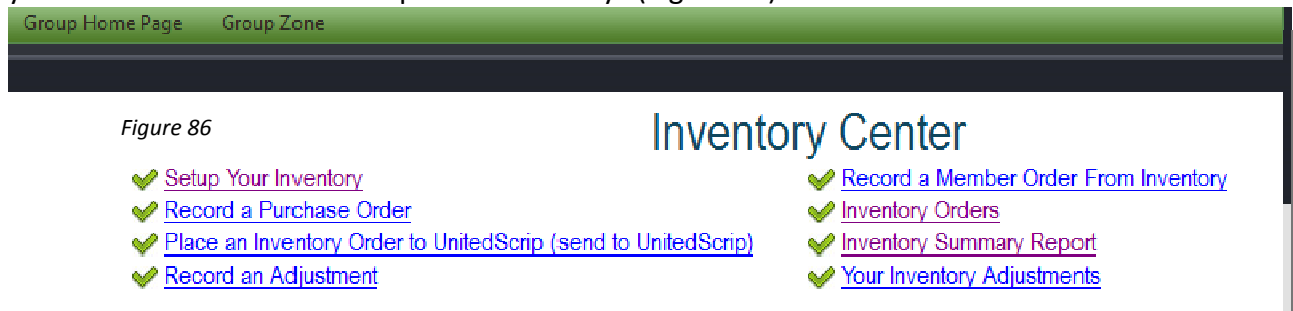


Figure 86

You will need to set up an inventory for each supplier (UnitedScrip and any local vendors). *Note: Local suppliers and certificates must be entered in ScripZone before the inventory can be set up.*

1. Choose your supplier from the drop-down menu. A list of certificates connected to that supplier will be moved into the “Select a Certificate” drop down.
2. Choose a certificate that you keep in inventory and click on “Add/Update Certificate for Inventory List.”
3. Follow this step for each certificate that you keep in house. If you wish to add a new certificate to inventory, you will need to come back to this area and choose the certificate to add it to your list. *Note: It is not necessary to enter data into the ReOrder Point, Desired Inventory Level, or*

Min Amount to Order. These sections are for those organizations that would like to utilize this information.

4. When you have chosen all of the certificates that you want to track, you will see a list of them as in the picture below.
5. Repeat these steps for each one of your suppliers.
6. Click on “Back to the Inventory Center Page.” Figure 87 shows what the screen will look like for this process.

Group Home Page
Group Zone

Setting your Inventory Certificates

Use this section to setup the certificates that you want to track in your inventory. Select the only Certificates that you plan to carry in your inventory. [Back to the Inventory Center Page](#)

Select a Supplier:

Select a Certificate:

ReOrder Point:

Desired Inventory Level:

Min Amount to Order:

[Add/Update Certificate for Inventory List](#)

Below is the list of your current Inventory certificates for the selected supplier

| Certificate | On Hand | ReOrder | Desired Level | Supplier | Active | | |
|--|---------|---------|---------------|-------------|-------------------------------------|------------------------|----------------------|
| 1-800-Flowers.com \$20.00 @14.00% (ID - 583)--Qty Left: 43 | 43 | 0 | 0 | UNITEDSCRIP | <input checked="" type="checkbox"/> | Delete | Edit |
| A Pea in the Pod \$25.00 @9.00% (ID - 680)--Qty Left: -5 | -5 | 0 | 0 | UNITEDSCRIP | <input checked="" type="checkbox"/> | Delete | Edit |
| A.J. Wright \$25.00 @7.00% (ID - 807)--Qty Left: 55 | 55 | 0 | 0 | UNITEDSCRIP | <input checked="" type="checkbox"/> | Delete | Edit |
| ACME \$50.00 @4.00% (ID - 1183)--Qty Left: 20 | 20 | 0 | 0 | UNITEDSCRIP | <input checked="" type="checkbox"/> | Delete | Edit |
| Advance Auto Parts \$25.00 @7.00% (ID - 931)--Qty Left: 42 | 42 | 0 | 0 | UNITEDSCRIP | <input checked="" type="checkbox"/> | Delete | Edit |
| Chipotle \$10.00 @10.00% (ID - 301)--Qty Left: 25 | 25 | 0 | 0 | UNITEDSCRIP | <input checked="" type="checkbox"/> | Delete | Edit |
| Safeway \$25.00 @4.00% (ID - 1151)--Qty Left: 78 | 78 | 0 | 0 | UNITEDSCRIP | <input checked="" type="checkbox"/> | Delete | Edit |
| Starbucks \$10.00 @7.00% (ID - 531)--Qty Left: 0 | 0 | 0 | 0 | UNITEDSCRIP | <input checked="" type="checkbox"/> | Delete | Edit |
| Stater Brother's Markets \$100.00 @5.00% (ID - 1173)--Qty Left: 30 | 30 | 20 | 10 | UNITEDSCRIP | <input checked="" type="checkbox"/> | Delete | Edit |
| Walmart \$100.00 @2.00% (ID - 9892)--Qty Left: 15 | 15 | 0 | 0 | UNITEDSCRIP | <input checked="" type="checkbox"/> | Delete | Edit |
| Walmart \$25.00 @2.00% (ID - 9890)--Qty Left: 58 | 58 | 0 | 0 | UNITEDSCRIP | <input checked="" type="checkbox"/> | Delete | Edit |

[Back to the Inventory Center Page](#)

Figure 87

Adding the Initial Inventory Numbers

Note: This section is only for those organizations that already have some stock in house and need to add those numbers to ScripZone.

To create your Inventory Purchase Order follow link to “Record a Purchase Order.” (Figure 88)

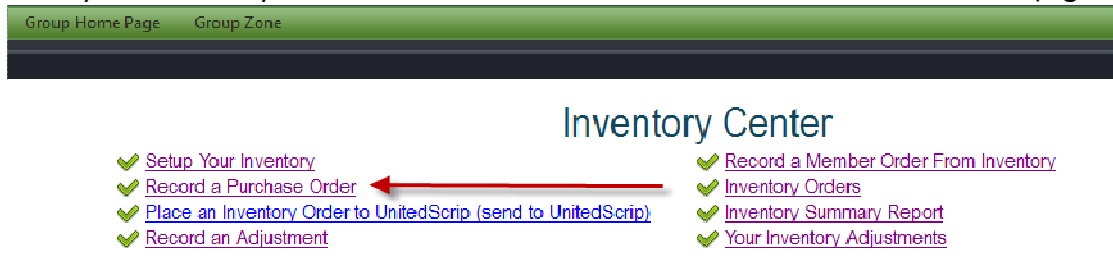


Figure 88

1. Enter your current numbers by clicking on “Record a Purchase Order.”
2. Choose a certificate and enter the quantity you have in stock. Click “Add Certificate to Order.” Add all of your certificates to the order and then click on “Create Purchase Order.” (Figure 89)

Figure 89

3. Return to the Inventory Setup Page and click on “Inventory Orders” link on the Inventory Center page. Orders must be received here before affecting the actual Inventory status or count of available inventory. You will have the following options for each purchase order:
 - To view the Order Details follow link to view the Purchase Order.
 - To Edit or Receive an order, simply click on the Edit Order option.
4. At the new screen, you will see an inventory with an “Open” status. Click on “Edit Order.” (See Figure 90).

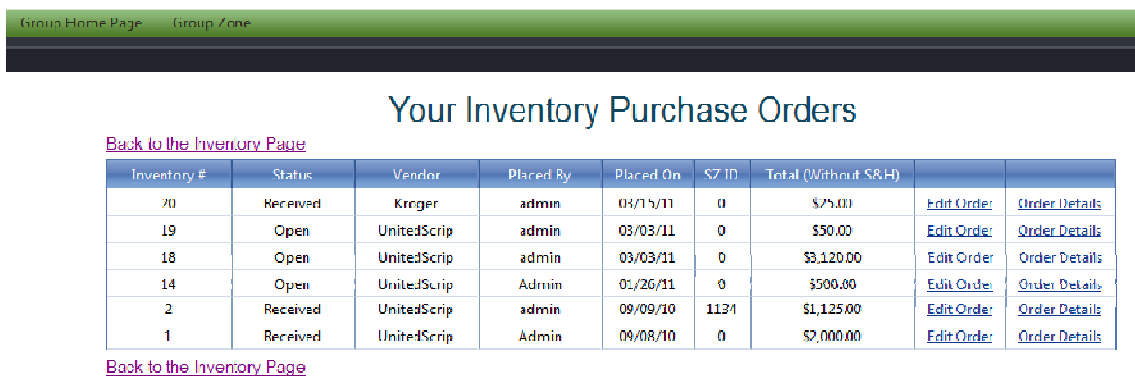


Figure 90

- To place your order into inventory, click on “Receive Order” and you will see the Status change to “ORDER RECEIVED.” Click on “Close Window” to refresh the page. (Figure 91)

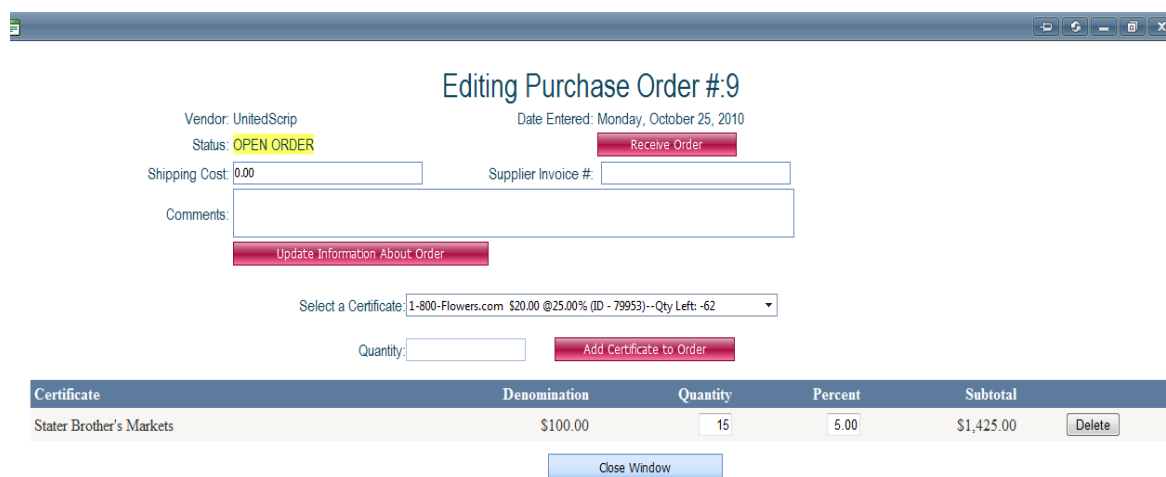


Figure 91

- If you carry local certificates, you will need to follow all of these steps for each supplier.

Please note that a separate Purchase Order is required for each Supplier. Use this option to record or upload inventory that you already have in house to the ScripZone.com site. Purchase Orders created from the “Record a Purchase order (From Inventory)” option are not sent to UnitedScrip for fulfillment.

Placing an Inventory Order to UnitedScrip

Now you have your initial inventory recorded. All of your inventory orders need to be added at this area. To enter any future orders into inventory click on “Place an Inventory Order to UnitedScrip (sent to UnitedScrip)” and fill out your order (See Figure 92). When you go through this process the order is sent directly to UnitedScrip for processing.

NOTE: If you are sending other orders through ScripZone, you will need to process them at the same time that you process the inventory order so that the two orders can be shipped in one package at one shipping charge.

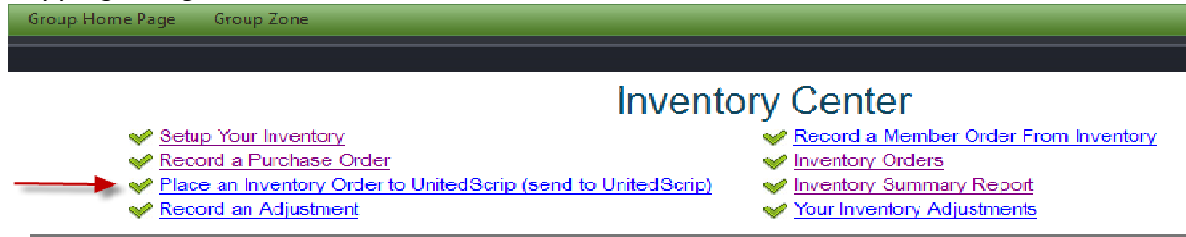


Figure 92

When the inventory is shipped to you, go back to the Inventory Center, click on your Inventory Orders and receive the Open purchase order.

Purchase orders for local certificates should always be placed in the “Record a Purchase Order” section of the Inventory Center.

REMEMBER: To keep your inventory accurate, it is necessary to “Receive” your purchase orders.

Record an Adjustment

“Adjustments” allow you to change your inventory without using a purchase order or invoice. See Figure 93 to find its location on the Inventory Center page.

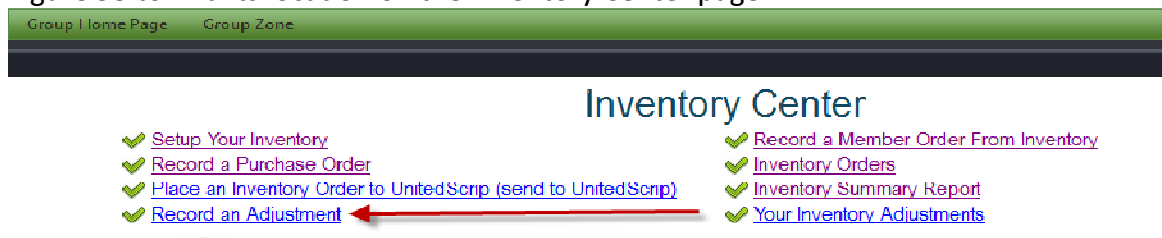


Figure 93

For example, if someone placed an order for 1 WalMart \$100 Gift Card but you had to fill it with 4 \$25 WalMart cards you could enter the following adjustment (Figure 94):

Group Home Page Group Zone

Record an Inventory Adjustment

Select a Vendor:

Select a Certificate:

Quantity:

| Certificate | Denomination | Quantity | Percent | Subtotal | |
|----------------------------|--------------|---------------------------------|---------|---------------|---------------------------------------|
| Walmart @2.00% (ID - 9890) | \$25.00 | <input type="text" value="4"/> | 2.00 | \$98.00 | <input type="button" value="Delete"/> |
| Walmart @2.00% (ID - 9892) | \$100.00 | <input type="text" value="-1"/> | 2.00 | (\$98.00) | <input type="button" value="Delete"/> |
| | | | | Total Amount: | <input type="text" value="\$0.00"/> |

[Return to Inventory Setup Page](#)

Figure 94

Inventory Adjustments

This function lists all of your adjustments. You may click on the adjustment details beside an adjustment to view the exact certificates involved. See Figure 95 for a screenshot of this page.

Group Home Page Group Zone

Your Inventory Adjustments

[Back to the Inventory Page](#)

| Adjustment # | Vendor | Placed By | Posted On | Total (Without S&H) | |
|--------------|-------------|-----------|-----------|---------------------|------------------------------------|
| 7 | UnitedScrip | admin | 04/07/11 | \$75.00 | Adjustment Details |
| 6 | UnitedScrip | admin | 02/17/11 | \$15.00 | Adjustment Details |
| 5 | UnitedScrip | admin | 02/03/11 | \$150.00 | Adjustment Details |
| 4 | UnitedScrip | admin | 02/03/11 | -\$165.00 | Adjustment Details |
| 3 | UnitedScrip | Admin | 10/27/10 | \$0.00 | Adjustment Details |
| 2 | Kroger | Admin | 10/05/10 | \$57.60 | Adjustment Details |
| 1 | UnitedScrip | Admin | 10/05/10 | \$816.00 | Adjustment Details |

[Back to the Inventory Page](#)

Figure 95

Recording Member Orders from Inventory

If you are recording a paper order that has been taken entirely from inventory:

1. Click on "Record a Member Order from Inventory" and enter each certificate that was purchased. A screen like Figure 96 will appear.

Group Home Page Group Zone

Entering a Member Order From Your Inventory

Select a Member:

Select a Team:
 This Order Benefits Someone Else

Select a Certificate:

Quantity:

| Certificate | Denomination | Quantity | Subtotal |
|---------------------------|--------------|--------------------------------|---|
| Barnes & Noble Bookstores | \$10.00 | <input type="text" value="6"/> | \$60.00 <input type="button" value="Delete"/> |
| Home Depot | \$25.00 | <input type="text" value="2"/> | \$50.00 <input type="button" value="Delete"/> |
| Olive Garden | \$25.00 | <input type="text" value="3"/> | \$75.00 <input type="button" value="Delete"/> |

Total Amount: \$185.00
Date:

Comments:

Note: Contents of carts are saved per member. Member shopping carts in the group section of ScripZone.com are independent of the shopping carts in the User section of ScripZone.com

Figure 96

2. Click on "Create and Add New Order."
3. When you enter the last order, click "Create Order." You will be returned to the Inventory Center page.

Note: Orders placed from inventory will appear in the details for your next compilation. There will be a check mark in the "INV" box. This means that when the order is compiled, these cards will not be included in the summary sent to UnitedScrip. (See the highlighted portion of Figure 97.)

Group Home Page Group Zone

Details for Order Compile #: 56

Order Compile On: Invoice:

Tracking Info:

Drag a column header and drop it here to group by that column

| Order # | Date | Placed By | Place For | Team | Payment | Total | Payments | Profit | Inv | Move | | | |
|---------|----------|-------------------------|--------------|-----------------|---------------|----------|----------|---------|-------------------------------------|--------------------------|-------------------------------|----------------------------|-------------------------------|
| 32153 | 06/27/11 | Hendrix Greg (By Admin) | Hendrix Greg | Boy Scout Troop | Paid to Group | \$185.00 | \$0.00 | \$14.15 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Order Details | Edit Order | Edit Payments |

Figure 97

Inventory Summary Report

This report lists all of your inventory and the current number of cards that you have in house. Figure 98 shows an example of what your inventory summary may look like.

Your Inventory Summary

[Return to Inventory Center Page](#)

Page 1 of 1 Pdf

Summary of Your Inventory

Tuesday, June 28, 2011

| Certificate | Qty | Profit | Total Cost | Total Value |
|-----------------------------------|-----|----------|------------|-------------|
| 1-800-Flowers.com \$20.00 | 43 | \$215.00 | \$645.00 | \$860.00 |
| A Pee in the Pod \$25.00 | -5 | -\$11.25 | -\$113.75 | -\$125.00 |
| A J Wright \$25.00 | 55 | \$96.25 | \$1278.75 | \$1475.00 |
| Ace Hardware \$25.00 | 0 | \$0.00 | \$0.00 | \$0.00 |
| ACME \$50.00 | 20 | \$40.00 | \$960.00 | \$1000.00 |
| Advance Auto Parts \$25.00 | 42 | \$73.50 | \$976.50 | \$1030.00 |
| Barnes & Noble Bookstores \$10.00 | -6 | -\$3.40 | -\$54.60 | -\$60.00 |
| Chipotle \$10.00 | 25 | \$25.00 | \$225.00 | \$250.00 |
| Grocery Store \$100.00 | 50 | \$250.00 | \$4750.00 | \$5000.00 |
| Home Depot \$25.00 | -2 | -\$2.00 | -\$48.00 | -\$50.00 |
| Kroger \$5.00 | 17 | \$3.40 | \$81.60 | \$85.00 |
| Olive Garden \$25.00 | -3 | -\$6.75 | -\$68.25 | -\$75.00 |
| Paesano's \$25.00 | 51 | \$127.50 | \$1147.50 | \$1275.00 |
| Restaurant \$10.00 | 2 | \$2.40 | \$17.60 | \$20.00 |
| Restaurant \$25.00 | 98 | \$294.00 | \$2156.00 | \$2450.00 |
| Safeway \$25.00 | 78 | \$78.00 | \$1872.00 | \$1950.00 |
| Stater Brothers Markets \$100.00 | 30 | \$150.00 | \$2850.00 | \$3000.00 |

Figure 98

Glossary

1. **ACH-** Stands for Automated Clearing House; an electronic method of banking online. Customer purchases are debited directly from the account provided by the member.
2. **Campaign** – The first step in setting up a program on ScripZone; it specifies the purpose for the funds raised (eg. New Printers for the Computer Lab or the Annual Youth Camping Trip). This function allows a group to define how the profit will be split among the organization, teams, and families.
3. **Compilation** – A group of member orders that have been clustered together to form a summarized list for UnitedScrip.
4. **Concept** – The individual retailers covered by a specific card. For example: the Darden gift card contains the concepts: Olive Garden, Red Lobster, Longhorn Steakhouse, Bahama Breeze, and The Capital Grill.
5. **Concept Templates** – Order forms offered in the Admin section of ScripZone which allows your selected concepts to be listed alphabetically, by category, by face value, by denomination or by discount percentage.
6. **Credit** – Outside profit generated by a member that can be recorded on ScripZone so that all fundraising data is maintained in one place.
7. **Direct Order** – An order placed by a group coordinator without the need for profit information. This order is not stored in any reports.
8. **Disbursement** – The recording of actual monies that have been released to or in the name of a member.
9. **Family** – Often the individual participant in a group; can be interchangeable with member. One family unit can have a single online account.
10. **Inventory** – Gift cards kept in stock at the group location; they may be sold directly to group members.
11. **Local Gift Card** – Gift cards that are purchased by the organization from a company not affiliated with UnitedScrip. For example: regional grocery stores and local small business owners.
12. **Local Supplier** – Grocery stores or small business owners that offer gift cards to your organization at a discount. The gift cards are purchased directly from the business and are not retailers associated with UnitedScrip.
13. **Member** – The individual participant in a group.
14. **Minimum** – The amount of profit required to be generated before an organization will share earnings with members; this function is available when setting up campaigns.
15. **Order by ID Codes** – UnitedScrip has assigned Id Codes that are associated with each Gift Card. By clicking on the ‘Switch to ‘Order by Id Codes’ you may place your order by entering the specific Item Code associated with a Gift Card. These item codes also appear in the invoice you receive from UnitedScrip.
16. **Profit** – The face value of the cards minus the discounted amount and any applicable shipping charges.
17. **Purchase Order** – An order created to restock inventory.

18. **Report** – A spreadsheet showing things such as orders and the profit that is generated available by teams, families, campaigns, and by dates.
19. **Scrip** – Anything used instead of cash, for UnitedScrip, this is the gift cards.
20. **Split** – A division of the profit generated between the organization, teams, and families; this is available when creating a campaign.
21. **Summary** – A list of orders or certificates and details; summaries are only available through an individual compilation.
22. **Supporter** – A person who purchases gift cards so that an organization member may receive the profit generated by that purchase.
23. **Team** – Divisions of an organization. This may include teachers, classrooms, clubs, grades, etc.
24. **User** – Any person registered on ScripZone.