



Group Savings Coordinator Success Guide

A handbook that has all you need to create and manage
your Group Savings Campaign!

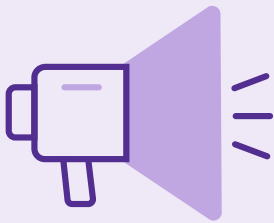


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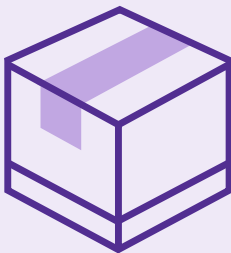
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Let's get started!

1. Register and create your Group

- Register as a new coordinator

If you are a new customer and registering for the first time, follow the simple steps below:

Step 1 - Go to group.purdys.com.

Step 2 - Click "Start a New Group" on the page OR "Register" at the top right corner of the page.

Step 3 - Fill in the details needed in the registration form:

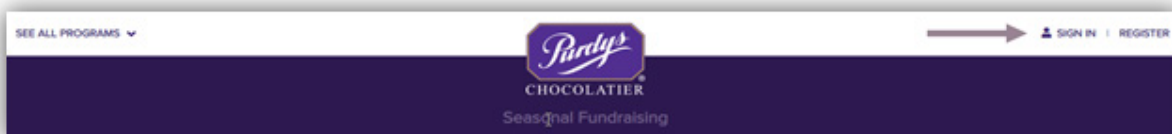
- Organization name (this name will be used as the payee's name for your profit cheque.)
- Name of Coordinator
- Phone number
- Address
- Email address
- Create a password.

- Log in as a returning customer

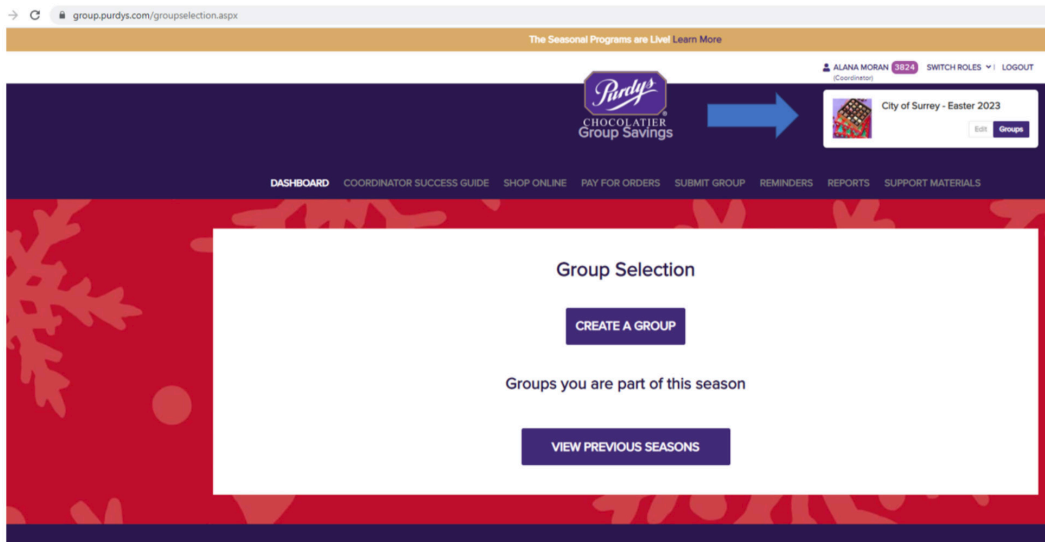
If you are already a member or had a previous savings group, welcome back! We are happy to see you again. We're sure you already know the drill, but here's a quick review, just in case:

Step 1 - Please go to group.purdys.com.

Step 2 - Click "Sign in" on the top right corner of the page.



Step 3 - Click "Sign in" on the top right corner of the page.



- Create your group

Once you are done registering or signing back into your account, you can move forward and create your Group. Here's a quick video that shows how to create a Group:

[VIDEO HERE](#)

How do I qualify for the Group Savings Program?

Your group order must reach a minimum of \$750 before tax and shipping charges to qualify for the Group Savings program.

What should I do if I experience issues while registering online?

If you experience any online registration issues, reach out to us at groupsavings@purdys.com or call 1.888.478.7397 Ext. 3. We're always happy to help!

Should I use my email address or my Customer Number for signing in?

Please make sure that you are using the Customer number when signing in and not your email address to ensure that you are signed in under coordinator mode.

What should I do if I forget my Customer Number?

In case you forget your Customer Number, contact us by email at groupsavings@purdys.com or call 1.888.478.7397 Ext. 3 so we can help you out!

What should I do if I forget my password?

If you forget your password, just click "Forgot password" and follow the prompts to create a new password.

- Updating coordinator's information

How do I update my contact information?

Any changes to the account information such as Coordinator name update, address, or email change please either call us directly at 1-888-478-7397 Ext.3 or email us at groupsavings@purdys.com.

- Tax and shipping information

Members ordering chocolates are charged for shipping and taxes according to the table below:

Province	Estimated Transit Days	Shipping Fee	Tax
British Columbia	1-4 business days	FREE	5%
Alberta	2-6 business days	FREE	5%
Saskatchewan	2-6 business days	FREE	11%
Manitoba	3-7 business days	FREE	12%
Ontario	4-8 business days	FREE	13%
Quebec	4-8 business days	8%	9.975%
New Brunswick	5-9 business days	8%	15%
Nova Scotia	5-9 business days	8%	15%
PEI	6-10 business days	12%	15%
Newfoundland	8-12 business days	35%	15%
Yukon	7-11 business days	8%	5%
Nunavut	8-12 business days	4%	5%
Northwest Territories	4-8 business days	12%	5%
BC - VOT	8-12 business days	8%	5%
BC - VOL	4-8 business days	8%	5%



2. Spread the word!

- It's time to share your Group Savings Campaign!

Share the group's link by clicking on "Copy Link" displayed on the group page with as many people as you can! Members who use this link will go directly to your group page!

To help you spread the word, here are some of our success tips:

1. Email people in your office or post in group forums. Save time by using our templates to create posts for Facebook, Instagram, work email etc.
2. Does your company do Corporate Gifting? Talk to the people in charge of it.
3. Share the catalogue. Leave it in lunchrooms, reception, waiting areas, etc.
4. Talk about your Group Savings Campaign at social gatherings (bring catalogues).
5. Get influencers on board (e.g., managers or executives, social media influencers, local businesses).
6. Ask for help from volunteers.
7. Put up posters in high traffic areas.
8. Share your group campaign's link on social media platforms like Facebook, Instagram, LinkedIn and Twitter.
9. Send it to your groups on WhatsApp, Telegram or any other messenger.
10. Create a dedicated Facebook page about your Group Savings Campaign and share the latest updates there.
11. Create Instagram stories and encourage other members to share them.
12. Post a professional update about your campaign through LinkedIn.
13. Create a specific hashtag for your campaign e.g., #GroupSaveWithPurdys and ask your members to use it in their posts & stories.
14. Engage with members by liking, commenting, & sharing their supporting social posts.

Where can I find some templates and more useful tips?

You can find free online information to promote or advertise your Group Savings Campaign [HERE](#).

- How to find your group without a link

Your members can also find your group campaign by logging in or registering manually on the Purdys Group Savings website by following these steps:

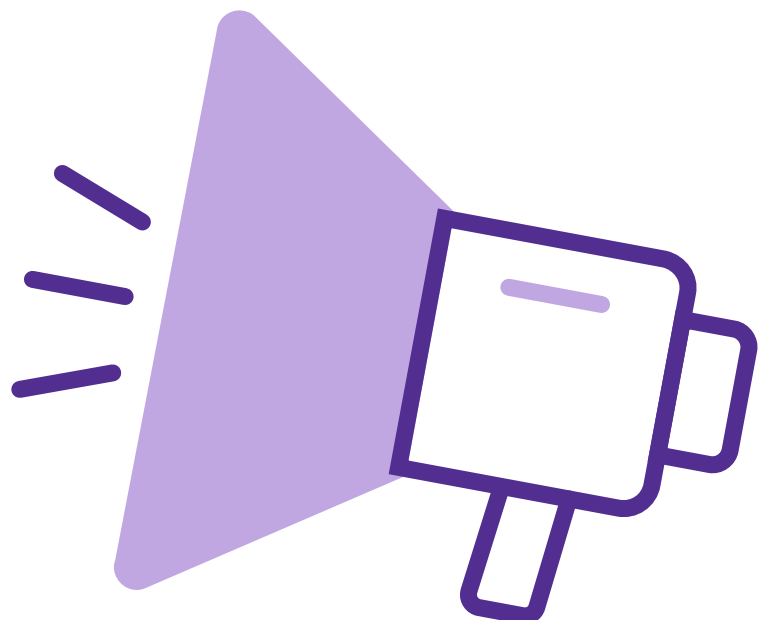
Step 1: Member should visit group.purdys.com.

Step 2: If they have registered and ordered with us from the past, they need to click “SIGN IN” at the top right corner of the page and enter their login details.

If it's their first time, they need to go to “REGISTER” at the top right corner of the page, click “Register as a Member” and then fill out the registration form.

REMINDER: Make sure you provide your members with the group's customer number so they can complete their registration.

Step 3: Once they are signed in/registered, they need to click “Join a Group” and enter the campaign number you've shared with them. This will automatically take them to your personalized group campaign's webpage. Now they can start shopping & saving!



- Shopping online - Switch roles so you can also shop

Coordinators and Members can place orders through our online dashboard. This is an easy and convenient way to check out the delicious chocolates available and to pay directly on the website.

There are two ways to order online:

1. Marketplace - This is the easiest way to navigate our online shopping, a product listing page that has pictures and descriptions of the available treats.

How to use the Marketplace:

[VIDEO HERE](#)

2. Online Order Form - It allows both coordinators and members to view all products on a single page and enter multiple orders efficiently. If you are placing bulk orders, this may be for you.

[VIDEO HERE](#)

- What's the difference between Coordinator mode & Member mode?

- **Coordinator mode** - Allows you to see the entire order of the group that you are coordinating. You can edit the campaign and change details like delivery address, delivery window and message.
- **Member Mode** - This is the same screen that your members see and access. It has limited functions. You can only see the orders of the people that you track.

- How do I switch roles to shop online as a member?

Coordinator mode allows you to shop online and use all the features that a member can use. However, if you would like to switch roles to a member you can easily switch from a Coordinator to a Member role.

To switch from Coordinator to Member mode or vice-versa, simply click on the switch role button on the top right corner and then click on the option you want.

3. Submit your Group Order

- Order submission

It is **important** to remember that the entire group order must still be submitted **even if all orders have been paid**. Submitting the group order will prompt us to receive and print your actual order slip which will then be forwarded to the warehouse for packing and shipping.

Follow these easy steps to submit your order: :

[VIDEO HERE](#)

How will the carrier find the additional delivery instructions like buzz code, use side door, etc.?

The delivery instructions will be communicated to the carrier partner, and they will try their best to accommodate it.

Can I make specific time/date requests for the delivery?

We are unable to make specific time/date requests for delivery as this will be in the carrier's control. Please avoid putting a specific date or time in this section.

Can I pay for my order via cheque?

If you pay via cheque, please allow 5 – 7 transit days for your cheque to get to us plus another 10 business days for processing.

Important: We will not be able to process orders until we receive payment from our customers. Only one (1) cheque will be accepted from the Coordinator for order submission and directly approved by Purdys representative.

When paying via cheque, please write your Customer Number in the MEMO field and use the following information:

Please make all cheques payable to: R.C. Purdy Chocolates Ltd.

Mailing Address: GROUP AND FUNDRAISING

Purdys Chocolatier, Group Purchase, 8330 Chester St., Vancouver, BC, V5X 3Y7.

Coordinators are responsible for ensuring that we get the cheque payment no later than ten (10) business days prior to the chosen delivery window. Any delay will push the delivery window to a later date.

Please refer to Terms and Conditions online for more information.

- Add-on orders

Coordinators may request an add-on order after submitting their group order and before the program deadline on December 13th only if their order is greater than \$750 (before taxes and shipping charges). The minimum order amount should be \$100 or more. Add-on orders are subject to their individual delivery range. The Coordinator is responsible for tracking the delivery on the carrier's website.

Important: Campaigns less than \$750 (before taxes and shipping charges) are not eligible for any add-on orders.

- Rebates

If your campaign reaches \$3,750 before taxes and shipping, you will qualify for a 2.5% rebate. If your campaign exceeds \$7,500 before taxes and shipping, you will qualify for an additional 5% rebate.

When should I expect to get my rebate cheque?

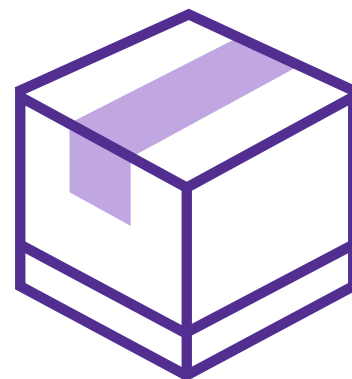
Rebate cheques are issued a minimum of four (4) to six (6) weeks after the Seasonal Program has closed, pending any outstanding issues. It is the responsibility of the Coordinator to provide the correct spelling of the name and address of the payee at the time of submission. Any processing fees for any cheque reissuance due to name changes and stale-dated cheques will be deducted from the rebate amount. Customers with multiple Group Savings orders where the combined order totals have exceeded the minimum rebate threshold will receive one (1) rebate cheque for all their Group Savings orders.

The rebate cheque amount is calculated based on the product subtotal of the Group Savings order. It does not factor in the shipping fee or the provincial tax of the Coordinator's mailing province. Purdys Chocolatier reserves the right to modify rebate policies and levels at any time without notice.

4. Sort and distribute

- Get ready for delivery

A link with the tracking information will be provided to you in the shipping confirmation email. A link to tracking information is also available on the Dashboard when you log in as a Coordinator.



Note: It is Coordinator's responsibility to track their order on the carrier's website and communicate with the carrier regarding the delivery status.

Step 1: Getting ready for delivery

- Print Summary report/Individual order report.
- Confirm volunteers. We recommend 2 volunteers for every \$1,000 of orders.
- Print “Member Pickup Reports” [HERE](#)
- and “Sorting Signs” [HERE](#) under RESOURCES tab.
- Confirm availability of delivery location, and ideally a secure, large room that will not exceed 20°C.
- Have supplies on hand, e.g., scissors, pens, highlighters, staplers, etc.

Step 2: Sorting

- Check your tracking number to determine the number of cartons you should be receiving. (Tracking number will appear on the site when the courier has uploaded the tracking information)
- Once you receive the order, count the number of cartons before signing for the delivery.
- Find and open carton #1 (labelled “Open Me First”), which contains packing slip and plastic bags.
- Ensure the quantities and SKUs of the items received match the packing slip.
- Unpack all boxes – check the SKU of EACH chocolate item and place it with the corresponding Sorting Sign.
- You are now ready to start packing your individual orders. Note: Most cartons contain different products as the same items are not packed together. Products with the same packaging can have the same wrapping paper, so it’s very important to check the SKU of each box.

Step 3: Packing individual orders

- Work in pairs: One person reads the items listed, and the other picks and bags items.
- Another pair of volunteers double-checks each completed order.
- Include the listed number of enclosure cards with the order.
- Staple the “Member Pickup Report” to the bag once it has been double-checked.
- Double-check all orders once they have been picked/bagged.
- Place bags in alphabetical order to make it easier to distribute orders to your customers
- If you have customers with multiple orders, you may wish to place their orders in a box for easier distribution

Important: if you find an error after filling all individual orders, please contact Purdys Chocolatier Group Savings Team within 5 (five) business days. Call us at 1-888-478-7397 Ext.3 Our call center is open from 8:00 am – 5:00 pm PST Monday – Friday.

- Reports

There are several different reports that Coordinators can access through the Reports tab:

Group Summary Report - this report is a summary of all orders (without the profit breakdown). You can choose from three sub-reports where the information has been organized in a different way to help you find what you need.

- Products - By All – Shows the grand total of all products ordered.
- Orders - This will list any orders placed by the individual signed in.
- Payment - This displays any payments made by the individual signed in.
- Rebate Cheque Info - Displays rebate thresholds and for closed groups, who the rebate was made out to.
- Sorting Signs - Signs that list the Line #, SKU, and product name.

Note: Please print signs before sorting.

- Returns & replacements

As our chocolate is a food product and cannot be re-sold due to Health and Safety reasons, we do not accept returns other than for quality concerns. We want our customers to be confident that when they purchase our products, they are not purchasing products previously sold and returned by other customers. Even if a product is in the original wrapper (or packaging) and in good condition, it will never be re-offered for sale. We do not compromise on this policy.

Any replacement needs to be initiated through the Group Savings Contact Center within 5 (five) calendar days of Order delivery at 1-888-478-7397 Ext. 3. Any issues encountered during the weekend should be addressed through the Group Savings Contact Center by the next business day. Group Savings Program orders will not be resolved through Purdy shop inquiries.

How do replacements work at Purdys Chocolatier?

Replacements are substituted with products of equal value if not available.

Any replacements in a shop or the warehouse will not be eligible to the original delivery range during the submission process and will be shipped out separately based on the availability date. The Coordinator understands this replacement does not have a guaranteed delivery date and may arrive after season.

What if there's no replacement available?

Purdys Chocolatier will need to authorize and approve (depending on shop stock levels or availability) any in-shop or warehouse replacements. Purdys Chocolatier reserves the right to authorize replacements at its own discretion. In the case the replacement is not feasible, Purdys has the right to refund any products that cannot be replaced.

For Christmas or Easter Season, any replacements need to be requested within five (5) calendar days after Coordinator receives the order.

Purdys Chocolatier may process the replacement of damaged items for no more than their original value. We reserve the right to honor any future claims against the original order.

- Important dates

Below is a list of the important dates to keep in mind:

Order Submission Deadline:

- This is the last date you can submit your group order to meet your delivery window. Orders submitted after your order submission deadline will not arrive within your delivery window.
- Please note: Changes to the submission deadline or submission of your campaign after the deadline will result in a delayed delivery window. The last date an order can be submitted for processing is December 7th.
- Group Savings Submission Deadline for your group order will be displayed on your dashboard.

Member Deadline:

- This is the last day for your members to submit their order and pay in full.
- It's one day before the Order Submission Deadline or a date chosen by the coordinator.

Delivery Window:

- This is the best estimated range of dates your order will be delivered.
- Your delivery window is calculated when you select a delivery date while creating a group online.
- Please note that the orders are shipped in bulk and will have to be sorted before member pickup.

Member Pickup Date:

- Communicate with your Members when they can pick up their orders from you. Under the "Reminders" tab on your dashboard you can find e-mails available to send directly to your members.
- We recommend you choose a couple of days after your last delivery window date to allow yourself enough time to sort your group order.
- Special Instructions can be added to specify the time/exact location (e.g., Pickup in the main office's parking lot between 4-8pm).



Enjoy saving on your favourite Purdys Chocolates!

If you have any other questions,
please visit our [FAQ](#) or contact us.