

Setting up a Pre-Order/Pre-Pay System for the GNT

We had a few questions and a lot of compliments on the pre-order, pre-pay system used at the 2008 NCFL GNT in the Fox Cities; so, we decided to help out anyone considering using this system by describing how we set it up.

Why did we use it?

We are coaches, too, and we realize that budgeting and paying for food at nationals can be a hassle. Reimbursement periods end before you return from nationals, you lose the food check or it doesn't reach you on time, GNT food vendors require you to pre-pay, some sites are too remote and schedules too tight to seek out alternative food options...

The added bonus is that students can see and have a parent pre-order memorabilia using a credit card!

How did we set up the order form?

The web page is a simple form with hidden tags to differentiate the items being ordered. We put it on the same page with Memorabilia to encourage people to take a look at what we have to offer (hosting the GNT isn't exactly free ; -). We use Yahoo to host our website and they have an e-mail handling form script (you'll see that in the HTML code). Yahoo gets the form results, dumps them in an e-mail and e-mails them to the address we specified in the Yahoo site admin area. We set up an e-mail account on Gmail to handle these orders.

How did we handle pre-payment?

We use PayPal because it is the most popular system out there, it can be tied to a person's bank account, or people can submit payments using a credit card without setting up an account. PayPal charges a fee equal to .025% + \$.30 per order. You'll need to consider that when setting your prices and any additional fees you charge. You'll also want to consider the cost of any office supplies you use to fulfill orders. You will need to submit your bank account information and the social security account number of the bank account holder when you set up the PayPal account to lift the \$500 cap on transfers to your bank from PayPal.

PayPal has a cool feature that allows you to save any completed invoice as a template, but please keep in mind that it saves everything from the first time you used it, including the first e-mail recipient's address. You will need to make sure you replace that each time.

PayPal also allows you to keep track of invoice and payment history and it sends you an e-mail whenever you: send an invoice, receive a payment, receive an eCheck, an eCheck clears, and you withdraw money to your bank account.

The rest of the instructions are out there on PayPal.

One more word of caution (you may want to put this in your order instructions): PayPal is often blocked by school spam filters! Consider suggesting that people use their personal e-mail accounts.

How did we keep track of order payment?

We used a spreadsheet. Across the top, we had a SUM of the count of items ordered, just below that, we had a formula that multiplied the SUM by the price per unit to determine revenue. We had a column for the order entry date and a column for the payment date (shortcut: **Ctrl+;** will enter today's date in an Excel spreadsheet cell). We had a column with a formula to add up the invoice amount to compare to what PayPal came up with. There was also a column to track the net revenue collected (invoice amount less actual PayPal fees) and a cell to SUM that net revenue. We also kept track of Food and Memorabilia revenue totals separately. Finally, we kept track of Name, School, Diocese (for Friday registration packet food ticket distribution), and E-mail Address

I highly recommend using FireFox and the AutoCopy Extension. It automatically copies to your clip board text you select in your browser window. I select contact info from the order e-mail and paste that in the Excel spreadsheet. I wait to select the e-mail until last because that is the first thing I paste into PayPal's Invoice (essentially, copy once paste into spreadsheet and then PayPal).

The spreadsheet we used can be downloaded from the website.

How did we process orders?

This should be how do we recommend processing orders. We received about 50 memorabilia pre-orders (most were combined with food tickets) and about 100 food ticket orders. It takes about 2-3 minutes to do these steps:

- 1) Order comes in via e-mail. Copy and paste Name, School, Diocese and E-mail into spreadsheet and enter the number of each item ordered (spreadsheet formulas should calculate handling and total invoice for you).
- 2) Paste E-mail into a PayPal Invoice Template, enter Quantities, Item Descriptions, Unit Prices and an E-mail Subject (i.e., "NCFL Food Ticket Invoice"). We used the following invoice instructions:
Thanks! Please bare with us if this is not as smooth as working with a business. As a reminder, the process is that you get this electronic invoice, which you will need to pay using PayPal. You may use a credit card or deduct it from your PayPal account. On the Friday of registration, we will provide the tickets in an envelope with your school name on it to your local league moderator along with your registration materials.
- 3) Click "Continue", review and click "Send". The system gives you an option of saving the invoice as a template or sending another invoice.

At this point, you could put the items in a shopping bag with a printout of the order info (hi-lite the spreadsheet row and print the selection). You could also pre-stuff the envelope with food tickets and mark as paid when the money comes in.

Warnings!

- PayPal takes 3-4 business days to process an eCheck and if you were counting on this money to pre-pay a vendor, you should set a date to submit and pay pre-orders wisely.

- Make sure you have customers enter a personal e-mail account because school e-mail accounts sometimes block PayPal invoices.
- If it takes a while for them to pay, you may want to send an e-mail to them using Gmail to make sure they entered their e-mail correctly, because PayPal won't tell you an e-mail was undeliverable.
- The day of any deadline, you can expect a surge of at least 10-20 e-mails. Be prepared!
- Note in your website order instructions that people should e-mail you if they don't get an invoice via e-mail within 2-3 days of ordering.
- Chose a memorabilia pickup location with internet access in case you need to verify that an order was paid (i.e., backup proof for claims that people did pay).

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