Groundfolk
Set up and run your sale

For the district administrator. The full sheet is at groundfolk.org/help/district.

Your first sale, start to finish. *Follow it top to bottom the first time; after that you'll only need the bottom half.*

SET UP (ONCE)

After you sign in, the dashboard shows a **Setup checklist**: five steps in this order, then opening the sale. Its one button is always the next step to do.

> **Confirm your email address first.** After you sign up, Groundfolk emails a link to the address you signed up with. Until you press it, your sale cannot open.

1. **District info.** Fill in the **Mailing address**: the sale cannot open without it, and it is printed at the bottom of bulk email. Check **District name** (it is the payee on every check) and **Time zone**. Fill in **Contact email** and **Contact phone**. The sale cannot open without a contact email either. Press **Save district info**.
2. **Add your plants.** The first time, this step asks you to create the sale: give it a name and year and press **Create sale**. **Upload your order form** (left menu) takes a CSV, an Excel file (.xlsx) or a PDF. **Nothing is saved until you approve the preview.** A plant imported without a quantity shows as sold out. In the preview, **Set blank quantities to** gives every blank plant one number at once; after that, add stock on each plant's page under **Catalog**.
3. **Sale settings.** Under **Ordering dates**, set **Ordering opens** and **Ordering closes** and press **Save ordering dates**. Read the three policies (substitution, refund and missed pickup): customers see them at checkout.
4. **Pickup places and times.** On **Sale settings**, add at least one **pickup location** and at least one **pickup window** (a date with a start and end time). Buyers choose their window at checkout.
5. **Payments.** Checks, cash and pay-at-pickup need no setup. Under **Payments**, tick the methods you take in **Payment methods accepted** and press **Save payment methods**. To take cards, read **Before setting up card payments** on the same page, then press **Set up card payments**.

Branding (left menu) is optional: paste your logo's address into **Logo image link** and press **Save branding**.

Open the sale

When all five are done, press **Open the sale** on the checklist. It shows when customers can order and asks you to confirm. If anything is missing, the page says **The sale can't open yet. Add:** and links to each missing item.

What customers see

A new sale always starts as **Draft**. While it is a draft the online store is invisible to everyone, you included; **Preview your online store** on Sale settings shows it to you. **Open** is what publishes it.

Once the sale has left Draft, the Dashboard and Sale settings show **Your store's address:** with a **Copy address** button. Put that address on your flyer, your website and your mailers. Sale settings also has **Print paper order form**.

Once ordering has opened, open the online store link and place a practice order with your own name and email address, paying by check or cash so no card is charged. Open it under **Orders** and press **Cancel order**: its plants go back on sale, and it does not count in your reports.

WHILE ORDERS COME IN

- **Paper, phone and walk-in orders** go in under **Phone or paper order**. They draw on the *same* stock as the website: one number for both. Choose how it arrived (Mail / Phone / Walk-in) and how they paid.
- **Recording a payment.** Open the order (Orders → search the name), press **Mark $X paid**, choose Check / Cash / **Card on the district's own reader** / Other, add the check number if you like.
- **Messages** sends reminders and announcements to customers. **Before sending, open "See exactly who gets this" and read the list. Send a test email** first: "Sent only to the address below. Customers are not emailed."
- **Waitlist.** A plant at zero shows **Sold out** in the online store but stays listed, with a **Join waitlist** button. People waiting are emailed in sign-up order, as many as there is stock for, when you add stock or press **Email the next** on the Waitlist page. Nothing is sent otherwise.
- **Customers.** Your mailing list starts empty. **Customers → Import customers** takes a CSV of last year's buyers: Name, Email, Phone and Address, matched loosely, previewed before anything is saved. One person at a time goes under **Add a customer**.

PICKUP DAY

Pickup day (left menu) shows: how many are checked in, who still owes money, **Pack lists** and **Pull sheet (by species)** to print, and **Walk-in sales** for selling leftover stock.

- **Volunteers:** Pickup day → **Generate volunteer link** → **Copy link** → text it. They don't need an account. Ask volunteers to **open the link once while they still have signal**.
- **What the volunteer sees: Pickup check-in**, the list of orders. They find the name and press **Check in**. **"Picked up:"** and their name means done: hand over their plants. Volunteers check people in and take the money at the table; **you** record it.
- **Substitutions.** Open the order, choose the plant in **Substitute with...**, press **Review substitution** and confirm. If the order has an email address, the customer is emailed the change and the substitution policy.
- **Recording a refund.** An order that says **Refund owed** is money the district pays back by hand: a canceled cash or check order, or a cheaper plant substituted. Pay the customer, open the order, press **Mark refunded ($X)**.
- **At the end of the day:** Pickup day → **Review and mark not picked up.** It shows exactly which orders never arrived and what the district keeps. Nothing is deleted.
- **After the day.** Each link stops on its own end date (the day after your last pickup time, or the number of days you chose), and **Turn off all volunteer links** ends every link at once. A new volunteer link doesn't switch off the old one.

AFTER THE SEASON

- Once online ordering stops, the **Dashboard** shows **Closing the season**. Each line opens the list where it is settled.
- **Reports** has the board figures: gross sales, sales by plant, cash, checks and card, refunds. It also has **Orders CSV**, **Order lines CSV** and **Payments CSV**.
- **Customers** is the district's mailing list. Export it any time; it belongs to the district. Use **Mailing list CSV** or **All customers CSV**.
- **Sale settings → Copy a previous season** carries plants and prices into next year (stock does not carry over; enter the new nursery numbers).

HELP

Help sheets in the left menu opens `groundfolk.org/help/district`. The coordinator's page for pickup day is `groundfolk.org/help/coordinator`.

Report a problem at the bottom of any admin page, or `groundfolk.org/support`.

Questions: **support@groundfolk.org**.

Fees: see groundfolk.org/pricing