



**PHEASANTS AND QUAIL FOREVER
CHAPTER BUSINESS PORTAL
INFORMATION GUIDE**

Property of:

**Pheasants Forever, Inc.
1783 Buerkle Circle
St. Paul, MN 55110**

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CHAPTER BUSINESS PORTAL INFORMATION GUIDE

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SECTION 1: INTRODUCTION TO THE BUSINESS PORTAL

What is the Business Portal?

The Chapter Business Portal is Chapter-Only Web Site hosted by the National Office of Pheasants Forever and Quail Forever. The purpose of the Portal is to facilitate efficient communication and information exchange between chapters and the National Office. The Business Portal currently includes features such as document libraries, quick links to other PF & QF websites, news feeds of press releases from Pheasants & Quail Forever, and on-line chapter merchandise ordering and account information.

Why is the Business Portal being Implemented?

There are two main reasons for the National Office investment in this tool: First, many chapters have asked for a Chapter-Only website on which they can order merchandise, view invoices and account information, obtain forms and documents - and do so on their time. The Portal provides the ability for chapter leaders to do this 24 hours a day, 7 days a week, 365 days a year. Many of the things that chapter leaders had to do during PF/QF National Office hours can now be done at any time of day or night, and on weekends.

Second, in addition to being a service to chapters, this will make our National Office operations more efficient. We traditionally process over 15,000 merchandise orders each year. The vast majority of these orders are taken over the phone, by fax or e-mail, or through a regional field representative. These orders are manually entered by customer service representatives in the National Office. In many cases, data entry is done twice – once by you as a chapter representative into an e-mail or fax, or when you write it down in order to prepare for your call to the National Office to place the order. The order is entered again by a customer service representative. This type of inefficiency is time-consuming and expensive, and takes away from resources that could otherwise be used to accomplish the mission of the organization.

Will the Business Portal take the Place of any existing Services?

While we hope that all chapters will make a point to use the Business Portal to accomplish many of the things they have traditionally relied on the telephone to accomplish, we realize that it may not be for everyone and cannot answer every question. As a result, chapters will continue to be able to call our merchandise department to order their merchandise as they have in the past. Regional Field Representatives are also available to process merchandise orders. We also realize that some things are just better accomplished by talking to a real person. As always, we encourage you to call the National Office or your Regional Field Representative for assistance in those situations. Again, we ask that you take the time to learn about the Business Portal and use it to accomplish some of the things that you have traditionally handled through a telephone call.

Who can Access the Business Portal?

The Business Portal is NOT a public website. Only PF and QF Chapters and Staff have access to the Portal. Initially, we will be issuing a single user name and password to each chapter. Since the Business Portal is connected to the PF/QF internal systems (i.e., the accounting system), controlling access is very important. The password will be provided to the Chapter Treasurer. The Treasurer can share the login information with others within the chapter (i.e., the President or Banquet Chair), but the Treasurer will be responsible for notifying the National Office if it becomes necessary to change the password when someone with whom the login information was shared is no longer authorized to access the site.

Are there any plans to add other Features to the Business Portal?

As with any new process, we expect that the Business Portal will change over time. We are currently in the process of evaluating proposals that would add Cash Management System (CMS) reporting to the Business Portal. We realize this is a natural extension of this tool and believe it would provide additional value to chapters. Watch your chapter e-mail and the Business Portal for future developments.

SECTION 2: LOGIN PROCEDURES

The first step to gaining access to the Business Portal is to log in. Remember, this is not a public website that is accessible to anyone. It requires a user name and password. To get started follow these instructions:

1. Launch your internet browser (You will need to use Microsoft Internet Explorer. Other browsers such as Mozilla and Google Chrome will likely result in limited functionality within the Portal)
2. In the internet address field of your browser, type: <https://www.pfstore.net>
3. A login box will pop-up (see image below)
4. Login using the format below and the user name and password provided to you by the Pheasants & Quail Forever National Office. NOTE: You must type **pheasants** before your chapter user name, which will be "CH" followed by your 4 digit chapter number (example: CH0473). Note that the password that you receive is **case sensitive**, so it must be entered exactly as provided.



SECTION 3 – INSTALLING MICROSOFT ADD-ONS

The first time that you log onto the Business Portal, you will be prompted to install several Microsoft Add-ons. These add-ons will generally appear at the top of the website (See below). Click on these Add-ons and select “Run” or “Install” as prompted. **It is necessary for all of these Microsoft Add-ons to be installed on your computer in order for you to have access to many of the features within the Business Portal.** *Note: You will only need to install these Add-ons the first time that you log onto the Business Portal from a new computer.*

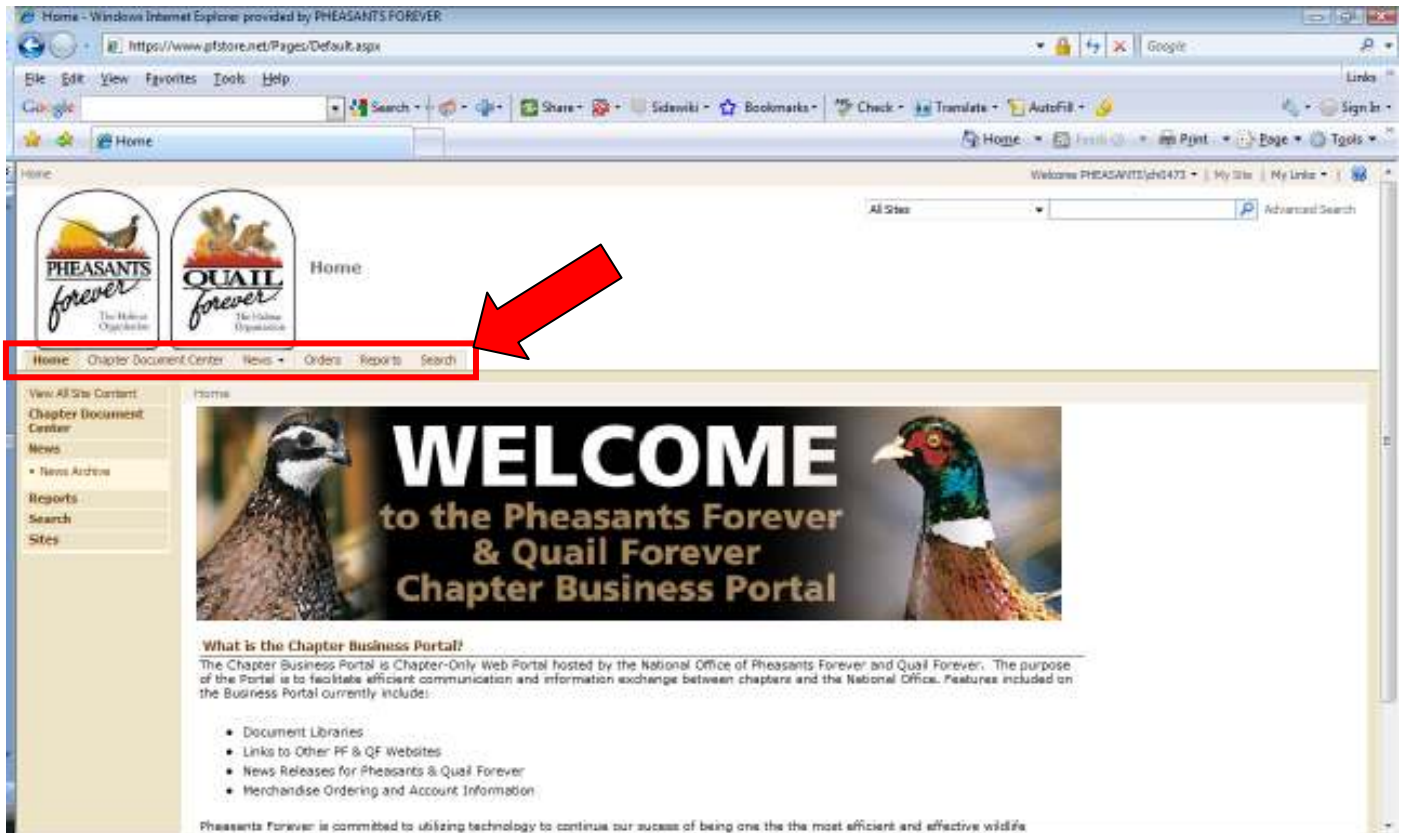


If you have difficulty gaining access to the Business Portal or getting all of the Add-ons installed, you can refer to the “**Internet Explorer Settings – Additional Information**” document at the bottom of the Business Portal Home Page under “**Additional Resources.**”

SECTION 4: GENERAL NAVIGATION

Once your login has been authenticated by the PF network, you will see the Home page of the Chapter Business Portal, which will look like the image below.

To navigate through the Portal, there is a tabbed menu across the top that will allow you access to various sites within the Portal.

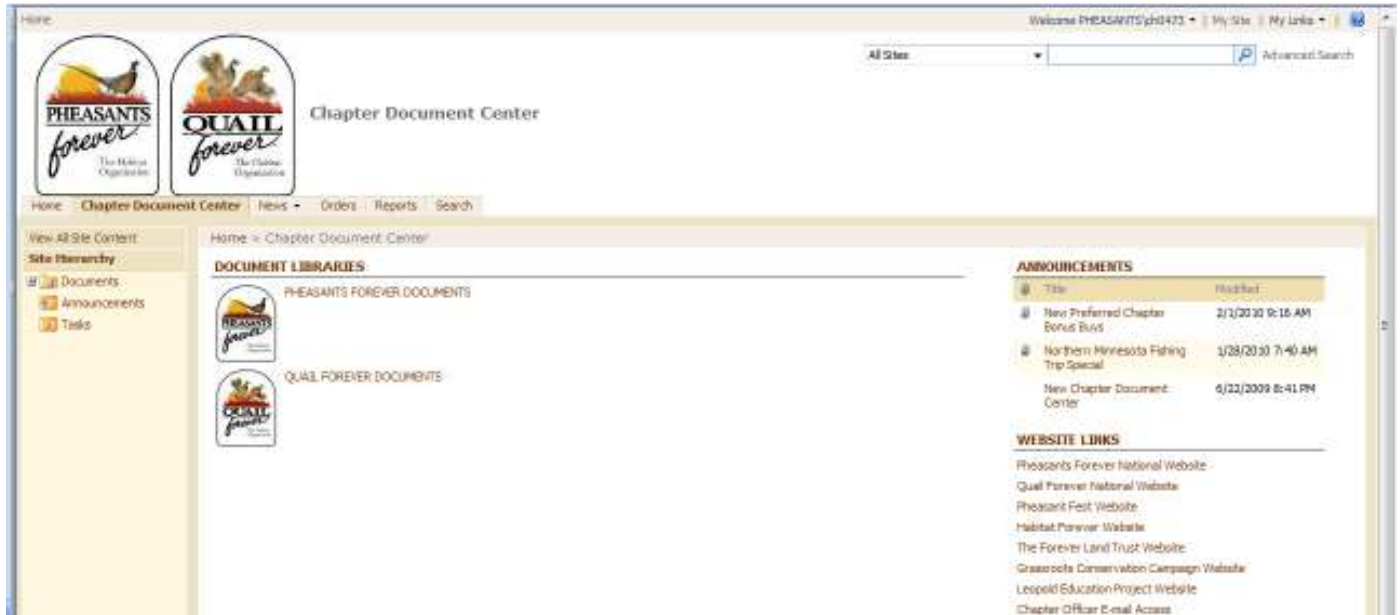


The Portal has several sites that will contain different information and functionality. They are generally broken into the following main pages/sites:

Site/Page	Contents
Chapter Document Center	Various frequently requested documents including insurance, tax, accounting, membership, merchandise, newsletters, etc.
News	Any chapter announcements (e.g., new products, etc) as well as a news feeds of press releases from PF and QF National websites.
Orders	Contains on-line real-time ordering and order monitoring, merchandise account information, and product availability.
Reports	Will be used for future reporting tools.

SECTION 5: CHAPTER DOCUMENT CENTER

This page contains various documents that are often requested by chapters, including insurance forms and information, tax information, chapter manuals, newsletters, merchandise flyers, etc. They are broken down by Pheasants Forever and Quail Forever Documents. Click on the PF or QF logos under **“Document Libraries”** to access the different document library folders. This site also contains recent announcements and links to other PF and QF websites.



When you click on the PF or QF logo, you will see the document folders, which you can open to view the various documents that can be printed or e-mailed.



SECTION 6: NEWS

The News site contains live news feeds of press releases from the PF and QF National websites. You can view the entire press release by clicking on the press release title. There is also a picture library that contains the banquet and encore merchandise for both PF and QF. These can be viewed in a slide show or the images can be downloaded for other use at your banquet.

The screenshot shows a web browser window displaying the news page for Pheasants Forever and Quail Forever. The page layout includes a header with logos, a navigation menu, and two main news sections. The 'Pheasants Forever News' section lists several news items from January and February 2010, including announcements about awards, habitat meetings, and gun giveaways. The 'Quail Forever News' section lists news items from January and February 2010, including announcements about awards, new chapters, and habitat projects.

Pheasants Forever News

- February 08, 2010 - Vermilion County Pheasants Forever and Donnellson's Laurent Honored with Illinois PF Awards
- February 06, 2010 - Introducing "Signature Series" Food & Cover Mixes from Pheasants Forever
- February 04, 2010 - It's Open Season in the Catalina Hunter Help Room at Pheasant Past
- February 03, 2010 - Best Land Use with Best Buy, and the Best Part...It's Free
- February 01, 2010 - You Get the Guns, We All Get the Grasslands
- January 28, 2010 - Kansas Pheasants Forever State Habitat Meeting is Feb. 6 in Salina
- January 28, 2010 - Need a New Pheasant? Pheasants Forever Gun-Giveaway is Happening Now!
- January 28, 2010 - Bird Dogs Bring Big Bark to Des Moines this February
- January 27, 2010 - Morrison County Pheasants Forever Chapter, Worthington's Scott Rall and L-SDHC Honored at Minnesota Pheasants Forever State Convention
- January 26, 2010 - First Annual Colorado Pheasants Forever State Habitat Meeting Coming to Stratton

Quail Forever News

Quail Forever News Feed

- February 09, 2010 - Introducing "Signature Series" Food & Cover Mixes from Quail Forever
- February 06, 2010 - Donnellson's Laurent Honored with Illinois QF Awards
- February 05, 2010 - Davis County Home to Iowa's Third Quail Forever Chapter
- February 03, 2010 - New Quail Forever Chapter Rushes in Cowley County, Kansas
- February 01, 2010 - Starting a Local Quail Forever Chapter
- January 15, 2010 - SportDOG Awards Funds to Quail Forever
- January 12, 2010 - Feed Your Next Habitat Project, Not the Quail
- January 12, 2010 - Half Million Acres of Habitat Work for "The Habitat Organization" in '09
- January 09, 2010 - Central Illinois Home to New Quail Forever Chapter
- January 06, 2010 - Kentucky Adds Four more of Quail Forever Chapters to Benefit Bluegrass Bobwhites

SECTION 7: ORDERS

The Orders site is the portion of site that provides you the ability to check your merchandise account balance (**Figure A**), review unpaid invoices and credits (**Figure B**), browse for merchandise and place orders (**Figure C**), search for merchandise items (**Figure D**), or check on the status of orders, and view order and invoices details (**Figure E**).

The screenshot shows the 'Orders' section of the Pheasants Forever website. The page is titled 'Orders' and includes a navigation menu with 'Home', 'Chapter Document Center', 'News', 'Orders', and 'Reports'. The main content area is divided into several sections:

- Figure A:** 'CHAPTER ACCOUNT SUMMARY' for 'GREAT PLAINS (NE) - 0473'. It displays account details such as Customer ID (040473), Customer Name (Great Plains (NE) - 0473), Customer Balance (\$808.94), Current balance (\$712.56), and various payment terms (31-60 Days, 61-90 Days, 91-120 Days, 121 & Over).
- Figure B:** 'UNPAID INVOICES' table listing several invoices with their respective dates and amounts.
- Figure C:** 'MERCHANDISE CATEGORIES (Click on a Category to Browse Items)'. A list of categories including 'Preferred Chapter Bonus Buys' (for Dec 2009, Feb 2010, Jan 2010, Nov 2009, Oct 2009), 'Banquet Packages', 'Books and DVDs', 'Casual Apparel', 'Cooking Accessories', 'Dns Products', 'Costume', 'Gift Cards', 'Gifts', 'Gun Accessories', 'Headwear', 'LSP Materials', 'Etc', 'Shooting Accessories', 'Stags', 'Supplies', 'Upland Hunting Accessories', 'Upland Hunting Apparel', 'Women's', and 'Youth'.
- Figure D:** 'SEARCH FOR MERCHANDISE ITEMS (Click on the Spy Glass to Search)'. A search input field with a magnifying glass icon and buttons for 'View Item Detail' and 'Add to Order'.
- Figure E:** 'ORDER HISTORY & STATUS (View Order Details)'. A table showing a list of orders with columns for Document No., Date, Order Amount, and Order Status.

At the bottom of the page, there are navigation links: 'Previous', 'Next', and 'View Document Detail'.

SECTION 8 – PLACING A MERCHANDISE ORDER

To place an order on the Business Portal, click on one of the Merchandise Categories to browse for items. This will open a listing of the items in the category or another sub-category. You can order the items by clicking the **“Select”** box on the far right column next to the item. The **“Quantity Selected”** field will default to 1, but you may change to the quantity to the desired amount. To view an image of the item, click on the **“Item Number”** in the left column. After selecting the items on the page that you wish to order, click the **“Add to Order”** button at the bottom of the page. This will place the items in your shopping cart.

Items

Company: Pheasants Forever, Inc.

Items by Category

Select the items you want to order. Then click the Add to Order button to add the selected items to the current order.

Category: Hearing Protection

Item Number	Item Description	Unit	Price	Qty. Selected	Qty. on Order	Qty. Available	Select
171960001	Hearing Protection Muffs	Each	\$24.00	<input type="text"/>	0	47	<input type="checkbox"/>
220100000	Ear Plugs on lanyard	Each	\$1.75	1	0	992	<input checked="" type="checkbox"/>
220400000	Compact Hearing Protection	Each	\$23.00	<input type="text"/>	0	45	<input type="checkbox"/>

If you wish to add other items to your cart, click the **“Add Items”** button at the bottom of the shopping cart page to return to the merchandise categories and continue browsing. If you are done shopping and wish to check out, click on the **“Check Out”** button.

Shopping Cart

Company: Pheasants Forever, Inc.

Shopping Cart

Select the Check Out button to enter shipping information and complete your order. Select the Refresh Order button to refresh the information on this page. Select the Clear Order button to remove all items currently in your order. Select the Add Items button to search for and add items to your order.

Item Number	Item Description	Unit	Price	Qty	Extended Price	Delete
220100000	Ear Plugs on lanyard	Each	\$1.75	1	\$1.75	<input type="checkbox"/>

Subtotal \$1.75

SECTION 9 – FINALIZING YOUR ORDER

When you have clicked the **“Check Out”** button, you will be directed to a page to finalize the details of your order. On this page you will be asked to verify the items and quantities on your order and enter the additional information in order to complete the processing (see screen shot on next page).

The additional information necessary to complete your order consists of the following:

Order Placed by: Type your name. This allows for follow-up if there is a question regarding the order.

Shipping Method: This will default to “Ground.” If you want a different shipping method, you may select it here.

Requested Ship Date: This will *default to the current date*, and the order will be processed in the order in which it was received. If you want the order shipped at a later date, enter that date here.

Bill to: Select the method in which you would like to pay for your order as either:

- 1) CMS ACCOUNT** - if you want us to transfer the funds directly from your CMS Account, or
- 2) ON ACCOUNT** - if you prefer to send a CMS check to pay for the order.

Shipping Address: Select the shipping address for the order, or if it does not exist in the drop down menu, click on the **“Change Shipping Address”** button to enter a new address.

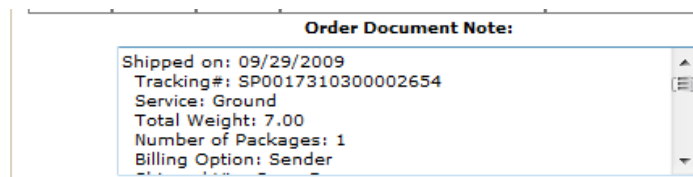
Order Note: Optional - You can enter additional information or instructions for your order in the notes section.

Once you have completed all of the above information and confirmed that your order is correct, click the **“FINISH”** Button. Once you click **“Finish,”** you will receive an order confirmation on your screen indicating the order number. At this point, your order status will be visible to you by looking at the **“Order History & Status”** area (See Figure E in Section 7).

When your order has shipped, you will be able to track the delivery using the tracking number provided on the invoice. This can be accessed by selecting the invoice or order and clicking **“View Document Detail”** (See Figure E in Section 7). This will display all of the order details, and will include the shipment information in the **“Order Document Note.”** You can use the Tracking # provided in this note to track using either the Spee-dee or UPS websites as follows:

SPEE-DEE (Tracking # beginning with “SP”): <http://packages.speedeedelivery.com/>

UPS (Tracking # beginning with “1Z”): <http://www.ups.com/tracking/tracking.html>



SECTION 9 – FINALIZING YOUR ORDER (Continued)

View All Site Content

Orders Home

Shopping Cart

Complete Order

This is the final step in completing your order. Check that all information on this page is correct. Click the Finish button to submit your order for processing. Click the Add Items button to return to the Orders page. Click the Cancel button to start over.

Shopping Cart

Item Number	Description	Unit	Your Price	Qty	Extended Price
220100000	Ear Plugs on lanyard each		\$1.75	1	\$1.75
Subtotal					\$1.75

Shipping & Payment Information

Confirm the shipping method & requested ship date. Select bill to option and shipping address information. Add a Note if desired.

Order Placed By:

Shipping Method:

Requested Ship Date:

For Bill To, Select either 1) CMS ACCOUNT or 2) ON ACCOUNT. Do not use any other Bill To Addresses

Bill To: Transfer From CMS Account

Shipping Address: Bob Smith
1234 1st Street
St. Paul, MN 55110

Order Note:

Customer

GREAT PLAINS (NE) - 0473

Skip this section. Proceed to bottom of screen and click FINISH

On Account:

Order Total Information

The totals below represent current information and may change due to freight charges or uncalculated taxes.

Shopping Cart Subtotal:	\$1.75
Trade Discount Amount:	\$0.00
Miscellaneous Amount:	\$0.00
Shipping Amount:	\$0.00
Tax Amount:	\$0.00
Order Total Amount:	\$1.75

SECTION 10 – ADDITIONAL HELP

If you are having difficulty logging into the portal or your password does not work, contact Brajesh Lacoul at (877) 773-2070, or via e-mail at blacoul@pheasantsforever.org.

If you need assistance finding information on the Business Portal or general questions about placing an order, your Regional Field Representative can also assist you.