



Welcome to the Support Local BC Business Portal powered by Duoplane!

This portal will help you to keep track of your business's Support Local BC gift certificates in real time.

Review this document in full to learn how to set up and get the most out of your Business Portal.

If you have any questions, please give us a call at 1-888-772-4667(Mon-Fri) or email us at

hello@supportlocalbc.com

1. Getting Started

REVIEWING GIFT CERTIFICATE CONFIRMATION EMAILS

Support Local BC customers receive gift certificates via confirmation email.

A sample is shown here which indicates what they have purchased and customer redemption instructions.



ORDER BC1407

Customer Name thank you for purchasing gift certificates from local businesses!






Your order details and gift certificates are below in the **Your Order Confirmation** section. **Please note that this email will also serve as your gift certificate(s).**

Here's how to redeem your gift certificates:

You can print this email or show it on your smartphone when you are ready to redeem at the business. They will mark off the amount you spent on their list but you should also keep track of your balance.

Questions? Please read our FAQs.

Your Order Confirmation

| | | |
|--|---|---------|
|  | Gift Certificate - Order BC1407 YOUR BUSINESS x 1 Gift Certificate Value: \$10 | \$10.00 |
|  | Gift Certificate - Order BC1407 Business Name 2 Gift Certificate Value: \$25 | \$25.00 |
|  | Gift Certificate - Order BC1407 Business Name 3 Gift Certificate Value: \$10 | \$10.00 |
|  | Gift Certificate - Order BC1407 Business Name 4 x 1 Gift Certificate Value: \$25 | \$25.00 |
|  | Gift Certificate - Order BC1407 Business Name 5 Gift Certificate Value: \$25 | \$25.00 |

Note that there may be more than just your business listed in their order.

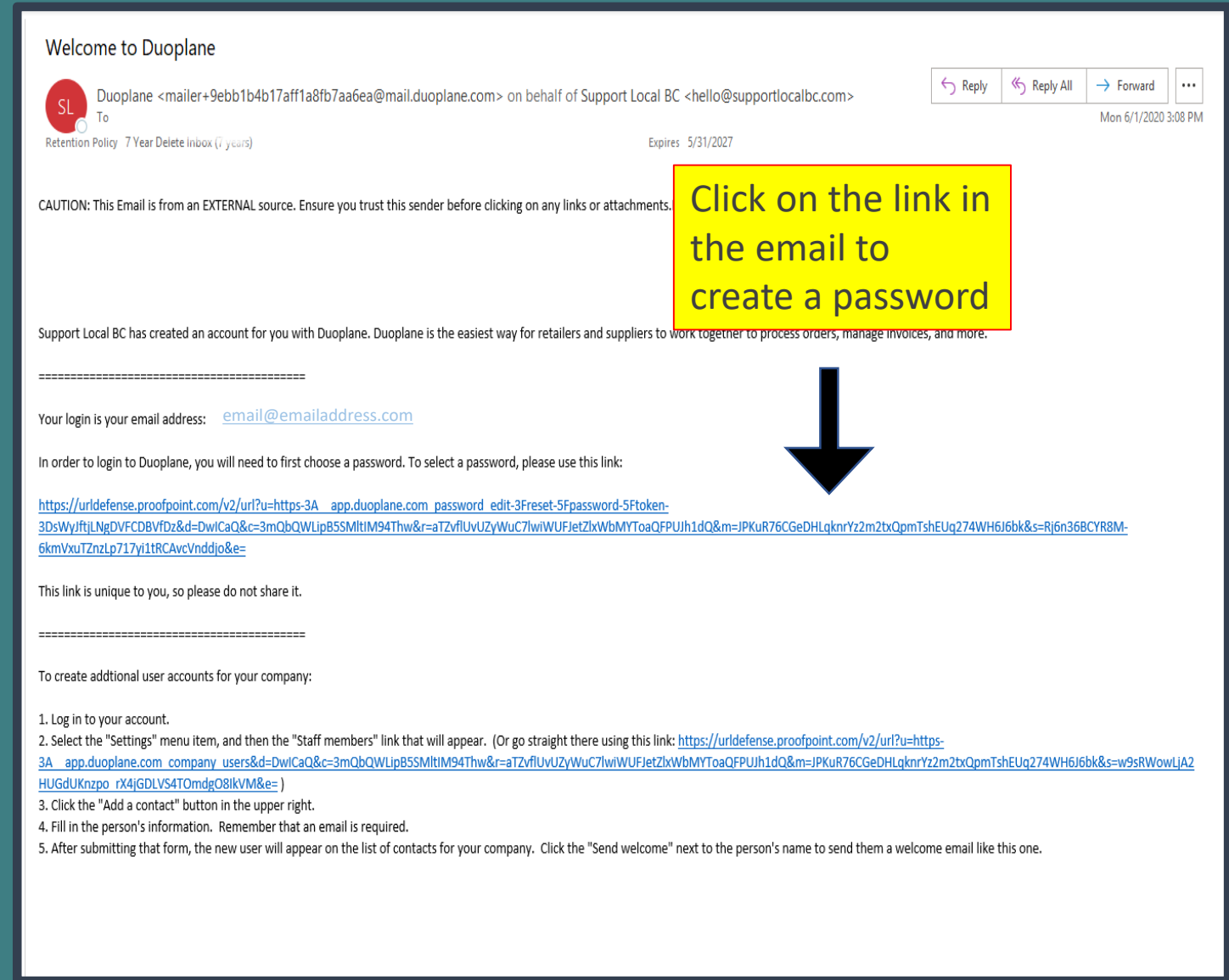
Locate the **order number** in the confirmation email so you can use this in your business portal.

2. Accessing Duoplane

SETTING UP YOUR ACCOUNT

The welcome email from Duoplane will have a link to create a password. Once you set up a password your registration will be complete and you may access your portal.

If you have more than one business on Support Local BC you can access them all through the same account



Welcome to Duoplane

SL Duoplane <mailer+9ebb1b4b17aff1a8fb7aa6ea@mail.duoplane.com> on behalf of Support Local BC <hello@supportlocalbc.com>
To
Retention Policy 7 Year Delete inbox (7 years) Expires 5/31/2027

CAUTION: This Email is from an EXTERNAL source. Ensure you trust this sender before clicking on any links or attachments.

Support Local BC has created an account for you with Duoplane. Duoplane is the easiest way for retailers and suppliers to work together to process orders, manage invoices, and more.

Your login is your email address: email@emailaddress.com

In order to login to Duoplane, you will need to first choose a password. To select a password, please use this link:

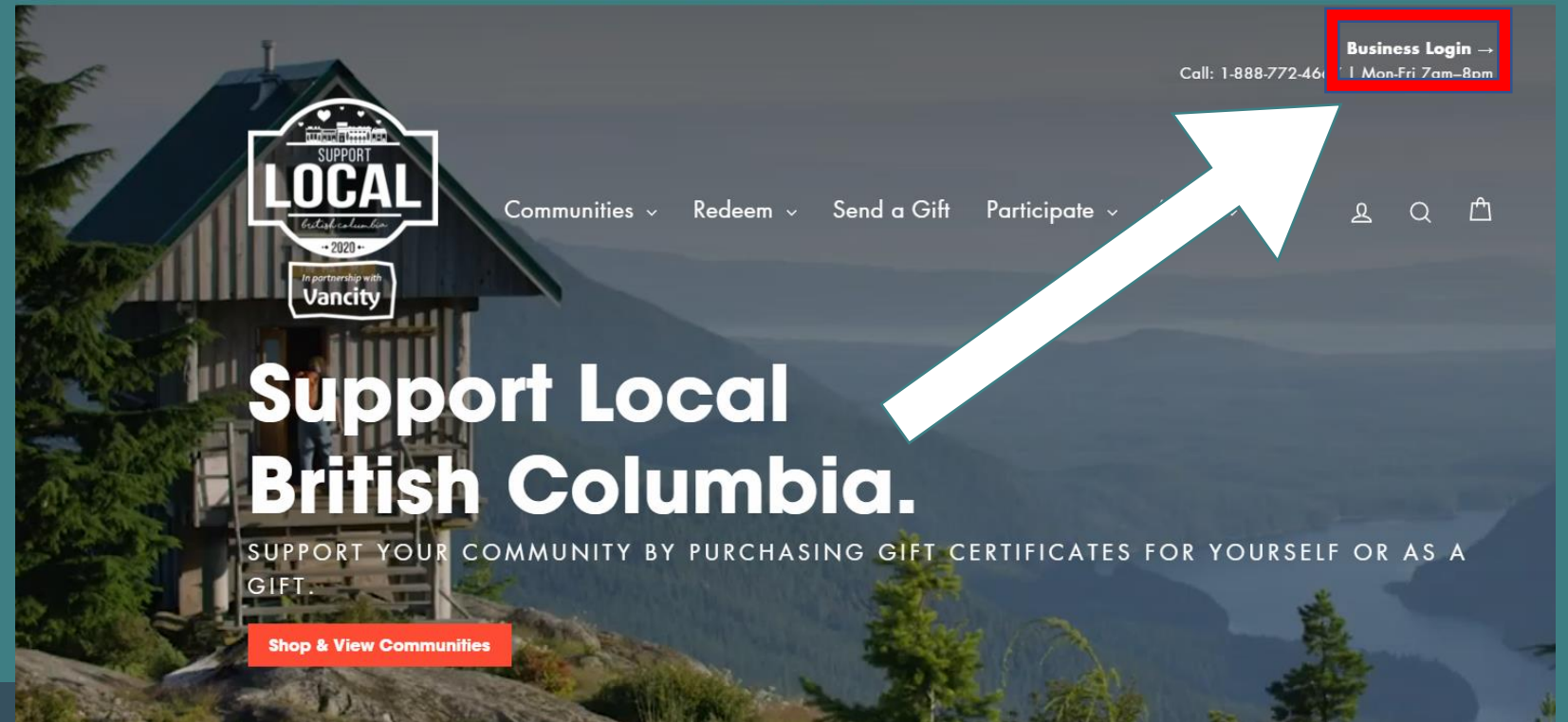
https://urldefense.proofpoint.com/v2/url?u=https-3A_app.duoplane.com_password_edit-3Freset-5Fpassword-5Ftoken-3DsWyjftjLNgDVFCDBVfdz&d=DwiCaQ&c=3mQbQWLipB5SMItIM94Thw&r=aTZvflUvUzYwUc7lwiWUFjetZlxWbMYToaQFPUjh1dQ&m=JPKuR76CGeDHLqknrYz2m2txQpmTshEUq274WH6j6bk&s=Rj6n36BCYR8M-6kmVxuTZnzLp717yi1tRCavcVnddjo&e=

This link is unique to you, so please do not share it.

To create additional user accounts for your company:

1. Log in to your account.
2. Select the "Settings" menu item, and then the "Staff members" link that will appear. (Or go straight there using this link: https://urldefense.proofpoint.com/v2/url?u=https-3A_app.duoplane.com_company_users&d=DwiCaQ&c=3mQbQWLipB5SMItIM94Thw&r=aTZvflUvUzYwUc7lwiWUFjetZlxWbMYToaQFPUjh1dQ&m=JPKuR76CGeDHLqknrYz2m2txQpmTshEUq274WH6j6bk&s=w9sRWowLJA2HUGdUKnzpo_rX4jGDLVS4T0mdgO8IkVM&e=)
3. Click the "Add a contact" button in the upper right.
4. Fill in the person's information. Remember that an email is required.
5. After submitting that form, the new user will appear on the list of contacts for your company. Click the "Send welcome" next to the person's name to send them a welcome email like this one.

LOGGING IN



Once you're set up, easily access your business portal by clicking the "Business Login" button on the Support Local BC homepage.

LOGGING IN

*duo*plane

Hello. Please sign in.

[Sign In](#)

Keep me logged in on this device.

[Sign up](#)

[Forgot your password?](#)

Login with your email address and the password you created during set-up.

If you forget your password, use this button to reset it at any time

GETTING TO KNOW YOUR DASHBOARD

Duoplane 

ABC Company

ABC Company

Staff Name



 DASHBOARD

 ORDERS

 SETTINGS

You have **2** open purchase orders.

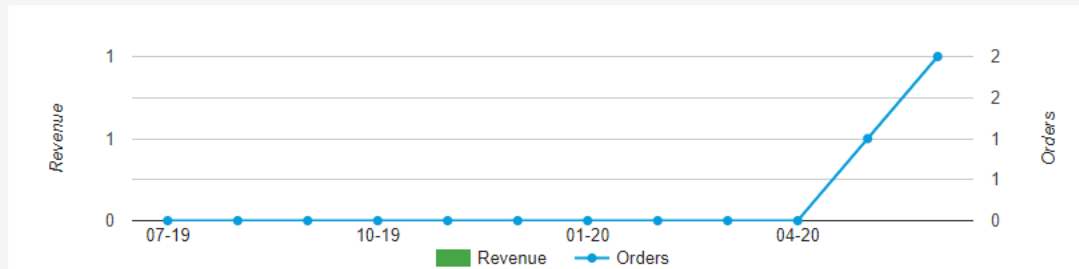
search purchase orders

 Search

Search by customer or PO | [More search options](#)

Manage orders 

Order history (12 months)



Last 30 days

REVENUE
0
0

ORDERS
1
▲ 0

Order alerts

Orders needing promise dates

2

Configuration alerts

None

Welcome to your **Business Dashboard**.

On this page you can view high level details on your sales, search for a specific order, and easily access your full order summary

GETTING TO KNOW YOUR DASHBOARD

Duoplane ABC Company ABC Company Staff Name

DASHBOARD
ORDERS
SETTINGS

You have **2** open purchase orders.

Search by customer or PO | [More search options](#)

[Manage orders](#)

Order history (12 months)

| Period | Revenue | Orders |
|--------|---------|--------|
| 07-19 | 0 | 0 |
| 10-19 | 0 | 0 |
| 01-20 | 0 | 0 |
| 04-20 | 0 | 1 |
| 07-20 | 0 | 2 |

Last 30 days

| REVENUE | ORDERS |
|---------|--------|
| 0 | 1 |
| 0 | ▲0 |

Order alerts
Orders needing promise dates 2

Configuration alerts
None

If you have more than one business registered, click on the company name to switch between accounts.

Welcome to your Business Dashboard.
On this page you can view high level details on your sales, search for a specific order, and easily access your full order summary

GETTING TO KNOW YOUR DASHBOARD

Navigate to the Orders page for full summary

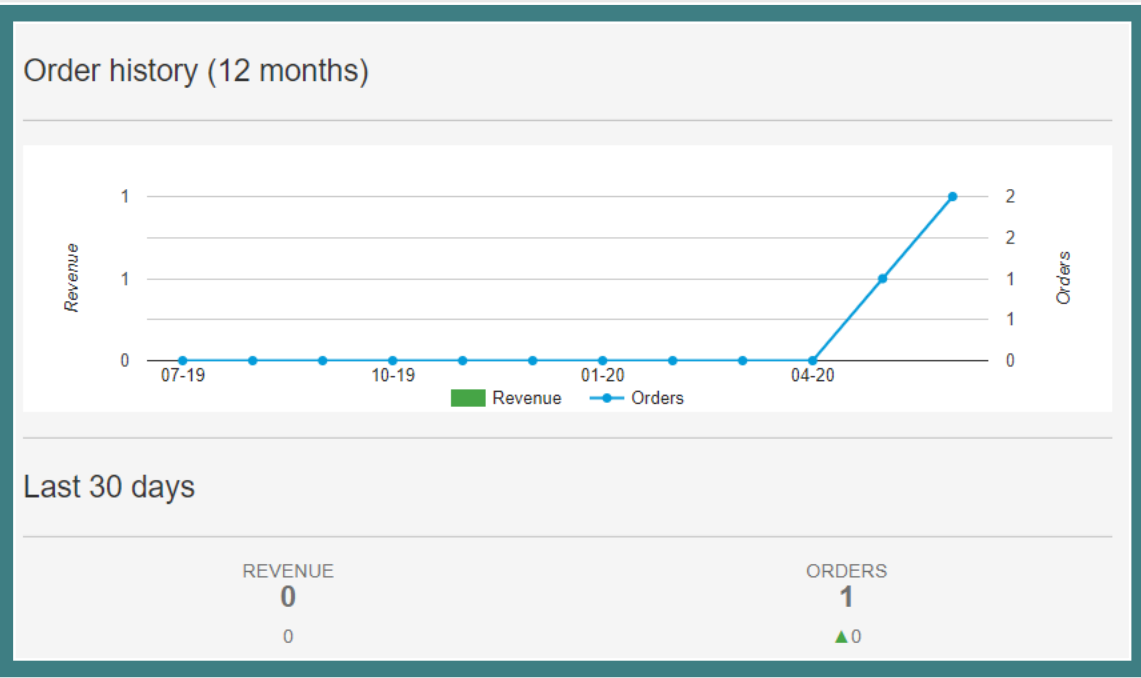
You have **2** open purchase orders.

Total number of outstanding gift certificates

search purchase orders
Search by customer or PO | More search options

Search for a specific gift certificate by order number or customer name

Manage orders



Order alerts

Orders needing promise dates **2**

Configuration alerts

None

Data about your gift certificate sales over the last 30 days

3. Verifying a Customer Gift Certificate

SEARCHING FOR A GIFT CERTIFICATE

Duoplane 

ABC Company

ABC Company

Staff Name

You have **1** open purchase order.

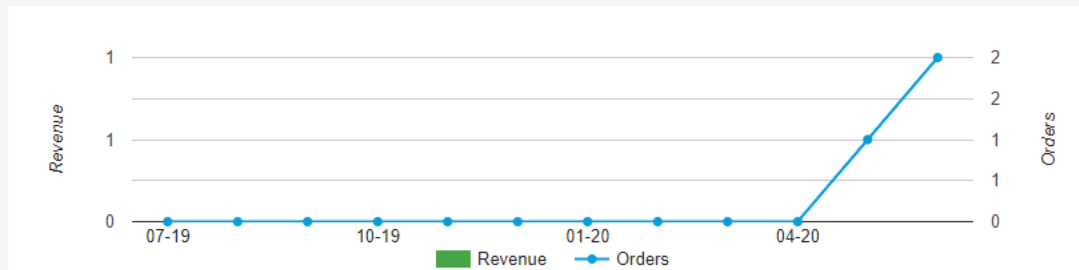
BC1480-1

 Search

Search by customer or PO | [More search options](#)

Manage orders 

Order history (12 months)



Last 30 days

REVENUE
0
0

ORDERS
1
▲0

Order alerts

[Orders needing promise dates](#)

Configuration alerts

None

Search the order number (eg. BC1480-1) or the name of the purchaser of the gift certificate and click Search. This will take you directly to that order.

UNDERSTANDING GIFT CERTIFICATE INFORMATION

- Main Menu
- ORDERS**
- search orders
- Overview
- Search Orders
- Confirm 0
- Ship 1
- Open Orders 1
- Late Orders 1
- Returns 0

All open purchase orders

Name of person who bought the gift certificate on Support Local BC

Downloads Ship open POs

Displaying 1 purchase order expand

Date certificate was redeemed

| Purchase order | Retailer | PO date | Ship to | Status | Promise date | Alerts | |
|----------------|------------------|--------------|-----------|--------|--------------|--------|------|
| BC1480-1 | Support Local BC | May 31, 2020 | Purchaser | open | | late | View |

Gift certificate number

Redemption Status: "open" means gift certificate has not been redeemed. "complete" means gift certificate has been redeemed.

Click to redeem certificate or read notes

Modify search

Customer name

Purchase order number

Sales order number

Item name

Item retailer SKU

Item vendor SKU

Retailer

Search

MARKING GIFT CERTIFICATES AS REDEEMED

Main Menu

ORDERS

search orders

Overview

Search Orders

Confirm **0**

Ship **1**

Open Orders **1**

Late Orders **1**

Returns **0**

Purchase Order BC1480-1

Support Local BC / May 31, 2020

Download Confirm PO **Create shipment**

Shipping address

Purchaser

PO Info

Items

This purchase order has 1 open item.

| Product | Qty | Price | | Status |
|-------------|-----|-------|-------|--------|
| | | Each | Total | |
| ABC Company | 1 | 10.00 | 10.00 | 1 Late |

Test note
- Dutch Bakery & Diner
support@duoplane.com
1 Jun 2020 7:33 AM

\$5 remaining
Kylie Pettifer
Dutch Bakery & Diner
2 Jun 2020 4:08 PM

Add message to Support Local BC

Optional: Click "Add message to Support Local BC" to add a note for this gift certificate (e.g. If partial redemption could write "\$5 remaining")

open

Retailer

Unique line item

Total item quantity

Date created

Date set

1:46 PM

Click "Create Shipment" to redeem

MARKING GIFT CERTIFICATES AS REDEEMED

- Main Menu
- ORDERS**
- search orders
- Overview
- Search Orders
- Confirm **0**
- Ship **1**
- Open Orders **1**
- Returns **0**

Edit Shipment on PO BC1480-1

Support Local BC

Ship to
Michele Hamilton

[Download packing slip](#)

Item and invoice information

* Shipped via: Gift Card Redeemed

Tracking number: 2 June 2020
[+ Add more tracking numbers](#)

Vendor invoice number:

Redemption has been confirmed

Shipment created Jun 2, 2020 6:19 PM

Items in this shipment and vendor invoice detail:

| Item | Qty Ordered | Qty In Shipment | |
|-------------|-------------|-----------------|--|
| ABC Company | | 1 | |

Enter today's date in tracking number

Save shipment

Click Save

MARKING GIFT CERTIFICATES AS REDEEMED

Main Menu **ORDERS**
search orders

Overview
 Search Orders
 Confirm **0**
 Ship **1**
Open Orders **1**
Returns **0**

Search purchase orders

Downloads Ship open POs

Displaying 1 purchase order

| Purchase order | Retailer | PO date | Ship to | Status | Promise date | Alerts |
|----------------|------------------|--------------|-----------|----------|---------------------|--------|
| BC1480-1 | Support Local BC | May 31, 2020 | Purchaser | complete | Shipped Jun 2, 2020 | |

50 per page

Modify search

Customer name

Purchase order number

Sales order number

Item name

Item retailer SKU

Item vendor SKU

Retailer

Created between

Fulfillment status

Late status

Confirmation status

Redemption status will now show as "complete"

Date gift certificate was redeemed will now appear with today's date

4. How to View All Orders & Download Payment Totals

VIEWING ALL ORDERS

Duoplane 

ABC Company

ABC Company

Staff Name



 DASHBOARD

 ORDERS

 SETTINGS

Click
"Orders"

You have 1 open purchase order.

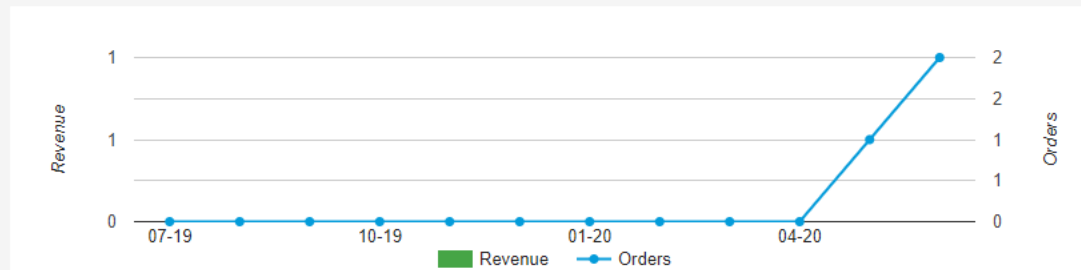
BC1480-1|

 Search

Search by customer or PO | [More search options](#)

Manage orders 

Order history (12 months)



Last 30 days

REVENUE
0
0

ORDERS
1
▲ 0

Order alerts

Orders needing promise dates

1

Configuration alerts

None

VIEWING ALL ORDERS

Duoplane  ABC Company

ABC Company

Staff Name

Main Menu

ORDERS

search orders



Overview

Search Orders

Confirm

0

Ship

1

Open Orders

1

Returns

0

NEW PURCHASE ORDERS

0

needing confirmation

OPEN PURCHASE ORDERS

1

NEW SHIPMENTS

2

in the last 24 hours



Click "Search Orders"

Purchase order aging



* 1 PO needs promise dates

Order alerts

[Orders needing promise dates](#)

1

VIEWING ALL ORDERS

Duoplane  ABC Company

ABC Company

Staff Name

Main Menu

ORDERS

search orders

Overview

Search Orders

Confirm 0

Ship 1

Open Orders 1

Returns 0

Search purchase orders

Search purchase orders

Customer name

Purchase order number

Sales order number

Item name

Item retailer SKU

Item vendor SKU

Created between

Fulfillment status

Late status

Confirmation status

Retailer

- Support Local BC

Search



Under Retailers click, "Support Local BC"

VIEWING ALL ORDERS

- Main Menu
- ORDERS**
- search orders
- Overview
- Search Orders**
- Confirm **0**
- Ship **1**
- Open Orders **1**
- Returns **0**

Search purchase orders

Search purchase orders

Customer name

Purchase order number

Sales order number

Item name

Item retailer SKU

Item vendor SKU

Retailer

You can also search by date, if you are looking for a specific period of time



Created between and

Fulfillment status

Late status

Confirmation status

| June 2020 | | | | | | |
|-----------|----|----|----|----|----|----|
| Su | Mo | Tu | We | Th | Fr | Sa |
| 31 | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| Today | | | | | | |

Search

VIEWING ALL ORDERS

- Main Menu
- ORDERS**
- search orders
- Overview
- Search Orders
- Confirm **0**
- Ship **1**
- Open Orders **1**
- Returns **0**

Search purchase orders

Downloads Ship open POs

Displaying all 3 purchase orders expand

| Purchase order | Retailer | PO date | Ship to | Status | Promise date | Alerts |
|----------------|------------------|--------------|-----------|----------|---------------------|---|
| BC1480-1 | Support Local BC | May 31, 2020 | Purchaser | complete | Shipped Jun 2, 2020 | View |
| BC1511-1 | Support Local BC | Jun 2, 2020 | Purchaser | complete | Shipped Jun 3, 2020 | View |
| BC1512-1 | Support Local BC | Jun 2, 2020 | Purchaser | open | | needs promise date View |

You will see all 'complete' and 'open' orders listed

| | | | | | |
|-----------------------|---|---------------------|----------------------|-----|----------------------|
| Customer name | <input type="text"/> | Created between | <input type="text"/> | and | <input type="text"/> |
| Purchase order number | <input type="text"/> | Fulfillment status | <input type="text"/> | | |
| Sales order number | <input type="text"/> | Late status | <input type="text"/> | | |
| Item name | <input type="text"/> | Confirmation status | <input type="text"/> | | |
| Item retailer SKU | <input type="text"/> | | | | |
| Item vendor SKU | <input type="text"/> | | | | |
| Retailer | <input type="text" value="Support Local BC"/> | | | | |

VIEWING ALL ORDERS

Duoplane ABC Company

ABC Company Staff Name

Main Menu

ORDERS

search orders

Search purchase orders

Displaying all 3 purchase orders

| Purchase order | Retailer | PO date | Ship to | Status | Promise date | Alerts |
|----------------|------------------|--------------|-----------|----------|---------------------|--------------------|
| BC1480-1 | Support Local BC | May 31, 2020 | Purchaser | complete | Shipped Jun 2, 2020 | |
| BC1511-1 | Support Local BC | Jun 2, 2020 | Purchaser | complete | Shipped Jun 3, 2020 | |
| BC1512-1 | Support Local BC | Jun 2, 2020 | Purchaser | open | | needs promise date |

50 per page

Click "Download" and select CSV to view spreadsheet with all payment totals

Downloads Ship of POs

PURCHASE ORDERS:

- PDF
- CSV

PACKING SLIPS:

- PDF

OTHER:

- Item summary

View

You can download a copy of all purchase details for your accounting purposes

Customer name

Purchase order number

Sales order number

Item name

Item retailer SKU

Item vendor SKU

Retailer

Created between and

Fulfillment status

Late status

Confirmation status

Thank You to Our Partners



We're better together

Vancity

