

How To Guide - Entering Suppliers and Products

In order to produce supplier orders all menu items must be linked to supplier products. Once suppliers are entered it is possible to generate or build menus from the supplier product data.

1. Go to the "**ORDERS**" tab => select "**Suppliers**" => click "**Insert New**".
2. Fill out any fields you can. The minimum required for a supplier is the "**Supplier Name**". Then click "**Insert**" to create the supplier record
3. Now click the "**file folder**" icon beside the supplier's name to manage the supplier products on the "**Supplier Products**" screen. 
4. Click "**Insert New**" to create a new product or click the "**pencil**" icon to edit an existing product. 
 - a. The **Product Name** will be used on the supplier order form and on menus but can be edited on menus.
 - b. The **Description** is only used on the menus.
 - c. **Label Title** is used on the delivery report and for labels.
 - d. The **Supplier Code** is used on supplier orders to identify items, especially for fund raisers where item titles are very similar.
 - e. **Package Quantity** is the quantity this product is packaged in. For example, hot dog buns often come in packages of 8.
 - f. The **Package Cost** is the cost of the package of products.
 - g. The **Selling Prices** are used to populate the menus.
 - i. **On-Line** and **Paper** prices are used for on-line and paper orders respectively.
 - ii. The **Special Prices** are offered only to students or staff who are flagged as being eligible for the special prices. These prices can be used for subsidized students or to offer different price points for staff.
 - h. **Options** are modifiers for the menu item. Do not use options to define a menu item. Valid options might be "lettuce" or "tomato" on a sub, NOT "cheese" or "pepperoni" for a pizza. There are two sets of options available to you and each set can be optionally labeled.
 - i. The **Product Image** can be uploaded from your computer and will be attached to the product. If the image has already been uploaded, you may select an image from the list of available images.

- j. **"Additional Information"** is displayed as a mouse-over pop-up to show nutritional information or any relevant information about the product that is not part of the title or description such as allergy info.
- 5. When all the products are entered they can be sorted by clicking on a row and dragging it up or down. The sequence of the products in this list will be the same sequence as the products are displayed when generating or building menus and will be the same order as printed on the supplier orders. Grouping items will facilitate future work with supplier products.
- 6. At the bottom of the **"Supplier Products"** screen are buttons that will allow you to quickly **"Edit Prices"**, **"Edit Special Prices"** or **"Edit Description"**.
- 7. When changes are made to supplier products you may wish to **"Post Products to Menu"**. Posting changes will update menu items which are linked to the products. If changes to products are not posted to the menus you will not see your changes on the order forms.