

# TOOL USER GUIDE

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## PRODUCT CHECK MANAGER



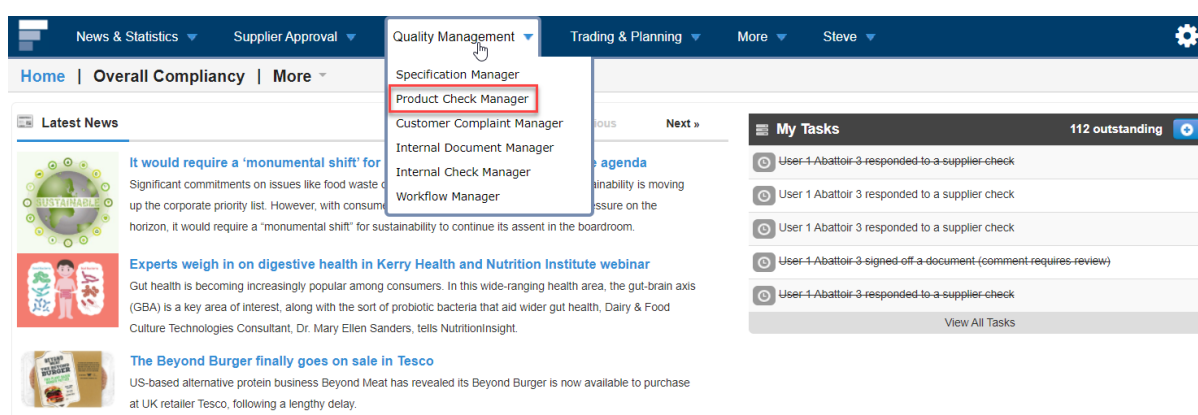
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## 1. HOW TO ACCESS PRODUCT CHECK MANAGER

**Step 1:** Sign in and go to **Product Check Manager** under Quality Management



**Step 2:** The tool opening view shows the list of the Product Check templates

News & Statistics

Supplier Approval

Quality Management

Trading & Planning

More

Steve

Product Check Manager

Product Check Templates

← Received Checks

Activity Overview

Reports

Admin

Site

All

Created By

All

Search

Search Template Names...

Filter

Clear Filters

Add New

Duplicate Selected

Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Completed		
<input type="checkbox"/>	21/08/2020 06:47:24	Poultry Goods Intake Check	Steve Jones	View Completed	<div>Record New</div>	<div></div>
<input type="checkbox"/>	30/07/2020 13:57:08	Goods Intake Check Sheet	Steve Jones	View Completed	<div>Record New</div>	<div></div>
<input type="checkbox"/>	10/02/2020 10:57:33	Finished Pack Organoleptic Testing	Steve Jones	View Completed	<div>Record New</div>	<div></div>
<input type="checkbox"/>	10/02/2020 10:57:22	Retail Pack Assesment (Dr, Ns, Calc)	Steve Jones	View Completed	<div>Record New</div>	<div></div>
<input type="checkbox"/>	05/02/2020 13:35:56	Raw Material - Non Conformance Record - (DR, NS, CALC) IN USE	Steve Jones	View Completed	<div>Record New</div>	<div></div>

## 1.1 HOW TO VIEW COMPLETED & IN PROGRESS PRODUCT CHECKS

**Step 1:** Once a check is created, go back to the Product Check Manager template list and select **view completed** on the form that you used

News & Statistics

Supplier Approval

Quality Management

Trading & Planning

More

Steve

Product Check Manager

Product Check Templates

Received Checks

Activity Overview

Reports

Admin

Site

Created By

Search

All

All

Search Template Names...

Filter

Clear Filters

Add New

Duplicate Selected

Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Completed	
<input type="checkbox"/>	21/08/2020 06:47:24	Poultry Goods Intake Check	Steve Jones	View Completed	<div><div>Record New</div><div></div></div>
<input type="checkbox"/>	30/07/2020 13:57:08	Goods Intake Check Sheet	Steve Jones	View Completed	<div><div>Record New</div><div></div></div>
<input type="checkbox"/>	10/02/2020 10:57:33	Finished Pack Organoleptic Testing	Steve Jones	View Completed	<div><div>Record New</div><div></div></div>
<input type="checkbox"/>	10/02/2020 10:57:22	Retail Pack Assesment (Dr, Ns, Calc)	Steve Jones	View Completed	<div><div>Record New</div><div></div></div>
<input type="checkbox"/>	05/02/2020 13:35:56	Raw Material - Non Conformance Record - (DR, NS, CALC) IN USE	Steve Jones	View Completed	<div><div>Record New</div><div></div></div>

**Step 2:** A list of all the completed & pending checks will show

**Product Check Manager - Poultry Goods Intake Check** ← Back

Between Dates:   Site:  Supplier:  Product:  Status:  Filter Clear Filters

Completed By:  Supplier Type:

Delete Selected Close Selected View Selected Export to Excel

Viewing 4 results | Page 1 of 1 25 50 100 << first < previous next > last >>

<input type="checkbox"/>	Date/Time Completed	Site	Completed By	Points	Response Required By	Status	
<input type="checkbox"/>	07/08/2020 11:20:18	Factory 2	Steve Jones	130/130 (100.00%)	N/A	Requires Your Action	
<input type="checkbox"/>	07/08/2020 11:17:15	Factory 2	Steve Jones	60/130 (46.15%)	N/A	Closed	
<input type="checkbox"/>	07/08/2020 11:13:36	Factory 2	Steve Jones	30/130 (23.08%)	N/A	Closed	
<input type="checkbox"/>	07/08/2020 11:12:19	Factory 2	Steve Jones	0/130 (0.00%)	N/A	Closed	

**Step 3:** You can view each Product Check by selecting **View Check**.

(From here you can also edit the check, share it, request more info or close the check)

**Product Check Manager - Poultry Goods Intake Check** ← Back

Between Dates:   Site:  Supplier:  Product:  Status:  Filter Clear Filters

Completed By:  Supplier Type:

Delete Selected Close Selected View Selected Export to Excel

Viewing 4 results | Page 1 of 1 25 50 100 << first < previous next > last >>

<input type="checkbox"/>	Date/Time Completed	Site	Completed By	Points	Response Required By	Status	
<input type="checkbox"/>	07/08/2020 11:20:18	Factory 2	Steve Jones	130/130 (100.00%)	N/A	Requires Your Action	
<input type="checkbox"/>	07/08/2020 11:17:15	Factory 2	Steve Jones	60/130 (46.15%)	N/A	Closed	
<input type="checkbox"/>	07/08/2020 11:13:36	Factory 2	Steve Jones	30/130 (23.08%)	N/A	Closed	
<input type="checkbox"/>	07/08/2020 11:12:19	Factory 2	Steve Jones	0/130 (0.00%)	N/A	Closed	

Viewing 4 results | Page 1 of 1 25 50 100 << first < previous next > last >>

- View Check
- Edit Check
- Send PDF Report
- Share
- Linked Checks
- Recall Check
- Notify Team Members
- Request More Info
- Close Check

**Step 4:** The completed check with the check and response details will then be displayed

Product	Category	Risk Rating	Re-classified rating	Completed By	Response Required By	Status	
160497 - Lamb Trimmings 85CL MW/VAC Carton	Foreign Object	Major		Craig Wilson	15/09/2020 05:10:00	Closed	
12444 - *YP* Trimmings 75CL 27.2kg BP FRZ Halal Generic Carton	Other	Minor		Chris Shennan	15/09/2020 03:29:00	Awaiting Response	
694286 - Lamb Trimmings 85CL MW/VAC Carton	Foreign Object	Major		Craig Wilson	14/08/2020 07:10:00	Closed	
681564 - Pork Trimmings 90CL 20kg FRZ Carton	Foreign Object	Notify		Craig Wilson	17/07/2020 22:13:00	Closed	
764700 - *YP* Trimmings 72CL 27.2kg BP FRZ Non-	Foreign Object	Major		Craig	19/05/2020	Closed	

View Check  
**Edit Check**  
 Duplicate Check  
 Send PDF Report  
 Share  
 Linked Checks

**Step 5:** To edit the Check. Right click on the menu icon and select EDIT. This will enable you to edit the Product Check and then Save.

Form Specification View Cancel Save

Product 12444 - \*YP\* Trimmings 75CL 27.2kg BP FRZ Halal Generic Carton

Supplier YARLI PAST - 2nd Pic # SA259063 (SA259063)

**Supplier Details**

Order Number \* NA

Order Number

Order Number

Order Number

Order Number

Pack Date \* 29/04/2020

Date of Complaint 08/09/2020

**Non Conformance Details**

## 2. SETUP

### 2.1 HOW TO CREATE A PRODUCT CHECK TEMPLATE

**Step 1:** Sign in and go to **Product Check Manager** under Quality Management

The screenshot shows the top navigation bar of the Foods Connected system. The 'Quality Management' dropdown menu is open, and 'Product Check Manager' is highlighted with a red box. The dashboard also displays 'Latest News' on the left and 'My Tasks' on the right, indicating 112 outstanding tasks.

## Step 2: Select *Add New*

The screenshot shows the 'Product Check Manager' interface. The 'Add New' button is highlighted with a red box. Below the button is a table of existing product checks.

<input type="checkbox"/>	Last Modified	Title	Created By	Completed	
<input type="checkbox"/>	21/08/2020 06:47:24	Poultry Goods Intake Check	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	30/07/2020 13:57:08	Goods Intake Check Sheet	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	10/02/2020 10:57:33	Finished Pack Organoleptic Testing	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	10/02/2020 10:57:22	Retail Pack Assessment (Dr. Ns, Calc)	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	05/02/2020 13:35:56	Raw Material - Non Conformance Record - (DR, NS, CALC) IN USE	Steve Jones	View Completed	<a href="#">Record New</a>

## Step 3: This is where you setup the details for that *Product Check*

## Product Check Manager - Create Product Check Template

Details

**Sites**

*Switching sites could potentially remove the autoshare if an existing share does not have a supplier for the selected site.*

☐ Demo Co (Group)
 ☐ Factory 1
 ☐ Factory 2
 ☐ Factory 3

**Title**

**Set to Supplier**

**Set to Product**

**Scoring System**


*None - No scoring required*  
*Default - Percentage of maximum possible score from weighted option points*  
*Addition - Score tallied from weighted option points*  
*Deduction - weighted option points deducted from maximum (per form or per section)*

**Supplier/User Auto Share Enabled**


If enabled, Suppliers/Users can be set up to automatically share the Product Check upon completion.

**Auto Reference Number Generation Enabled**

Note that when details are added in this screen there may be different options that then require populating (see examples below)

**Set to Supplier**

**Supplier Type**


☐ Meat Processor  
☐ Primal Processor  
☐ Meat Retail Packer  
☐ Internal  
☐ Customer  
☐ Finished Foods  
☐ Transport

**Intermediate Supplier**

**Set to Product**

**Product Category**

**Step 4:** The Check also allows for a PRODUCT CHECK to be Auto Shared. This function allows for Product Checks to be automatically shared upon Completion to supplier users or teams. To turn this on, enable "Supplier/User Auto Share".



In addition, there is the option to set Auto Share to "Always" on or only "When Requires Response". The email Auto Share will ultimately be dictated by the user completing the check on the desktop site or the app, where they'll be prompted in a dialog box to set "Require response" to Yes or No at submission.

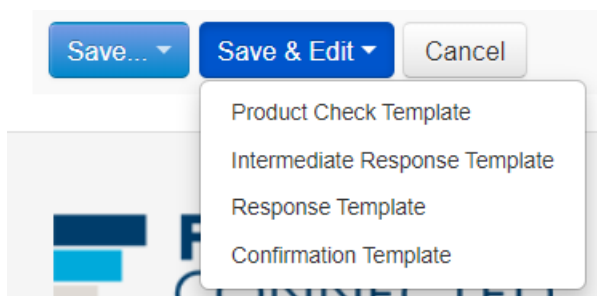
Title	Raw Material Intake & Production Rejections	
Set to Supplier	Yes	
Supplier Type	All Supplier Types	
Intermediate Supplier	- None -	
Set to Product	Yes	
Product Category	Finished Product	
Scoring System	None	
Limit Internal Visibility	No	(if yes - this product check template is only visible to selected users shown, otherwise visible to all)
Supplier/User Auto Share Enabled	Yes	<i>If enabled, Suppliers/Users can be set up to automatically share the Product Check upon completion.</i>
Auto Share - Notify Suppliers	When Requires Response	
Auto Share - Attach PDF Copy	When Requires Response	
	Always	
Auto Reference Number Generation Enabled	No	
Select Product Barcode Template	None	
<input type="button" value="Save..."/> <input type="button" value="Save &amp; Edit"/> <input type="button" value="Cancel"/>		

Auto Share users can be setup at the top of the "Edit details" screen, in the "Auto Share suppliers/users" tab.

Product Check Manager						
Details		Auto Share Suppliers/Users				
Assign auto share recipients for this template below. If any supplier/users are set up for auto share, upon completing a Product Check where a response is required, it will automatically be shared.						
Suppliers						
All						Filter
						Clear Filters
						10 25 50 100 All   << first < previous next > last >>
Add New		Delete Selected				
<input type="checkbox"/>	Supplier	Via	Send to for response	CC Email	CC Internal Users	
There are currently no autoshares set up for this template...						

**Step 5:** Once done above select **Save & edit** then select **Product Check Template**





**Step 6:** Build your check using the form builder to suit your needs. To add a new section select **Add New Section**.

New Section looks like this below

**Step 7:** To add a new field or question select **Add New – Standard Field**

**Step 8:** Now add in the details of the question & how you want it answered using the field types.

**Add New Field**

Field Label: What is the question? Show

Section: New section

Field Type: Standard Dropdown - Single

Options:
 

- ↑ Yes
- ↑ No

Add

Help Text: Guide your users with help text

Help Image: Choose file No file chosen

Required: ☒ No ☐ Always ☐ Condition Based

Visible: ☒ Always ☐ Condition Based

Cancel Add Field

Enter your question here

Choose the field type or way to answer question

Choose the answers or options for the question

Help text is good to guide the user

Select if this question is required to be answered by the user

Select if this question is conditionally based on the answer of another

Select if this questions visibility on the check is conditionally based on the answer of another question.

**Step 9:** Once done select **Add Field**

**Add New Field**

Field Label: What is the question? Show

Section: New section

Field Type: Standard Dropdown - Single

Options:
 

- ↑ Yes
- ↑ No

Add

Help Text: Guide your users with help text

Help Image: Choose file No file chosen

Required: ☒ No ☐ Always ☐ Condition Based

Visible: ☒ Always ☐ Condition Based

Cancel Add Field

New Field looks like this below

Product Check Manager - Update Form ← Back

Template Name  Save Title

Edit Options Add New Reorder Triggers Settings

Form Preview

New Section Settings Copy

What is the question? --Please Select--

**Step 10:** Repeat steps to build up your check

**Step 11:** Deleting a field from a Product Check Template will result in a loss of historical data associated with that field and a warning message will appear as below, requiring confirmation before proceeding.

app.foodsconnected.com says

Warning: Deleting this field will result in loss of historical data recorded on this form.

Are you sure you want to make this change?

OK Cancel

**Step 12:** Product Check Scoring. Edit Product Check Template.

Scoring System Default

*None* - No scoring required  
*Default* - Percentage of maximum possible score from weighted option points  
*Addition* - Score tallied from weighted option points  
*Deduction* - weighted option points deducted from maximum (per form or per section)

Score By/Display Format Points Scoring - Display Points & Percentage

Total Score Display

Score Summary Display

Limit Internal Visibility

Supplier/User Auto Share Enabled

Score Summary Display Shown

Limit Internal Visibility

Supplier/User Auto Share Enabled

Shown

Shown

Hidden for Customer

Hidden

**Step 13:** Product Check Scoring templates – Colour coded dropdowns.

For product check templates with scoring enabled, colours can be set against “Weighted dropdown” options. These will pull through when completing the check and viewing completed records. Click on the edit button beside each dropdown option to add a colour from the palette.

**Step 14:** Using the result from a calculation field to setup conditional fields.

When setting up conditional fields using the value from another numerical field, it's possible to also use the numerical result from a calculation to determine field visibility or requirement, by selecting the calculation field in the "Field conditions" dialog box and setting the "Comparison type" and "Comparison value".

### 2.1.1 HOW TO ADD EMAIL TRIGGERS

Email alerts are a feature that allows you to create a trigger when a certain answer is given to a question. This will then send an email to someone to notify them of the answer to the question.

**Step 1:** Select *Triggers & Email Alerts*

Product Check Manager - Update Form ← Back

Template Name  
 Save Title

Edit Options  
Add New Reorder Triggers Email Alerts

Form Preview

New Section

What is the question? --Please Select--

## Step 2: Now select **Add Alert**

Product Check Manager - Update Form - Test - Email Alerts ← Back

To add a new alert click the 'Add Alert' button below. When you are finished click the 'Done' button to return to the Form.

Add Alert Cancel Done

Field	Alert Rules	Recipients
You have not added any alerts.		

## Step 3: Select the question that requires the email trigger from the **Field** dropdown list of options (these are all fields in the template built for this Product Check)

Product Check Manager - Test - Email Alerts ← Back to List

Field New Section - What is the question?

Field Option Yes

Recipients Steve Jones Add to list

Cancel Save

## Step 4: Then select the answer from **Field Option** that will raise the trigger/alert

Product Check Manager - Test - Email Alerts ← Back to List

Field New Section - What is the question?

Field Option Yes

Recipients Steve Jones Add to list

Cancel Save

**Step 5:** Select the user or team from the **Recipients** dropdown list that will receive the notification and select **Add to list**. Repeat this until all users requiring the notification have been added.

Product Check Manager - Test - Email Alerts ← Back to List

Field: New Section - What is the question?

Field Option: Yes

Recipients: -- Please Select -- Add to list

Steve Jones ✕

Cancel Save

**Step 6:** Select **Save** button

Product Check Manager - Test - Email Alerts ← Back to List

Field: New Section - What is the question?

Field Option: Yes

Recipients: -- Please Select -- Add to list

Steve Jones ✕

Cancel Save

Trigger setup will look like this below

Product Check Manager - Update Form - Test - Email Alerts ← Back

To add a new alert click the 'Add Alert' button below. When you are finished click the 'Done' button to return to the Form.

+ Add Alert Cancel Done

Field	Alert Rules	Recipients	
New Section - What is the question?	Option equal to Yes	Steve Jones	<span>Update</span> <span>✕</span>

**Step 7:** Repeat steps to add triggers to any question.

## 2.1.2 HOW TO DUPLICATE A PRODUCT CHECK TEMPLATE

**Step 1:** Select the template you want to duplicate by selecting the check box on the left side

Product Check Manager

**Product Check Templates** ← Received Checks Activity Overview Reports Admin

Site: All Created By: All Search: Search Template Names... Filter Clear Filters

+ Add New ✕ Duplicate Selected ✕ Delete Selected

	Last Modified	Title	Created By	Completed	
<input checked="" type="checkbox"/>	07/09/2020 05:47:23	Test	Steve Jones	View Completed	<span>Record New</span> <span>⋮</span>
<input type="checkbox"/>	21/08/2020 06:47:24	Poultry Goods Intake Check	Steve Jones	View Completed	<span>Record New</span> <span>⋮</span>
<input type="checkbox"/>	30/07/2020 13:57:08	Goods Intake Check Sheet	Steve Jones	View Completed	<span>Record New</span> <span>⋮</span>
<input type="checkbox"/>	10/02/2020 10:57:33	Finished Pack Organoleptic Testing	Steve Jones	View Completed	<span>Record New</span> <span>⋮</span>

## Step 2: Then select **Duplicate Selected**

**Product Check Manager**

Product Check Templates ← Received Checks Activity Overview Reports Admin

Site: All Created By: All Search: Search Template Names... Filter Clear Filters

+ Add New Duplicate Selected Delete Selected

	Last Modified	Title	Created By	Completed	
<input checked="" type="checkbox"/>	07/09/2020 05:47:23	Test	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	21/08/2020 06:47:24	Poultry Goods Intake Check	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	30/07/2020 13:57:08	Goods Intake Check Sheet	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	10/02/2020 10:57:33	Finished Pack Organoleptic Testing	Steve Jones	View Completed	<a href="#">Record New</a>

## Step 3: Your duplicate template will now show, ready to edit or use.

**Product Check Manager**

Product Check Templates ← Received Checks Activity Overview Reports Admin

Selected items have been successfully duplicated.

Site: All Created By: All Search: Search Template Names... Filter Clear Filters

+ Add New Duplicate Selected Delete Selected

	Last Modified	Title	Created By	Completed	
<input type="checkbox"/>	07/09/2020 06:50:26	Test - Copy	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	07/09/2020 05:47:23	Test	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	21/08/2020 06:47:24	Poultry Goods Intake Check	Steve Jones	View Completed	<a href="#">Record New</a>

### 2.1.3 HOW TO DELETE A PRODUCT CHECK TEMPLATE

## Step 1: Select the template you want to delete by selecting the check box on the left side

**Product Check Manager**

Product Check Templates ← Received Checks Activity Overview Reports Admin

Site: All Created By: All Search: Search Template Names... Filter Clear Filters

+ Add New Duplicate Selected Delete Selected

	Last Modified	Title	Created By	Completed	
<input checked="" type="checkbox"/>	07/09/2020 06:50:26	Test - Copy	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	07/09/2020 05:47:23	Test	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	21/08/2020 06:47:24	Poultry Goods Intake Check	Steve Jones	View Completed	<a href="#">Record New</a>

## Step 2: Choose **Delete Selected**



**Product Check Manager**

Product Check Templates ← Received Checks Activity Overview Reports ▾ Admin

Site: All Created By: All Search: Search Template Names... Filter Clear Filters

+ Add New Duplicate Selected **Delete Selected**

<input type="checkbox"/>	Last Modified	Title	Created By	Completed	
<input checked="" type="checkbox"/>	07/09/2020 06:50:26	Test - Copy	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	07/09/2020 05:47:23	Test	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	21/08/2020 06:47:24	Poultry Goods Intake Check	Steve Jones	View Completed	<a href="#">Record New</a>

**Step 3:** A confirmation window will come up, if this is the correct item to be deleted click the **OK** button

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Are you sure you would like to delete the selected items?

**OK** Cancel

**Step 4:** The template will now be deleted & its history

## 2.1.4 HOW TO SETUP PRE-SET FIELDS FOR USE IN A PRODUCT CHECK TEMPLATE

Pre-set fields allow you to create your own set of options or answers to questions so that these don't have to be manually created each time when building the template.

**Step 1:** Go to the **Admin** section of the Product Check Manager

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾ ⚙

**Product Check Manager**

Product Check Templates ← Received Checks Activity Overview Reports ▾ **Admin**

Site: All Created By: All Search: Search Template Names... Filter Clear Filters

+ Add New Duplicate Selected **Delete Selected**

<input type="checkbox"/>	Last Modified	Title	Created By	Completed	
<input type="checkbox"/>	21/08/2020 06:47:24	Poultry Goods Intake Check	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	30/07/2020 13:57:08	Goods Intake Check Sheet	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	10/02/2020 10:57:33	Finished Pack Organoleptic Testing	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	10/02/2020 10:57:22	Retail Pack Assessment (Dr, Ns, Calc)	Steve Jones	View Completed	<a href="#">Record New</a>
<input type="checkbox"/>	05/02/2020 13:35:56	Raw Material - Non Conformance Record - (DR, NS, CALC) IN USE	Steve Jones	View Completed	<a href="#">Record New</a>

**Step 2:** To create a new set select **Add New Preset Field**

The screenshot shows the 'Product Check Manager' interface. At the top, there's a navigation bar with 'Product Check Templates', 'Received Checks', 'Activity Overview', 'Reports', and 'Admin'. Below this, a 'Preset Fields' button is visible. A description states: 'Add/Manage preset fields which can be used when creating/editing a Product Intake check.' On the right side, there are two buttons: 'Add New Preset Field' (highlighted with a red box) and 'Manage Categories'.

**Step 3:** Give the Pre-set field an **Internal description**. That is Yes/No/N/A. Then choose the **Type** of field it will be.

The screenshot shows the 'Add New Preset Field' dialog box. It has a close button (X) in the top right corner. The fields are as follows:
 

- Internal Description:** A text input field containing 'Yes/No/N/A'.
- Default Label:** An empty text input field.
- Type:** A dropdown menu currently showing 'Dropdown - Single selection from'. A dropdown menu is open, showing the following options:
  - Dropdown - Single selection from custom options (highlighted in blue)
  - Dropdown with Quantity - single selection option with number
  - Checkbox - Multiple selection from custom options
  - Textbox Grid - Simple Grid populated with textboxes
  - Checkbox Grid - Simple Grid populated with checkboxes
- Category:** An empty text input field.
- Options:** An empty text input field.

 At the bottom right, there are 'Cancel' and 'Add Field' buttons.

**Step 4:** If you have categories setup for these pre-set fields choose the **Category** it should sit under. Then add the pre-set field **Options** which in this instance are Yes, No, N/A.

Add New Preset Field

Internal Description
Yes/No/N/A

Default Label

Type
Dropdown - Single selection from

Category
Standard

Options

Yes

No

N/A

Add

Cancel
Add Field

**Step 5:** If you need to edit or delete an option, choose edit icon or delete icon to do so.

Add New Preset Field

Internal Description
Yes/No/N/A

Default Label

Type
Dropdown - Single selection from

Category
Standard

Options

Yes

No

N/A

Add

Cancel
Add Field

**Step 6:** Once done select **Add Field**

Add New Preset Field

Internal Description

Yes/No/N/A

Default Label

Type

Dropdown - Single selection from

Category

Standard

Options

↑ Yes

✎ ✕

↑ No

✎ ✕

↑ N/A

✎ ✕

Add

Cancel

Add Field

**Step 7:** It will look like this in the **Standard** category.

Product Check Manager

Product Check Templates

← Received Checks

Activity Overview

Reports

Admin

Product Manager has been successfully updated.

Preset Fields

Add/Manage preset fields which can be used when creating/editing a Product Intake check.

Uncategorised

Uncategorised

Add New Preset Field

Manage Categories

Internal Description: YES/NO/N/A

3 Options [\[Show...\]](#)

Edit

Delete

Default Label:

Field Type: Standard Dropdown - Single selection from custom options

**Step 8:** To **Edit** select edit & follow steps above. And to delete simply select **Delete**

Product Check Manager

Product Check Templates

← Received Checks

Activity Overview

Reports

Admin

Product Manager has been successfully updated.

Preset Fields

Add/Manage preset fields which can be used when creating/editing a Product Intake check.

Uncategorised

Uncategorised

Add New Preset Field

Manage Categories

Internal Description: YES/NO/N/A

3 Options [\[Show...\]](#)

Edit

Delete

Default Label:

Field Type: Standard Dropdown - Single selection from custom options

## 2.2 HOW TO CREATE AN INTERMEDIATE TEMPLATE

An Intermediate template is the form that is used for your users to commence the building process of completing product checks across various sites.


**Step 1:** Go back to the main table and select the radio button to the right of your check & select **Edit Intermediate Template**

**Product Check Manager**

Product Check Templates ← Received Checks Activity Overview Reports Admin

Site: All Created By: All Search: Search Template Names... Filter Clear Filters

+ Add New Duplicate Selected Delete Selected

	Last Modified	Title	Created By	Completed	
<input type="checkbox"/>	09/09/2020 00:03:06	Test	Steve Jones	View Completed	
<input type="checkbox"/>	21/08/2020 06:47:24	Poultry Goods Intake Check	Steve Jones	View	<ul style="list-style-type: none"> <li>Financial Report Templates</li> <li>Edit Details</li> <li>Edit Check Template</li> <li><b>Edit Intermediate Response Template</b></li> <li>Edit Response Template</li> <li>Edit Confirmation Template</li> <li>Preview</li> <li>View Edit History</li> </ul>
<input type="checkbox"/>	30/07/2020 13:57:08	Goods Intake Check Sheet	Steve Jones	View	
<input type="checkbox"/>	10/02/2020 10:57:33	Finished Pack Organoleptic Testing	Steve Jones	View	
<input type="checkbox"/>	10/02/2020 10:57:22	Retail Pack Assessment (Dr, Ns, Calc)	Steve Jones	View	
<input type="checkbox"/>	05/02/2020 13:35:56	Raw Material - Non Conformance Record - (DR, NS, CALC) IN USE	Steve Jones	View	

**Step 2:** Follow the steps above that you used to build the Check Template to build the Intermediate Template. The same functions are used.

## 2.3 HOW TO CREATE A RESPONSE TEMPLATE


**Step 1:** Go back to the main table and select the radio button to the right of your check & select **Edit Response Template**

**Product Check Manager**

Product Check Templates ← Received Checks Activity Overview Reports Admin

Site: All Created By: All Search: Search Template Names... Filter Clear Filters

+ Add New Duplicate Selected Delete Selected

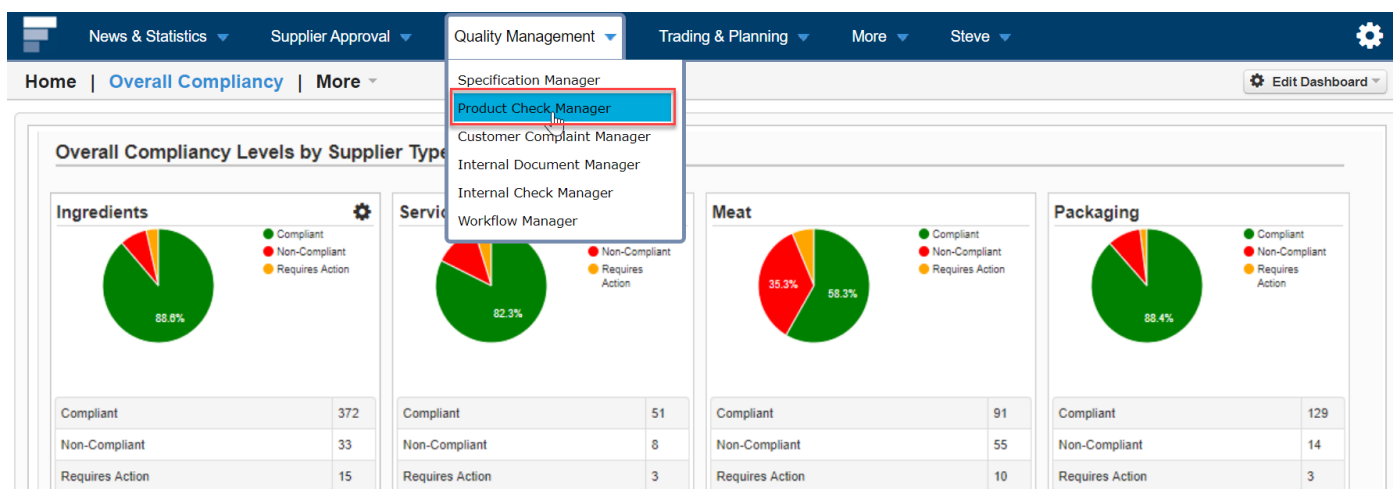
	Last Modified	Title	Created By	Completed	
<input type="checkbox"/>	09/09/2020 00:03:06	Test	Steve Jones	View Completed	
<input type="checkbox"/>	21/08/2020 06:47:24	Poultry Goods Intake Check	Steve Jones	View	<ul style="list-style-type: none"> <li>Financial Report Templates</li> <li>Edit Details</li> <li>Edit Check Template</li> <li>Edit Intermediate Response Template</li> <li><b>Edit Response Template</b></li> <li>Edit Confirmation Template</li> <li>Preview</li> <li>View Edit History</li> </ul>
<input type="checkbox"/>	30/07/2020 13:57:08	Goods Intake Check Sheet	Steve Jones	View	
<input type="checkbox"/>	10/02/2020 10:57:33	Finished Pack Organoleptic Testing	Steve Jones	View	
<input type="checkbox"/>	10/02/2020 10:57:22	Retail Pack Assessment (Dr, Ns, Calc)	Steve Jones	View	
<input type="checkbox"/>	05/02/2020 13:35:56	Raw Material - Non Conformance Record - (DR, NS, CALC) IN USE	Steve Jones	View	

**Step 2:** Follow the steps above that you used to build the Response Template to build the Check Template. The same functions are used.

### 3. HOW TO RECORD A PRODUCT CHECK

#### 3.1 HOW TO RECORD A PRODUCT CHECK

**Step 1:** Go to **PRODUCT CHECK MANAGER**



**Step 2:** Select **Record New** beside the form you want to use

## Product Check Manager

Product Check Templates ← Received Checks Activity Overview Reports Admin

Site Created By Search  
 All All Search Template Names... Filter Clear Filters

Add New Duplicate Selected Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Completed		
<input type="checkbox"/>	09/09/2020 00:03:06	Test	Steve Jones	View Completed	<a href="#">Record New</a>	
<input type="checkbox"/>	21/08/2020 06:47:24	Poultry Goods Intake Check	Steve Jones	View Completed	<a href="#">Record New</a>	
<input type="checkbox"/>	30/07/2020 13:57:08	Goods Intake Check Sheet	Steve Jones	View Completed	<a href="#">Record New</a>	
<input type="checkbox"/>	10/02/2020 10:57:33	Finished Pack Organoleptic Testing	Steve Jones	View Completed	<a href="#">Record New</a>	
<input type="checkbox"/>	10/02/2020 10:57:22	Retail Pack Assessment (Dr, Ns, Calc)	Steve Jones	View Completed	<a href="#">Record New</a>	

**Step 3: Select the customer if you have a subscription to the Product Check Manager tool.**

## Product Check Manager - Test - Demo Co (Group)

Form

View Cancel Save

An intermediate response form has not yet been created for this product check, therefore you cannot request an intermediate response. [Click here to create an intermediate response form.](#)  
 A response form has not yet been created for this product check, therefore you cannot request a supplier response.

Supplier N/A

## New Section

What is the question? --Please Select--

Cancel Save

**Step 4: Fill in your answers and complete then select *Save* then *Save Progress & Share*. This will then allow you to send the investigation template to a user within the business to complete.**

**Product Check Manager - Test - Demo Co (Group)**

Form Q View Cancel Save

An intermediate response form has not yet been created for this product check, therefore you cannot request an intermediate response. [Click here to create an intermediate response form.](#)  
 A response form has not yet been created for this product check, therefore you cannot request a supplier response.

Supplier N/A

**New Section**

What is the question? --Please Select--

**FOODS CONNECTED**

**Quick Links**

- Products
- About Us
- Privacy Policy
- Help Section
- Contact Foods Connected
- Terms & Conditions

**Support**

Invest North

Cancel Save

Save Progress  
 Save Progress & Exit  
 Save Progress & Add New  
**Save Progress & Share**  
 Save Progress & Complete

### 3.1.1 HOW TO BULK IMPORT PRODUCT CHECKS

This function is used when there are a large number of Product Checks to be completed.

**Step 1:** After entering Product Check Manager (see 1. *How to Access Product Check Manager*) and finding which check needs completed, select the menu button beside that check and click **Generate Import Template**.

**Product Check Manager**

Product Check Templates ← Received Checks Activity Overview Reports Admin

Site All Created By All Search Search Template Names... Filter Clear Filters

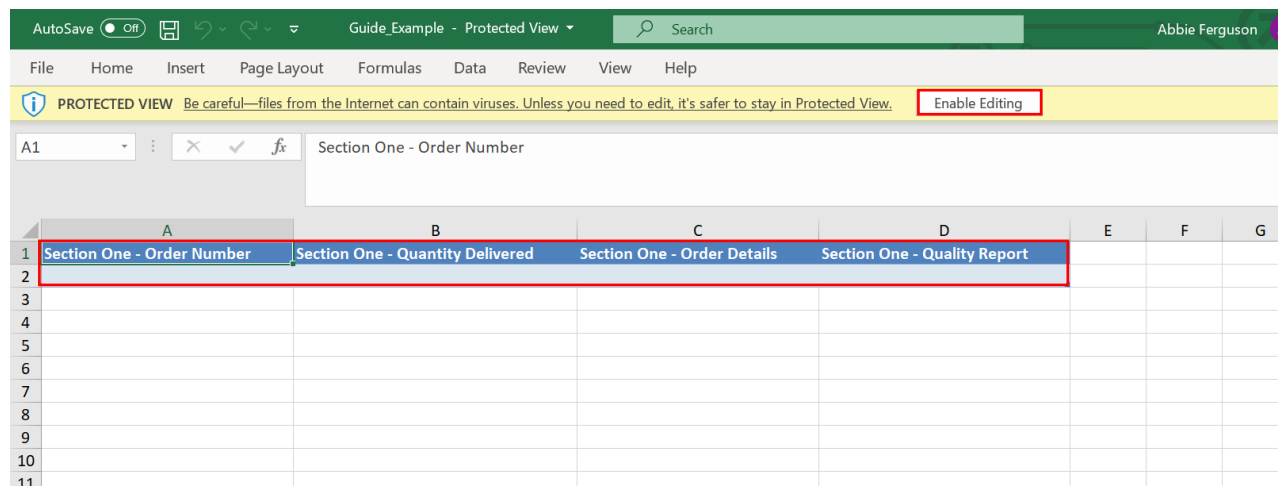
Add New Duplicate Selected Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Completed		
<input type="checkbox"/>	04/11/2021 11:18:32	Guide Example	Steve Jones	View Completed	<span>Record New</span>	<span>⋮</span>
<input type="checkbox"/>	03/11/2021 15:08:16	Goods Intake Checks	Steve Jones	View Completed	<span>Record New</span>	<span>⋮</span>
<input type="checkbox"/>	21/10/2021 02:27:45	Certificate of Analysis	Steve Jones	View Completed	<span>Record New</span>	<span>⋮</span>
<input type="checkbox"/>	21/10/2021 02:13:15	Lab Checks - Copy	Steve Jones	View Completed	<span>Record New</span>	<span>⋮</span>
<input type="checkbox"/>	20/10/2021 10:03:24	Raw Material - Non-Conformance Record	Steve Jones	View Completed	<span>Record New</span>	<span>⋮</span>
<input type="checkbox"/>	30/09/2021 03:09:10	CF - Finished Pack Assessment (Dr. Ns, Calc) v2	Steve Jones	View Completed	<span>Record New</span>	<span>⋮</span>
<input type="checkbox"/>	27/09/2021 02:42:35	Intake Assessment- Non-Conformance Record	Steve Jones	View Completed	<span>Record New</span>	<span>⋮</span>

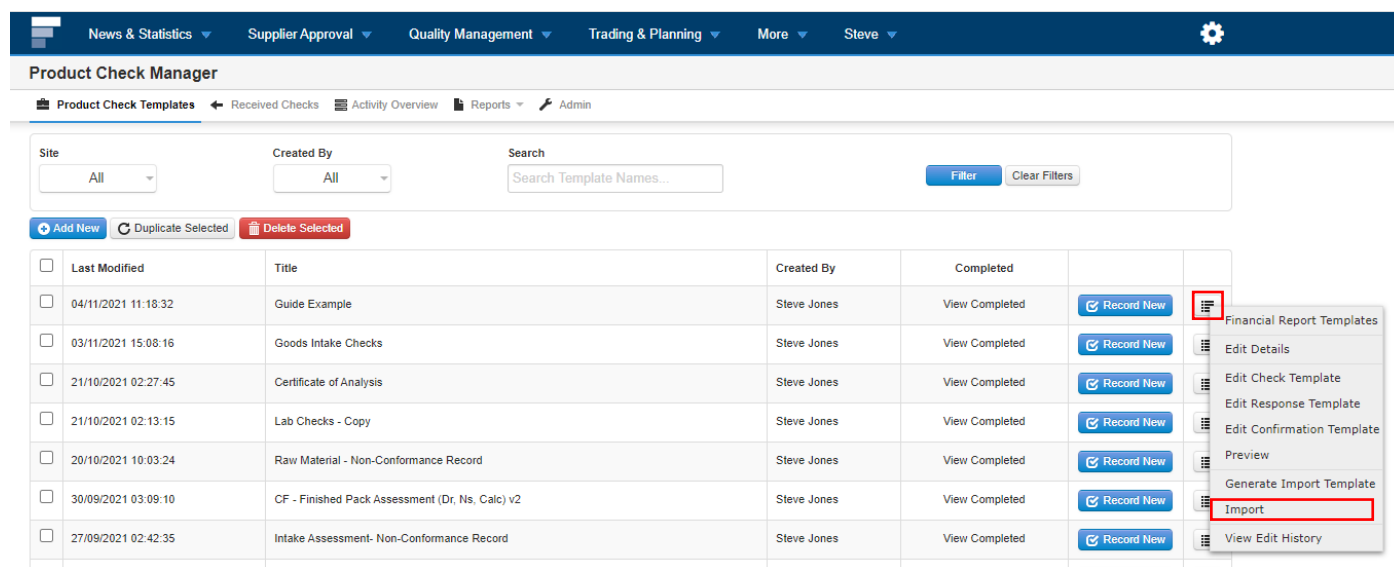
Financial Report Templates  
 Edit Details  
 Edit Check Template  
 Edit Response Template  
 Edit Confirmation Template  
 Preview  
**Generate Import Template**  
 Import  
 View Edit History



**Step 2:** The Import Template will be downloaded to your device – **open the document**. The document will look similar to the one pictured below. Click **Enable Editing**. **Fill out each section** as requested – each row will be a new check. **Save** the document.



**Step 3:** Return to Foods Connected and to the same page outlined in step 1. Click the **menu** and select **Import**.



**Step 4:** Click **Choose File** and select your document. Then click **Import Forms**.

Product Check Manager - Import Form

Import File: Choose file Guide\_Example.xlsx

Import Forms

**Step 5:** It will then show you which form values are valid. The valid forms will be signified with a green tick as shown below. There is also a **Valid** and **Invalid Form Count**.

Product Check Manager - Import Form

Valid Form Count: 11 Invalid Form Count: 0 Import Valid Forms

Search...

	Form Data	
✓	All form values are valid ✓	<span>Edit</span>
✓	All form values are valid ✓	<span>Edit</span>

If any forms are invalid it will have a warning symbol. If the form is invalid, you can **Edit** it, as shown above.

Product

⚠ B8913 ✓

**Step 6:** Once all forms are corrected (if necessary) and are valid, click **Import Valid Forms**.

Product Check Manager - Import Form

Valid Form Count: 11 Invalid Form Count: 0 Import Valid Forms

Search...

	Form Data	
✓	All form values are valid ✓	<span>Edit</span>
✓	All form values are valid ✓	<span>Edit</span>

The import is complete and is ready to be checked. If you are reviewing/approving the Product Checks, please see section 3.3 *How to Approve a Product Check*. If you wish to share the Product Check please see section 3.1.2. *How to Share and Request More Information*.

**Product Check Manager - Guide Example** ← Back

Between Dates:   Site:  Supplier:  Product:  Status:  Filter Clear Filters

Completed By:  Supplier Type:

Delete Selected Close Selected View Selected Export to Excel

Viewing 11 results | Page 1 of 1 25 50 100 << first < previous next > last >>

<input type="checkbox"/>	Date/Time Completed	Site	Completed By	Response Required By	Status
<input type="checkbox"/>	04/11/2021 11:53:54	Group	Steve Jones	N/A	Requires Your Action
<input type="checkbox"/>	04/11/2021 11:53:54	Group	Steve Jones	N/A	Requires Your Action
<input type="checkbox"/>	04/11/2021 11:53:54	Group	Steve Jones	N/A	Requires Your Action
<input type="checkbox"/>	04/11/2021 11:53:54	Group	Steve Jones	N/A	Requires Your Action
<input type="checkbox"/>	04/11/2021 11:53:54	Group	Steve Jones	N/A	Requires Your Action
<input type="checkbox"/>	04/11/2021 11:53:54	Group	Steve Jones	N/A	Requires Your Action
<input type="checkbox"/>	04/11/2021 11:53:54	Group	Steve Jones	N/A	Requires Your Action

### 3.1.2 HOW TO SHARE A PRODUCT CHECK AND REQUEST MORE INFORMATION

**Step 1:** After you select Save & Share above, Select a **Company User** to share with who will complete the investigation, then select a **Respond By Date**. once done select **Share**

**Share Product Check** ×

Intermediate Supplier: Acorn Produce

Supplier:

Share With: ☒ Company User ☐ Via ☐ Email Address

Company User:

CC'd User(s):  Optional

CC'd Email(s):  Optional

Request Response from Intermediate Supplier: Please note: There is no **Supplier** set for this product check

Response Required By:   🕒

Cancel Share

**Step 2:** The **Status** will revert to **Awaiting Response** ready for the user to complete.

**Step 3:** To Request More Information. Right Click against the CHECK. Select Request More Info. This will Open a dialogue box to directly send a message to accompany the check.

**Product Check Manager - Non-Conformance Record** ← Back

Between Dates:   Site: All  Supplier: All  Product: All  Status: All  Filter Clear Filters

Completed By: All  Supplier Type: All  Category: All  Risk Rating: All  Re-classified rating: All

Delete Selected Close Selected View Selected Export to Excel

Viewing 11 results | Page 1 of 1

<input type="checkbox"/>	Date/Time Completed	Site	Ref Num	Supplier	Product	Category	Risk Rating	Re-classified rating	Completed By	Response Required By	Status
<input type="checkbox"/>	08/09/2020 14:09:14	Group	87995-10223		160497 - Lamb Trimmings 85CL MW/VAC Carton	Foreign Object	Major		Craig Wilson	15/09/2020 05:10:00	Closed
<input type="checkbox"/>	08/09/2020 12:16:12	Group	87995-10215		12444 - *YP* Trimmings 75CL 27.2kg BP FRZ Halal Generic Carton	Other	Minor		Chris Shennan	15/09/2020 03:29:00	Awaiting Response

Context menu options: View Check, Edit Check, Duplicate Check, Send PDF Report, Share, Linked Checks, Recall Check, Notify Team Members, **Request More Info**, Close Check, Response

#### Add Note/Comment

ADD COMMENT



Cancel

Save

Re-classified rating: All

25 50 100 | ← first → previous next → last

	Product	Category	Risk Rating	Re-classified rating	Completed By	Response Required By	Status	
	160497 - Lamb Trimmings 85CL MW/VAC Carton	Foreign Object	Major		Craig Wilson	15/09/2020 05:10:00	Closed	
ry Choice	12444 - *YP* Trimmings 75CL 27.2kg BP FRZ Halal Generic Carton	Other	Minor		Chris Shennan	15/09/2020 03:29:00	Awaiting Response	
Lamb	694286 - Lamb Trimmings 85CL MW/VAC Carton	Foreign Object	Major		Craig Wilson	14/08/2020 07:10:00	Closed	

### 3.1.3 HOW TO SEND A PDF REPORT OF A PRODUCT CHECK

**Step 1:** On the Product Check Manager, select View Completed of the view the checks you want to send.

**Product Check Manager**

Product Check Templates ← Received Checks Activity Overview Reports ▾ Admin

Site: All Created By: All Search: Search Template Names... Filter Clear Filters

+ Add New Duplicate Selected Delete Selected

	Last Modified	Title	Created By	View Completed	Record New
<input type="checkbox"/>	09/09/2020 00:03:06	Test	Steve Jones	View Completed	

Click to view completed

**Step 2:** Now select the check you want to send the report of then select **Send PDF Report**

**Product Check Manager - Test** ← Back

Between Dates: Site: All Supplier: All Product: All Status: All

Completed By: All Supplier Type: All

Delete Selected Close Selected View Selected Export to Excel

Viewing 1 results | Page 1 of 1

	Date/Time Completed	Site	Supplier	Completed By	Response Required By	Status
<input type="checkbox"/>	09/09/2020 06:36:12	Group	None	Steve Jones	N/A	Requires

Viewing 1 results | Page 1 of 1

25 50 100 | << first < previous next > last >>

Context menu options:

- View Check
- Edit Check
- Duplicate Check
- Send PDF Report**
- Share
- Linked Checks
- Recall Check
- Notify Team Members
- Request More Info
- Close Check

**Step 3:** Add an email address, any notes. Once done select **Send**

Send PDF Report

Email Address

user@democo.com

Comments/Notes

Add notes here

Copy

☒ Send copy to me

Cancel

Send

#### Step 4: Setup Auto share of PDF report:

Within “Edit details” for a product check template, its possible to setup an auto share of a PDF for completed check templates. When turned on, this will attach a PDF copy to supplier recipients email notifications, when Auto Share is set up.

Title

Raw Material Intake & Production Rejections

Set to Supplier

Yes

Supplier Type

All Supplier Types

Intermediate Supplier

- None -

Set to Product

Yes

Product Category

Finished Product

Scoring System

None

Limit Internal Visibility

No

(if yes - this product check template is only visible to selected users shown, otherwise visible to all)

Supplier/User Auto Share Enabled

Yes

[i](#) If enabled, Suppliers/Users can be set up to automatically share the Product Check upon completion.

Auto Share - Notify Suppliers

When Requires Response

Auto Share - Attach PDF Copy [i](#)

Yes

Auto Reference Number Generation Enabled

No

Select Product Barcode Template

None

Save...

Save & Edit

Cancel

## 3.2 HOW TO RESPOND TO A PRODUCT CHECK ASSIGNED TO YOU

### 3.2.1 HOW TO VIEW THE PRODUCT CHECK DETAILS

**Step 1:** The user who has to complete the product check will get an email notification and a notification in their task manager like this. Select this task

Or they can go to **Received Product Checks** in the **Product Check Manager Tool** and see that a CHECK requires their action

**Step 2:** Select View to review & close when done

**Product Check Manager**

Product Check Templates ← **Received Checks** Activity Overview Reports Admin

Received Between:

Sent From (Supplier):  All

Sent To (Site):  All

Product:  All

Status:  All

Reference Number:

Product Type:  All

Product Group 1:  All

Product Group 2:  All

Includes Key Fields:  All

Date/Time	Ref Num	From	Sent To	Product	Key Fields	Response Required By	Status
Currently no received product checks...							

**Step 3:** The product check details will now show. Close when done.

### 3.2.2 HOW TO COMPLETE THE CHECK TEMPLATE

Completing the Product Check is down to the user who is responsible for that area

**Step 1:** The user who has to complete the check will get an email notification and a notification in their task manager.

Or they can go to **Received Product Checks** in the **Product Check Manager** and see that a check requires their action

**Step 2:** Then select **View Check**

**Product Check Manager - Poultry Goods Intake Check** ← Back

Between Dates

Site  
All

Supplier  
All

Product  
All

Status  
All

Filter

Clear Filters

Completed By  
All

Supplier Type  
All

Delete Selected
Close Selected
View Selected
Export to Excel

Viewing 4 results | Page 1 of 1 25 50 100 | << first < previous next > last >>

<input type="checkbox"/>	Date/Time Completed	Site	Completed By	Points	Response Required By	Status	
<input type="checkbox"/>	07/08/2020 11:20:18	Factory 2	Steve Jones	130/130 (100.00%)	N/A	Requires Your Action	
<input type="checkbox"/>	07/08/2020 11:17:15	Factory 2	Steve Jones	60/130 (46.15%)	N/A	Closed	
<input type="checkbox"/>	07/08/2020 11:13:36	Factory 2	Steve Jones	30/130 (23.08%)	N/A	Closed	
<input type="checkbox"/>	07/08/2020 11:12:19	Factory 2	Steve Jones	0/130 (0.00%)	N/A	Closed	

**Step 3:** Fill in details then select **Save Progress & Complete**



## Product Check Manager - Poultry Goods Intake Check - Factory 2

Form

View Cancel Save

Save Progress  
 Save Progress & Exit  
 Save Progress & Add New  
**Save Progress & Complete**

## 1. Intake Checks

Please note all the details required for this check.

Supplier *	Produce Supplier 1
Product *	Fuji Apple
PO Number *	754535
Received Date *	07/08/2020
Total Number of Pallets *	60
Expected Arrival Count *	800

## 3.2.3 HOW TO SEND A PRODUCT CHECK BACK FOR APPROVAL

**Step 1:** Go to **Received Checks** in the **Product Check Manager tool** and you can see that a product check requires your attention. Select **Respond**

## Product Check Manager

Product Check Templates Received Checks Activity Overview Reports Admin

Received Between:	Sent From (Supplier):	Sent To (Site):	Product:	Status:	Reference Number:
<input type="text"/>	All	All	All	All	<input type="text"/>
<input type="text"/>	Product Type:	Product Group 1:	Product Group 2:	Includes Key Fields:	
<input type="text"/>	All	All	All	All	

Filter  
Clear Filters

Export to Excel

Viewing 3 results | Page 1 of 1

Date/Time	Ref Num	From	Sent To	Product	Key Fields	Response Required By	Status		
10/07/2020 10:34:36	1549774-7	Claire McCrory Foods Connected Ltd	Claire McCrory			17/07/2020 10:37:00	Requires Your Action	→ Respond	View
09/07/2020 15:29:14	1549774-6	Claire McCrory Foods Connected Ltd	Claire McCrory			16/07/2020 15:29:00	Awaiting Response	→ Respond	View
19/04/2017 12:19:58	2625-1	Hilton Admin Hilton Food Group - Hilton Foods Ireland	Kyle Anderson (Foods Connected Ltd - Sales & Marketing Department) Advanced Laboratory Testing Ltd		Primal Supplier: Manor Farm (IE 803) Log: 9.82 Presumptive Enterobacteriaceae: 5433333	N/A	Requires Your Action	→ Respond	View

**Step 2:** Fill in details then select **Save & Save & Send Response**

**Step 3:** The status now reverts to **Awaiting Response**

09/07/2020 15:29:14	1549774-6	Claire McCrory Foods Connected Ltd	Claire McCrory			16/07/2020 15:29:00	Awaiting Response	<a href="#">→ Respond</a>	<a href="#">View</a>
------------------------	-----------	---------------------------------------	----------------	--	--	------------------------	-------------------	---------------------------	----------------------

### 3.3 HOW TO APPROVE A PRODUCT CHECK

Once sent to the user the status will change to **Awaiting Response** again and will follow the steps above

#### 3.3.1 HOW TO CONFIRM & CLOSE A PRODUCT CHECK

Once you have finished the steps above and are happy with the responses, your next steps are now to confirm and close the Product Check

**Step 1:** After the above the status changes to **Requires Your Action**.

**Product Check Manager**

Product Check Templates **← Received Checks** Activity Overview Reports Admin

Received Between:   Sent From (Supplier): All Product Type: All Sent To (Site): All Product Group 1: All Product: All Product Group 2: All Status: All Includes Key Fields: All Reference Number:  [Filter](#) [Clear Filters](#)

[Export to Excel](#) Viewing 3 results | Page 1 of 1

Date/Time	Ref Num	From	Sent To	Product	Key Fields	Response Required By	Status		
10/07/2020 10:34:36	1549774-7	Claire McCrory Foods Connected Ltd	Claire McCrory			17/07/2020 10:37:00	Requires Your Action	<a href="#">→ Respond</a>	<a href="#">View</a>
09/07/2020 15:29:14	1549774-6	Claire McCrory Foods Connected Ltd	Claire McCrory			16/07/2020 15:29:00	Awaiting Response	<a href="#">→ Respond</a>	<a href="#">View</a>

**Step 2:** Click on the check to open the options and select **Close Check**

Between Dates:  Site:  Supplier:  Product:  Status:  Filter

Completed By:  Supplier Type:  Category:  Risk Rating:  Re-classified rating:

Delete Selected Close Selected View Selected Export to Excel

Viewing 9 results | Page 1 of 1

	Date/Time Completed	Site	Ref Num	Supplier	Product	Category	Risk Rating	Re-classified rating	Completed By	Res Rec
<input type="checkbox"/>	07/08/2020 16:07:58	Group	87995-9321	Australian Prime Lamb	694286 - Lamb Trimmings 85CL MW/VAC Carton	Foreign Object	Major		Craig Wilson	14/08/2020 07:10:00

View Check  
 Edit Check  
 Duplicate Check  
 Send PDF Report  
 Share  
 Linked Checks  
 Recall Check  
 Notify Team Members  
 Request More Info  
**Close Check**

**Step 3:** To bulk close checks, click the checkboxes and hit “Close selected”. This will also be logged in the “Activity Overview” tab within the tool, creating a log for each check separately with the name of the user who closed.

Delete Selected Close Selected View Selected Export to Excel

Viewing 3 results | Page 1 of 1

	Date/Time Completed	Site	Sample Score	Result	Completed By	Response Required By	Status
<input checked="" type="checkbox"/>	20/02/2022 12:40:44	Group			Leah Sloan	N/A	Closed
<input checked="" type="checkbox"/>	24/02/2022 12:40:37	Group			Leah Sloan	N/A	In Progress
<input checked="" type="checkbox"/>	02/02/2022 09:42:14	Group	0.988411035332706668	Authentic	Gary Tyre	N/A	Closed

Viewing 3 results | Page 1 of 1

**Step 4:** That is the check complete and the **Status** reverts to **Closed**

Between Dates:  Site:  Supplier:  Product:  Status:  Filter

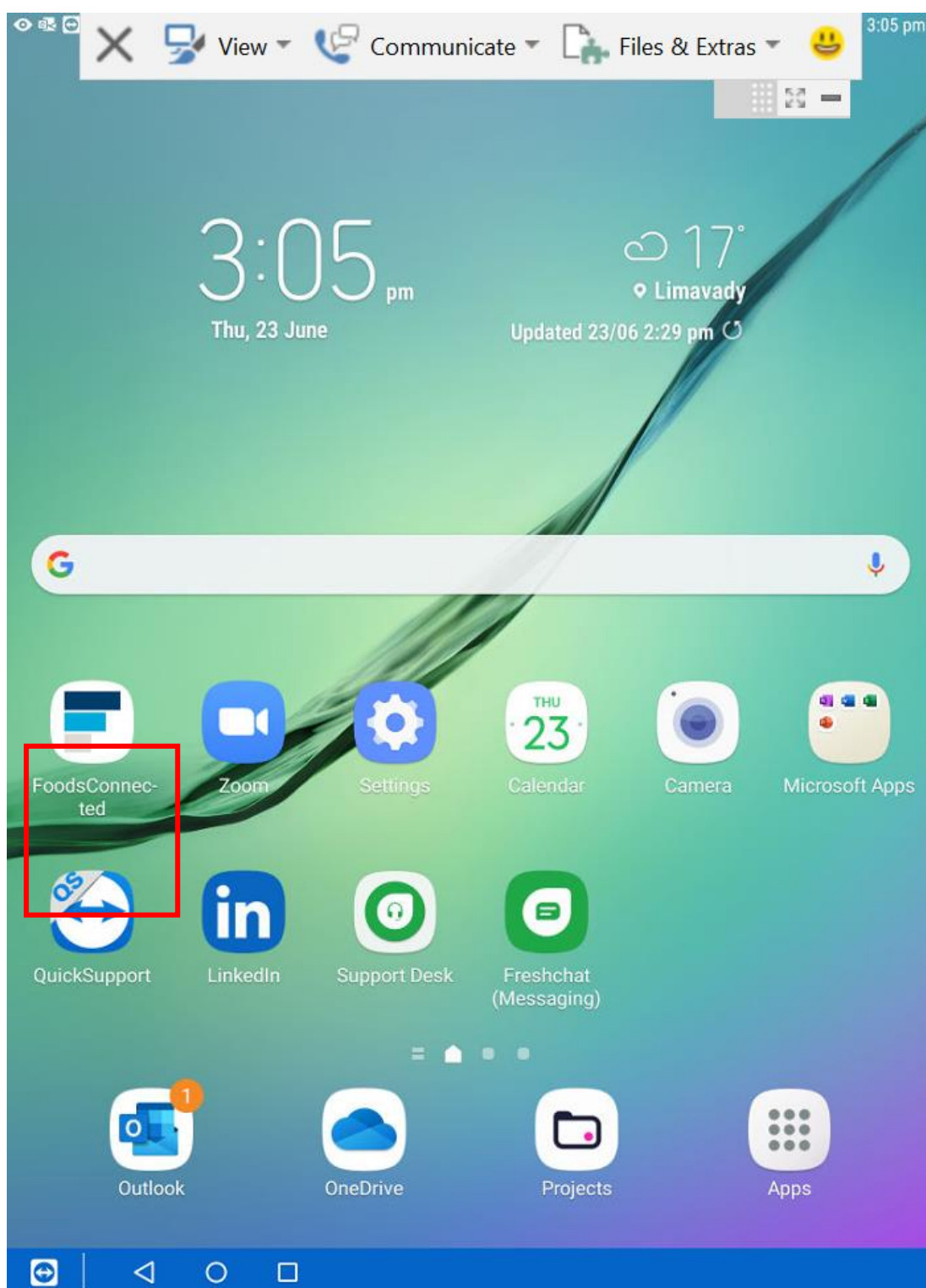
Completed By:  Supplier Type:  Category:  Risk Rating:  Re-classified rating:  Clear Filters

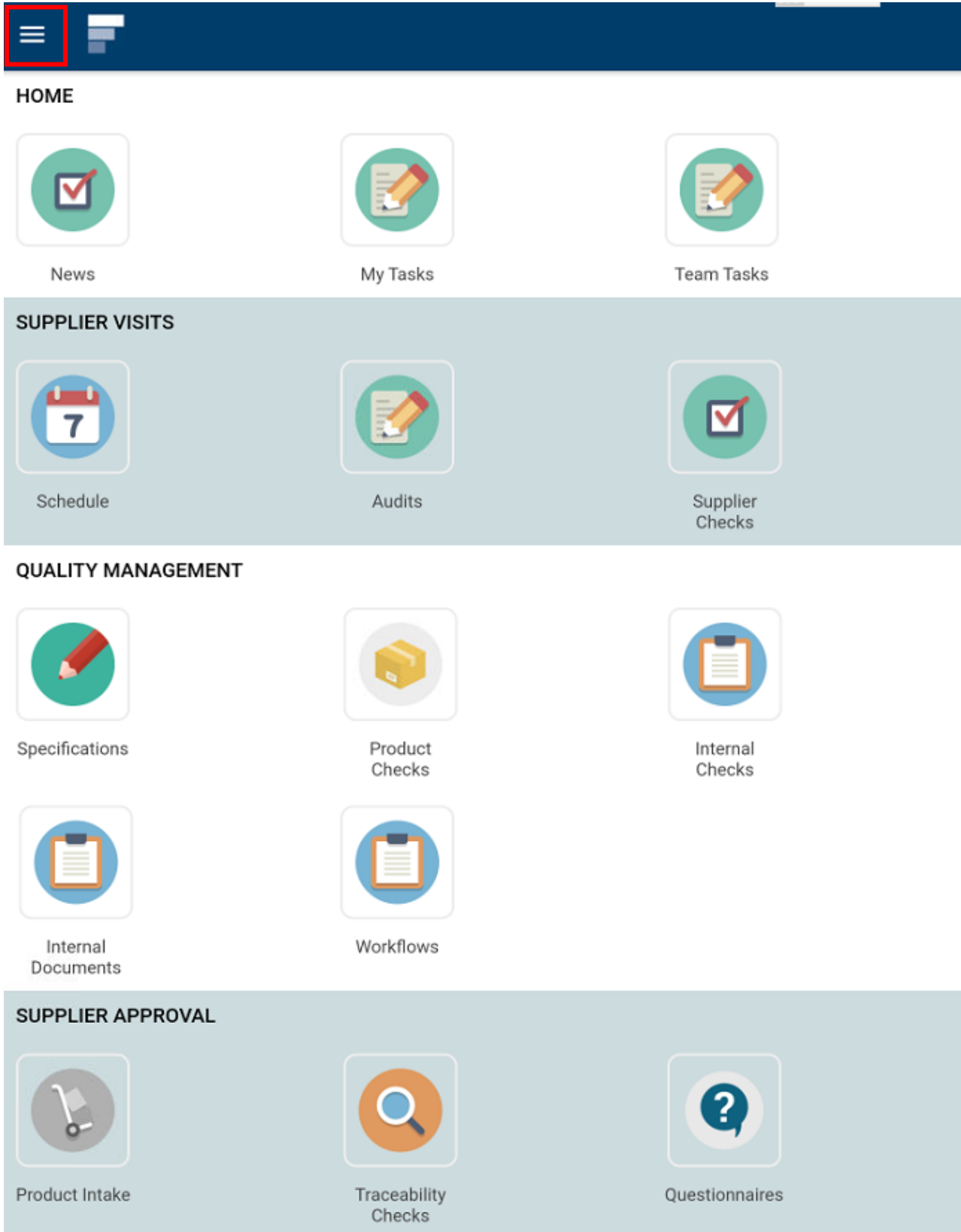
Delete Selected Close Selected View Selected Export to Excel

Viewing 9 results | Page 1 of 1

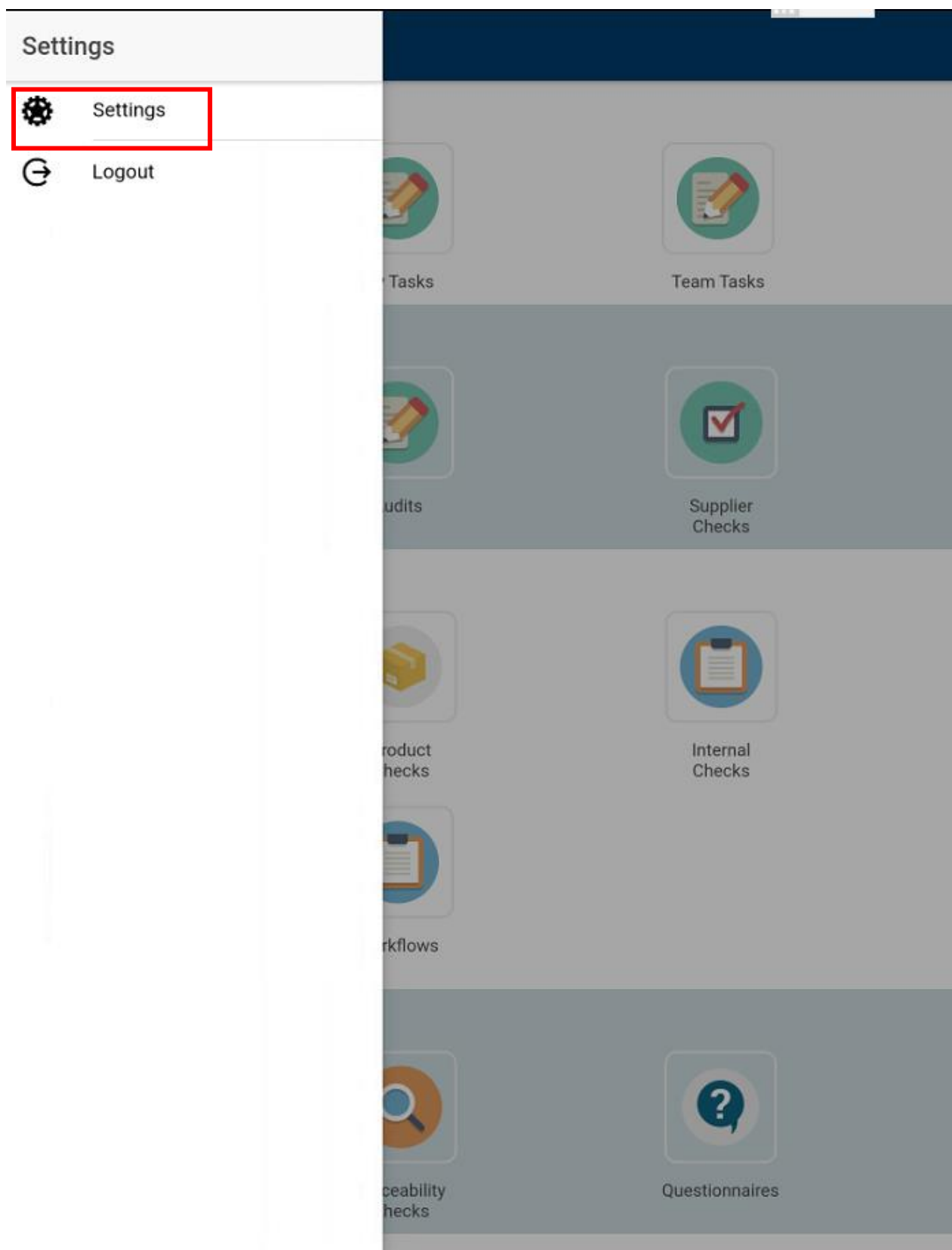
	Date/Time Completed	Site	Ref Num	Supplier	Product	Category	Risk Rating	Re-classified rating	Completed By	Response Required By	Status
<input type="checkbox"/>	07/08/2020 16:07:58	Group	87995-9321	Australian Prime Lamb	694286 - Lamb Trimmings 85CL MW/VAC Carton	Foreign Object	Major		Craig Wilson	14/08/2020 07:10:00	Closed

## 4. HOW TO RECORD A PRODUCT CHECK ON THE TABLET


**Step 1:** Sign in on your tablet**Step 2:** Now select the settings icon




**Step 3:** Now select **Settings**



**Step 4:** Navigate to **Site** and select

 **Settings**


 **Application**

Build Version

2.3.8

Notifications

On

 **User**

Name


Ravi Sharma

Email

ravi@foodsconnected.com

Site

Group

 **Company Data**

Products

Suppliers


Specifications

Audits

Auto Sync Settings

Language

EN

 **Device Data**

CLEAR APPLICATION DATA


**Step 5:** Now select your site then **Save**


← Site SAVE

Group	
Sales & Marketing Department	<input type="radio"/>
System Development	<input type="radio"/>

**Step 6:** Now navigate to **Auto Sync Settings**



 **Settings**


 **Application**

Build Version

2.3.8

Notifications

On

 **User**

Name


Ravi Sharma

Email

ravi@foodsconnected.com

Site

Group

 **Company Data**

Products

Suppliers


Specifications

Audits

Auto Sync Settings

Language

EN

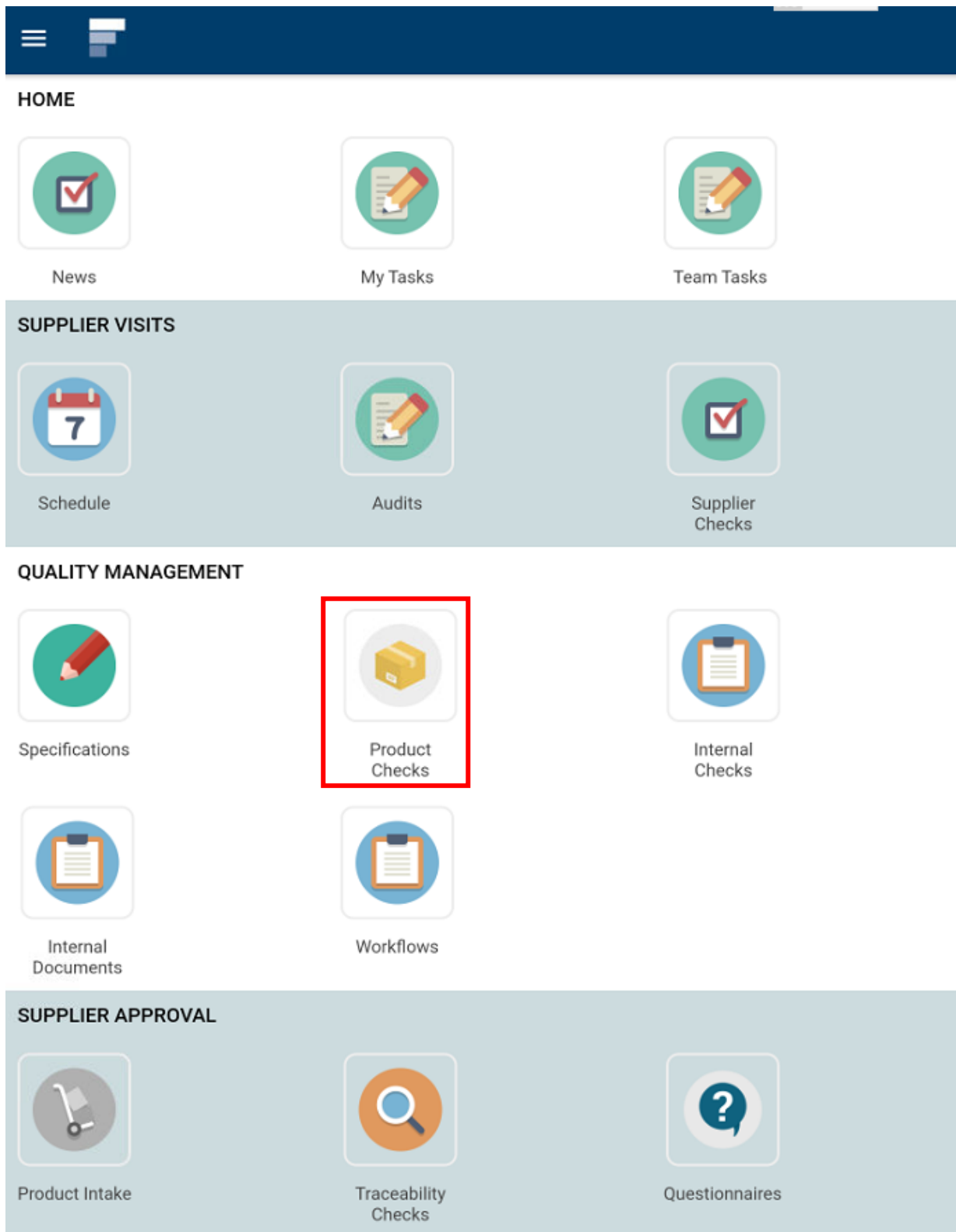
 **Device Data**

CLEAR APPLICATION DATA

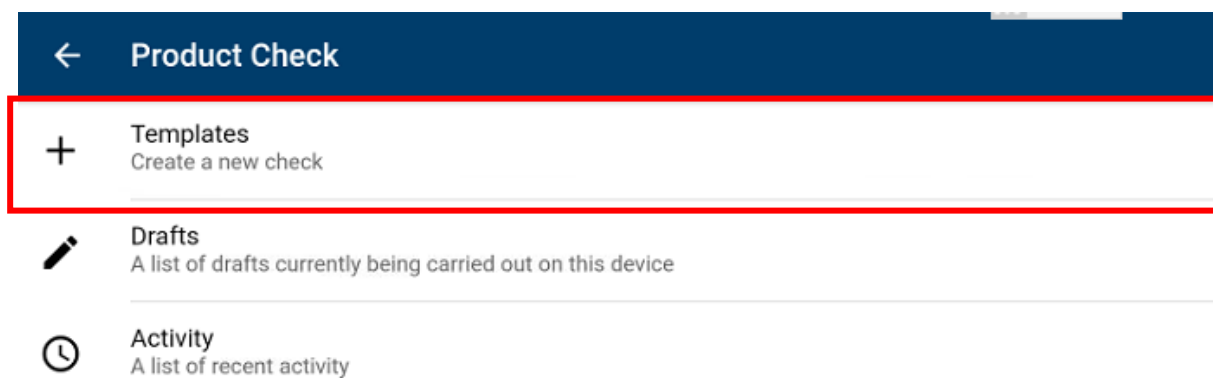
**Step 7:** Turn on **Company Product, Company Suppliers & Product Check Templates**. This is so every time you log in on your tablet all suppliers, products & templates will download to your tablet so you can perform checks offline.

← Auto Sync	
Company Products	<input checked="" type="checkbox"/>
Company Suppliers	<input checked="" type="checkbox"/>
Supplier Check Templates	<input type="checkbox"/>
Traceability Templates	<input type="checkbox"/>
Product Intake Templates	<input type="checkbox"/>
Product Check Templates	<input checked="" type="checkbox"/>
Internal Check Templates	<input type="checkbox"/>

**Step 8:** Select back & back until you get to the tablet homepage. Now select **Product Checks**



### Step 9: Select Templates





**Step 10:** If there is no templates select the cloud download icon.



Tap the cloud download icon or swipe down to sync templates...

**Step 11:** The templates now download. Select your template/Check

 Product Check 

**Templates**  
Results: 18

Test Abbie

test

test

Test (HL)

test confirmation

test

test

Raw Material Intake Check

Bethany Test

Barry Test

Integration test incoming

Product Check

Spectral Tests - Tumeric

**Step 12:** Now perform your check by selecting the **Supplier** or **Product** if these are part of your check & any other fields. Select **Save** when done

←
**Product Check**
SAVE

Supplier
Fresh Food Supplies (EC 12345)

Product
AAB605 - \*A\* BRISKET NE 5 RIB IW FRZN

**Product Check**

Date
23/06/2022

Time
03:37 PM



Question 1

Answer question


Is the product correct?

YES ✓
NO

Images

MARK SECTION AS COMPLETE


Form

**Step 14:** Now select **Save & Preview**. If when you complete a check and hit **Save & Home** or **Save & Create New Check** on your check you just did, it ends up in the Drafts tab. Where you need to upload. See Step 19 after viewing next steps.

←

Product Check

SAVE

Supplier

Fresh Food Supplies (EC 12345)

▼

Product

AAB605 - \*A\* BRISKET NE 5 RIB IW FRZN

▼

Product Check

✓

Date

Time

03:37 PM

Question 1

Answer question

Is the product correct?

YES ✓

NO

Images

Save Check

Save And Preview



Save And Home

Save And Create New Check

Cancel

**Step 15:** If you selected Save & Preview above. This allows you to view the info you have added or **Edit** by selecting the Edit button.



 **Product Check** 

Supplier

Fresh Food Supplies (EC 12345)

Product

AAB605 - \*A\* BRISKET NE 5 RIB IW FRZN

**Product Check**

Time

15:37

Question 1

Answer question

Is the product correct?

Yes



**Step 16:** Edit or amend your details. Select **Save** when done

←

Product Check

SAVE

Supplier

Fresh Food Supplies (EC 12345)

Product

AAB105 - \*A\* BRISKET PE 5 RIB IW FRZN

Product Check

Date

Time

03:47 PM

Question 1



Answer question

Is the product correct?


YES ✓

NO

Images



MARK SECTION AS COMPLETE

  
Form

**Step 16:** Once done select the **Cloud** upload icon. Then Select **Yes**.

←

Product Check

Supplier
Fresh Food Supplies (EC 12345)
Product
AAB605 - *A* BRISKET NE 5 RIB IW FRZN
<b>Product Check</b>
Time
15:37
Question 1
Answer question
Is the product correct?
Yes

Are you sure?

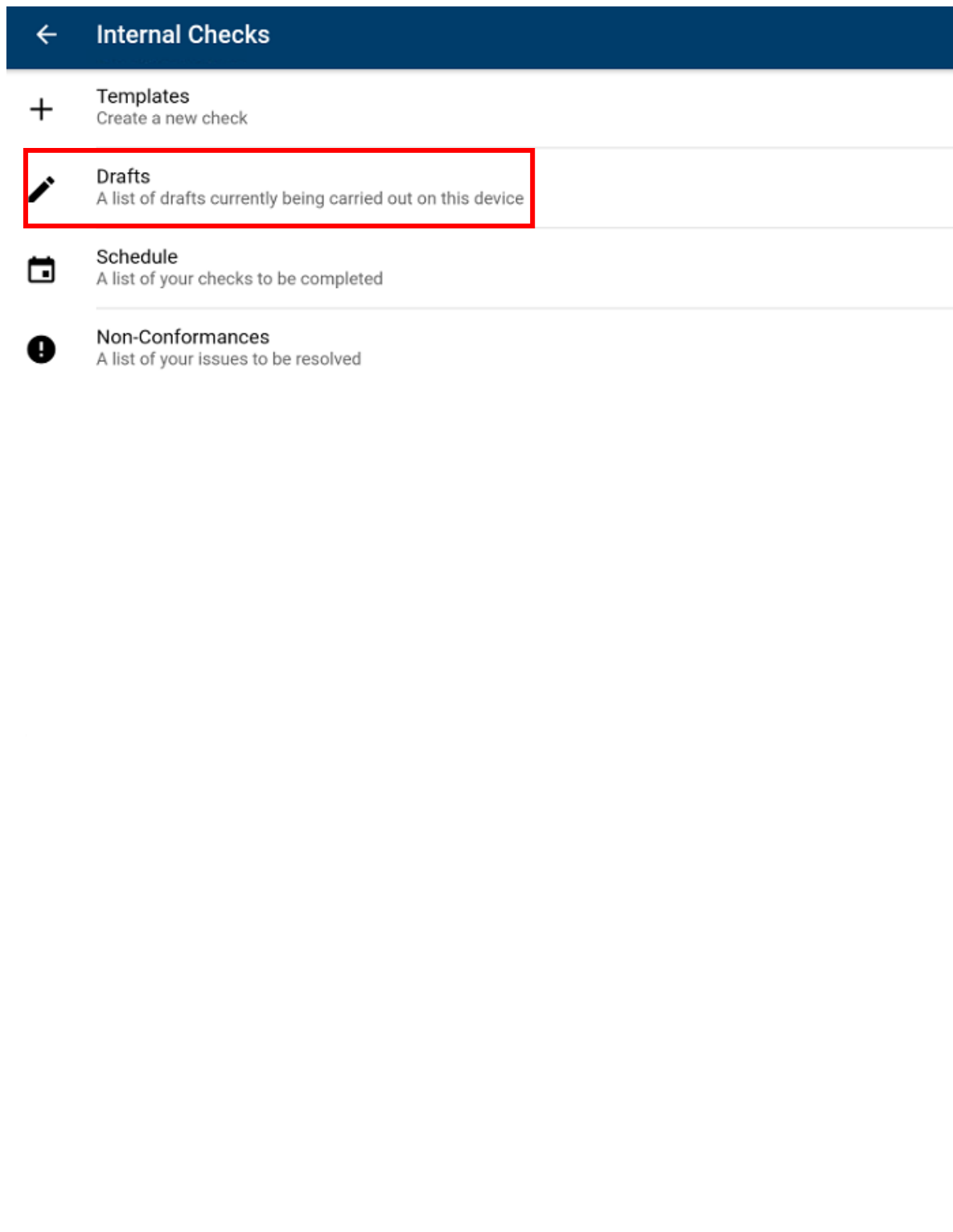
Do you want to submit this check?

NO

YES

**Step 17:** Your check is now complete & uploaded to the desktop

### Step 19: Select Drafts





**Step 20:** If you know your draft check(s) are fully complete and don't need reviewed you can upload all checks in this drafts folder by selecting the **Upload** cloud icon.



**Step 21:** Or if you need to review or edit one of these checks you can select it.



**Step 22:** Now you are back to where you can select **Edit**.

 **Product Check** 

Supplier

Fresh Food Supplies (EC 12345)

Product

AAB605 - \*A\* BRISKET NE 5 RIB IW FRZN

**Product Check**

Time

15:37

Question 1

Answer question

Is the product correct?

Yes



**Step 23:** Now Edit or Amend your check

←

Product Check

SAVE

Supplier

Fresh Food Supplies (EC 12345) ▾

Product

AAB105 - \*A\* BRISKET PE 5 RIB IW FRZN ▾

Product Check ✓

Date

Time

03:47 PM

Question 1


Answer question


Is the product correct?

YES ✓


NO

Images





MARK SECTION AS COMPLETE

  
Form

**Step 24:** Once done, select **Save** then **Save & Preview**



←

Product Check

SAVE

Supplier

Fresh Food Supplies (EC 12345) ▾

Product

AAB605 - \*A\* BRISKET NE 5 RIB IW FRZN ▾

Product Check ✓

Date

Time

03:37 PM

Question 1

Answer question

Is the product correct?

YES ✓

NO

Images

Save Check

Save And Preview

Save And Home

Save And Create New Check

Cancel

**Step 25:** Once your check is finally ready & complete. Select the **Cloud** upload icon. Then Select **Yes**.

The screenshot shows a mobile application interface for a 'Product Check'. The form has several sections: 'Supplier' with the value 'Fresh Food Supplies (EC 12345)', 'Product' with the value 'AAB605 - \*A\* BRISKET NE 5 RIB IW FRZN', and 'Time' with the value '15:37'. A 'Question 1' section asks 'Is the product correct?' with a 'Yes' answer. A white confirmation dialog box is overlaid on the form, asking 'Are you sure?' and 'Do you want to submit this check?'. It has two buttons: 'NO' and 'YES'. The 'YES' button is highlighted with a red box. In the top right corner of the app, there is a cloud upload icon, also highlighted with a red box. At the bottom right, there is a circular edit icon.

Product Check	
Supplier	Fresh Food Supplies (EC 12345)
Product	AAB605 - *A* BRISKET NE 5 RIB IW FRZN
<b>Product Check</b>	
Time	15:37
Question 1	
Answer question	
Is the product correct?	
Yes	

**Are you sure?**

Do you want to submit this check?

NO YES

**Step 28:** Your check is now complete & uploaded to the desktop

## 5. HOW TO ACCESS THE ACTIVITY OVERVIEW FOR PRODUCT CHECK MANAGER

**Step 1:** In the Product Check Manager tool, select **Activity Overview**

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

**Product Check Manager**

Product Check Templates ← Received Checks **Activity Overview** Reports ▾ Admin

Site: All Created By: All Search: Search Template Names... [Filter](#) [Clear Filters](#)

[Add New](#) [Duplicate Selected](#) [Delete Selected](#)

<input type="checkbox"/>	Last Modified	Title	Created By	Completed
--------------------------	---------------	-------	------------	-----------

**Step 2:** Your activity view will show like this below. Bulk closing checks will create a separate log in the activity overview for every check that was closed and the user who “bulk-closed” the records specified.

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

**Product Check Manager**

Product Check Templates ← Received Checks **Activity Overview** Reports ▾ Admin

Between Dates:   Site: All Product Check: All Supplier: All Product: All User: All Action: All [Filter](#) [Clear Filters](#)

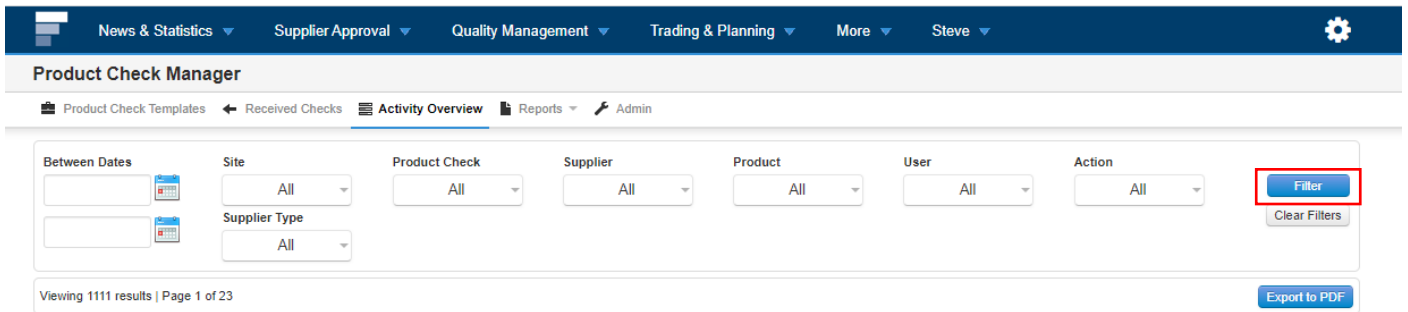
Supplier Type: All

Viewing 1111 results | Page 1 of 23 [Export to PDF](#)

Date	Title	Supplier	Product	User	Action
21/10/2021 02:31:20	Certificate of Analysis	N/A	10001382 - Grated Mozzarella	Steve Jones	Completed Product Check
21/10/2021 02:31:20	Certificate of Analysis	N/A	10001382 - Grated Mozzarella	Steve Jones	Completed Product Check
21/10/2021 02:12:26	Certificate of Analysis	N/A	N/A	Steve Jones	Created Product Check
05/10/2021 02:06:05	Intake Non Conformance Report (DR, NS)	Bakery Supplier	N/A	Steve Jones	Supplier Non-Conformance Report - Non Conformance Type (Alert: Option equal to Extrinsic Foreign Body)
05/10/2021 02:06:04	Intake Non Conformance Report (DR, NS)	Bakery Supplier	N/A	Steve Jones	Updated Product Check
05/10/2021 02:05:54	Intake Non Conformance Report (DR, NS)	Bakery Supplier	N/A	Steve Jones	Completed Product Check
30/09/2021 01:28:42	Goods Intake Checks	Acorn Produce	1678 - All Rounder Potatoes 2.5kg	Steve Jones	Completed Product Check
29/09/2021 05:23:33	Micro Results (Raw Materials)	N/A	N/A	Steve Jones	Completed Product Check
27/09/2021 04:56:26	Intake Assessment- Non-Conformance Record	Northern Ireland Abattoir	12 - Beef Rump Cap	Steve Jones	Confirmed & Closed Product Check
27/09/2021	Intake Assessment- Non-	Northern Ireland	12 - Beef Rump Cap	Steve Jones	Shared Product Check with Technical Manager (HI, please review & submit

## 5.1 HOW TO SEARCH FOR SPECIFIC ACTIVITY

**Step 1:** To search for specific activity use the filters at the top of the page. The drop downs will have options for you to use to filter. Select the **dates, users & actions**. Once done select **Filter**



Product Check Manager

Product Check Templates ← Received Checks **Activity Overview** Reports Admin

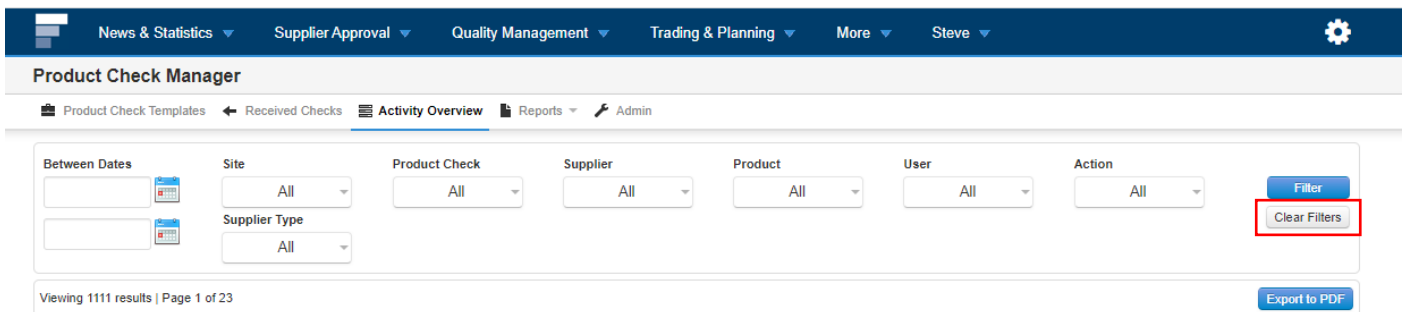
Between Dates: [ ] [ ] Site: All Product Check: All Supplier: All Product: All User: All Action: All

Supplier Type: All

Filter Clear Filters

Viewing 1111 results | Page 1 of 23 Export to PDF

**Step 2: Clear filters** when done to reset the activity back to normal view.



Product Check Manager

Product Check Templates ← Received Checks **Activity Overview** Reports Admin

Between Dates: [ ] [ ] Site: All Product Check: All Supplier: All Product: All User: All Action: All

Supplier Type: All

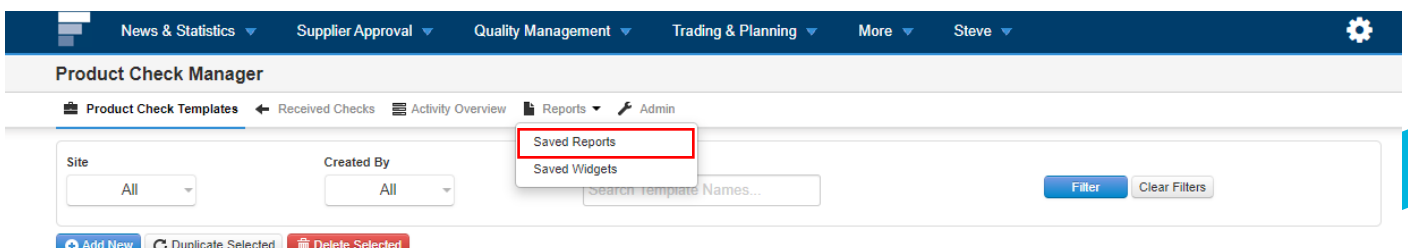
Filter Clear Filters

Viewing 1111 results | Page 1 of 23 Export to PDF

## 6. REPORTING

### 6.1 HOW TO ANALYSE RECORDED PRODUCT CHECKS

**Step 1:** In the Product Check Manager, select the Product Check, template that you want to analyse, then select **Saved Reports**



Product Check Manager

Product Check Templates ← Received Checks **Activity Overview** Reports Admin

Site: All Created By: All

Saved Reports Saved Widgets

Search template Names...

Filter Clear Filters

Add New Duplicate Selected Delete Selected

**Step 2:** Choose the date range, the fields that you want to analyse & what type of chart.

**Step 3:** Select ***Generate Report*** when done.

## 6.2 HOW TO CREATE A COMPLETED SNAPSHOT REPORT ON PRODUCT CHECKS

**Step 1:** Select the Product Check Manager template you want to do a report on, then select ***Completed Snapshot Report***

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

**Product Check Manager**

Product Check Templates ← Received Checks Activity Overview Reports Admin

Site: All Created By: All Search: Search Template Names... Filter Clear Filters

+ Add New Duplicate Selected Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Completed	
<input type="checkbox"/>	22/10/2021 09:47:21	Goods Intake Checks	Steve Jones	View Completed	Record New
<input type="checkbox"/>	21/10/2021 02:27:45	Certificate of Analysis	Steve Jones	View Completed	Record New
<input type="checkbox"/>	21/10/2021 02:13:15	Lab Checks - Copy	Steve Jones	View Completed	Record New
<input type="checkbox"/>	20/10/2021 10:03:24	Raw Material - Non-Conformance Record	Steve Jones	View Completed	Record New
<input type="checkbox"/>	30/09/2021 03:09:10	CF - Finished Pack Assessment (Dr. Ns. Calc) v2	Steve Jones	View Completed	Record New
<input type="checkbox"/>	27/09/2021 02:42:35	Intake Assessment- Non-Conformance Record	Steve Jones	View Completed	Record New
<input type="checkbox"/>	09/09/2021 05:20:53	Final Product Testing - Label Pack Assessment	Steve Jones	View Completed	Record New
<input type="checkbox"/>	26/08/2021 01:15:45	Final Product Testing - Label Pack Assessment - Coles	Steve Jones	View Completed	Record New
<input type="checkbox"/>	05/08/2021 04:53:36	Micro Testing Soul Fresh	Steve Jones	View Completed	Record New
<input type="checkbox"/>	13/07/2021 14:33:33	Animal Feed Raw Material Check	Steve Jones	View Completed	Record New
<input type="checkbox"/>	27/05/2021 12:51:28	Finished Pack Assessment (Dr. Ns. Calc)	Steve Jones	View Completed	Record New
<input type="checkbox"/>	30/04/2021 11:23:56	Goods Intake Check	Steve Jones	View Completed	Record New

- View Completed
- Completed Analysis Report
- Completed Comparison Report
- Completed Snapshot Report
- Score Over Time Report
- Financial Report Templates
- Edit Details
- Edit Check Template
- Edit Response Template
- Edit Confirmation Template
- Preview
- Generate Import Template
- Import
- View Edit History

## Step 2: Select all current suppliers for the report

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

**Product Check Manager**

Product Check Snapshot - Supplier Checking Sheet Back to Templates Next >

Supplier Options









☒ All Current Suppliers whenever report is run ☐ Filtered Supplier selection from current list

Next >

**FOODS CONNECTED**

Or filter your suppliers & choose. The select **Next** when done

**Step 3:** Now choose the parameters of your report. As you can see there are many to use to create a custom report. Once done select **Next**

Sites	<input checked="" type="radio"/> All Available Sites <input type="radio"/> Specific Sites
Date Filtering	<input checked="" type="radio"/> Date Range <input type="radio"/> From Set Date <input type="radio"/> During Set Time Period <input type="radio"/> Current Year to Date <input type="radio"/> Company Period <input type="radio"/> Last Period <input type="radio"/> Current Period
Date Range	<input type="text"/>  <input type="text"/> 
Report on Field of Type	<input checked="" type="radio"/> Numeric <input type="radio"/> Dropdown <input type="radio"/> Overall Count
Numeric Field	<div>None </div>
Dropdown / Timespan	<div>Non Conformance Details - Locat </div>
Output Type	<div>Totals </div>
Charts Type	<div>Pie Chart </div>
Legend Percentages	<input checked="" type="radio"/> Shown <input type="radio"/> Hidden
Total/Average per Outcome	<input checked="" type="radio"/> Shown <input type="radio"/> Hidden
Filter By	<div>Non Conformance Details - Locat </div> <div>Add</div>
Summarize By	<div>Non Conformance Details - Locat </div> <div>Add</div>

**Step 4:** If you have chosen to filter your report this option will show below, choose which you would like to filter by the select **Generate Report**

**Step 5:** Your report will show like this below, you can amend several parameters of the report by selecting **Amend Parameters**.

**Step 6:** To save the report in the Product manager select **Save Report**


**Step 7:** Name the report, select the site & the access level. Once done select **Save As**, then **New Report**

Save Report As...


Report Title

Snapshot Report


Report Site

IPL (Group) 

Report Access Level

All Users 

New Report

Save As... 

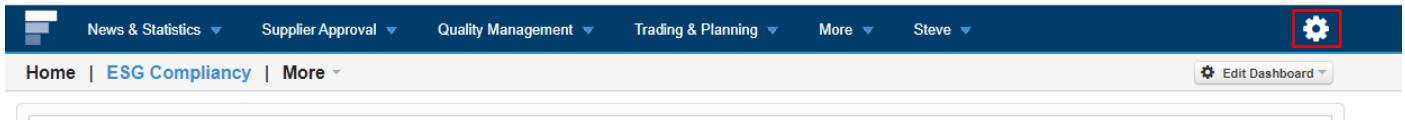
Cancel

## 7. USER ACCESS

User access is granted by the admin of the system. So if you need access please request it. If you are an admin you can grant access to other users. You do this in the settings page. This is how you do it below.

### 7.1 GRANT A NEW USER ACCESS

### Step 1: Select the **Settings** Icon

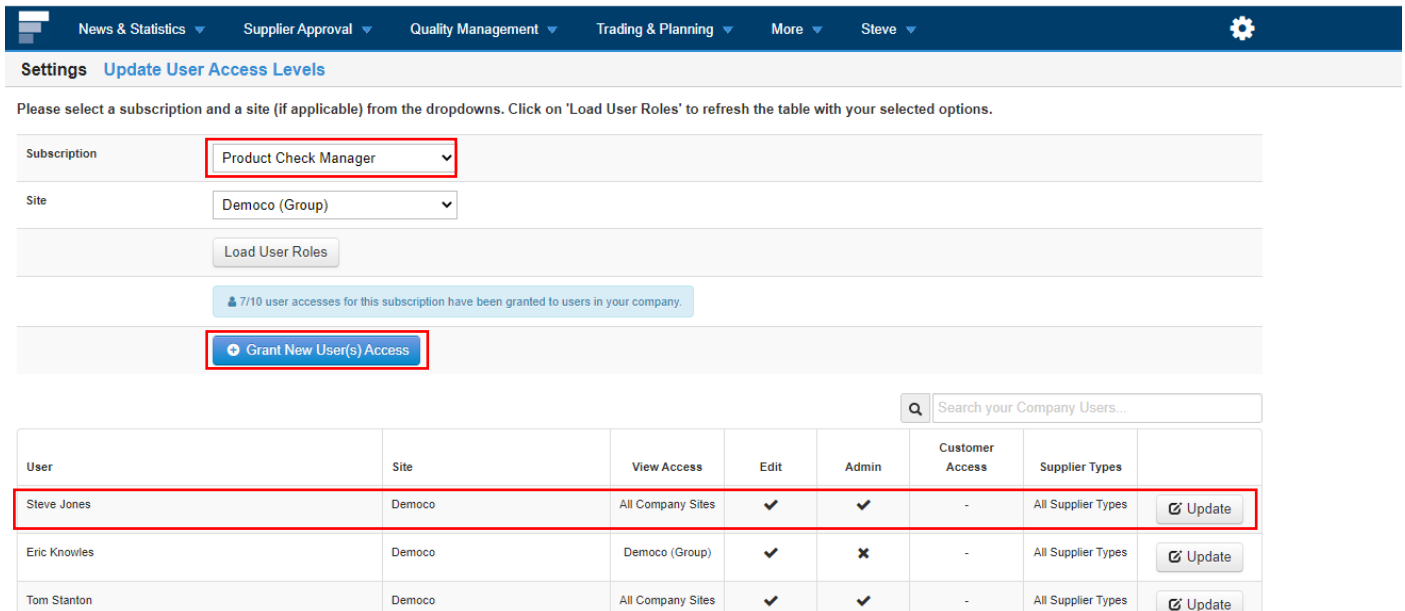


### Step 2: Scroll down to Company Users, Email & Security. Select **User Access – By tool**

#### ► Company Users, Email & Security



### Step 3: Select the tool, then the site the person relates too. Then select **Grant New User Access**



#### 7.1.1 GRANT VIEW ACCESS

### Step 1: Select user, then click update and set **View Access** to View their site only. Select **Save** when done

User	Site	View Access	Edit	Admin	Customer Access	Supplier Types	
Steve Jones	Democo	All Company Sites	✓	✓	-	All Supplier Types	Update
Eric Knowles	Democo	Democo (Group)	✓	✗	-	All Supplier Types	Update
Tom Stanton	Democo	All Company Sites	✓	✓	-	All Supplier Types	Update

#### User Access Levels

Subscription	Product Check Manager
User	Steve Jones
Site	Democo (Group)
View Access	<div>View all sites</div>
Subscription Roles	<input checked="" type="checkbox"/> Record



### 7.1.1.1 VIEW ACCESS PER SITE

**Step 1:** Select View Specific Sites from the dropdown of View Access. Then choose the sites they can view by ticking them. Once done select **Save**

### 7.1.2 GRANT RECORD ACCESS

**Step 1:** Select Record for the user. Then select **Save** when done

Subscription Roles

- ☒ Record
- ☒ Create/Edit Template
- ☒ Share
- ☒ Respond
- ☒ Admin
- ☒ Run Financial Reports

### 7.1.3 GRANT CREATE/EDIT TEMPLATE ACCESS

**Step 1:** Select Create/Edit template for the user. Then select **Save** when done

Subscription Roles

- ☒ Record
- ☒ Create/Edit Template
- ☒ Share
- ☒ Respond
- ☒ Admin
- ☒ Run Financial Reports

### 7.1.4 GRANT SHARE ACCESS

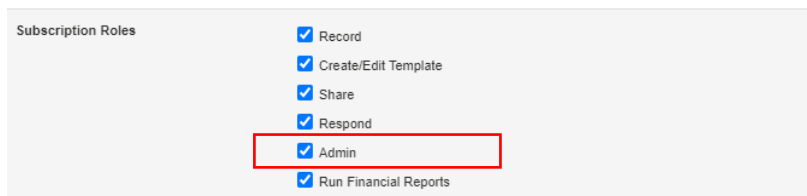
**Step 1:** Select Share for the user. Then select **Save** when done

Subscription Roles

- ☒ Record
- ☒ Create/Edit Template
- ☒ Share
- ☒ Respond
- ☒ Admin
- ☒ Run Financial Reports

### 7.1.5 GRANT ADMIN ACCESS

**Step 1:** Select Admin for the user. The select **Save** when done

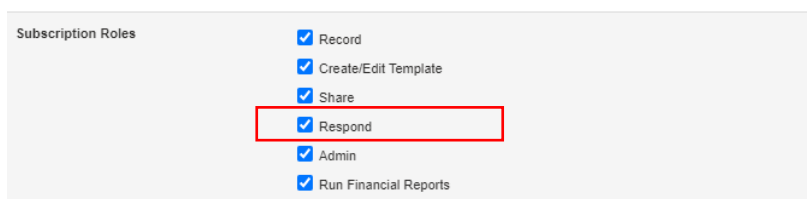


Subscription Roles

- ☒ Record
- ☒ Create/Edit Template
- ☒ Share
- ☒ Respond
- ☒ Admin
- ☒ Run Financial Reports

### 7.1.6 GRANT RESPOND ACCESS

**Step 1:** Select Respond for the user. The select **Save** when done



Subscription Roles

- ☒ Record
- ☒ Create/Edit Template
- ☒ Share
- ☒ Respond
- ☒ Admin
- ☒ Run Financial Reports

### 7.1.7 ACCESS LEVEL

You can restrict or grant the access level further by selecting suppliers that the user can view, respond too etc.

#### 7.1.7.1 GRANTING SUPPLIER TYPES ACCESS

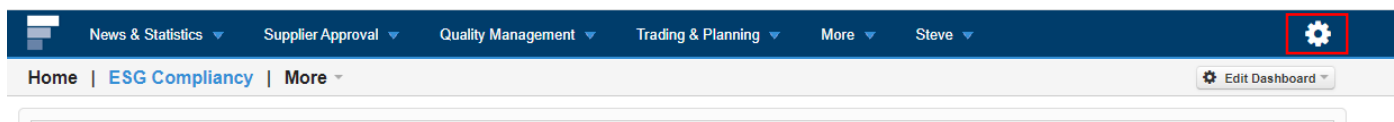
**Step 1:** Select All Types under **Supplier types**. This means this user can view all types of suppliers. Select **Save** when done

**Step 2:** If you want to restrict access, select Selected types only, under **Selected Types**

**Step 3:** The supplier types options opens up for you to select which suppliers they can view. Select suppliers then select **Save** when done.

## 7.2 HOW TO AMEND A USER'S ACCESS

### Step 1: Select the **Settings** Icon



### Step 2: Scroll down to Company Users, Email & Security. Select **User Access – By tool**

#### ► Company Users, Email & Security



### Step 3: Select the tool, then the site the person relates too. Then select **Load User Roles**

The screenshot shows the 'Update User Access Levels' form. The 'Subscription' dropdown is set to 'Product Check Manager' and the 'Site' dropdown is set to 'Democo (Group)'. The 'Load User Roles' button is highlighted with a red box. Below the form, there is a status message: '7/10 user accesses for this subscription have been granted to users in your company.' and a button labeled 'Grant New User(s) Access'.

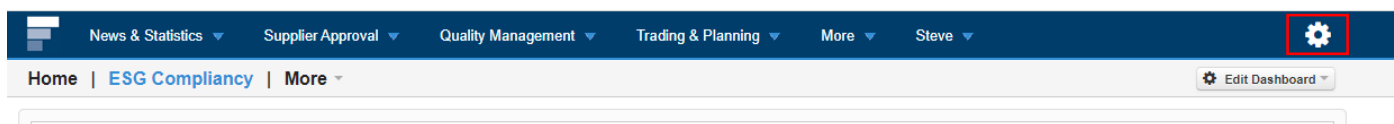
User	Site	View Access	Edit	Admin	Customer Access	Supplier Types	
Steve Jones	Democo	All Company Sites	✓	✓	-	All Supplier Types	<input checked="" type="checkbox"/> Update
Eric Knowles	Democo	Democo (Group)	✓	✗	-	All Supplier Types	<input type="checkbox"/> Update
Tom Stanton	Democo	All Company Sites	✓	✓	-	All Supplier Types	<input type="checkbox"/> Update

### Step 4: Then select **Update** beside the chosen user (as shown above)

### Step 5: Change **Subscription Roles** to the new requirements (as seen in section 6.0), then select **Save when done**

## 7.3 HOW REMOVE A USER'S ACCESS

**Step 1:** Select the **Settings** Icon



**Step 2:** Scroll down to Company Users, Email & Security. Select **User Access – By tool**

› Company Users, Email & Security



**Step 3:** Select the tool, then the site the person relates too. Then select **Load User Roles**

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

**Settings** **Update User Access Levels**

Please select a subscription and a site (if applicable) from the dropdowns. Click on 'Load User Roles' to refresh the table with your selected options.

Subscription: Product Check Manager ▾




Site: Democo (Group) ▾

Load User Roles

7/10 user accesses for this subscription have been granted to users in your company.

Grant New User(s) Access

Search your Company Users...

User	Site	View Access	Edit	Admin	Customer Access	Supplier Types	
Steve Jones	Democo	All Company Sites	✓	✓	-	All Supplier Types	 Update
Eric Knowles	Democo	Democo (Group)	✓	✗	-	All Supplier Types	 Update
Tom Stanton	Democo	All Company Sites	✓	✓	-	All Supplier Types	 Update

**Step 4:** Then select **Update** beside the user (as shown above)

### Step 5: Select **Remove Access**

User Access Levels

Subscription: Product Check Manager

User: Steve Jones

Site: Democo (Group)

View Access: View all sites ▾

Subscription Roles:

- ☒ Record
- ☒ Create/Edit Template
- ☒ Share
- ☒ Respond
- ☒ Admin
- ☒ Run Financial Reports

Supplier Type: ☒ All Types ☐ Selected Types Only

Notify user of role change(s) ? ☐ Email Notification

Remove Access Cancel Save

**Step 6:** The user is now removed