TOOL USER GUIDE

PURCHASING & SALES MANAGER

CONTENTS

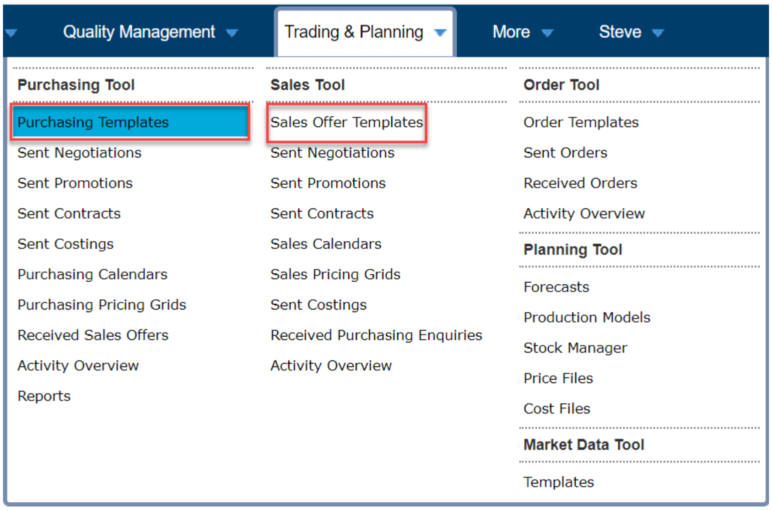
1. INITIAL SETUP FOR PURCHASING & SALES MANAGER

Some initial setup you need to do before you move into building the purchasing and sales templates

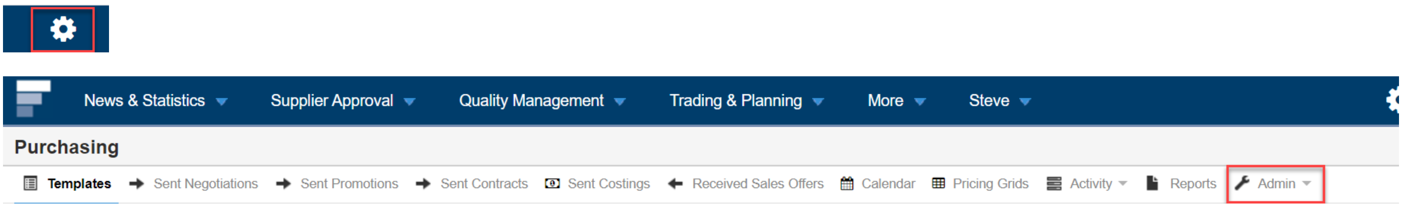
1.1. ADMIN SECTION

Withing the Purchasing tool and sales tool there is an admin section broken into two separate areas ***General Admin*** and ***Costing Admin***.

Step 1: Sign in and go to *the **Purchasing Tool*** or ***Sales Tool*** and select ***Purchasing Templates** or **Sales** Templates.*



Step 2: Navigate to the ***Admin*** section using the tab selection shown across the top of the screen. (Please note the admin section will only be visible if the user has the correct access level set within the ***Company users, Email & Security*** section accessible through the settings section in the top right of the screen – displayed as a 'cog'

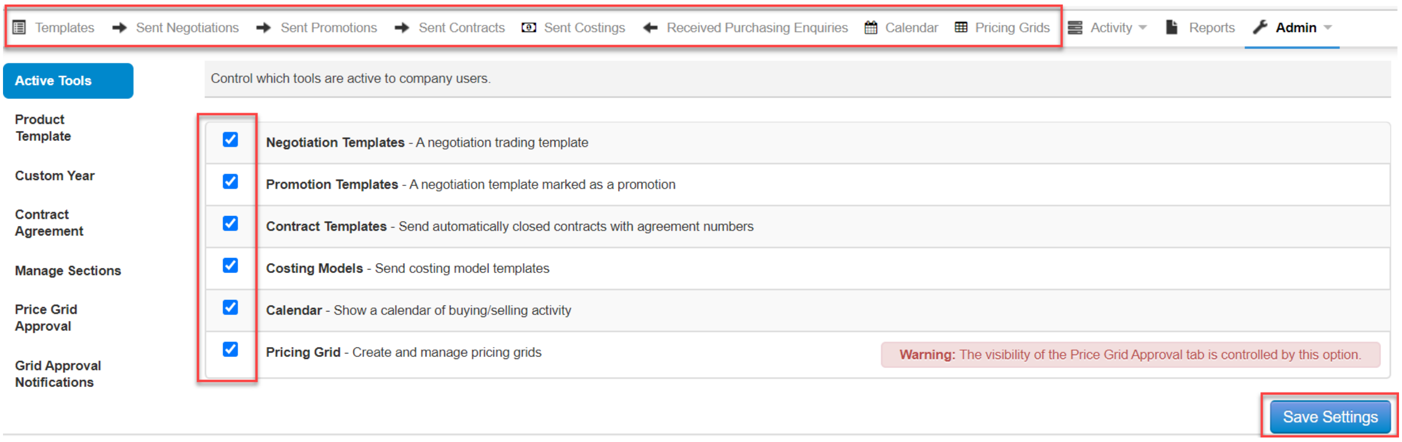


Step 3: Select ***General Admin***, this will display a series of setting areas: (Any changes need to be saved using the ***Save Settings*** button).

- Active Tools
- Product Template
- Custom Year
- Contract Agreement
- Manage Sections
- Price Grid Approval

- Grid Approval Notifications

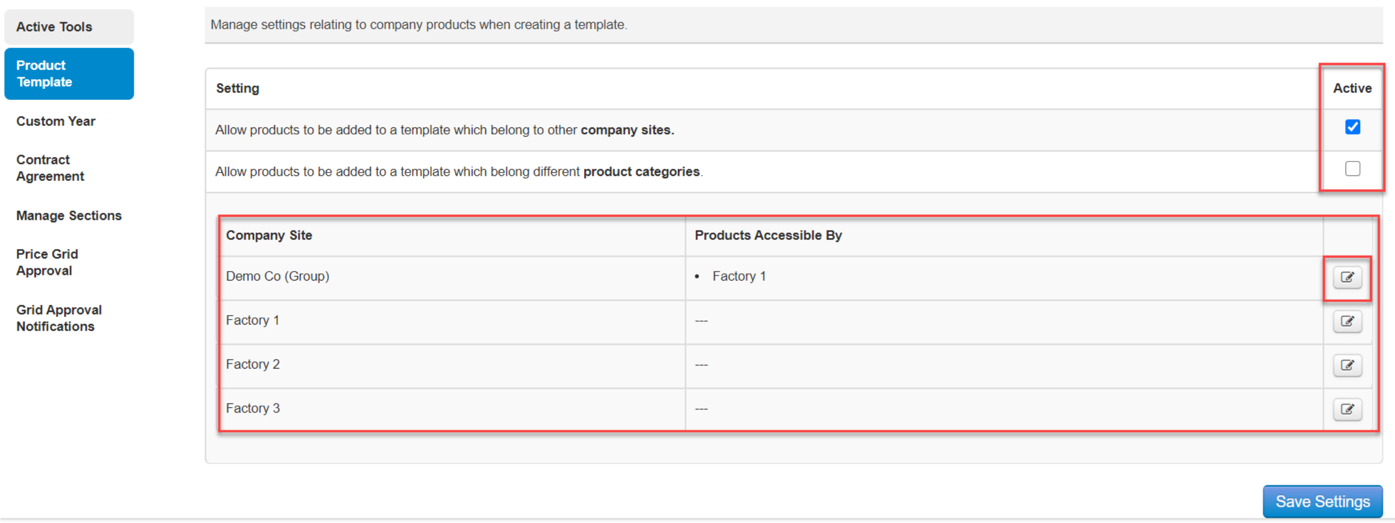
Step 4: Select ***Active Tools***, this will display the display the available tools for company users, tools can be selected and deselected to turn on/off and will then show in the tab display for the company users.



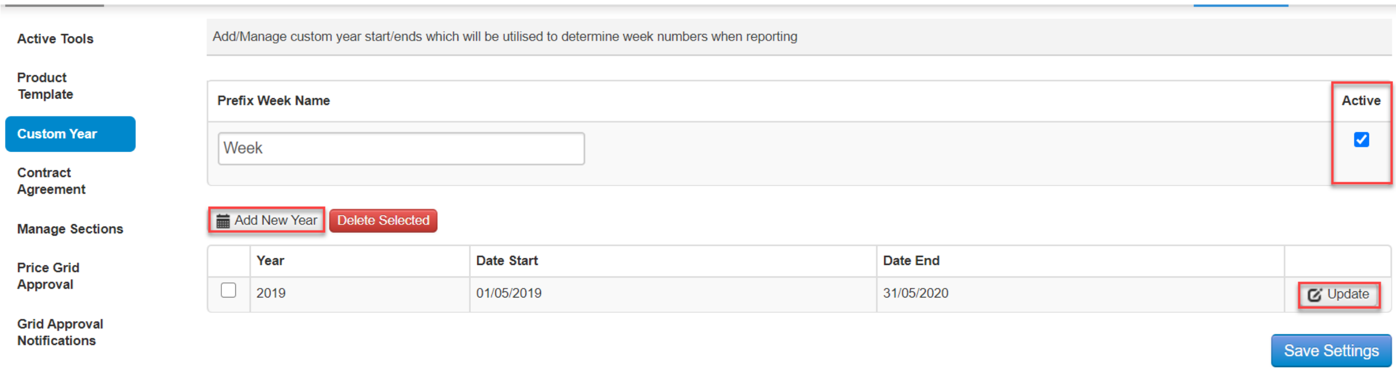
Step 5: Select ***Product Template***, this will display two options which can be selected and deselected to turn on/off.

- ***Allow products to be added to a template which belong to other company sites.*** When products are created in the ***Company Product File*** they are set against which company site they relate to. When deselected users will only be able to add products, which relate to that user's company site to templates. When turned on, the box will expand, and you will be able to set by company site what products are accessible from other company sites. This is done by using the edit button.

- ***Allow products to be added to a template which belong different product categories.*** When deselected users will only be able to add products, which match the templates settings product categories. When selected user will be able to add different product categories to the same template.

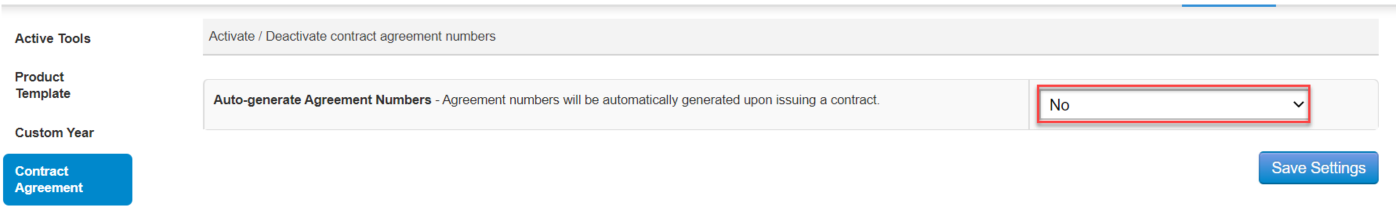


Step 6: Select ***Custom Year***, this will display an option which can be selected and deselected to turn on/off. Allowing you to add custom year start/end dates which will be utilised to determine week numbers when reporting.

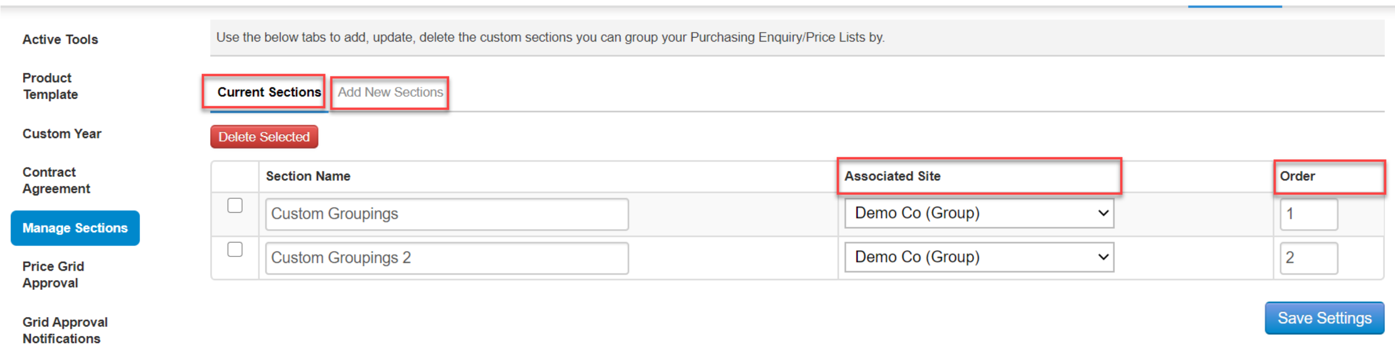


- Set a prefix to follow week numbers for example ‘Accounting Week’ would display as Accounting Week 1
- Add a New Year allows you to name the year and select the start and end date of that year. The system will treat the first week of that period as week 1 and follow subsequently until the end date. This can be repeated for multiple years.

Step 7: Select ***Contract Agreement***, this will display an option which can be selected and deselected to turn on/off. Allowing you to set if contract agreements are auto generated by the system in sequential order or inputted by the user.

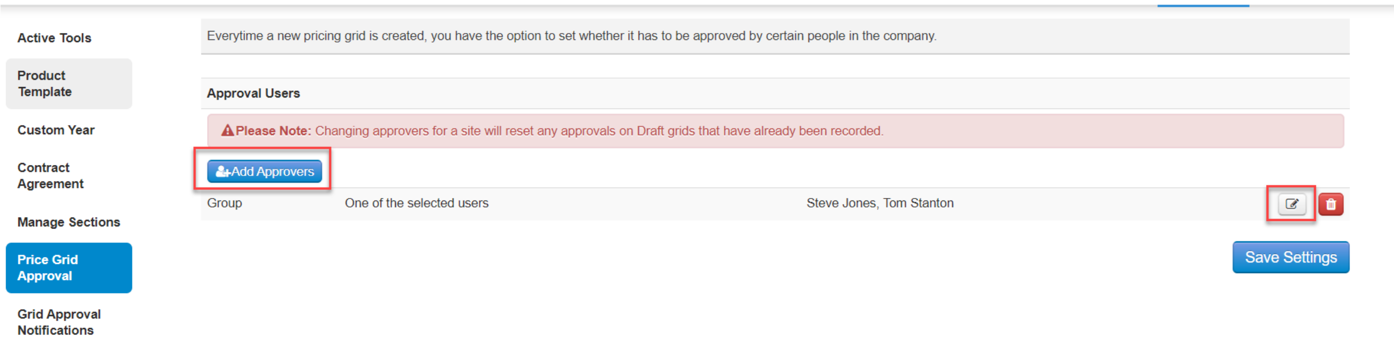


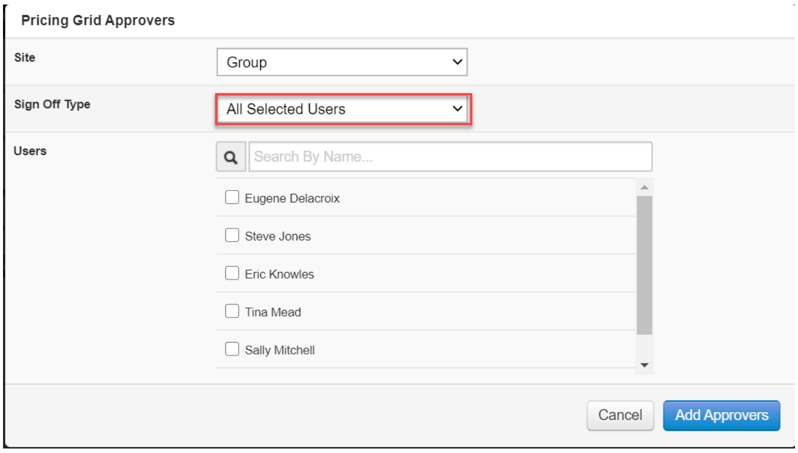
Step 8: Select ***Manage Sections***, this will display the option to create your own custom groupings – these would be displayed withing the templates to help order products into custom sections. This can only be set against 1 site so repeat as required for different company sites. The ‘Order’ allows you to set the display order for example 1 will be at the top.



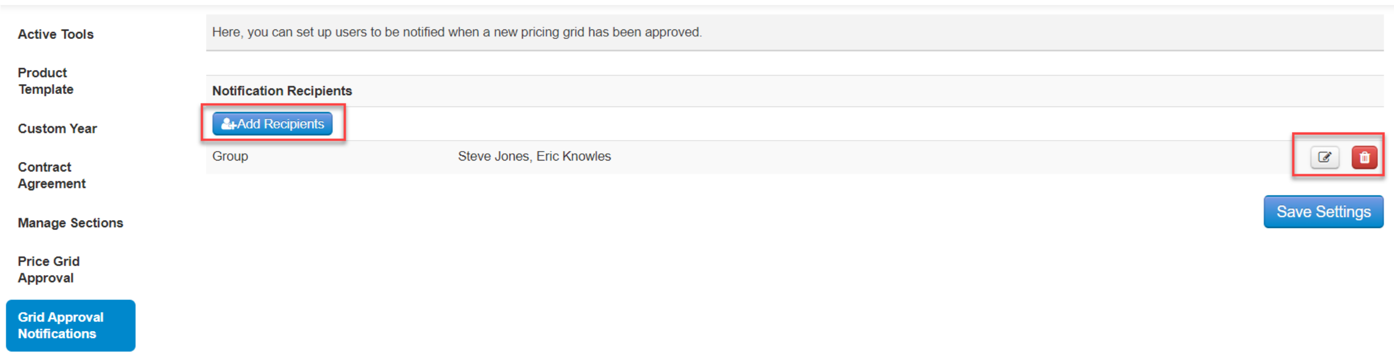
Step 9: Select ***Price Grid Approval***, when new pricing grids are created you have the option to set whether it must be approved by certain people within the company. The users can be configured here by clicking

add approvers or editing current approvers. There are two methods to approve ‘All Selected Users’ will mean all users added as approvers must each approve before it is move to approved status, or ‘One Selected Users’ will mean only one users added as a approver much approve before it is moved to approved status. This can be configured on a site of group level.



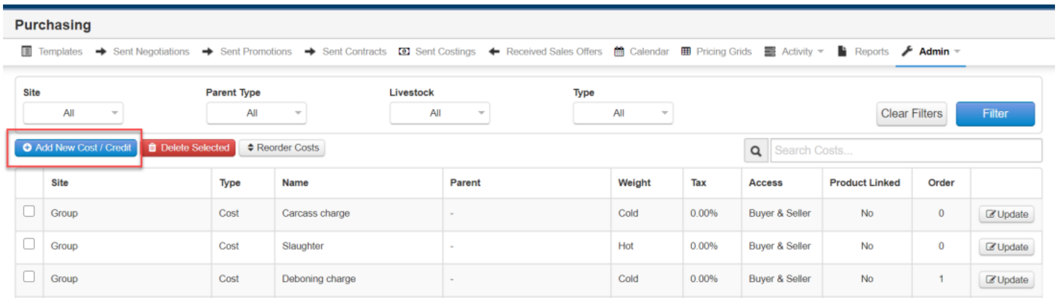


Step 10: Select ***Grid Approval Notifications***, here you can select certain users to be notified by email when a new pricing grid has been approved.



Step 11: Select ***Costing Admin***, this section allows configuration of costs and credits which can be used within the cost model templates. Costs relate to charges which are applied to an agreement for example – carcase cost, factory processing fee, transport etc. Credits are re-imbursements which are applied to an agreement for example offal credits, hide credit, rebates etc.

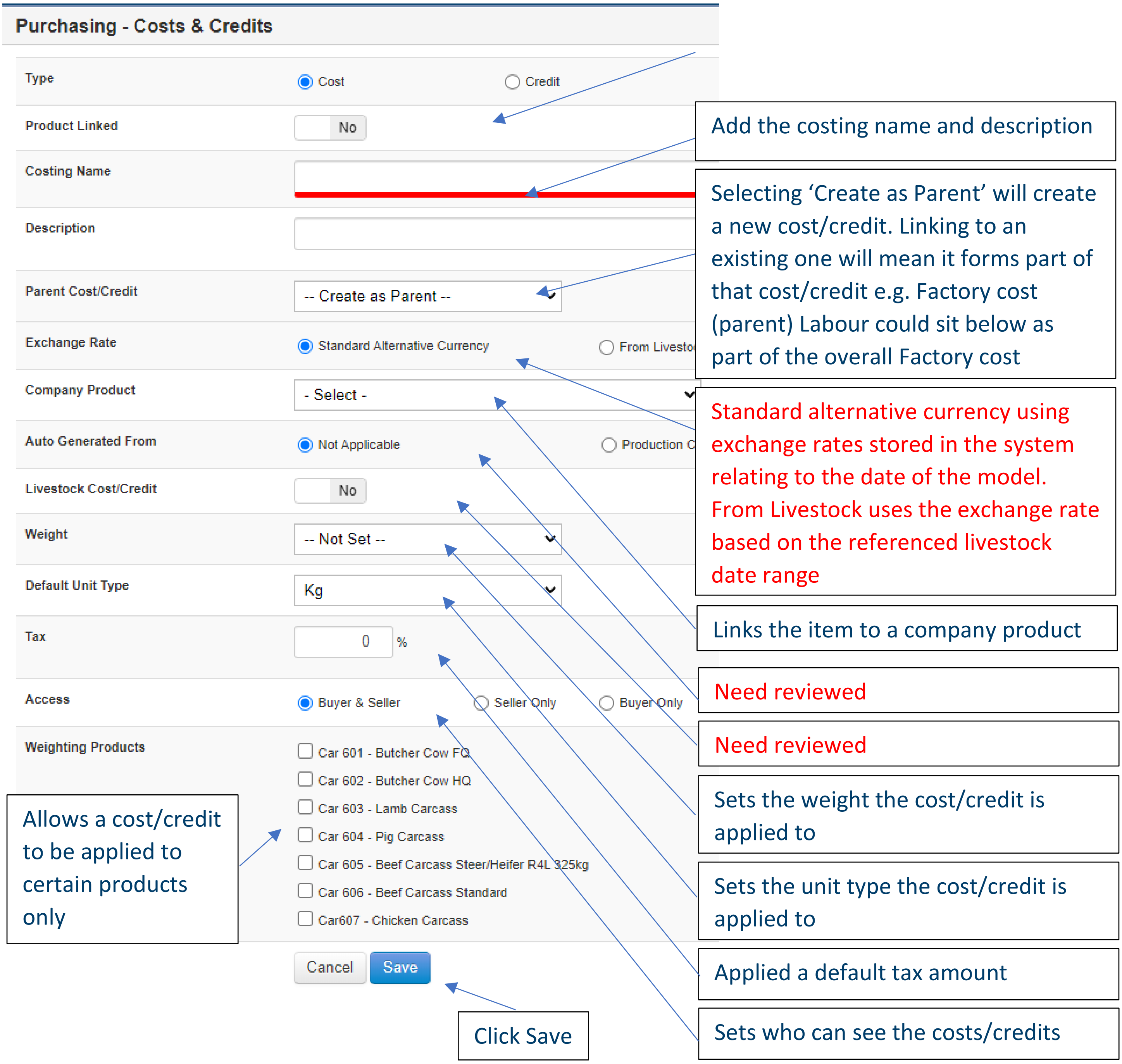
New costs and credits can be created by selecting ***Add New Cost / Credit***



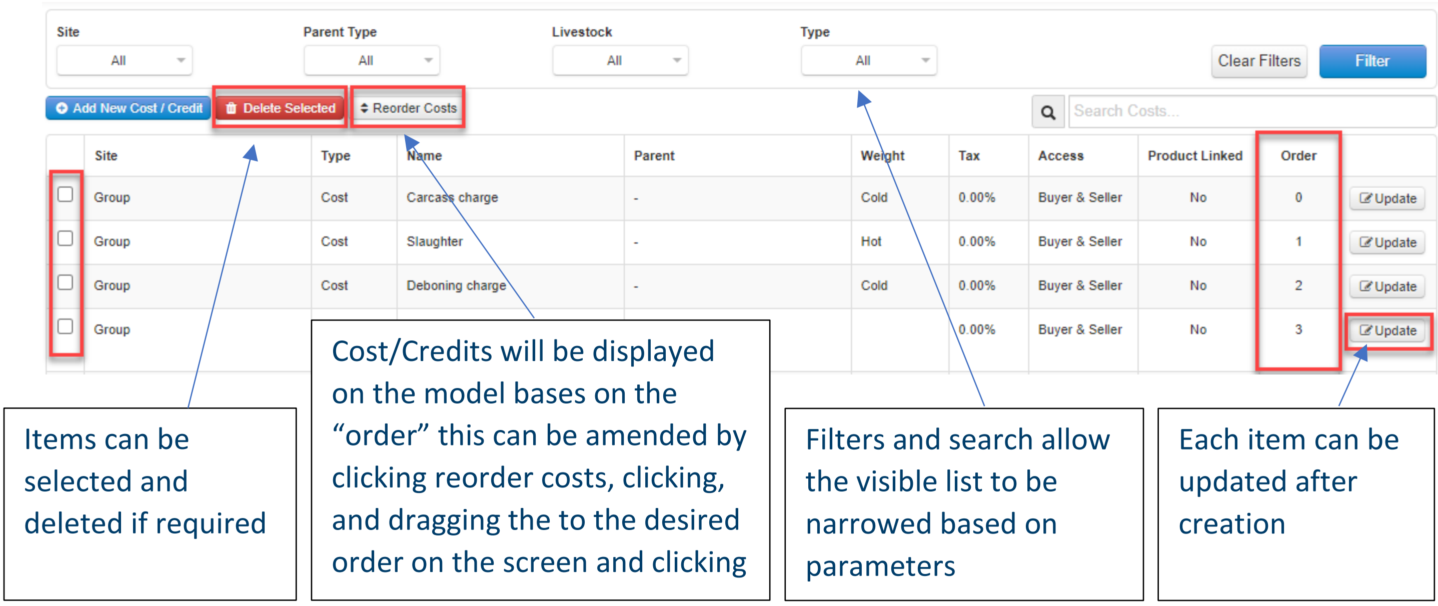
This will open a setup screen with the below options:

Select the type Cost or Credit

Allows the cost/credit to be linked to article in the product file



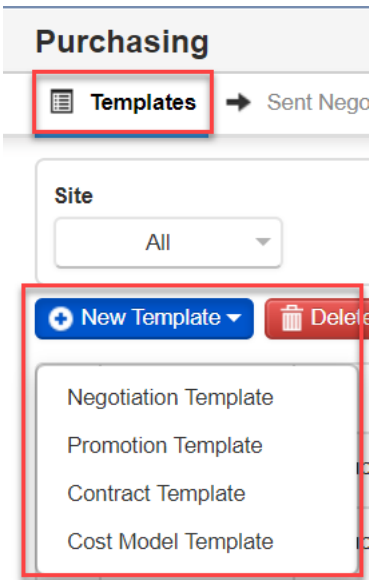
Updates and amends can be made to created Costs and Credits:



1.2. CREATING A TEMPLATE

Purchasing and Sales templates can be created to store initial setup information for the different events to help of the speed of updating and issuing to suppliers and customers.

Step 1: Go to *the **Purchasing Tool*** and select ***Purchasing Templates***. This will display all current templates that have been created. To create a new template, click the blue 'New Template' button and select the type of template you would like to create.



- ***Negotiation Template***

  Are designed to allow the back and forwards between suppliers & customers through Foods Connected to agree volumes and prices for individual products
- ***Promotion Template***

Are designed to allow the back and forwards between suppliers & customers through Foods Connected to agree volumes and prices for individual products that sit outside the normal negotiations. It also allows suppliers to suggest non requested products and prices in addition.

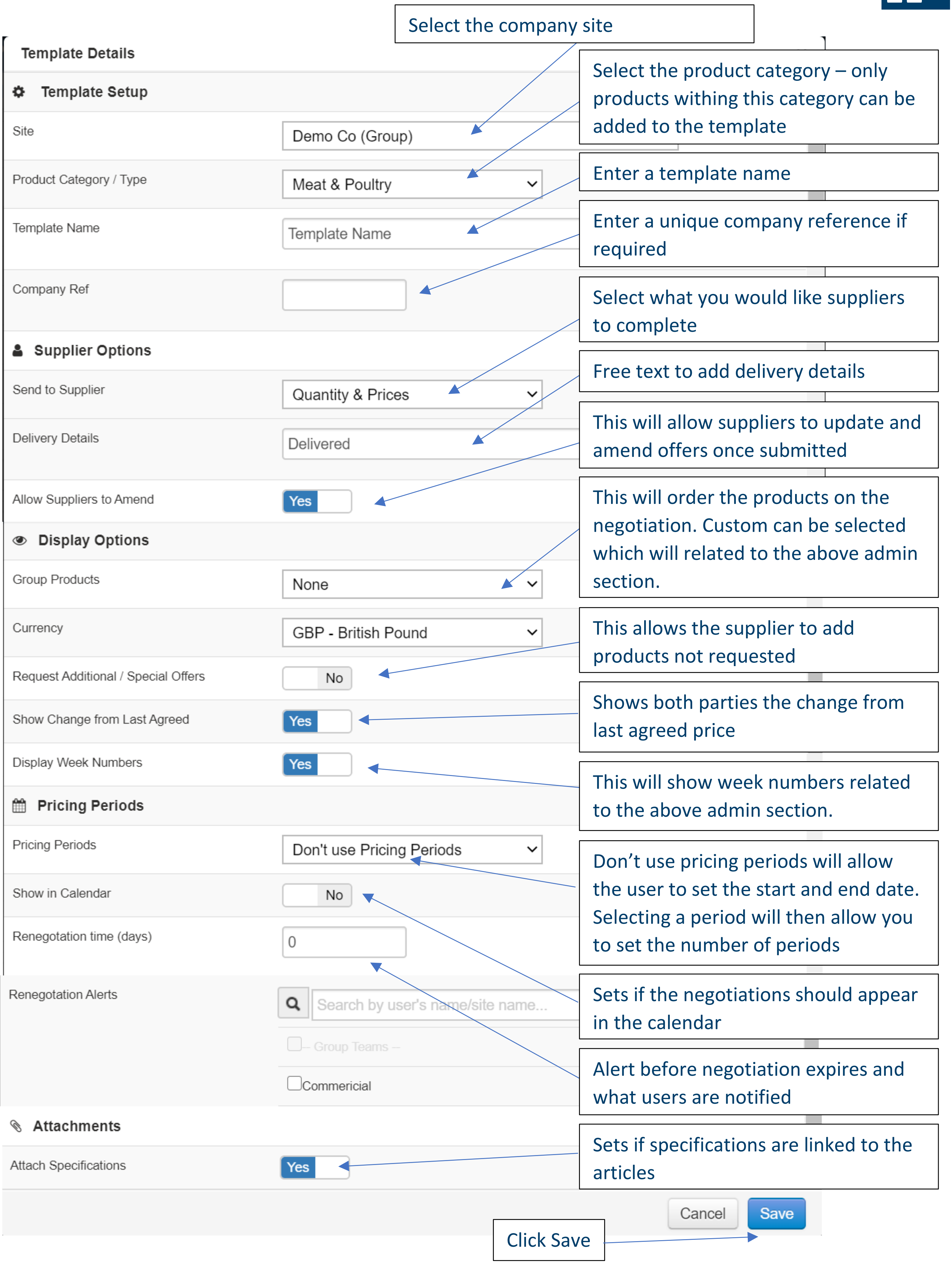
- ***Contract Template***

  Are designed to allow the agreements of contracts for longer periods of time to be captured in the system. This can also allow for items which have already been agreed to be captured in a central location.

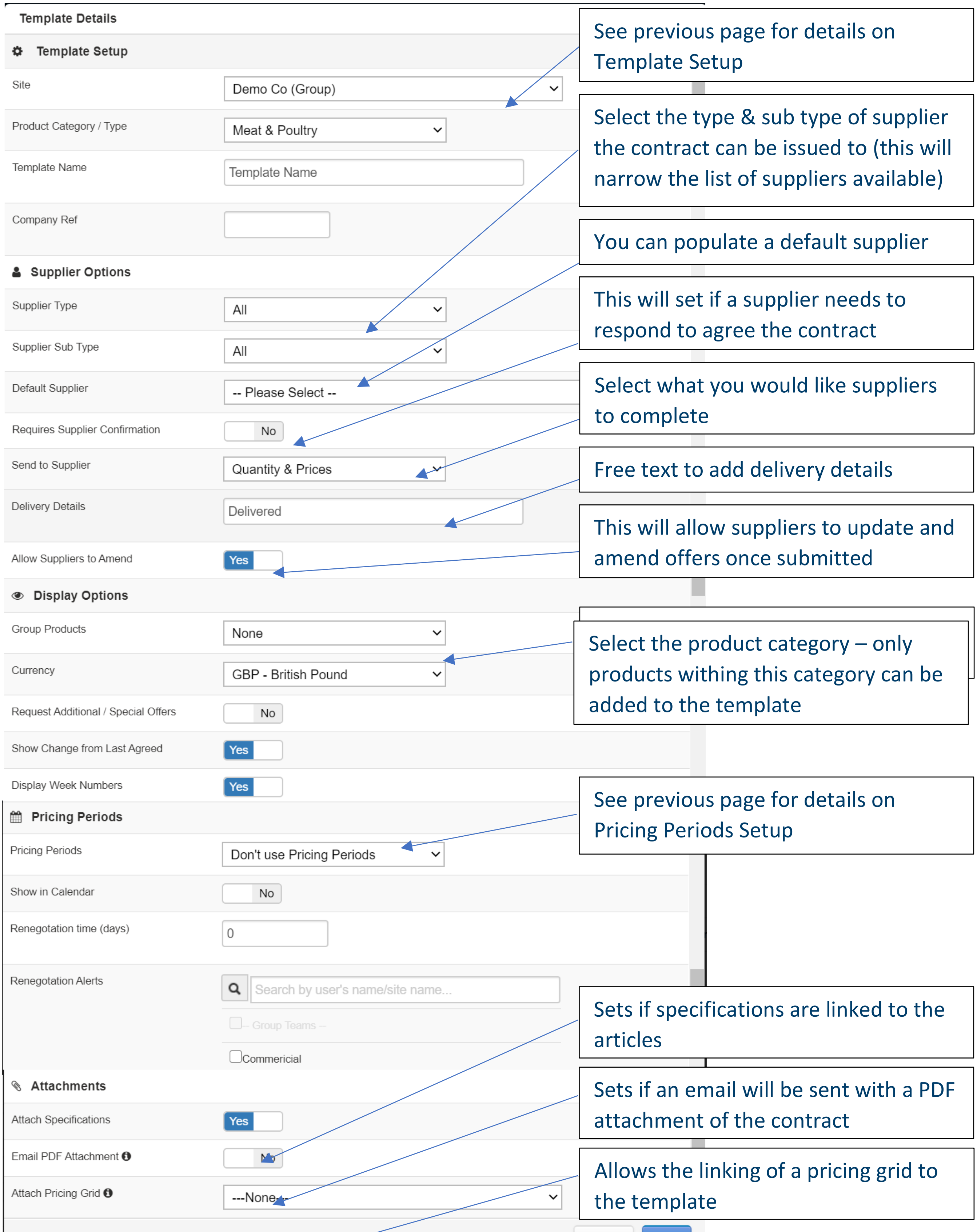
- ***Cost Model Template***

  Are designed for the complex deconstruction of carcases into individual components and balancing of cost and prices associated.

Step 2: ***Negotiation*** and ***Promotion Templates***, after selecting the type of template you would like to create the below template configuration pop up will appear:


Select the company site
Template Details
Template Setup
Site
Demo Co (Group)
Product Category / Type
Meat & Poultry
Template Name
Template Name
Company Ref
Select the product category – only products withing this category can be added to the template
Enter a template name
Enter a unique company reference if required
Supplier Options
Send to Supplier
Quantity & Prices
Delivery Details
Delivered
Allow Suppliers to Amend
Yes
Select what you would like suppliers to complete
Free text to add delivery details
This will allow suppliers to update and amend offers once submitted
Display Options
Group Products
None
Currency
GBP - British Pound
Request Additional / Special Offers
No
Show Change from Last Agreed
Yes
Display Week Numbers
Yes
This will order the products on the negotiation. Custom can be selected which will related to the above admin section.
This allows the supplier to add products not requested
Shows both parties the change from last agreed price
This will show week numbers related to the above admin section.
Pricing Periods
Pricing Periods
Don't use Pricing Periods
Show in Calendar
No
Renegotation time (days)
0
Renegotation Alerts
Search by user's name/site name...
-- Group Teams --
Commericial
Don't use pricing periods will allow the user to set the start and end date. Selecting a period will then allow you to set the number of periods
Sets if the negotiations should appear in the calendar
Alert before negotiation expires and what users are notified
Attachments
Attach Specifications
Yes
Sets if specifications are linked to the articles
Cancel
Save
Click Save

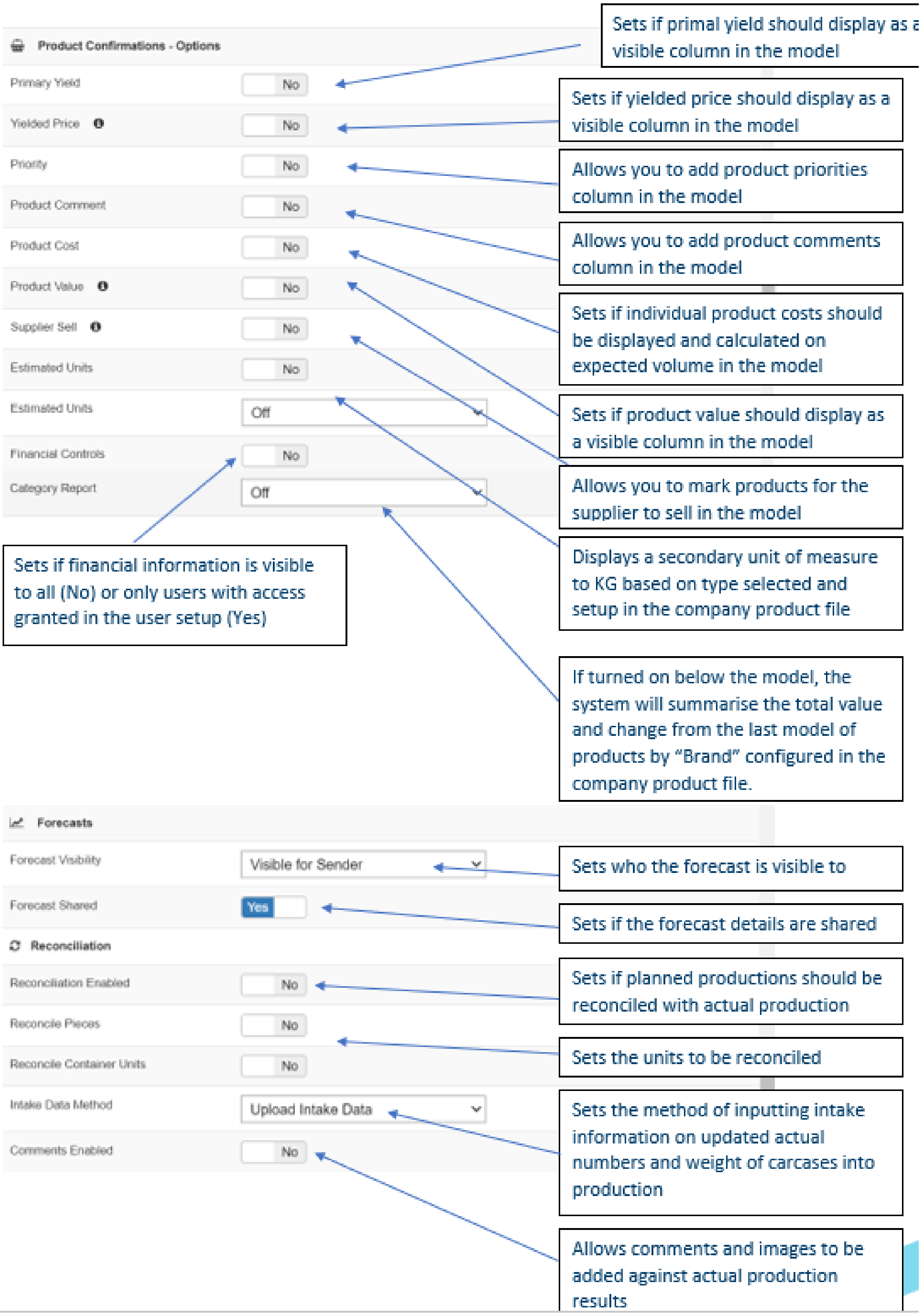
Step 3: *Contract Templates*, after selecting the type of template you would like to create the below template configuration pop up will appear:

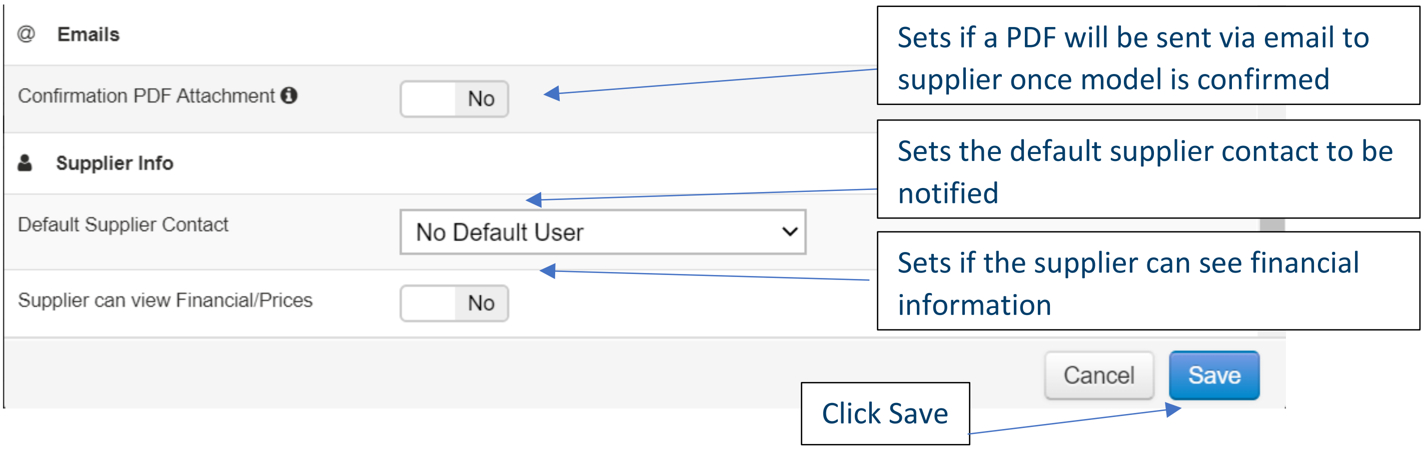


Step 4: *Cost Model Templates*, after selecting the type of template you would like to create the below template configuration pop up will appear:

Click Save

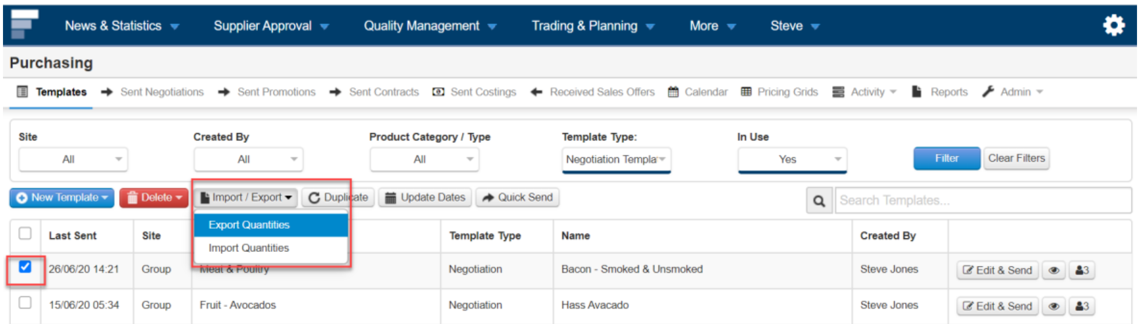

Template Details
Site
Demo Co (Group)
Product Category
Meat & Poultry
Supplier
Internal
Product Tree
- Select -
Template Name
Template Name
Payment Ref
Prices Enabled
Yes
Currency
GBP - British Pound
Margin
0
%
After Costs
Delivery Details
Delivered
Allow Suppliers to Amend
Display Week Numbers
Dispatch Orders Enabled
No
Summary Enabled
No
Service Orders Enabled
No
Scenarios
Scenario Enabled
Yes
Scenario Unit Type
Kg
Scenario Sub Costs
Percentage %
Scenario Selection
Sender to confirm scenario
Select the company site
Set what supplier the model relates to or internal to allow working without sharing to a supplier
Select the yield tree
Enter a template name
Enter a unique company reference if required
Set the currency
Add a margin % for the supplier and when it is calculated
Free text to add delivery details
This will allow suppliers to update and amend offers once submitted
This will show week numbers related to the above admin section.
Turn on if orders manager link
Turn on an overall model summary
Turn on if a service order should be created to pay supplier for costs
Sets if scenarios should be activated, for example default number of carcases and weights
Sets the unit type
Sets if sub costs are a % of overall cost area or individual prices which are added together
Sets who can confirm agreement to set scenario


Product Confirmations - Options
Primary Yield No
Yielded Price No
Priority No
Product Comment No
Product Cost No
Product Value No
Supplier Sell No
Estimated Units No
Estimated Units Off
Financial Controls No
Category Report Off
Sets if primal yield should display as a visible column in the model
Sets if yielded price should display as a visible column in the model
Allows you to add product priorities column in the model
Allows you to add product comments column in the model
Sets if individual product costs should be displayed and calculated on expected volume in the model
Sets if product value should display as a visible column in the model
Allows you to mark products for the supplier to sell in the model
Displays a secondary unit of measure to KG based on type selected and setup in the company product file
Sets if financial information is visible to all (No) or only users with access granted in the user setup (Yes)
If turned on below the model, the system will summarise the total value and change from the last model of products by "Brand" configured in the company product file.
Forecasts
Forecast Visibility Visible for Sender
Forecast Shared Yes
Reconciliation
Reconciliation Enabled No
Reconcile Pieces No
Reconcile Container Units No
Intake Data Method Upload Intake Data
Comments Enabled No
Sets who the forecast is visible to
Sets if the forecast details are shared
Sets if planned productions should be reconciled with actual production
Sets the units to be reconciled
Sets the method of inputting intake information on updated actual numbers and weight of carcases into production
Allows comments and images to be added against actual production results

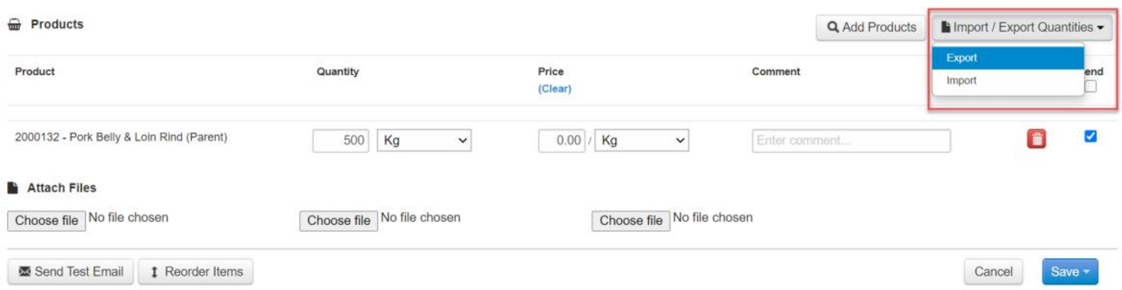


1.3. IMPORT / EXPORT

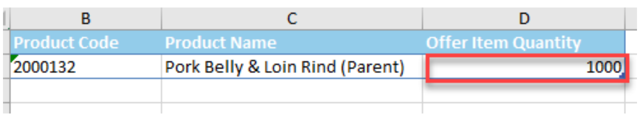
Once templates have been created it is possible to both export the product quantities out to excel and import this back into the system, supporting easy of update. This is only possible for products which have already been added to the template (new items will be ignored) and must be done one template at a time. This can be completed from the Templates screen or from within the template as shown below:



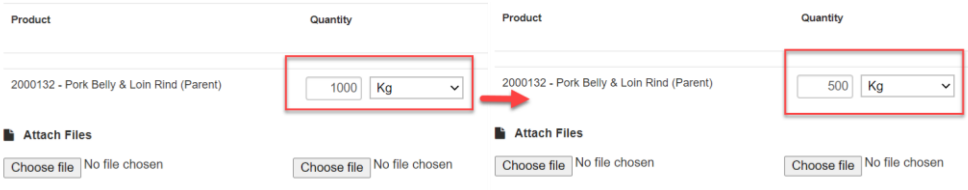
Or



Step 1: ***Import/Export*** Clicking **Export** will download an excel file where you can update the quantity and re-import into the system, by clicking **Import** and choosing the file you have updated:



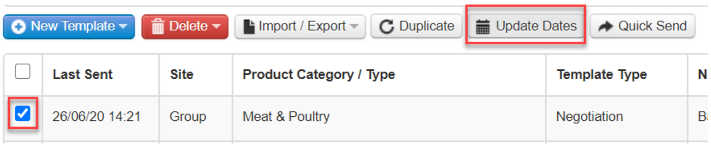
FOODS CONNECTED

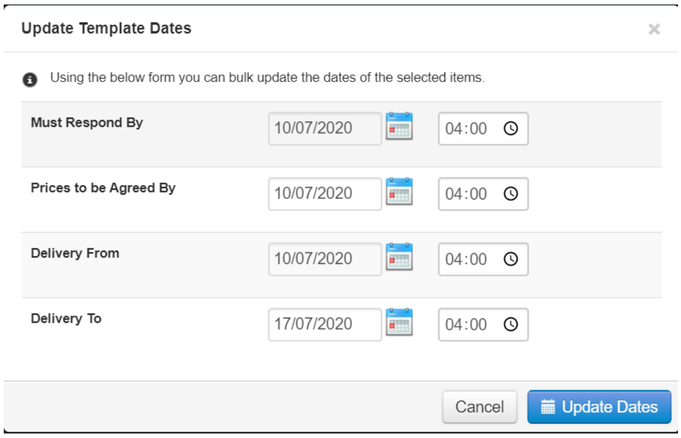


1.4. QUICK SEND SETTTINGS

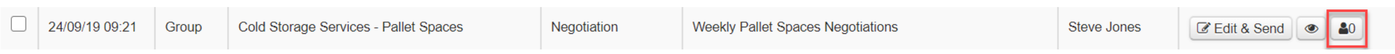
Once templates have been created it is possible to update basic information quickly and issue these to a pre-set list of suppliers/customers. This is completed using the **Update Dates** and **Quick Send** options, which can be performed on multiple templates.

Step 1: ***Update Dates,*** select the relevant templates and click **Update Dates** from here a popup will load and you will be able to amend the date parameters:

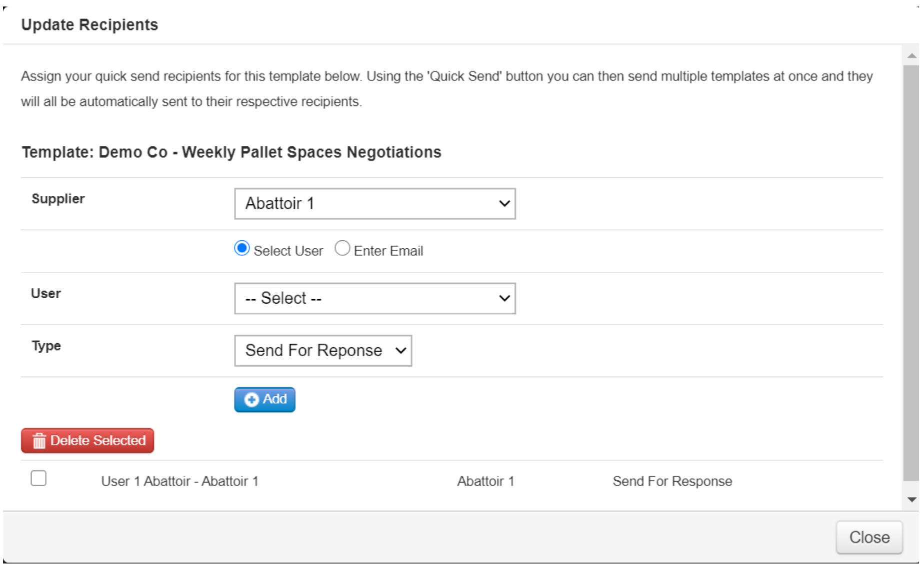




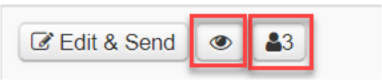
Step 2: ***Quick Send Recipients,*** When a template is first created it is important to add the quick send recipients. Click the person button to the right of the template:



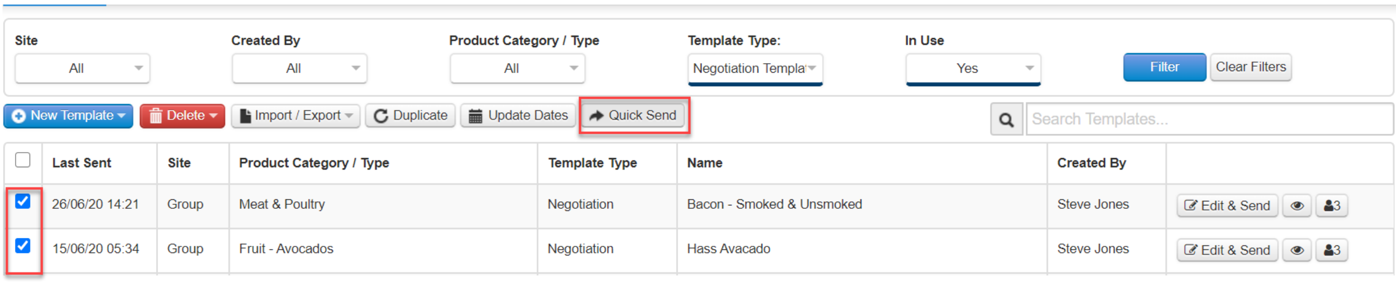
This will open a popup where you can select the supplier, user and type of response required, adding this will create a list of suppliers who the template can be shared with in one instance. This can be updated at any time using the same process and deleting the selected share and re-adding.

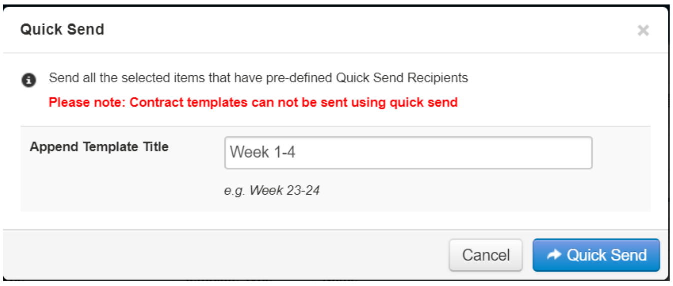


Once quick send recipients have been added the number will show next to the person button indicating how many people will receive the negotiation. The eye button allows a preview of how the template has been configures and will be seen by the recipients.

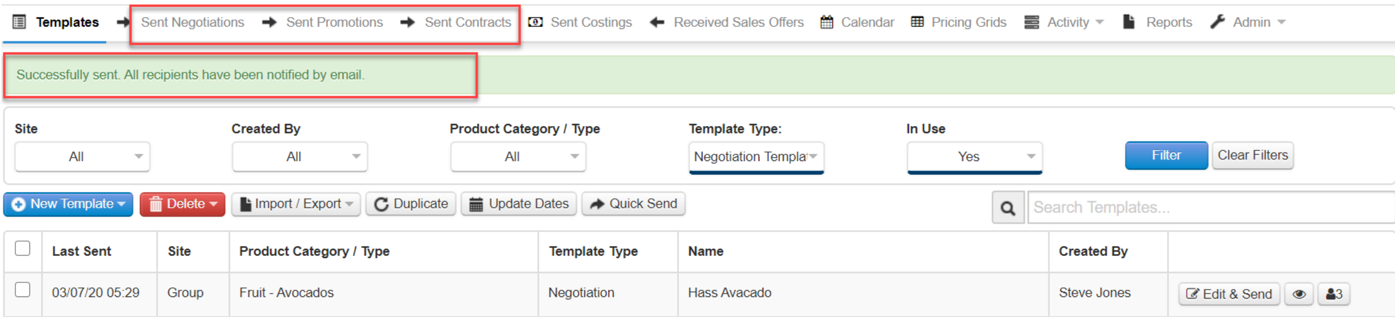


Step 3: ***Quick Send,*** Once update dates and quick send recipients have been completed, select the templates you wish to issue and click **Quick Send** – you will be prompted to append template title where you can add detail specific to that event e.g. weeks





After sending you will receive a green confirmation message and can then check the events by selecting the appropriate Sent Negotiation, Sent Promotion, Sent Contract section:

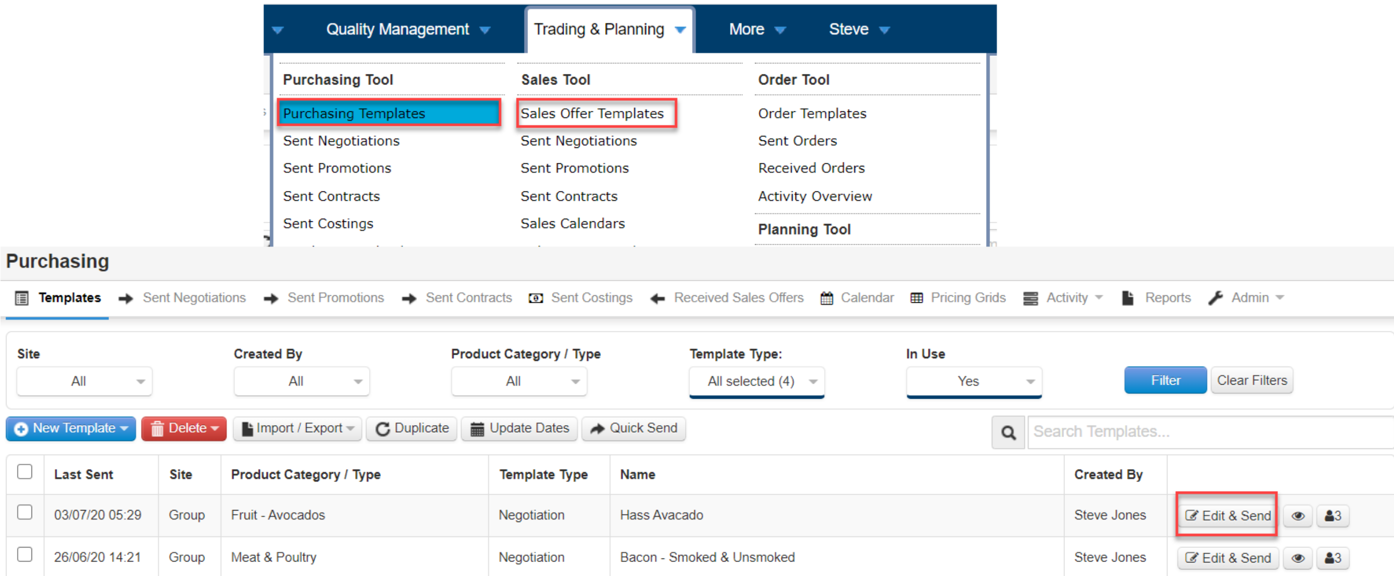


2. SENDING A TEMPLATE

Once a template has been created it can simple be updated and issued to customers/suppliers.

2.1. UPDATING AND ISSUEING

Step 1: ***Templates (Negotiations, Promotions & Contracts),*** navigate to the templates section which is located within the Trading and Planning area and select edit & Send against the required template:



Step 2: ***Updating:***

If required update template settings

Update the desired delivery dates

This is when the supplier must have responded to the request and when prices are to be agreed by. Please note this cannot be on the day or after the delivery from date.

Add general notes, which are displayed on the notification email sent to supplier

Additional Custom Notes can be added, the responded will be required to add a response to these

New products can be added to the template. This list will be filtered by the Product Category set in the template

The import/export function allows products already added to the template to be updated in excel (quantities and prices)

Product quantity and prices can be updated and the unit of measure selected

Individual product comments can be added

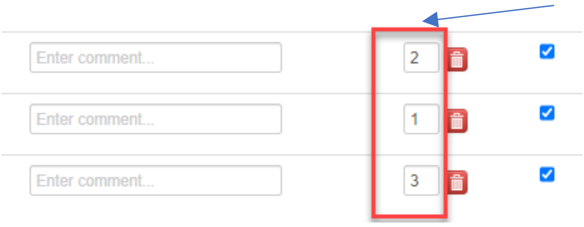
A blue tick will show against each product, only ticked products will be issued to the supplier/customer. Clicking the top box will tick all products.

Additional files/documents can be added to template

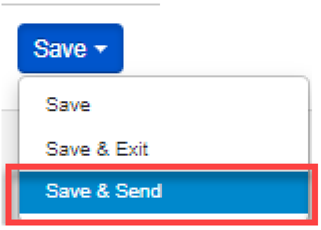
Send test email will email yourself showing how the template will look and the notification

Clicking reorder will allow the order products are displayed to be updated. This will add a box next to each product, where you can enter

Click Save to save updates

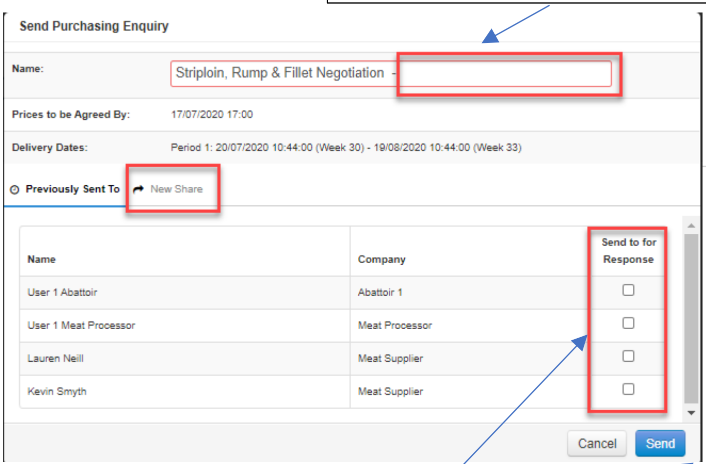


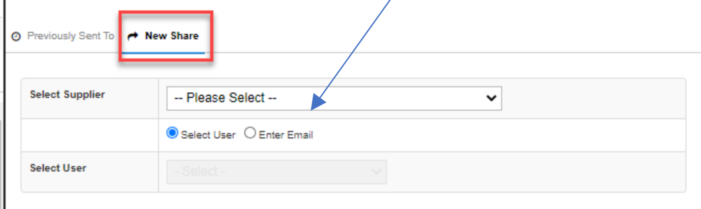
Step 3: *Sending:* Once all detail has been updated as required, click Save / Save & Send



Amend the title of the event

New share allows you to select the company and user

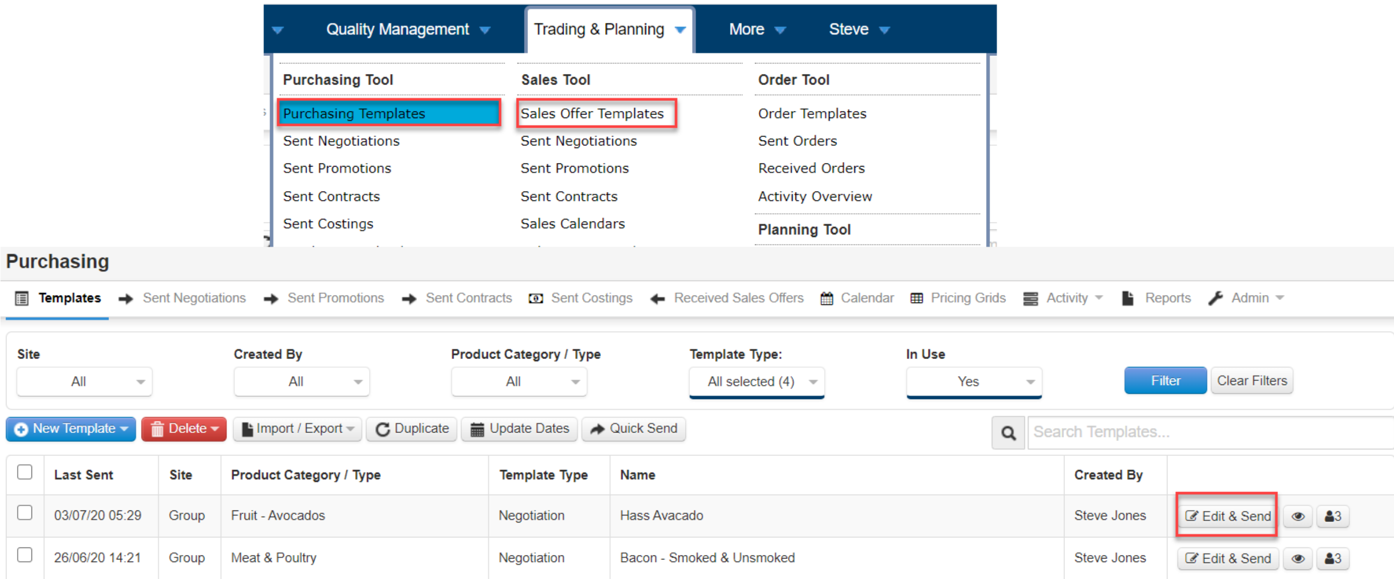




Previous shares will show who the project has been issued to, they can be ticked to re-issue individually events in one action

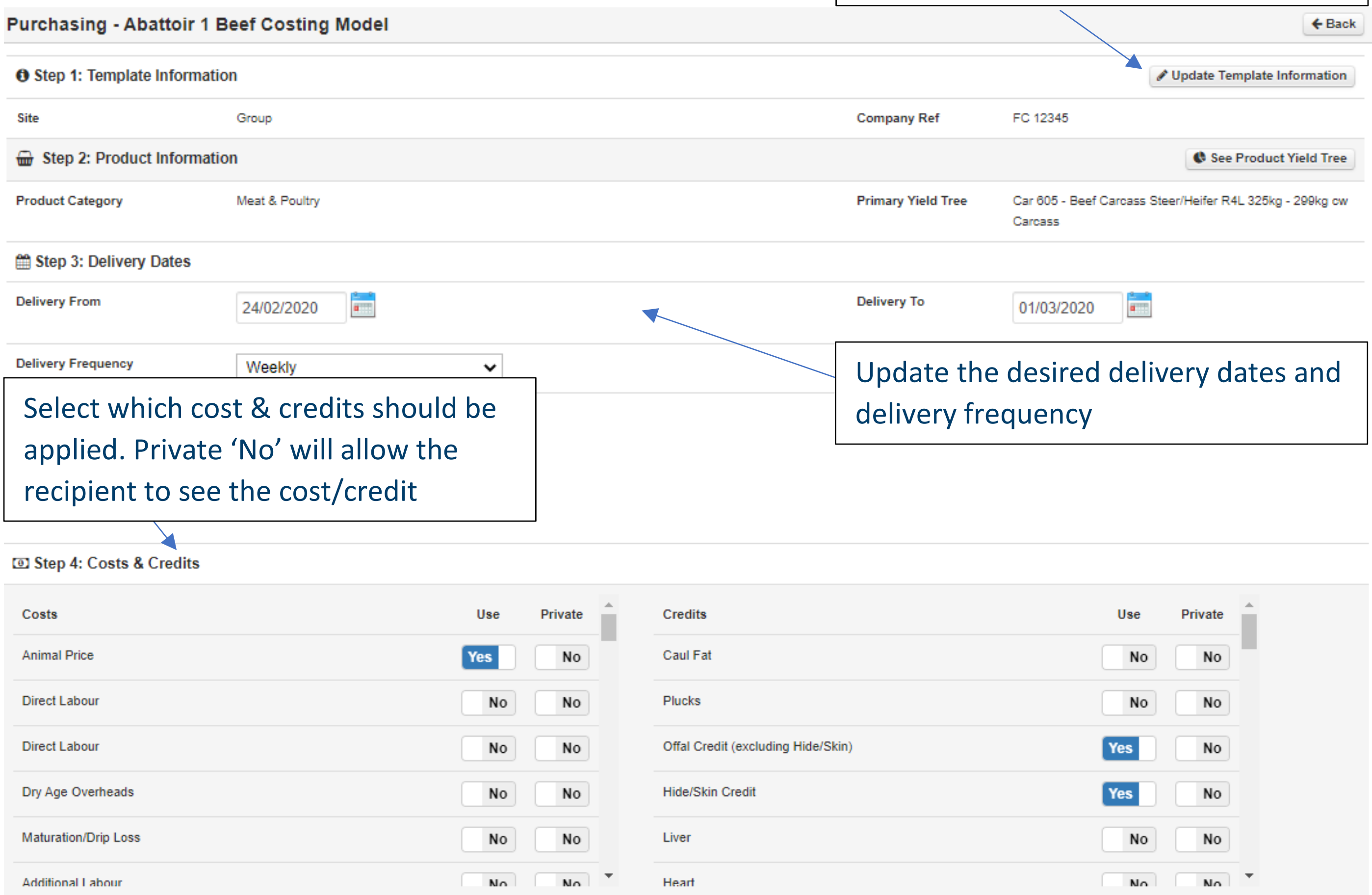
Clicking send, you will be prompted to check you wish to send the event. Once sent you will be directed back to the templates section and will see a green confirmation message advising this has been issued. Sent events can then be viewed in the corresponding sent sections

Step 4: *Templates (Cost Models),* navigate to the templates section which is located within the Trading and Planning area and select edit & Send against the cost model template:



Step 5: *Updating:*

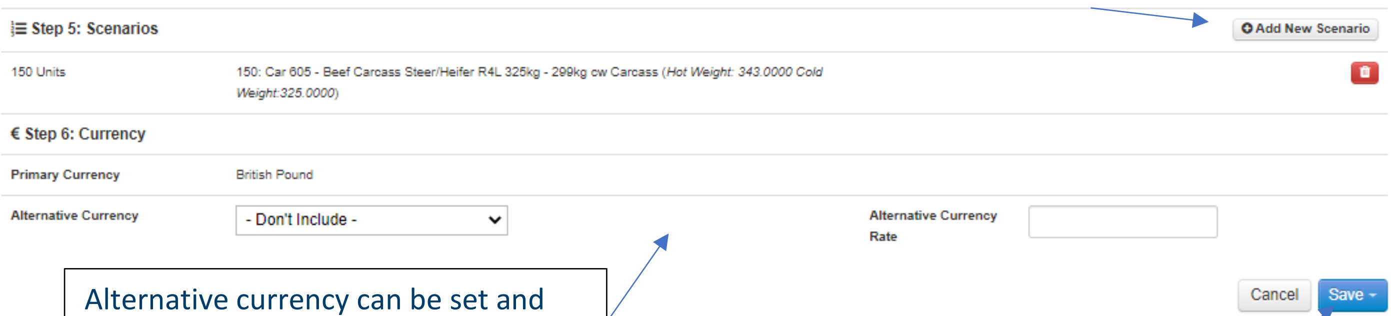
If required update template settings



Update the desired delivery dates and delivery frequency

Select which cost & credits should be applied. Private ‘No’ will allow the recipient to see the cost/credit

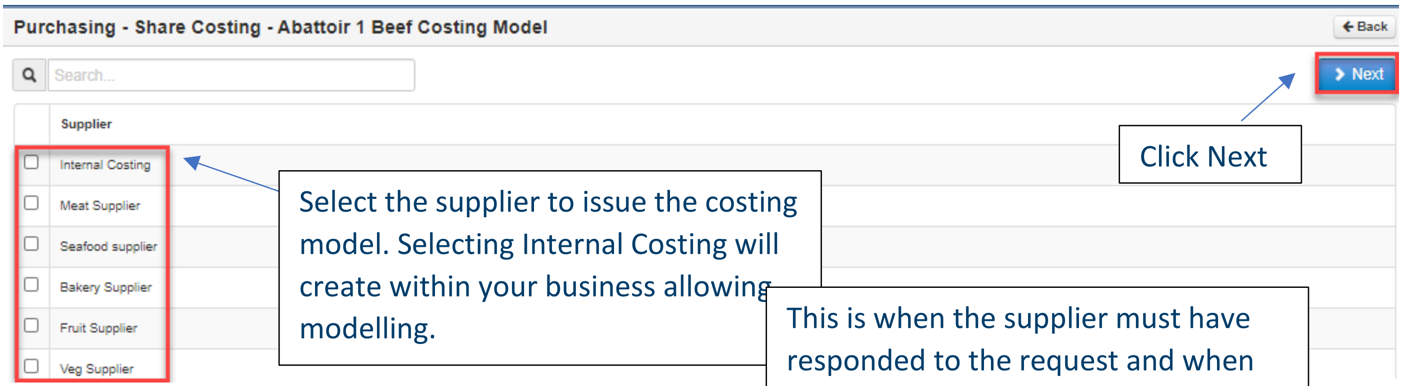
Allows you to set the default number of carcases and hot/cold weight



Alternative currency can be set and the desired exchange rate

Click Save to save updates

Step 6: *Sending:* Once all detail has been updated as required, click Save / Save & Share. You will then be prompted to complete details on who to share the event with.

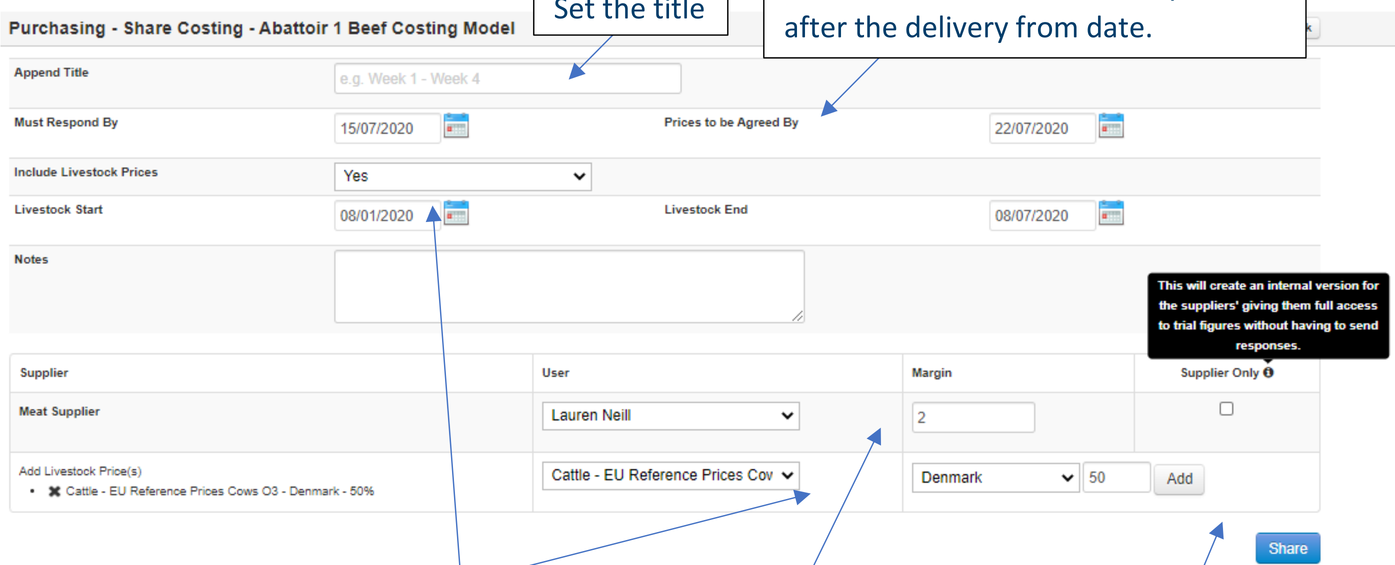


Click Next

Select the supplier to issue the costing model. Selecting Internal Costing will create within your business allowing modelling.

This is when the supplier must have responded to the request and when prices are to be agreed by. Please note this cannot be on the day or after the delivery from date.

Set the title



Set if livestock price comparison should be visible and what date period this should relate to. You can then add market data sources and the weighting of that price to create a bespoke overall price.

Select the user to issue the event to and the company % margin if applicable.

Clicking Share. Once sent you will be directed back to the templates section and will see a green confirmation message advising this has been issued. Sent events can then be viewed in the corresponding sent

2.2. NOTIFICATIONS

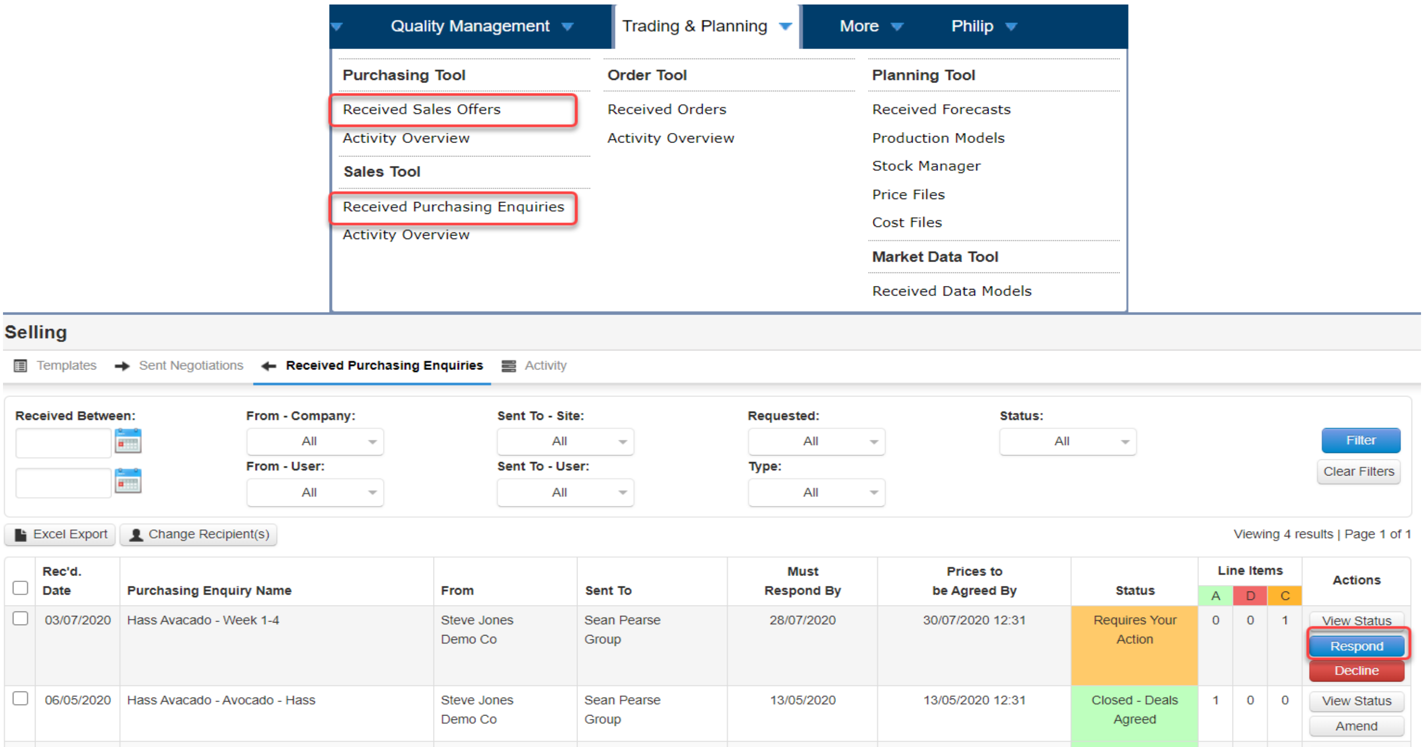
Once an event has been shared the recipient will receive both an email and a task within Foods Connected to respond to the event.

3. AGREEMENTS

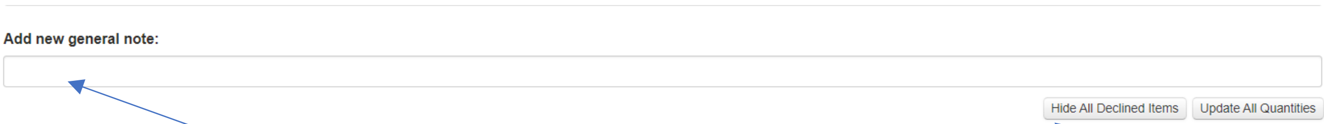
Once the agreement has been issued the recipient will receive an email and task advising about the event. Tasks will be visible on their home page when logging into Foods Connected.

3.1. RESPONDING

Step 1: ***Responding (Negotiations, Promotions, Contracts & Costings).*** Agreements can be accessed by selecting the task visible on the homepage when logging into Foods Connected. To view all received agreements, navigate to the purchasing section which is found in the Trading & Planning area and select Respond at the required agreement.



Step 2: Updating (Negotiations, Promotions & Contracts)



Add general notes, which are displayed on the notification email sent to Customer

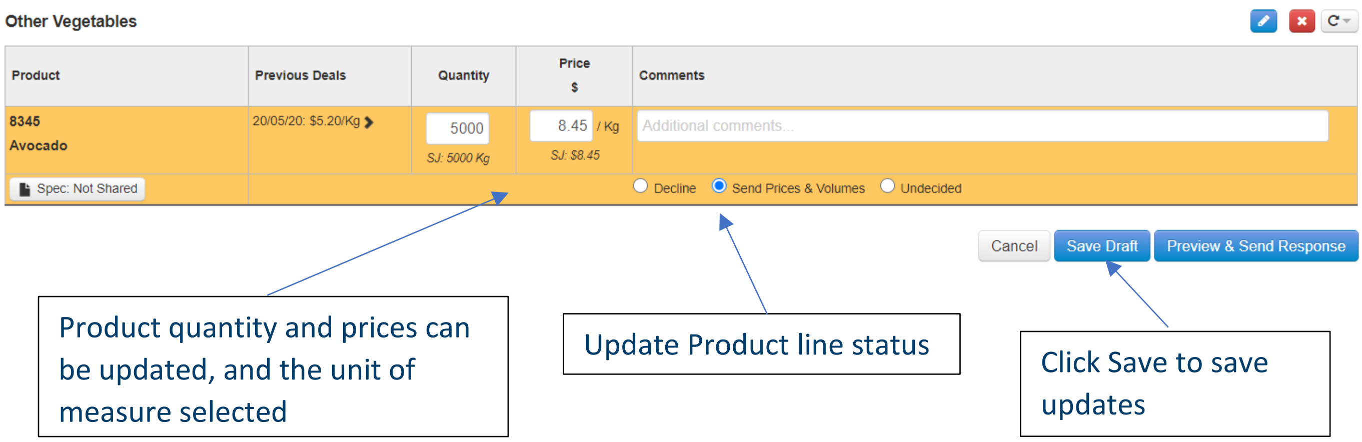
Hide all decline all product lines from view

Update all products lines quantity

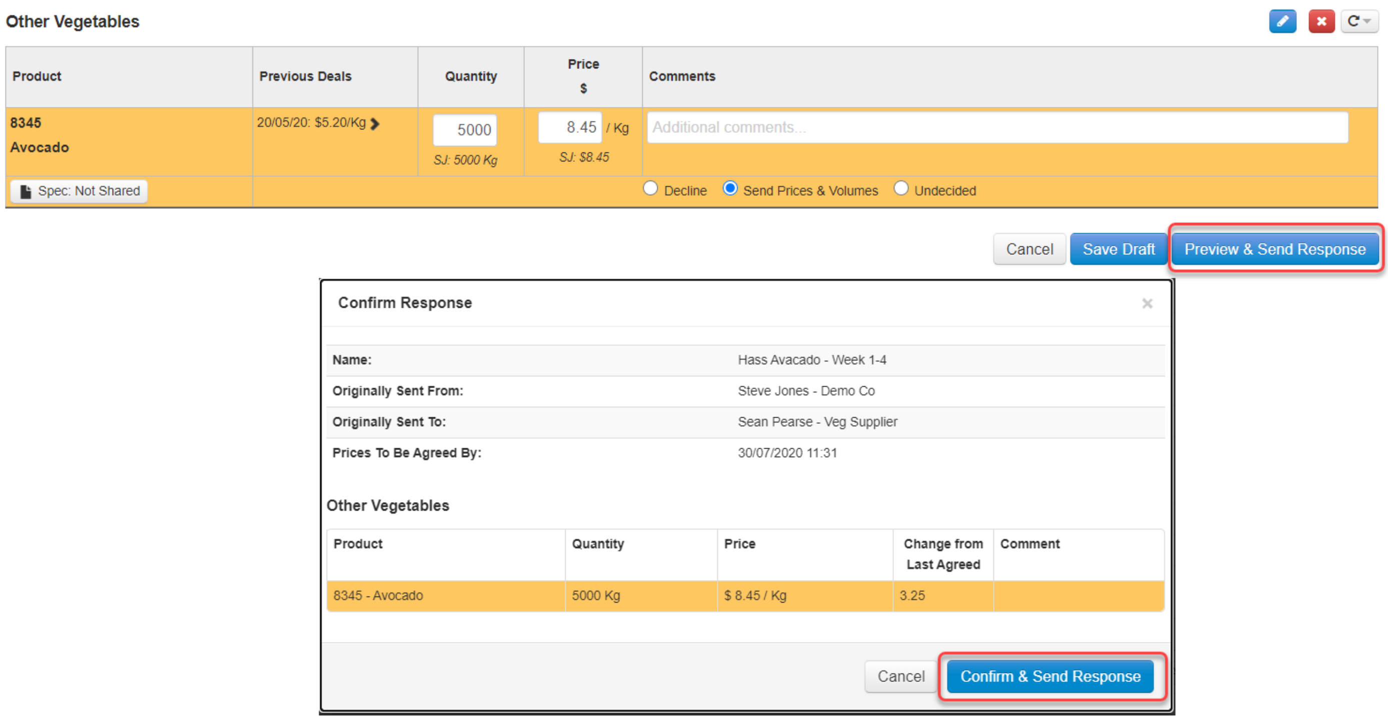
Individual product comments can be added

Update Prices / Decline Product lines

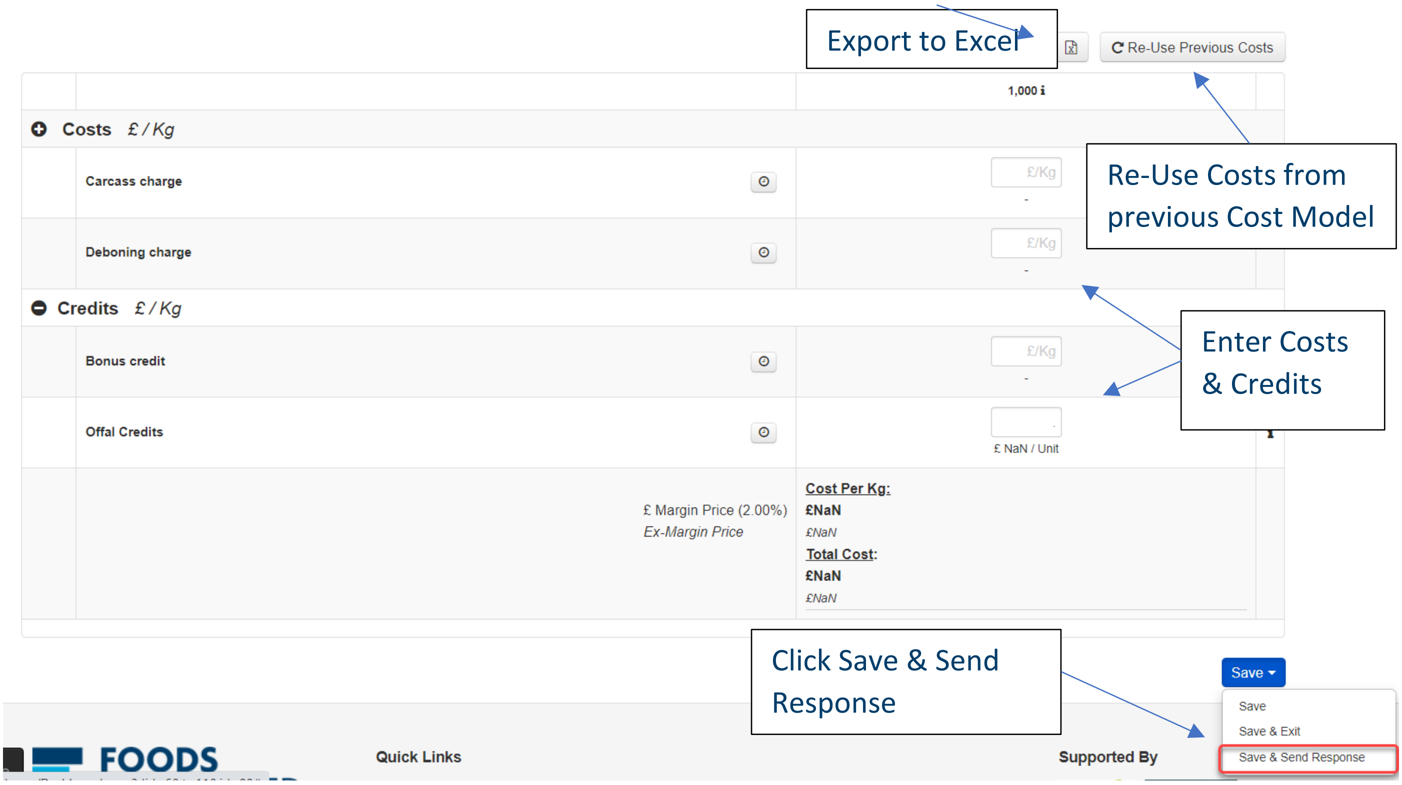
Use pricing from previous agreement



Step 3: Sending (Negotiations, Promotions & Contracts). Once updated, select Preview & Send Response, a window will appear to review updated agreement. Select Confirm & Send Response.



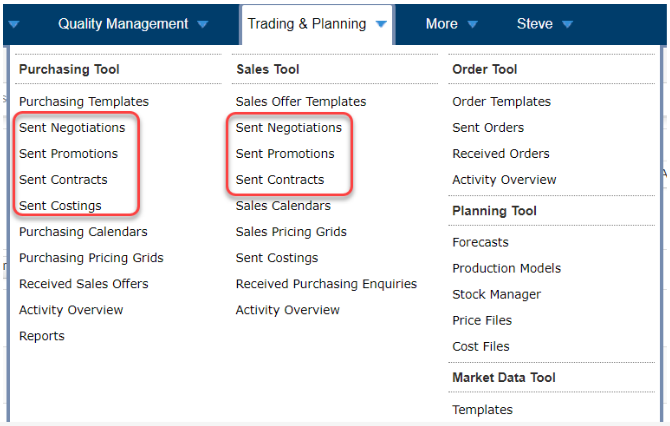
Step 4: Updating & Sending (Costings).



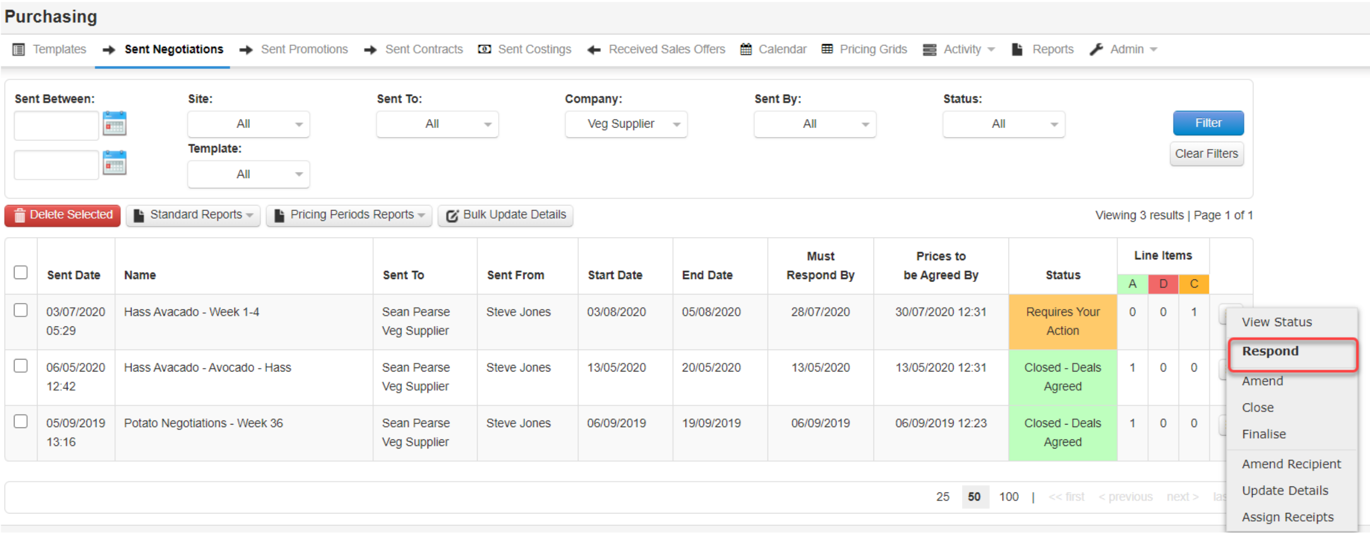
3.2. NEGOTITATIONS

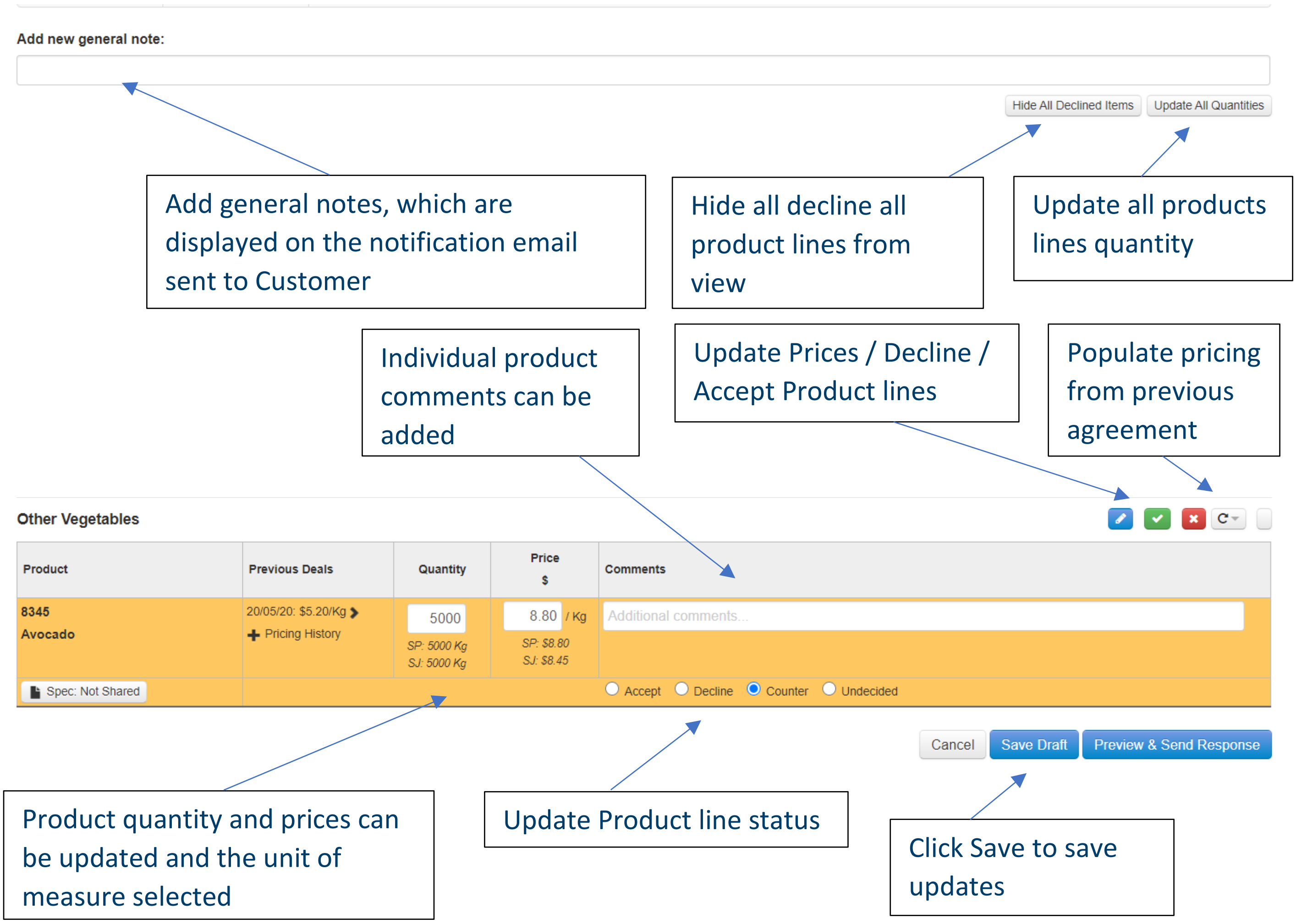
Once the agreement response has been submitted the recipient will receive an email and task advising about the event. Tasks will be visible on their home page when logging into Foods Connected:

Step 1*: Responding to Submitted Agreements (Negotiations, Promotions & Contracts).* Agreements can be accessed by selecting the task visible on the homepage when logging into Foods Connected. To view all submitted agreements, navigate to the purchasing section which is found in the Trading & Planning area.

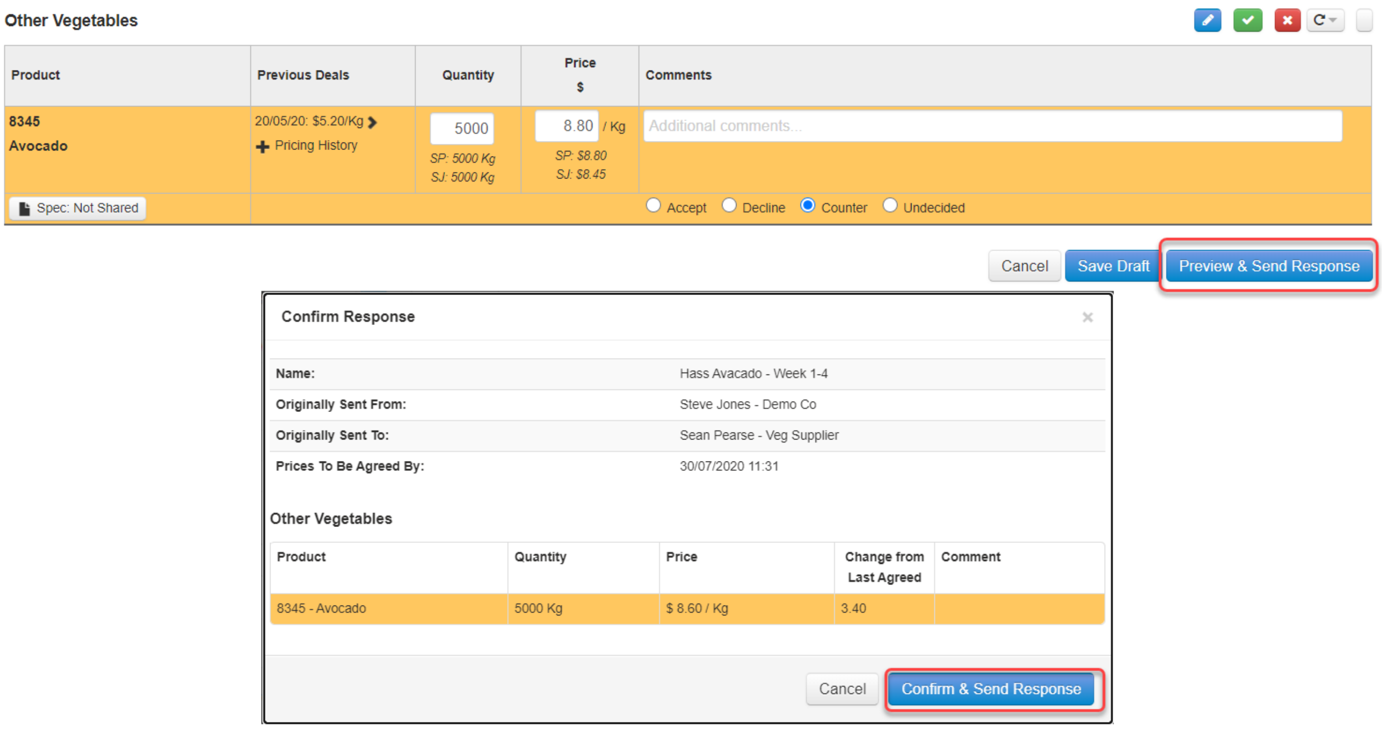


Step 2: Updating Submitted Agreements *(Negotiations, Promotions & Contracts).* Select the dropdown and Respond at the required agreement.

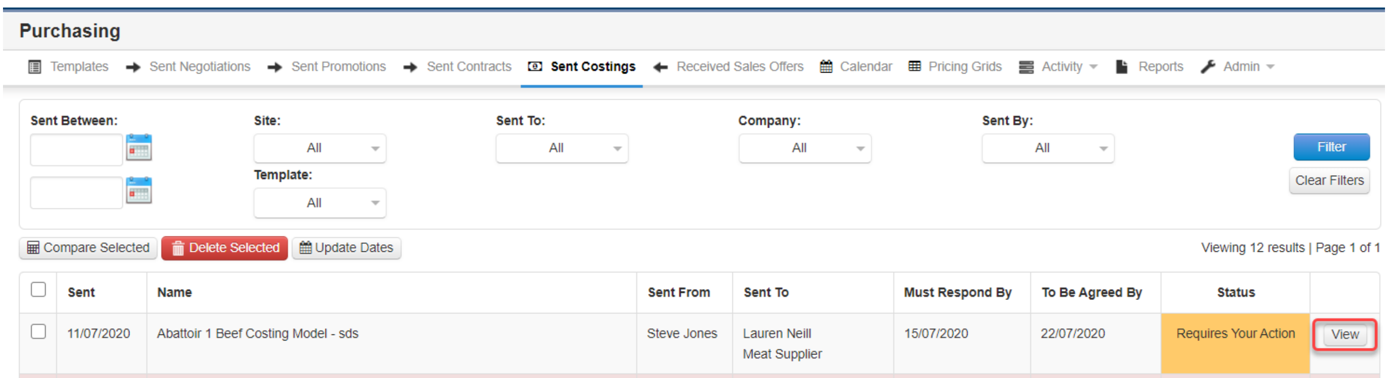

Purchasing
Templates
Sent Negotiations
Sent Promotions
Sent Contracts
Sent Costings
Received Sales Offers
Calendar
Pricing Grids
Activity
Reports
Admin
Sent Between:
Site: All
Template: All
Sent To: All
Company: Veg Supplier
Sent By: All
Status: All
Filter
Clear Filters
Delete Selected
Standard Reports
Pricing Periods Reports
Bulk Update Details
Viewing 3 results | Page 1 of 1
Sent Date | Name | Sent To | Sent From | Start Date | End Date | Must Respond By | Prices to be Agreed By | Status | Line Items A D C
03/07/2020 05:29 | Hass Avacado - Week 1-4 | Sean Pearse Veg Supplier | Steve Jones | 03/08/2020 | 05/08/2020 | 28/07/2020 | 30/07/2020 12:31 | Requires Your Action | 0 0 1
06/05/2020 12:42 | Hass Avacado - Avocado - Hass | Sean Pearse Veg Supplier | Steve Jones | 13/05/2020 | 20/05/2020 | 13/05/2020 | 13/05/2020 12:31 | Closed - Deals Agreed | 1 0 0
05/09/2019 13:16 | Potato Negotiations - Week 36 | Sean Pearse Veg Supplier | Steve Jones | 06/09/2019 | 19/09/2019 | 06/09/2019 | 06/09/2019 12:23 | Closed - Deals Agreed | 1 0 0
View Status
Respond
Amend
Close
Finalise
Amend Recipient
Update Details
Assign Receipts
25 50 100 | << first < previous next >


Add new general note:
Hide All Declined Items
Update All Quantities
Add general notes, which are displayed on the notification email sent to Customer
Hide all decline all product lines from view
Update all products lines quantity
Individual product comments can be added
Update Prices / Decline / Accept Product lines
Populate pricing from previous agreement
Other Vegetables
Product | Previous Deals | Quantity | Price $ | Comments
8345 Avocado | 20/05/20: $5.20/Kg Pricing History | 5000 SP: 5000 Kg SJ: 5000 Kg | 8.80 / Kg SP: $8.80 SJ: $8.45 | Additional comments...
Spec: Not Shared
Accept
Decline
Counter
Undecided
Cancel
Save Draft
Preview & Send Response
Product quantity and prices can be updated and the unit of measure selected
Update Product line status
Click Save to save updates

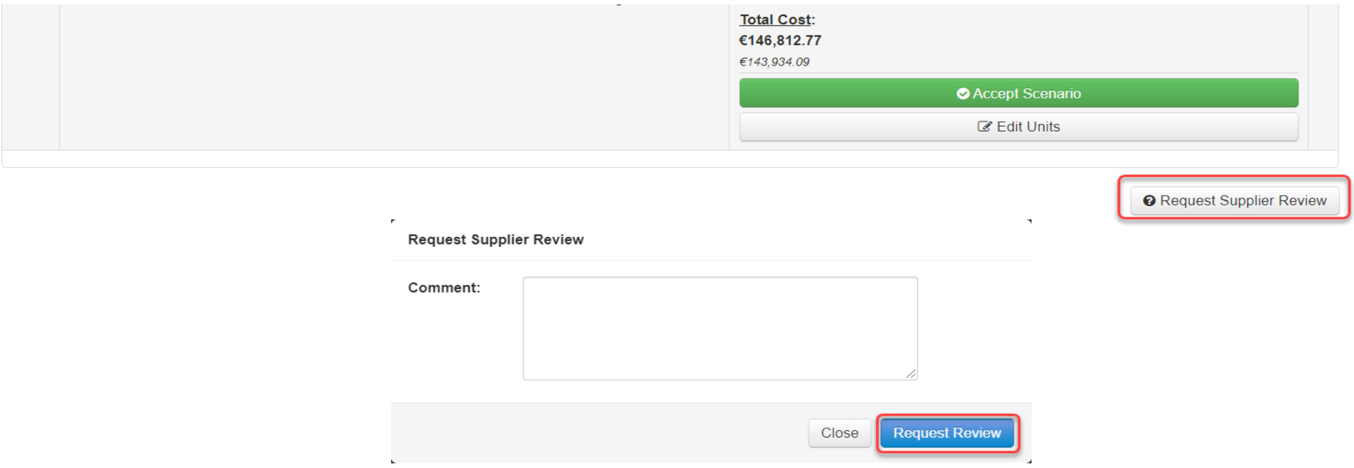
Step 3: Sending Updated Agreements *(Negotiations, Promotions & Contracts).* Once all the product lines have been updated, selected Preview & Send Response. Then select Confirm & Send Response.



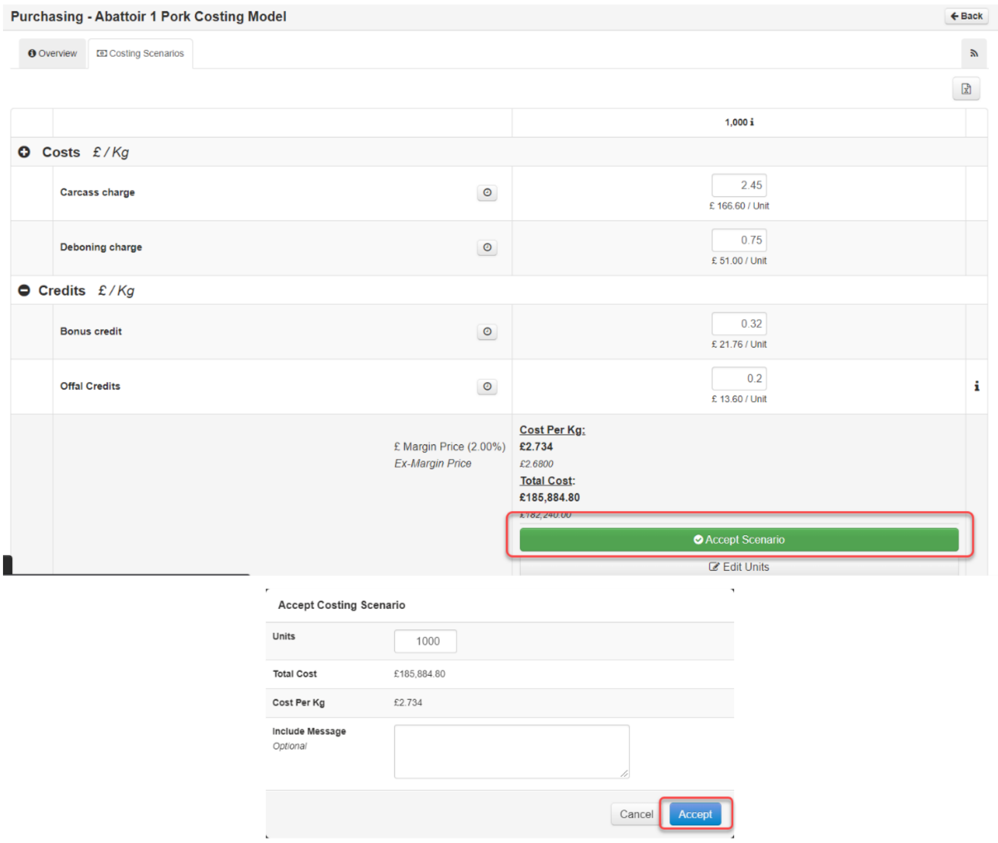
Step 4: Updating Submitted Agreements (Costings). Select view at the received costing to view submitted costing and prices.



To request Supplier Review, select Request Supplier Review, enter comments and Request Review



To accept submitted prices select Accept Scenario and select Accept



Step 5: Balancing associated Cost & Prices (Costings). Once submitted prices and costs have been accepted a confirmation template will need to be created to balance the carcase model.

Amend the title of the cost model

Enter Reference Number (if required)

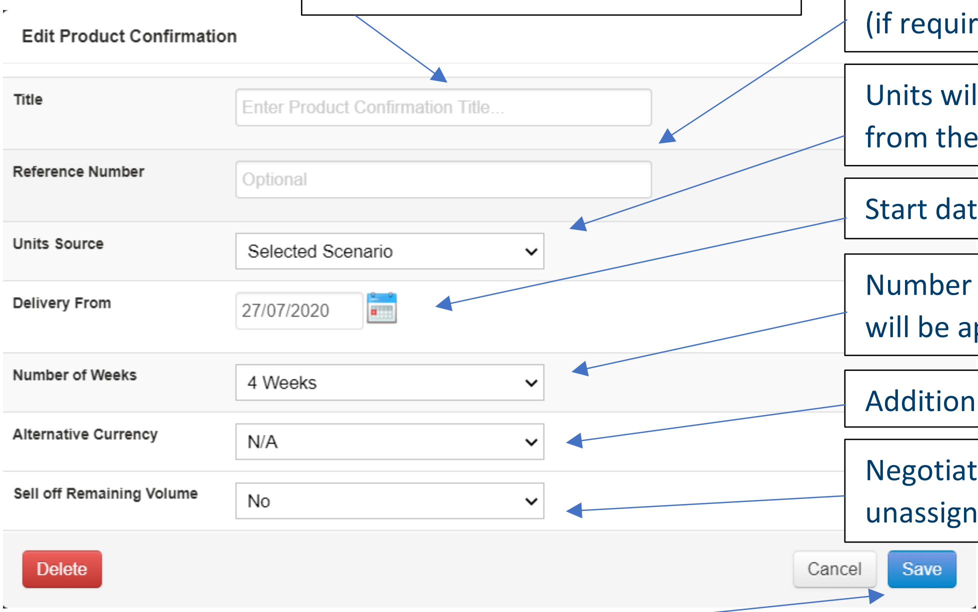
Units will be populated from the costing Scenario

Start date for costings

Number of weeks costing will be applied over

Additional Currency

Negotiate prices for unassigned quantities

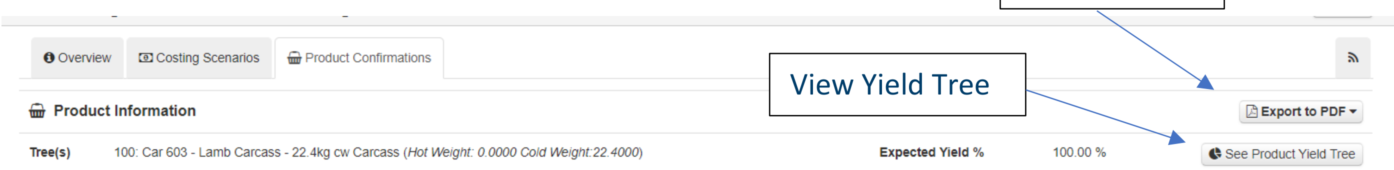


Select Save to progress to balance the carcase model

Balance the carcase model with required volumes.

Export to PDF

View Yield Tree

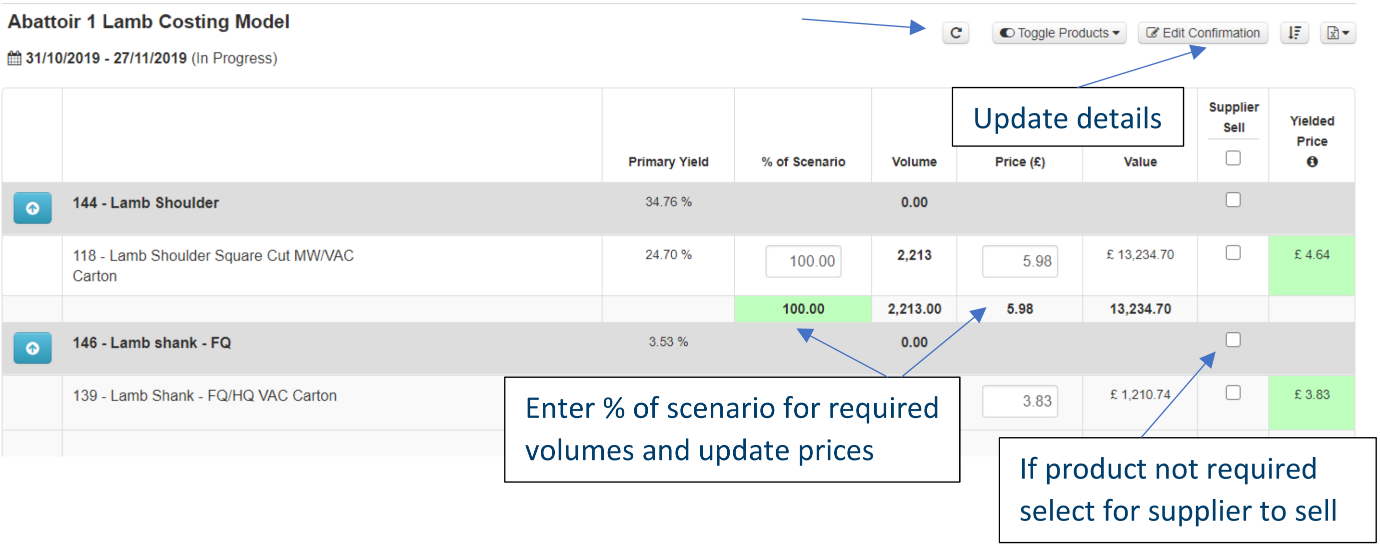


Collapse product lines

Reorder by yielded price

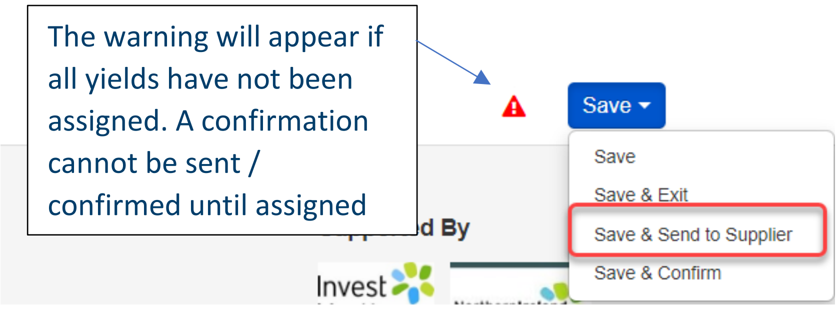
Export to Excel

Populate prices from previous cost model

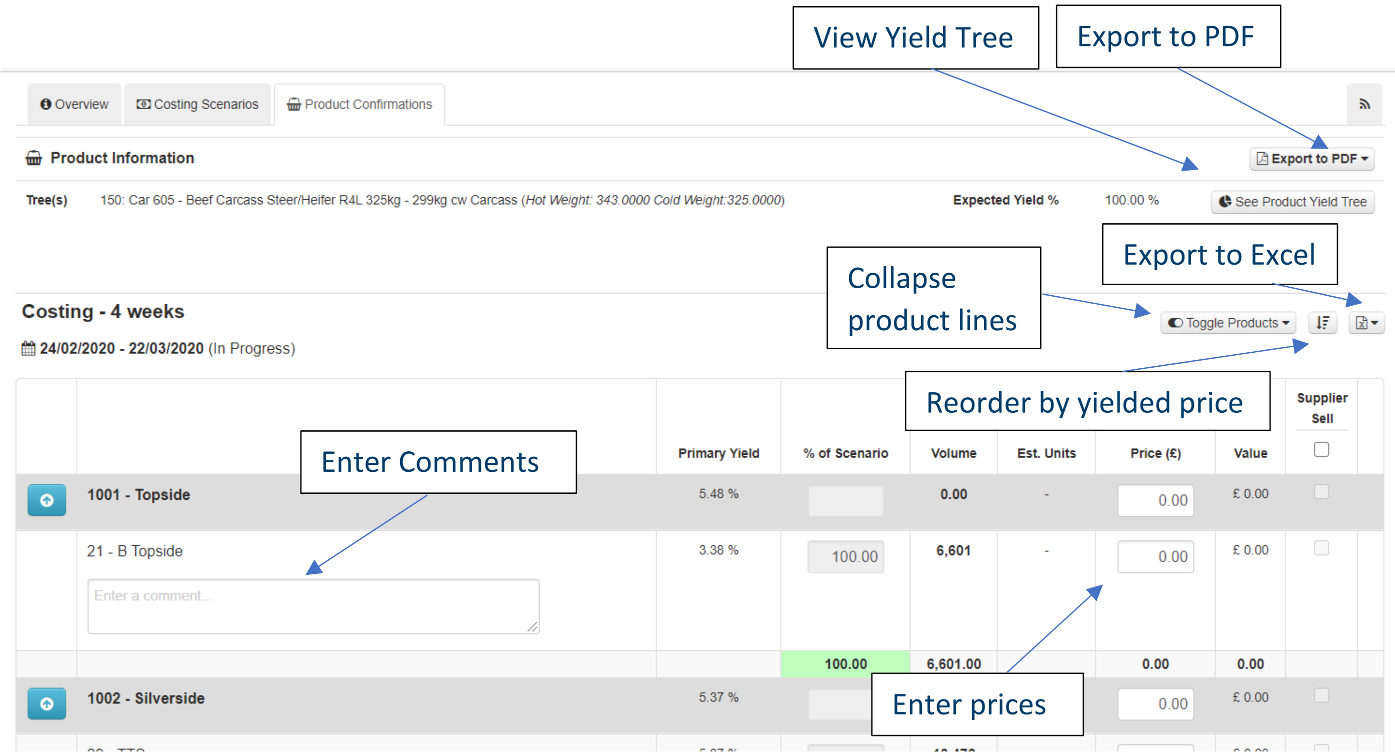


Step 6: Sending Submitted Agreements (Costings). The balanced cost model can be sent back to the supplier to enter prices. Select Save & Send to Supplier.

Confirmation Cost Per Kg:	€4.339
Agreed Scenario Cost Per Kg:	€4.339
Confirmation Total Value:	€5,872
Agreed Scenario Total Value:	€5,873
Difference	€-1
Difference / Kg	€-0.002
Target Margin	2.00 %
Actual Planned Margin	1.96 %

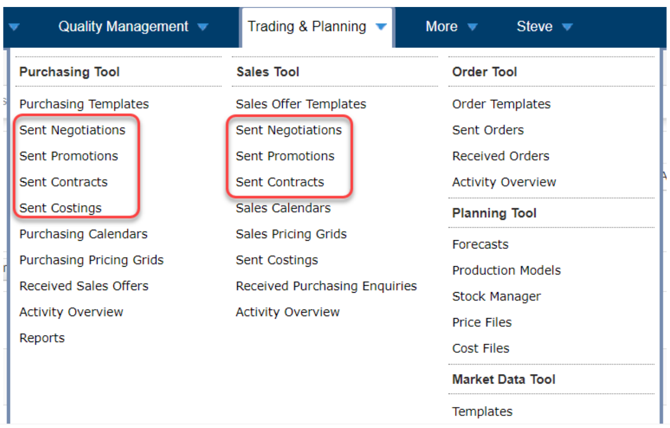


Step 7: Responding to Updated Agreements (Costings). Select Respond at the received to respond to received confirmation template and enter prices.

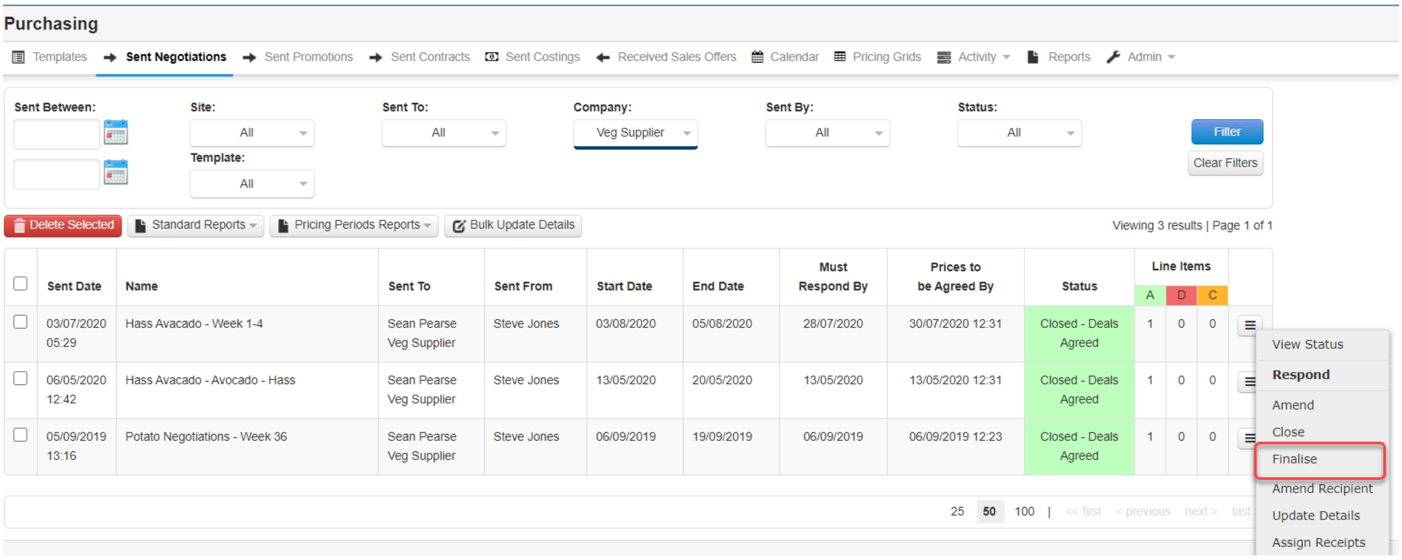


3.3. CONFRIMING

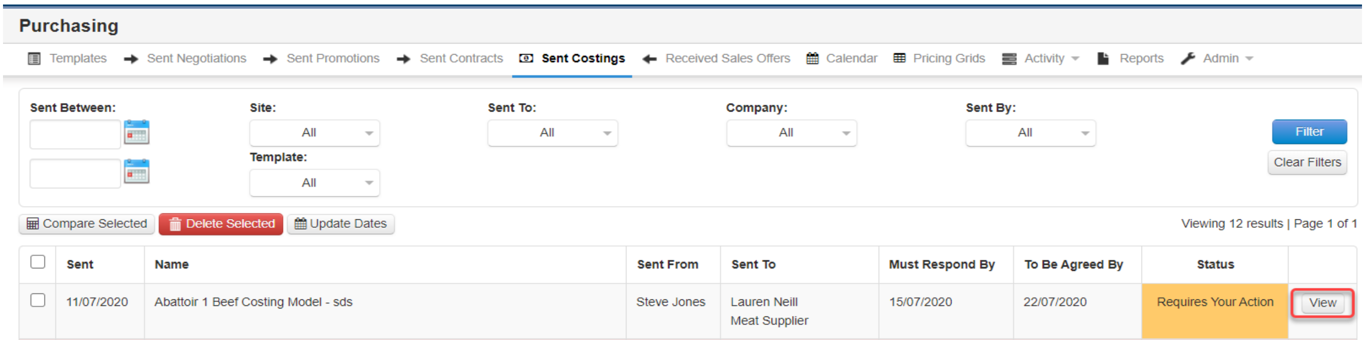
Step 1: Accessing Agreements *(Negotiations, Promotions, Contracts & Costings).* Agreements can be accessed by selecting the task visible on the homepage when logging into Foods Connected. To view all complete agreements, navigate to the purchasing section which is found in the Trading & Planning area.

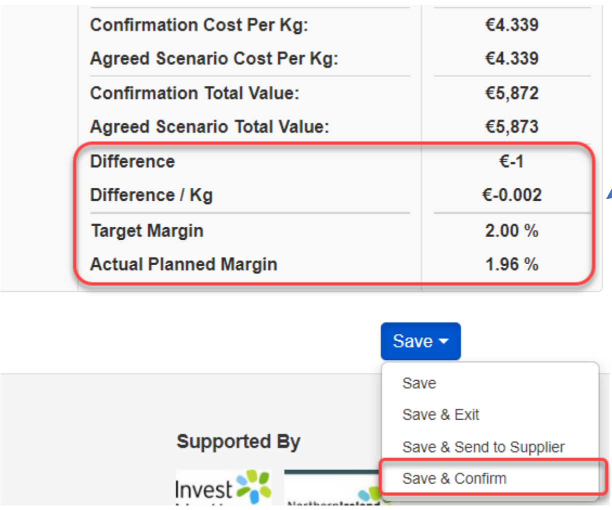


Step 2: Finalising Agreements *(Negotiations, Promotions &Contracts).* Once all products lines have been agreed / declined the status will automatically update to Closed – Deals Agreed, select the drop down and then select Finalise.



Step 3: Confirming Agreements *(Costings).* Select View at required cost model. Once the model has been balanced Select Save & Confirm.





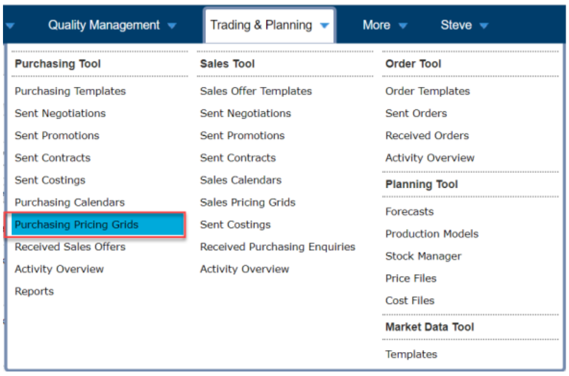
Ensure associated costs and prices are balanced.

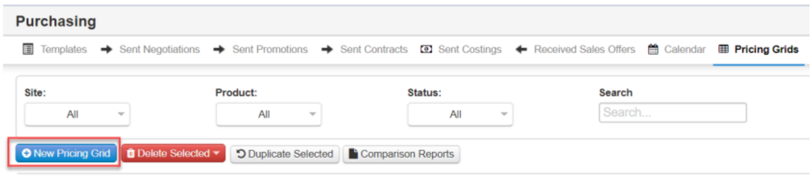
4. PRICING GRIDS

Pricing Grids can be used to calculate the amount to be paid based on a series of factors. This typically relates to the purchase of livestock – however the functionality can be used more broadly than this.

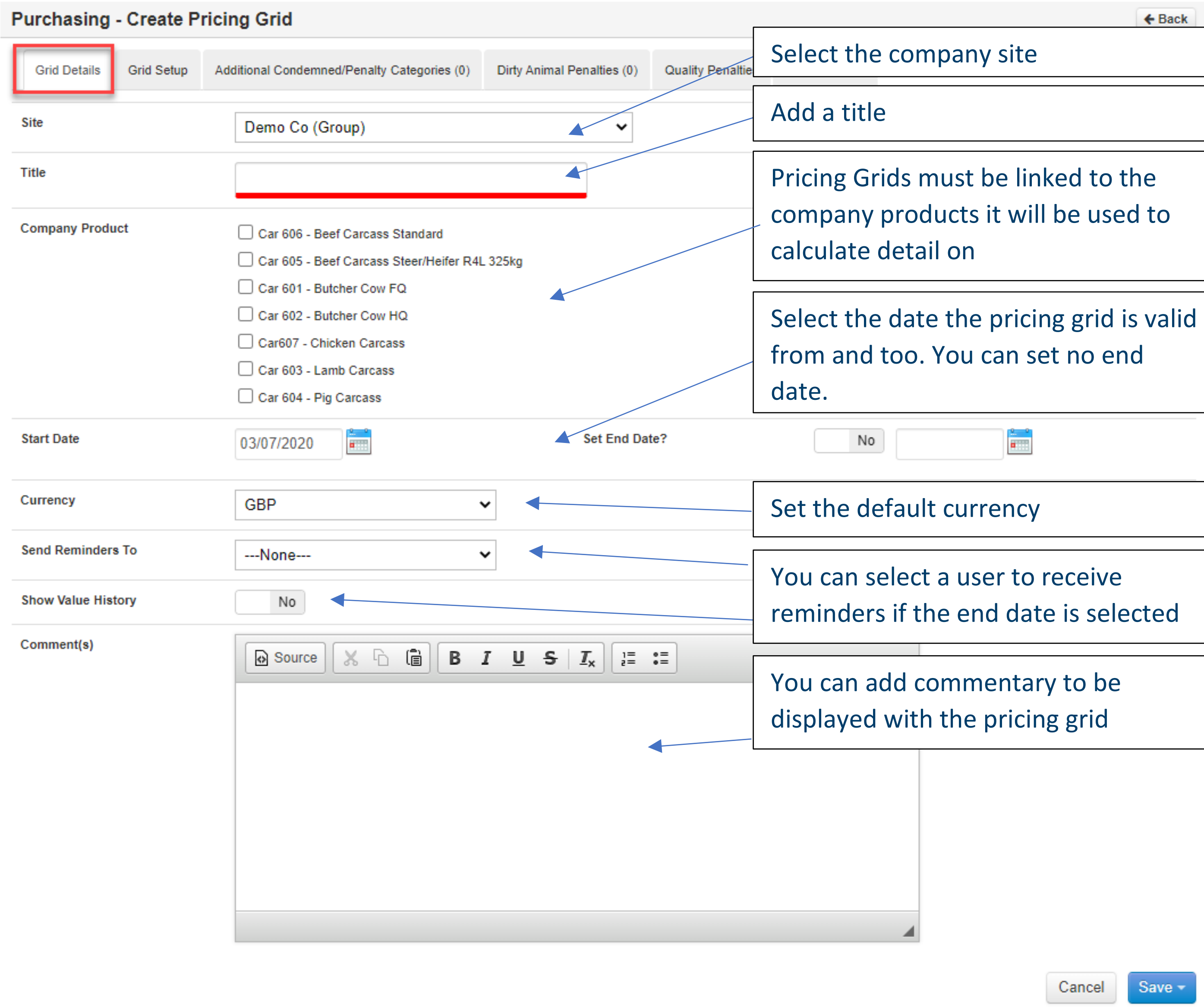
4.1. CREATING A NEW PRICING GRID

Step 1: ***Pricing Grid,*** navigate to the pricing grid section which is located within the Trading and Planning area and select new pricing grid to be directed to the initial setup:





Step 2: ***Grid Details***



Select the company site

Add a title

Pricing Grids must be linked to the company products it will be used to calculate detail on

Select the date the pricing grid is valid from and too. You can set no end date.

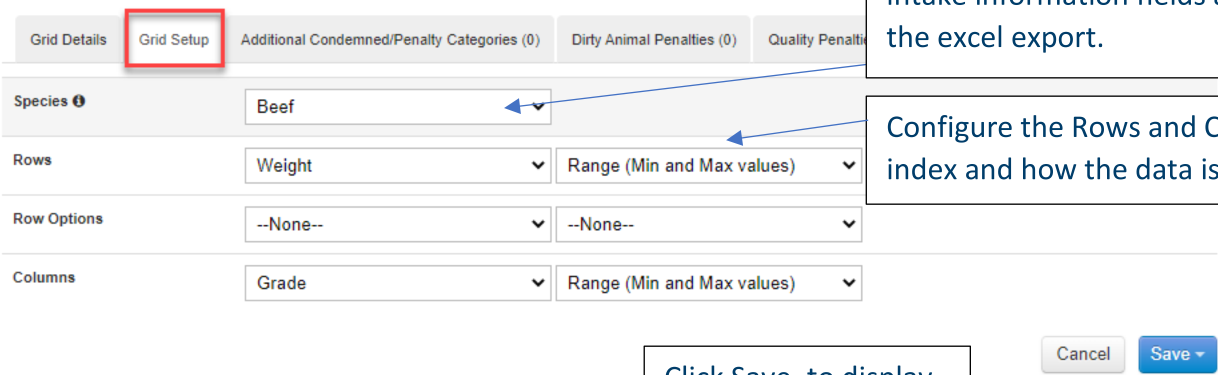
Set the default currency

You can select a user to receive reminders if the end date is selected

You can add commentary to be displayed with the pricing grid

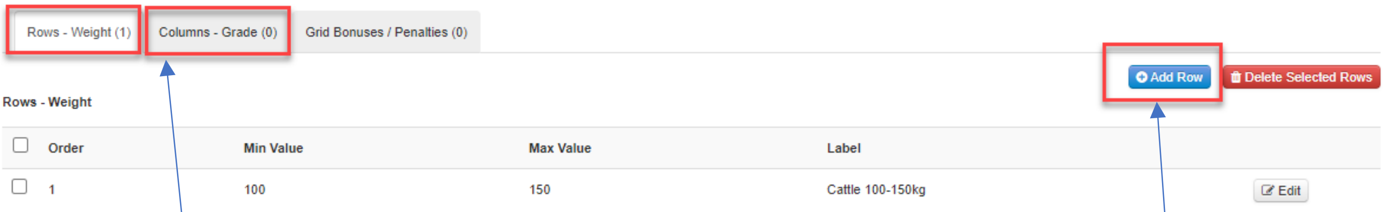
Step 3: *Grid Setup*

Set the species, this will affect the intake information fields available on the excel export.



Configure the Rows and Columns index and how the data is managed

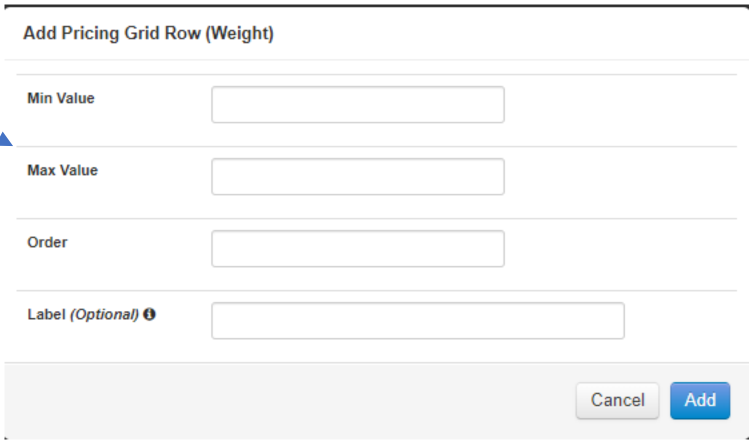
Click Save, to display further configuration



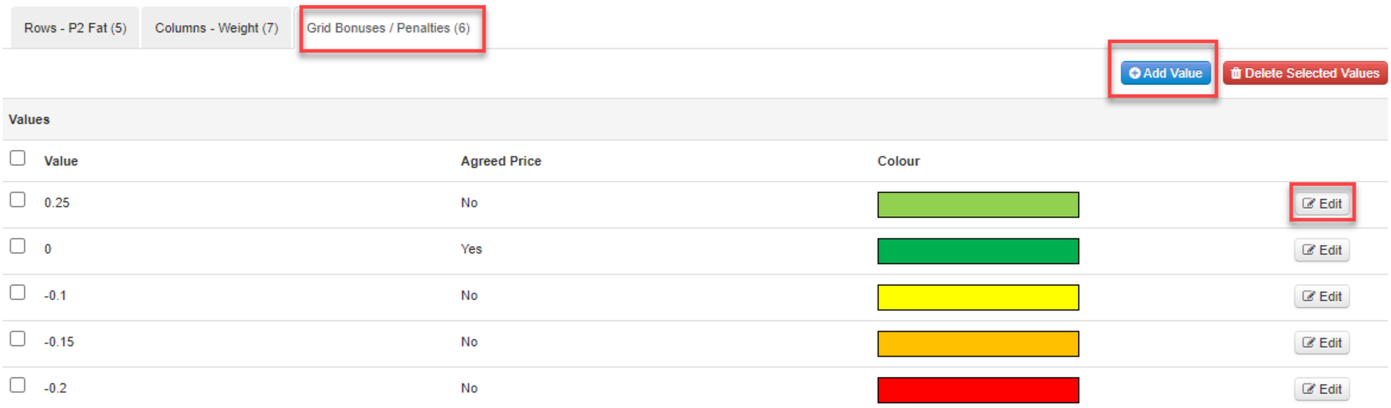
You can select between Rows and Columns information

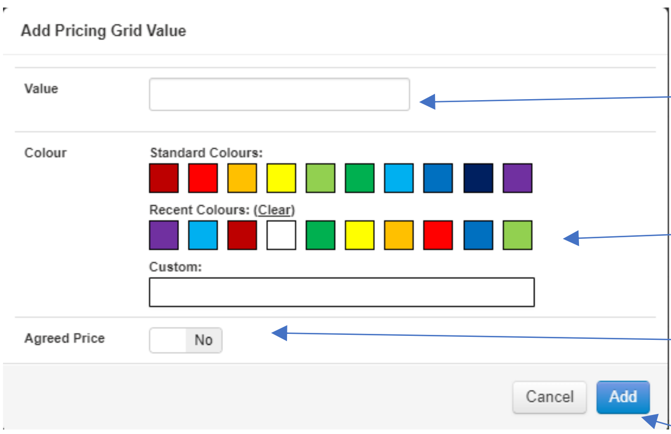
Add Row/Column will allow configuration of the Grid criteria

Complete details and select Add, repeat for each criteria



Grid Bonuses / Penalties, allows the creation of the criteria that can be added to each region of the grid





For Bonused enter as 0.10, for penalties enter as -0.10, for agreed price enter 0

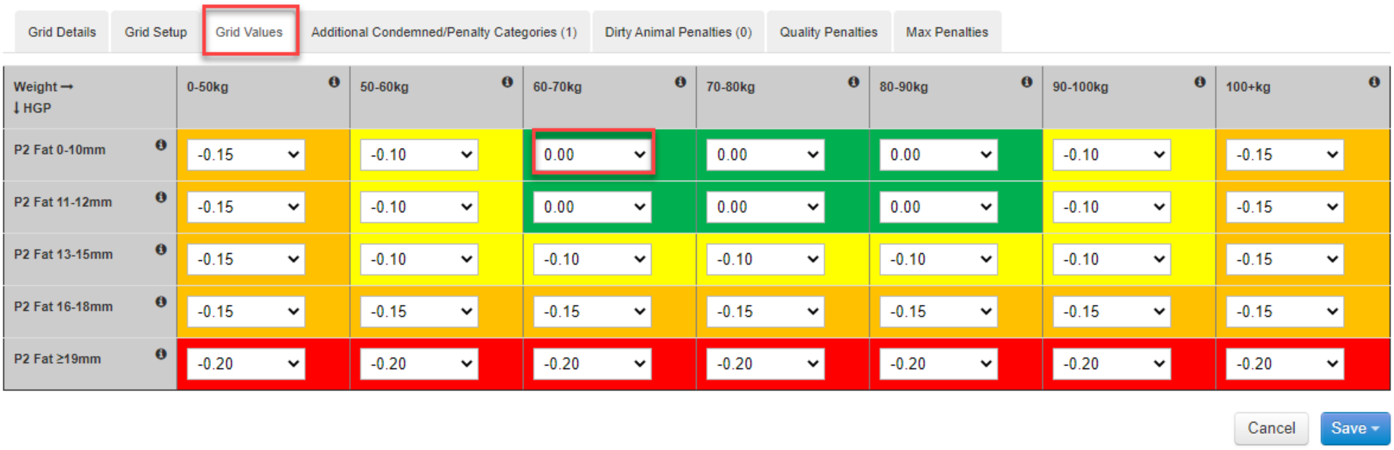
For Bonused enter as 0.10, for penalties enter as -0.10

Agreed price is where no bonuses or penalties are applied

Click Add to complete

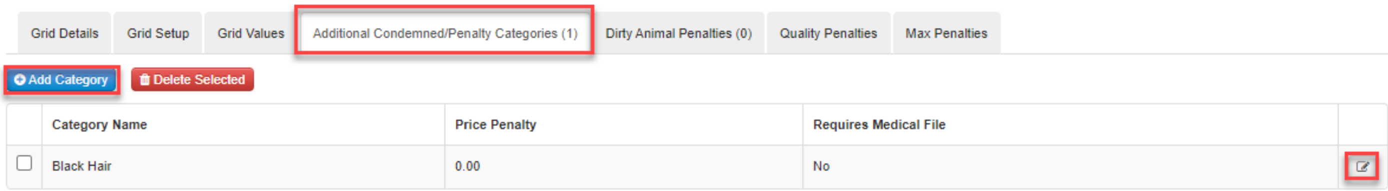
After updating all the grid setup click save.

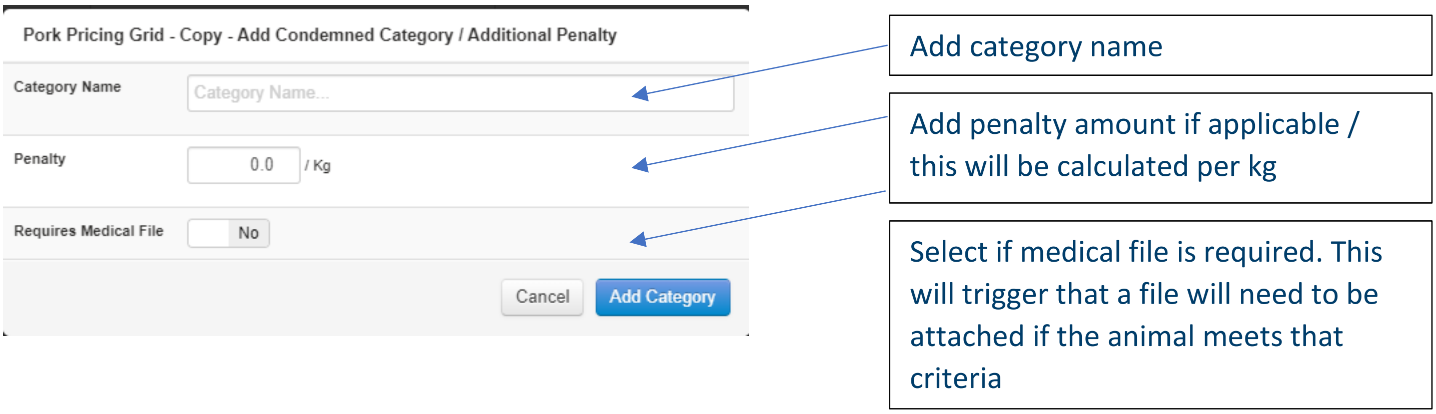
Step 4: ***Grid Values***, on the grid values section you can assign each bonus/penalty to the segments of the grid using the drop down. Once confirmed click save.



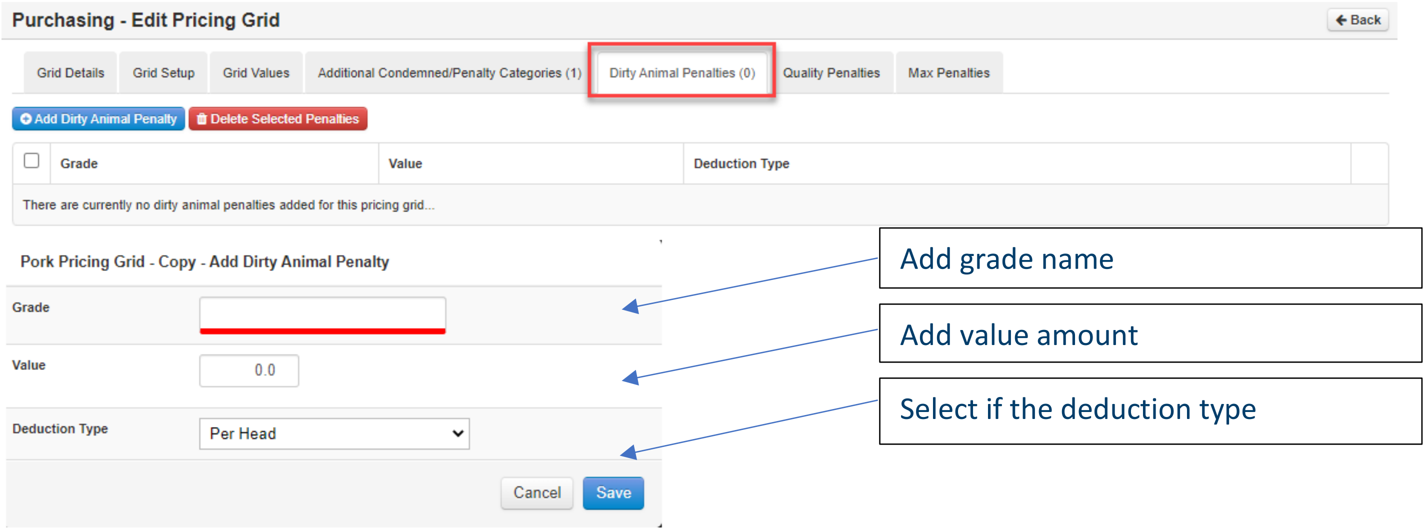
Weight → / ↓ HGP	0-50kg	50-60kg	60-70kg	70-80kg	80-90kg	90-100kg	100+kg
P2 Fat 0-10mm	-0.15	-0.10	0.00	0.00	0.00	-0.10	-0.15
P2 Fat 11-12mm	-0.15	-0.10	0.00	0.00	0.00	-0.10	-0.15
P2 Fat 13-15mm	-0.15	-0.10	-0.10	-0.10	-0.10	-0.10	-0.15
P2 Fat 16-18mm	-0.15	-0.15	-0.15	-0.15	-0.15	-0.15	-0.15
P2 Fat ≥19mm	-0.20	-0.20	-0.20	-0.20	-0.20	-0.20	-0.20

Step 5: ***Additional Condemned/Penalty Categories***, here you can create additional categories of information you would like to collect on an animal level. These can have additional price penalties applied and can require a medical file to be attached if for example the animal was condemned.

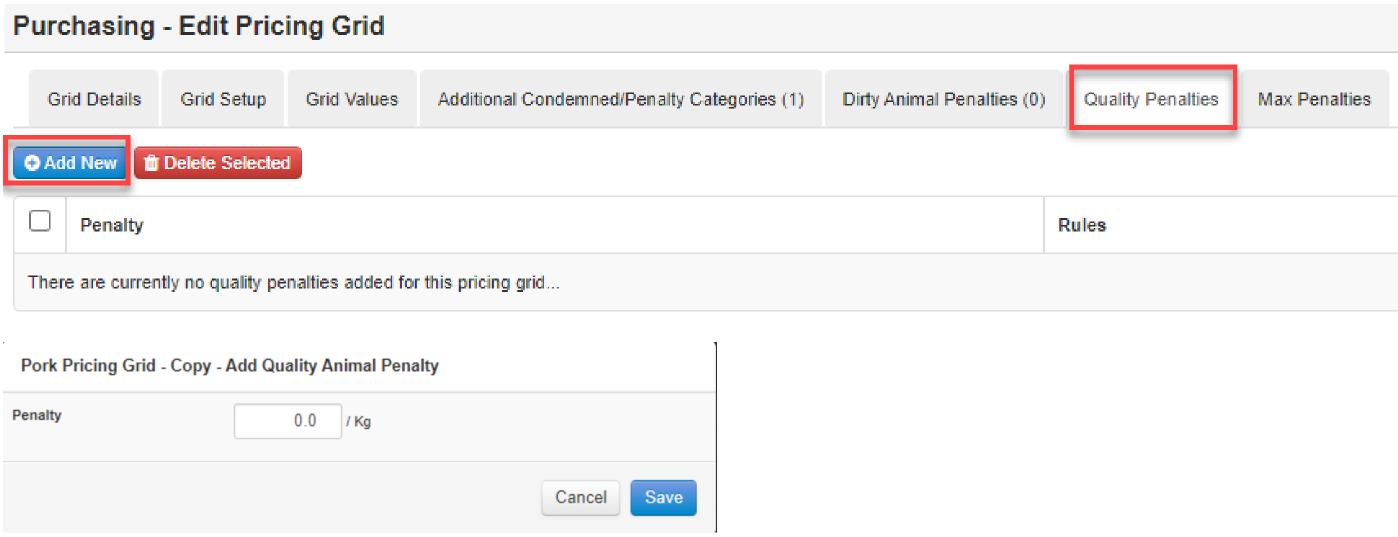




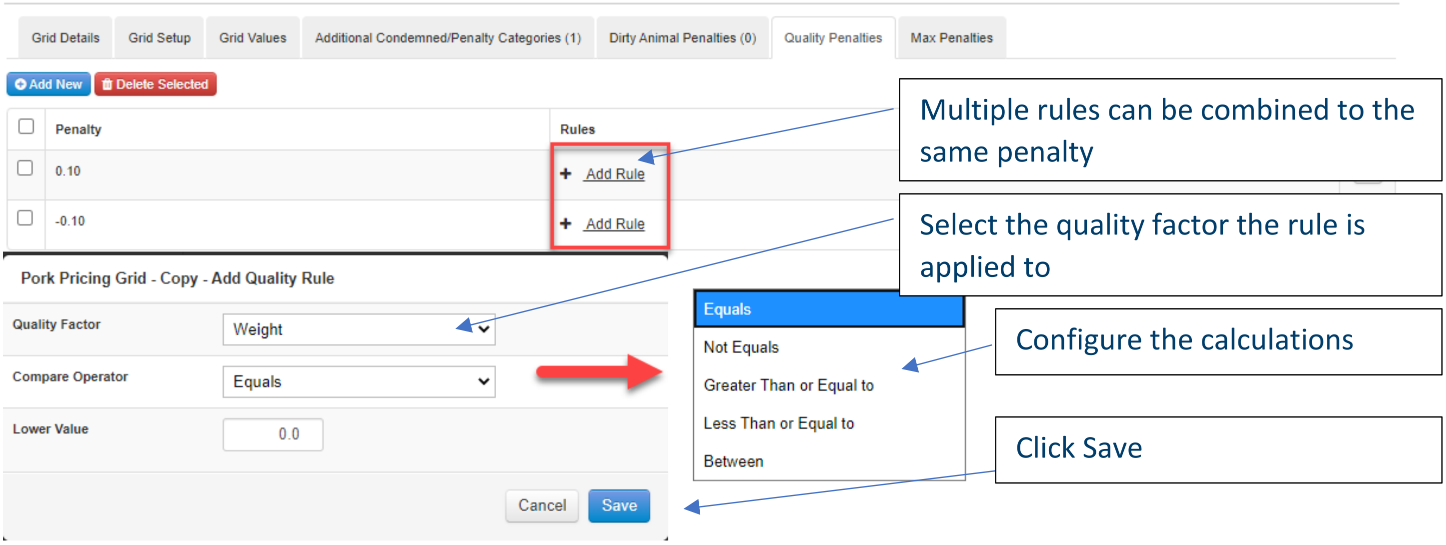
Step 6: ***Dirty Animal Penalties***, here you can create additional grades of information you would like to collect on an animal level, like the above however you can set is the deduction amount per kg or per head. This has been designed for Dirty Animal Penalties but could be used for other purposes.



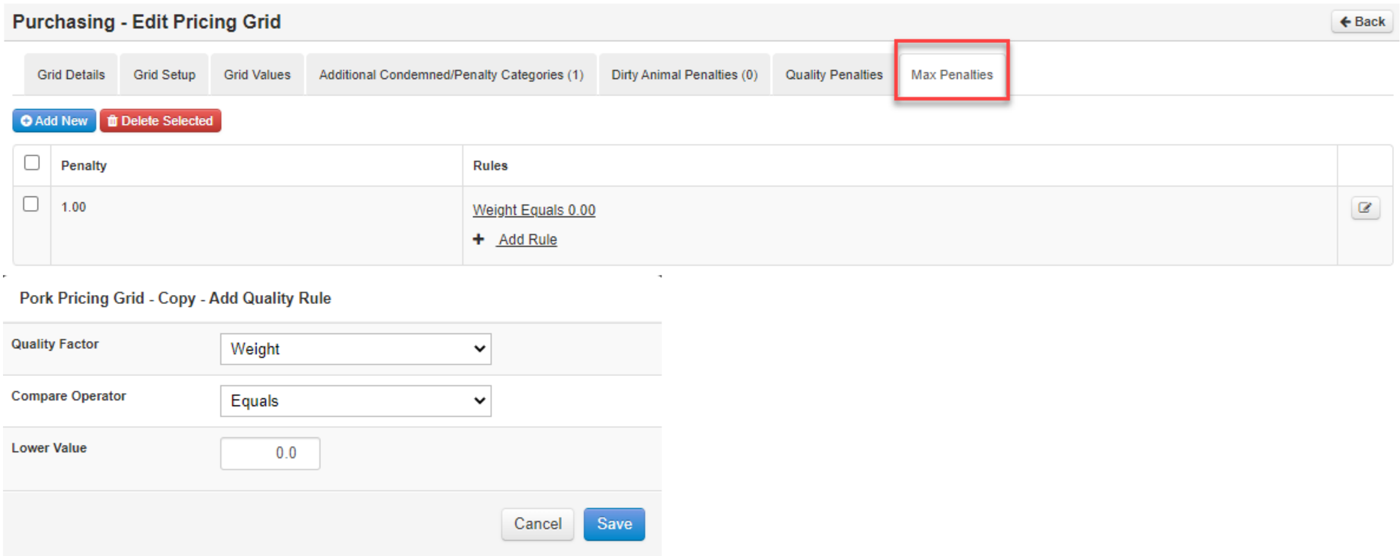
Step 7: ***Quality Penalties,*** here you can create additional penalties which can be applied to the pricing grid, first select Add New and enter the penalty amount (this can be add as 0.10 or -0.10 as this is a penalty -0.10 will act as an additional amount).



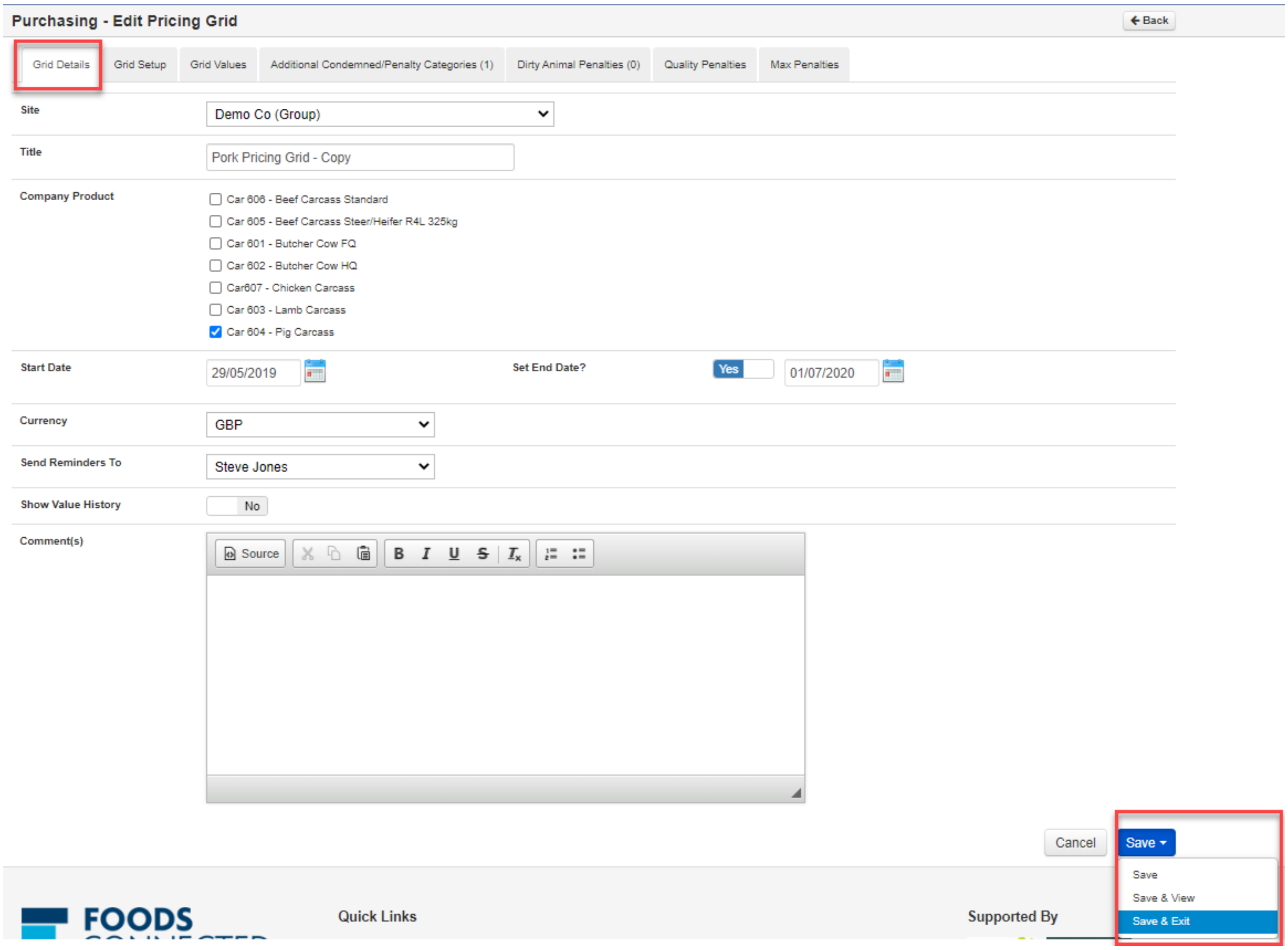
Once the penalty has been added further configuration will be visible – allowing the rules to be created on how this is applied (click Add Rule).



Step 8: ***Max Penalties,*** like quality penalties the max penalties can be configured in the same method to set a maximum deduction that can be applied. This considers all penalties from the grid, additional condemned, dirty cattle and quality penalties and will cap the amount at the maximum set.



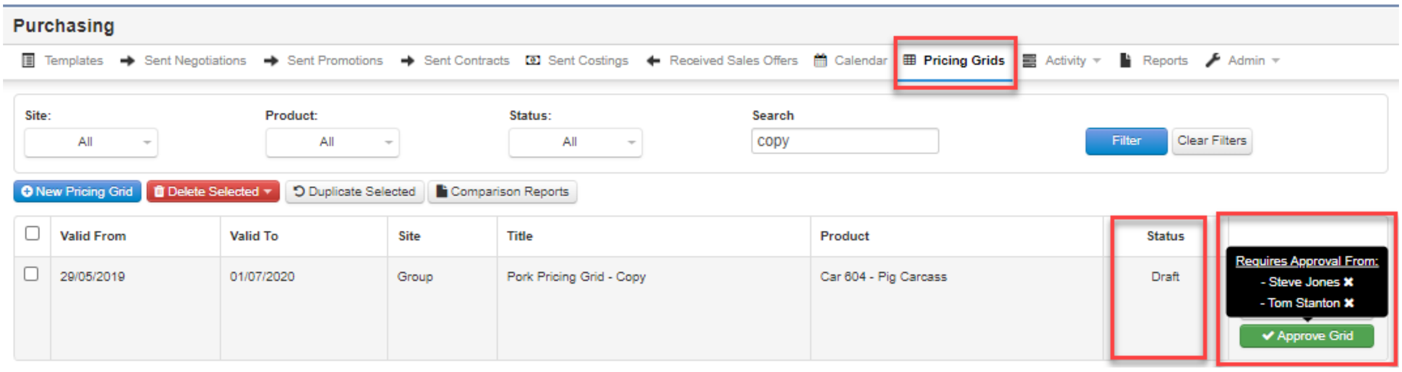
Step 9: ***Saving***, once all configuration has been completed return Grid Detail and select save and exit to return to the template screen.



4.2. APPROVAL

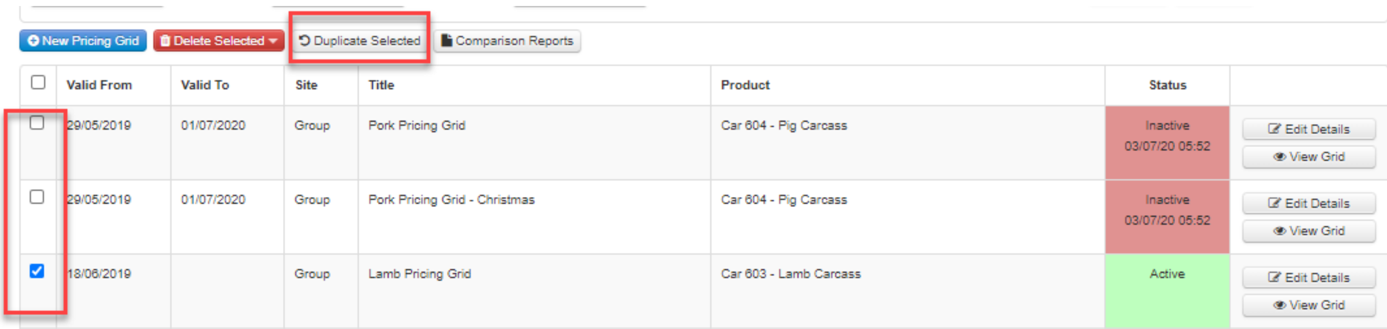
If withing the general admin section grid approval has been configured (details in section 1.1. step 9) the grid will show as status Draft, if no approval process has been added it will go directly to Active

Step 1: ***Approval,*** if multiple approvers have been configured, they will all individually need to approve the grid, if one approver has been configured any of them can approve the grid. Users without this access will not be able to approve the grid but can hover over the approval button to see who the setup approvers are and status.



Step 2: *Status,* only pricing grids that are approved can be linked to purchasing and sales templates, pricing grids that become inactive by surpassing the end date can be updated by editing the pricing grid and updating the end date. For active pricing grids to be set as inactive you must edit them and set an end date which has passed.

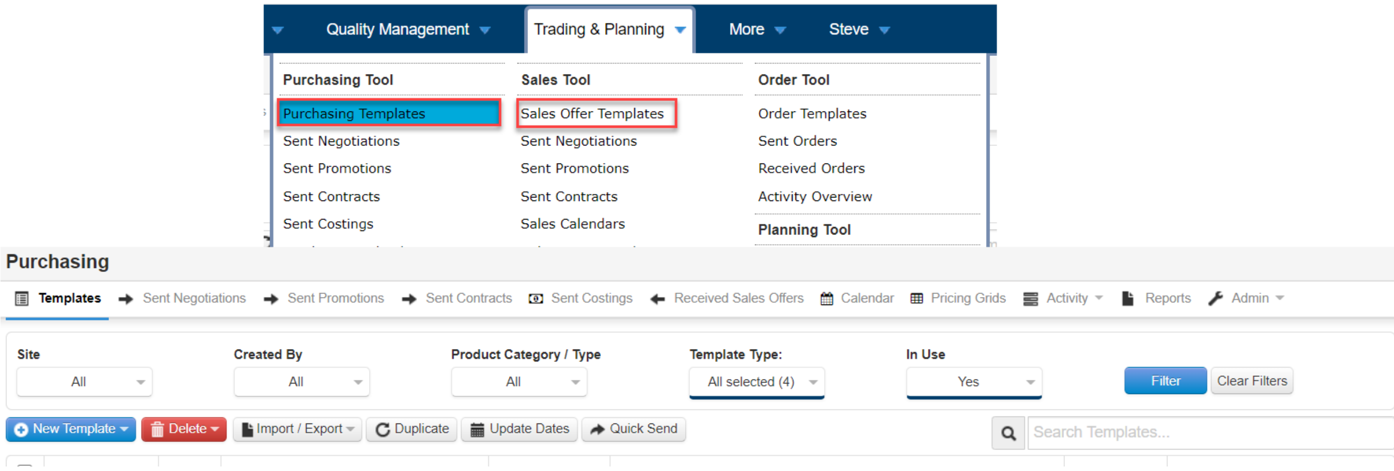
Step 3: *Editing,* it is not possible to edit a pricing grid once it has been approved, if updates are required please use the duplicate function – making the required changed and setting the old pricing grid as inactive.



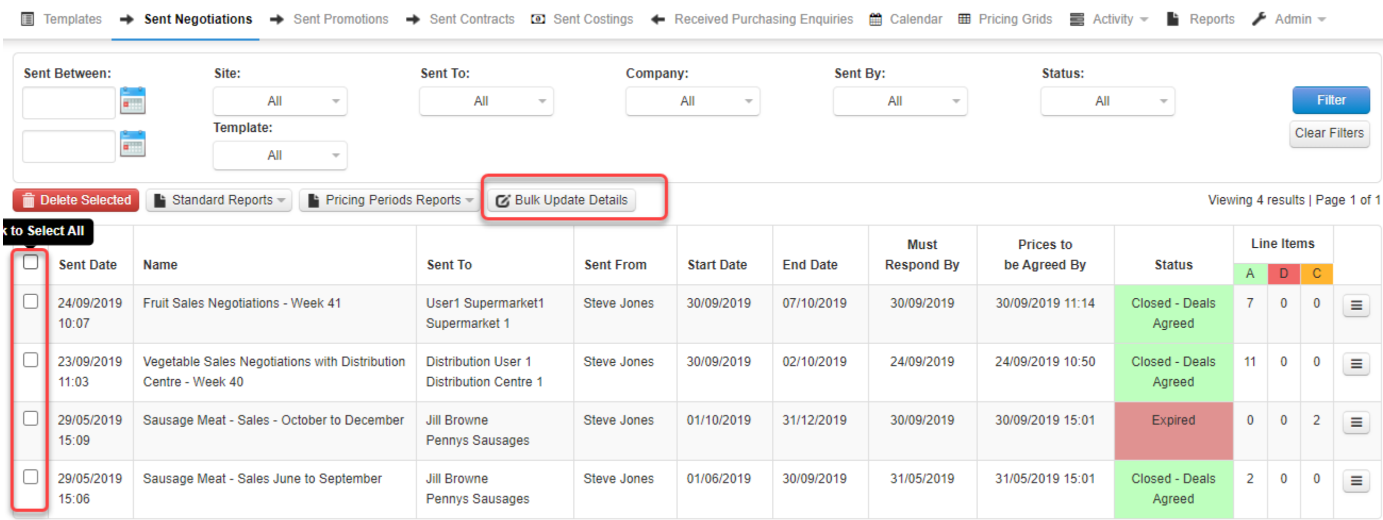
5. Reporting

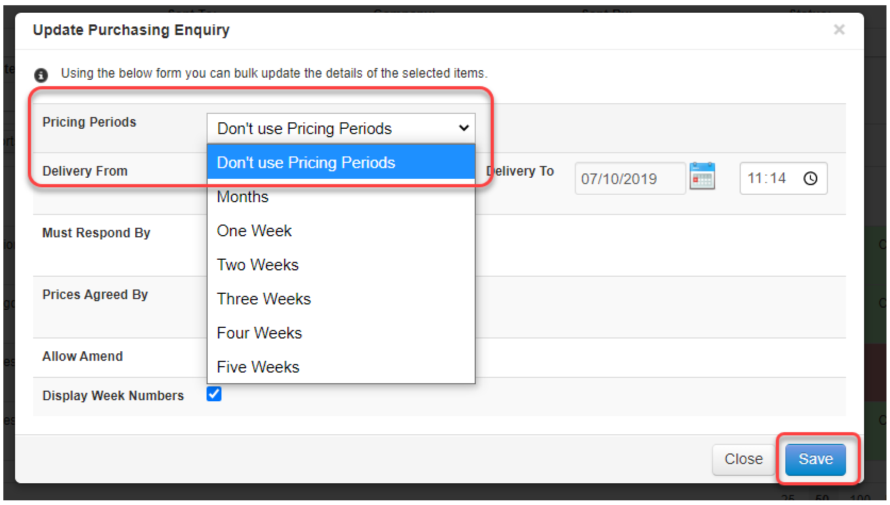
5.1. BUYING PERIOD REPORTS

Step 1: Navigate to the ***Sent Negotiations*** section which is located within the Trading and Planning area:

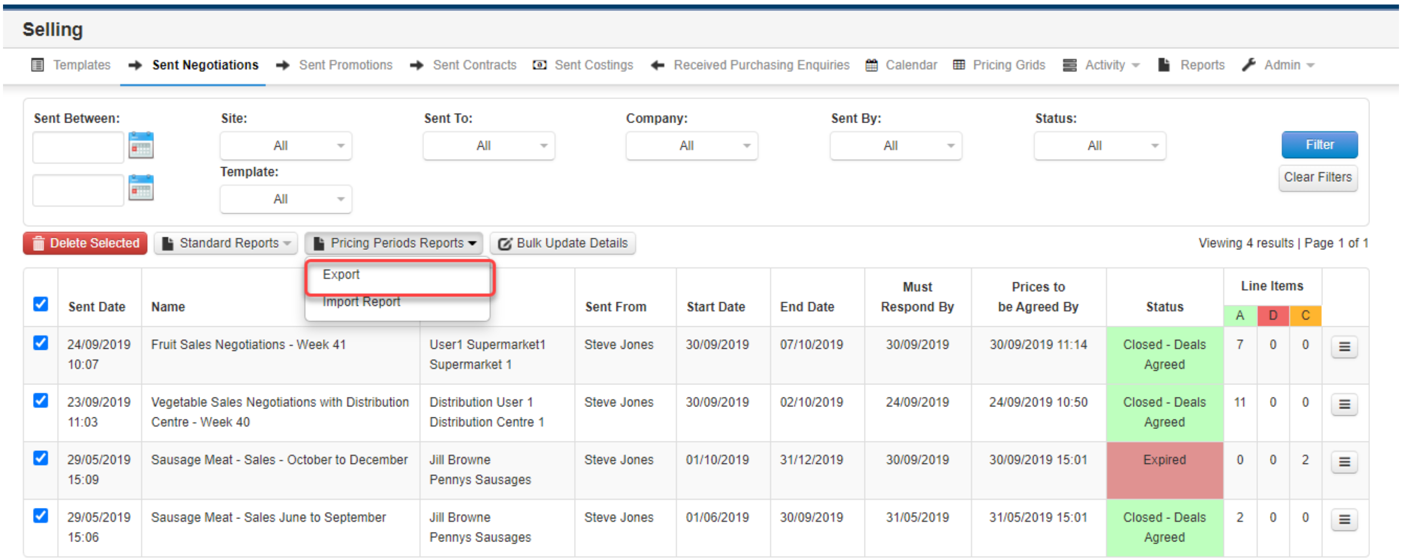


Step 2: Update ***Details to include Buying Periods*** if not already included: Select all negotiations which required to be reported on and select Bulk Update Details. Select a pricing period and select Save

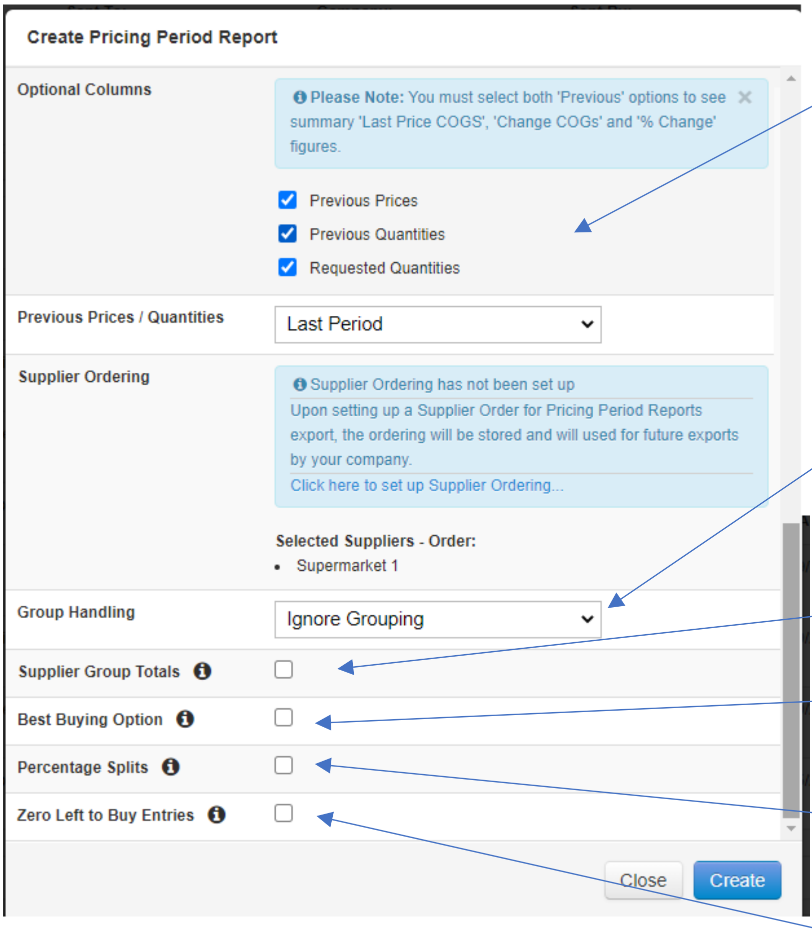




Step 3: Select all negotiations which required to be reported on and select **Pricing Periods Reports** and **Export**



Step 4: Enter required report Details and select **Save**



Include detail from previous negotiations and requested quantities

Split Supplier Company detail into separate tabs

Include total for each Supplier Company

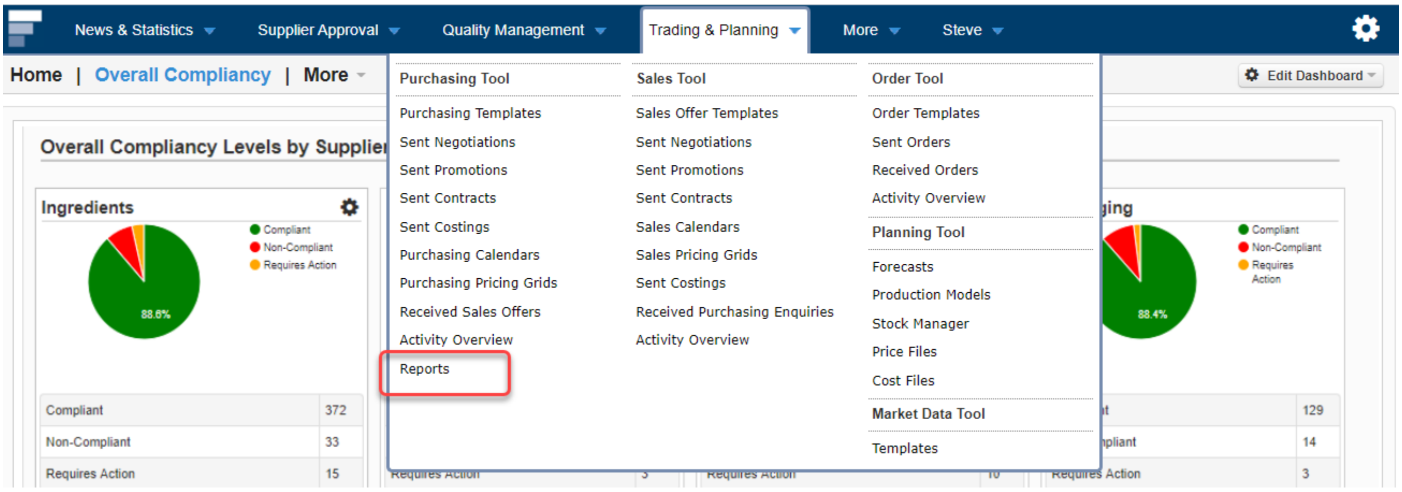
The System will allocate volume based on best offer

The System will allocate volume based on % splits in product file

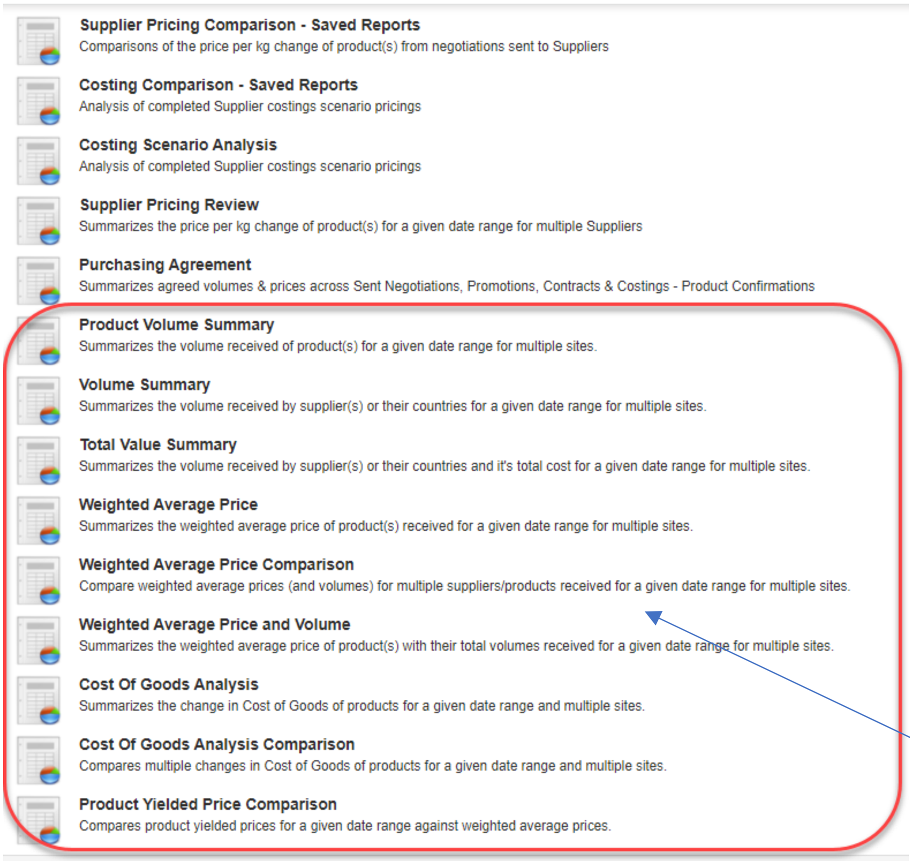
Include product codes which have no volume left to buy

5.2. PURCHASING REPORTS

Step 1*: Navigating to Purchasing Reports:* To access navigate to the purchasing section which is found in the Trading & Planning area and select Reports



Step 2*: Creating Reports:* Select the type of report required and enter required parameters.



Receipt data must be included to complete reports highlighted