

TOOL USER GUIDE

PURCHASING & SALES MANAGER



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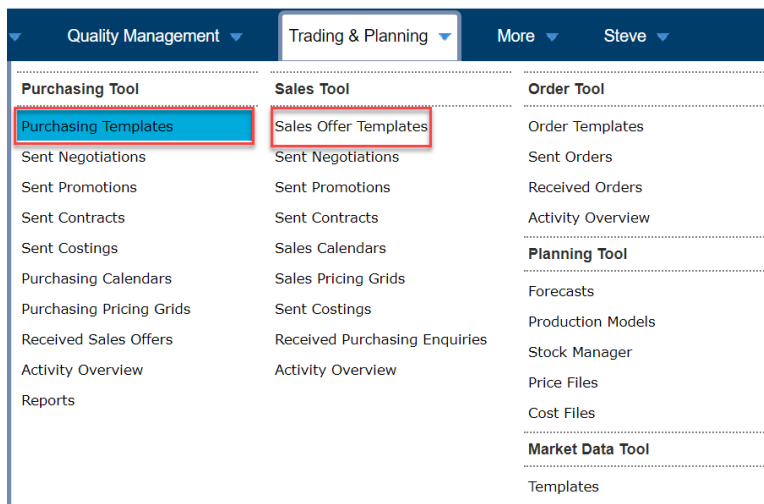
1. INITIAL SETUP FOR PURCHASING & SALES MANAGER

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

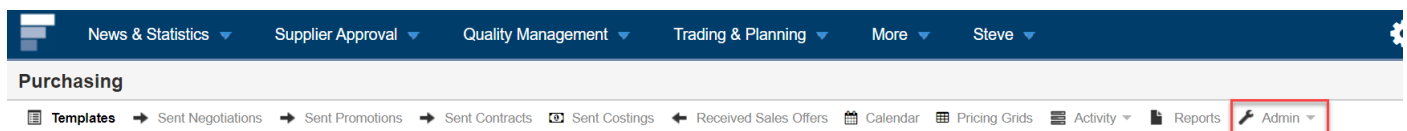
1.1. ADMIN SECTION

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 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.

Control which tools are active to company users.

<input checked="" type="checkbox"/>	Negotiation Templates - A negotiation trading template
<input checked="" type="checkbox"/>	Promotion Templates - A negotiation template marked as a promotion
<input checked="" type="checkbox"/>	Contract Templates - Send automatically closed contracts with agreement numbers
<input checked="" type="checkbox"/>	Costing Models - Send costing model templates
<input checked="" type="checkbox"/>	Calendar - Show a calendar of buying/selling activity
<input checked="" type="checkbox"/>	Pricing Grid - Create and manage pricing grids

Warning: The visibility of the Price Grid Approval tab is controlled by this option.

[Save Settings](#)

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.

Manage settings relating to company products when creating a template.

Setting	Active
Allow products to be added to a template which belong to other company sites .	<input checked="" type="checkbox"/>
Allow products to be added to a template which belong different product categories .	<input type="checkbox"/>

Company Site	Products Accessible By	
Demo Co (Group)	• Factory 1	<input type="text" value="edit"/>
Factory 1	---	<input type="text" value="edit"/>
Factory 2	---	<input type="text" value="edit"/>
Factory 3	---	<input type="text" value="edit"/>

[Save Settings](#)

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.

Active Tools: Add/Manage custom year start/ends which will be utilised to determine week numbers when reporting

Product Template: Prefix Week Name: Week

Custom Year: Active

Contract Agreement: Add New Year Delete Selected

	Year	Date Start	Date End	
<input type="checkbox"/>	2019	01/05/2019	31/05/2020	<input type="button" value="Update"/>

Grid Approval Notifications: Save Settings

- 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.

Active Tools: Activate / Deactivate contract agreement numbers

Product Template: Auto-generate Agreement Numbers - Agreement numbers will be automatically generated upon issuing a contract. No

Custom Year: Contract Agreement

Save Settings

Step 8: Select **Manage Sections**, this will display the option to create your own custom groupings – these would be displayed with 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.

Active Tools: Use the below tabs to add, update, delete the custom sections you can group your Purchasing Enquiry/Price Lists by

Product Template: Current Sections Add New Sections

Custom Year: Delete Selected

	Section Name	Associated Site	Order
<input type="checkbox"/>	Custom Groupings	Demo Co (Group)	1
<input type="checkbox"/>	Custom Groupings 2	Demo Co (Group)	2

Contract Agreement: Manage Sections

Price Grid Approval: Save Settings

Grid Approval Notifications: Save Settings

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.

Active Tools: Everytime a new pricing grid is created, you have the option to set whether it has to be approved by certain people in the company.

Product Template: Approval Users

Custom Year: **Please Note:** Changing approvers for a site will reset any approvals on Draft grids that have already been recorded.

Contract Agreement: **Add Approvers**

Manage Sections: Group One of the selected users Steve Jones, Tom Stanton **Save Settings**

Price Grid Approval

Grid Approval Notifications

Pricing Grid Approvers

Site: Group

Sign Off Type: **All Selected Users**

Users: Search By Name... Eugene Delacroix, Steve Jones, Eric Knowles, Tina Mead, Sally Mitchell

Cancel Add Approvers

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.

Active Tools: Here, you can set up users to be notified when a new pricing grid has been approved.

Product Template: Notification Recipients

Custom Year: **Add Recipients**

Contract Agreement: Group Steve Jones, Eric Knowles **Save Settings**

Manage Sections: **Grid Approval Notifications**

Price Grid Approval

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 – carcass cost, factory processing fee, transport etc. Credits are re-imburements 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**

Purchasing

Templates → Sent Negotiations → Sent Promotions → Sent Contracts → Sent Costings ← Received Sales Offers → Calendar → Pricing Grids → Activity → Reports → Admin

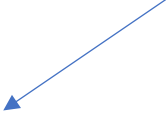
Site: All Parent Type: All Livestock: All Type: All Clear Filters Filter

Add New Cost / Credit Delete Selected Reorder Costs Search Costs...

	Site	Type	Name	Parent	Weight	Tax	Access	Product Linked	Order	
<input type="checkbox"/>	Group	Cost	Carcass charge	-	Cold	0.00%	Buyer & Seller	No	0	<input type="checkbox"/> Update
<input type="checkbox"/>	Group	Cost	Slaughter	-	Hot	0.00%	Buyer & Seller	No	0	<input type="checkbox"/> Update
<input type="checkbox"/>	Group	Cost	Deboning charge	-	Cold	0.00%	Buyer & Seller	No	1	<input type="checkbox"/> Update

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

Purchasing - Costs & Credits

Type Cost Credit

Product Linked

Costing Name

Description

Parent Cost/Credit

Exchange Rate Standard Alternative Currency From Livesto

Company Product

Auto Generated From Not Applicable Production C

Livestock Cost/Credit

Weight

Default Unit Type

Tax %

Access Buyer & Seller Seller Only Buyer Only

Weighting Products

- Car 601 - Butcher Cow FQ
- Car 602 - Butcher Cow HQ
- Car 603 - Lamb Carcass
- Car 604 - Pig Carcass
- Car 605 - Beef Carcass Steer/Heifer R4L 325kg
- Car 606 - Beef Carcass Standard
- Car607 - Chicken Carcass

Click Save

Add the costing name and description

Selecting 'Create as Parent' will create a new cost/credit. Linking to an existing one will mean it forms part of that cost/credit e.g. Factory cost (parent) Labour could sit below as part of the overall Factory cost

Standard alternative currency using exchange rates stored in the system relating to the date of the model. From Livestock uses the exchange rate based on the referenced livestock date range

Links the item to a company product

Need reviewed

Need reviewed

Sets the weight the cost/credit is applied to

Sets the unit type the cost/credit is applied to

Applied a default tax amount

Sets who can see the costs/credits

Allows a cost/credit to be applied to certain products only

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

The screenshot shows a software interface for managing costs/credits. At the top, there are filters for Site, Parent Type, Livestock, and Type, all set to 'All'. Below the filters are buttons for 'Add New Cost / Credit', 'Delete Selected', and 'Reorder Costs'. A search bar labeled 'Search Costs...' is also present. The main table has columns for Site, Type, Name, Parent, Weight, Tax, Access, Product Linked, and Order. The first four rows of the table are highlighted with a red box. Each row has an 'Update' button. A callout box points to the 'Delete Selected' button, stating 'Items can be selected and deleted if required'. Another callout box points to the 'Reorder Costs' button, stating 'Cost/Credits will be displayed on the model bases on the "order" this can be amended by clicking reorder costs, clicking, and dragging the to the desired order on the screen and clicking'. A third callout box points to the filters and search bar, stating 'Filters and search allow the visible list to be narrowed based on parameters'. A fourth callout box points to the 'Update' buttons, stating 'Each item can be updated after creation'.

Site	Type	Name	Parent	Weight	Tax	Access	Product Linked	Order	
Group	Cost	Carcass charge	-	Cold	0.00%	Buyer & Seller	No	0	<input type="checkbox"/> Update
Group	Cost	Slaughter	-	Hot	0.00%	Buyer & Seller	No	1	<input type="checkbox"/> Update
Group	Cost	Deboning charge	-	Cold	0.00%	Buyer & Seller	No	2	<input type="checkbox"/> Update
Group					0.00%	Buyer & Seller	No	3	<input type="checkbox"/> Update

Items can be selected and deleted if required

Cost/Credits will be displayed on the model bases on the "order" this can be amended by clicking reorder costs, clicking, and dragging the to the desired order on the screen and clicking

Filters and search allow the visible list to be narrowed based on parameters

Each item can be updated after creation

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.

The screenshot shows the 'Purchasing' section of a software interface. A red box highlights the 'Templates' button. Below it, there is a 'Site' dropdown menu set to 'All'. A red box highlights the 'New Template' button, which has a dropdown menu open. The dropdown menu contains the following options: Negotiation Template, Promotion Template, Contract Template, and Cost Model Template. A 'Delete' button is also visible next to the 'New Template' button.

➤ **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 carcasses 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

Select the product category – only products with this category can be added to the template

Enter a template name

Enter a unique company reference if required

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

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.

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

Sets if specifications are linked to the articles

Click Save

Cancel Save

Template Details

⚙️ Template Setup

Site: Demo Co (Group)

Product Category / Type: Meat & Poultry

Template Name: Template Name

Company Ref: []

👤 Supplier Options

Send to Supplier: Quantity & Prices

Delivery Details: Delivered

Allow Suppliers to Amend: Yes

👁️ Display Options

Group Products: None

Currency: GBP - British Pound

Request Additional / Special Offers: No

Show Change from Last Agreed: Yes

Display Week Numbers: Yes

📅 Pricing Periods

Pricing Periods: Don't use Pricing Periods

Show in Calendar: No

Renegotiation time (days): 0

Renegotiation Alerts

Search by user's name/site name...

Group Teams

Commercial

📎 Attachments

Attach Specifications: Yes

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

The screenshot shows a 'Template Details' configuration window with several sections and callout boxes:

- Template Setup**
 - Site: Demo Co (Group) [dropdown]
 - Product Category / Type: Meat & Poultry [dropdown]
 - Template Name: Template Name [text input]
 - Company Ref: [text input]
- Supplier Options**
 - Supplier Type: All [dropdown]
 - Supplier Sub Type: All [dropdown]
 - Default Supplier: -- Please Select -- [dropdown]
 - Requires Supplier Confirmation: No [checkbox]
 - Send to Supplier: Quantity & Prices [dropdown]
 - Delivery Details: Delivered [text input]
 - Allow Suppliers to Amend: Yes [checkbox]
- Display Options**
 - Group Products: None [dropdown]
 - Currency: GBP - British Pound [dropdown]
 - Request Additional / Special Offers: No [checkbox]
 - Show Change from Last Agreed: Yes [checkbox]
 - Display Week Numbers: Yes [checkbox]
- Pricing Periods**
 - Pricing Periods: Don't use Pricing Periods [dropdown]
 - Show in Calendar: No [checkbox]
 - Renegotiation time (days): 0 [text input]
 - Renegotiation Alerts: Search by user's name/site name... [text input]
 - Group Teams -
 - Commercial
- Attachments**
 - Attach Specifications: Yes [checkbox]
 - Email PDF Attachment: [checkbox]
 - Attach Pricing Grid: ---None--- [dropdown]

Callout boxes provide additional context:

- See previous page for details on Template Setup
- Select the type & sub type of supplier the contract can be issued to (this will narrow the list of suppliers available)
- You can populate a default supplier
- This will set if a supplier needs to respond to agree the contract
- 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
- Select the product category – only products withing this category can be added to the template
- See previous page for details on Pricing Periods Setup
- Sets if specifications are linked to the articles
- Sets if an email will be sent with a PDF attachment of the contract
- Allows the linking of a pricing grid to the template

Buttons: Cancel, Save

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

Product Confirmations - Options

Primary Yield	<input type="checkbox"/> No	←	Sets if primal yield should display as a visible column in the model
Yielded Price ⓘ	<input type="checkbox"/> No	←	Sets if yielded price should display as a visible column in the model
Priority	<input type="checkbox"/> No	←	Allows you to add product priorities column in the model
Product Comment	<input type="checkbox"/> No	←	Allows you to add product comments column in the model
Product Cost	<input type="checkbox"/> No	←	Sets if individual product costs should be displayed and calculated on expected volume in the model
Product Value ⓘ	<input type="checkbox"/> No	←	Sets if product value should display as a visible column in the model
Supplier Sell ⓘ	<input type="checkbox"/> No	←	Allows you to mark products for the supplier to sell in the model
Estimated Units	<input type="checkbox"/> No	←	Displays a secondary unit of measure to KG based on type selected and setup in the company product file
Estimated Units	Off	←	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.
Financial Controls	<input type="checkbox"/> No	←	Sets if financial information is visible to all (No) or only users with access granted in the user setup (Yes)
Category Report	Off	←	

Forecasts

Forecast Visibility	Visible for Sender	←	Sets who the forecast is visible to
Forecast Shared	<input checked="" type="checkbox"/> Yes	←	Sets if the forecast details are shared

Reconciliation

Reconciliation Enabled	<input type="checkbox"/> No	←	Sets if planned productions should be reconciled with actual production
Reconcile Pieces	<input type="checkbox"/> No	←	Sets the units to be reconciled
Reconcile Container Units	<input type="checkbox"/> No	←	Sets the method of inputting intake information on updated actual numbers and weight of carcasses into production
Intake Data Method	Upload Intake Data	←	Allows comments and images to be added against actual production results
Comments Enabled	<input type="checkbox"/> No	←	

@ Emails

Confirmation PDF Attachment No

Supplier Info

Default Supplier Contact: No Default User

Supplier can view Financial/Prices: No

Buttons: Cancel, Save

Annotations:

- Confirmation PDF Attachment: Sets if a PDF will be sent via email to supplier once model is confirmed
- Default Supplier Contact: Sets the default supplier contact to be notified
- Supplier can view Financial/Prices: Sets if the supplier can see financial information
- Save button: Click Save

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:

Navigation: News & Statistics, Supplier Approval, Quality Management, Trading & Planning, More, Steve

Purchasing

Templates → Sent Negotiations → Sent Promotions → Sent Contracts → Sent Costings → Received Sales Offers → Calendar → Pricing Grids → Activity → Reports → Admin

Filters: Site (All), Created By (All), Product Category / Type (All), Template Type (Negotiation Template), In Use (Yes)

Actions: New Template, Delete, Import / Export, Duplicate, Update Dates, Quick Send

	Last Sent	Site	Product Category / Type	Template Type	Name	Created By	
<input checked="" type="checkbox"/>	26/06/20 14:21	Group	Meat & Poultry	Negotiation	Bacon - Smoked & Unsmoked	Steve Jones	[Edit & Send] [Share] [Info]
<input type="checkbox"/>	15/06/20 05:34	Group	Fruit - Avocados	Negotiation	Hass Avacado	Steve Jones	[Edit & Send] [Share] [Info]

Or

Products

Product: 2000132 - Pork Belly & Loin Rind (Parent)

Quantity: 500 Kg

Price (Clear): 0.00 / Kg

Comment: Enter comment...

Actions: Add Products, Import / Export Quantities (Export, Import)

Attach Files: Choose file (No file chosen)

Buttons: Send Test Email, Reorder Items, Cancel, Save

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:

B	C	D
Product Code	Product Name	Offer Item Quantity
2000132	Pork Belly & Loin Rind (Parent)	1000

Product	Quantity	Product	Quantity
2000132 - Pork Belly & Loin Rind (Parent)	1000 Kg	2000132 - Pork Belly & Loin Rind (Parent)	500 Kg
Attach Files Choose file No file chosen	Attach Files Choose file No file chosen	Attach Files Choose file No file chosen	Attach Files Choose file No file chosen

1.4. QUICK SEND SETTINGS

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:

New Template	Delete	Import / Export	Duplicate	Update Dates	Quick Send
---------------------	---------------	------------------------	------------------	---------------------	-------------------

<input type="checkbox"/>	Last Sent	Site	Product Category / Type	Template Type	N
<input checked="" type="checkbox"/>	26/06/20 14:21	Group	Meat & Poultry	Negotiation	B

Update Template Dates

Using the below form you can bulk update the dates of the selected items.

Must Respond By 10/07/2020 04:00

Prices to be Agreed By 10/07/2020 04:00

Delivery From 10/07/2020 04:00

Delivery To 17/07/2020 04:00

Cancel **Update Dates**

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:

<input type="checkbox"/>	24/09/19 09:21	Group	Cold Storage Services - Pallet Spaces	Negotiation	Weekly Pallet Spaces Negotiations	Steve Jones	Edit & Send	Person
--------------------------	----------------	-------	---------------------------------------	-------------	-----------------------------------	-------------	------------------------	---------------

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.

Update Recipients

Assign your quick send recipients for this template below. Using the 'Quick Send' button you can then send multiple templates at once and they will all be automatically sent to their respective recipients.

Template: Demo Co - Weekly Pallet Spaces Negotiations

Supplier:

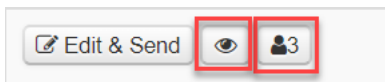
Select User Enter Email

User:

Type:

<input type="checkbox"/>	User 1 Abattoir - Abattoir 1	Abattoir 1	Send For Reponse
--------------------------	------------------------------	------------	------------------

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 configured 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

Site	Created By	Product Category / Type	Template Type	In Use			
All	All	All	Negotiation Template	Yes	<input type="button" value="Filter"/> <input type="button" value="Clear Filters"/>		
<input type="button" value="New Template"/> <input type="button" value="Delete"/> <input type="button" value="Import / Export"/> <input type="button" value="Duplicate"/> <input type="button" value="Update Dates"/> <input checked="" type="button" value="Quick Send"/>							
<input type="checkbox"/>	Last Sent	Site	Product Category / Type	Template Type	Name	Created By	
<input checked="" type="checkbox"/>	26/06/20 14:21	Group	Meat & Poultry	Negotiation	Bacon - Smoked & Unsmoked	Steve Jones	<input type="button" value="Edit & Send"/> <input type="button" value="eye"/> <input type="button" value="3"/>
<input checked="" type="checkbox"/>	15/06/20 05:34	Group	Fruit - Avocados	Negotiation	Hass Avacado	Steve Jones	<input type="button" value="Edit & Send"/> <input type="button" value="eye"/> <input type="button" value="3"/>

Quick Send

Send all the selected items that have pre-defined Quick Send Recipients

Please note: Contract templates can not be sent using quick send

Append Template Title:
e.g. Week 23-24

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:

Templates → Sent Negotiations → Sent Promotions → Sent Contracts → Sent Costings ← Received Sales Offers → Calendar → Pricing Grids → Activity → Reports → Admin

Successfully sent. All recipients have been notified by email.

Site: All | Created By: All | Product Category / Type: All | Template Type: Negotiation Template | In Use: Yes

Buttons: New Template, Delete, Import / Export, Duplicate, Update Dates, Quick Send

Last Sent	Site	Product Category / Type	Template Type	Name	Created By	
03/07/20 05:29	Group	Fruit - Avocados	Negotiation	Hass Avacado	Steve Jones	Edit & Send

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:

Quality Management | Trading & Planning | More | Steve

- Purchasing Tool
- Purchasing Templates**
- Sent Negotiations
- Sent Promotions
- Sent Contracts
- Sent Costings
- Sales Tool
- Sales Offer Templates**
- Sent Negotiations
- Sent Promotions
- Sent Contracts
- Sales Calendars
- Order Tool
- Order Templates
- Sent Orders
- Received Orders
- Activity Overview
- Planning Tool

Purchasing

Templates → Sent Negotiations → Sent Promotions → Sent Contracts → Sent Costings ← Received Sales Offers → Calendar → Pricing Grids → Activity → Reports → Admin

Site: All | Created By: All | Product Category / Type: All | Template Type: All selected (4) | In Use: Yes

Buttons: New Template, Delete, Import / Export, Duplicate, Update Dates, Quick Send

Last Sent	Site	Product Category / Type	Template Type	Name	Created By	
03/07/20 05:29	Group	Fruit - Avocados	Negotiation	Hass Avacado	Steve Jones	Edit & Send
26/06/20 14:21	Group	Meat & Poultry	Negotiation	Bacon - Smoked & Unsmoked	Steve Jones	Edit & Send

Step 2: Updating:

If required update template settings

Purchasing - Edit and Send Negotiation Template

Update Template Information

Site	Demo Co (Group)	Company Reference	8345		
Send to Supplier	Quantity & Prices	Request from Supplier	Prices & Quantity	Allow Supplier Amend	Yes
Currency	US Dollar	Attach Specifications	Yes	Display Week Numbers	Yes
Delivery Details	Delivered	Pricing Periods	Pricing Periods not used	Product Grouping	By Product Type

Update the desired delivery dates

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.

Delivery From: 03/08/2020 12:31

Delivery To: 05/08/2020 12:31

Must Respond By: 28/07/2020 12:31

Prices to be Agreed By: 30/07/2020 12:31

General Notes

Product needs to be organi

Custom Notes Require Response

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)

Products Add Products Import / Export Quantities -

Product	Quantity	Price (Clear)	Comment	Send
Other Vegetables				<input type="checkbox"/>
8345 - Avocado	5000 Kg	8.45 / Kg	Enter comment...	<input checked="" type="checkbox"/>

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 Reorder Items

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

Cancel Save

- Save
- Save & Exit
- Save & Send

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:

Quality Management | Trading & Planning | More | Steve

Purchasing Tool	Sales Tool	Order Tool
Purchasing Templates	Sales Offer Templates	Order Templates
Sent Negotiations	Sent Negotiations	Sent Orders
Sent Promotions	Sent Promotions	Received Orders
Sent Contracts	Sent Contracts	Activity Overview
Sent Costings	Sales Calendars	Planning Tool

Purchasing

Templates → Sent Negotiations → Sent Promotions → Sent Contracts → Sent Costings → Received Sales Offers → Calendar → Pricing Grids → Activity → Reports → Admin

Site: All | Created By: All | Product Category / Type: All | Template Type: All selected (4) | In Use: Yes

Buttons: New Template, Delete, Import / Export, Duplicate, Update Dates, Quick Send

<input type="checkbox"/>	Last Sent	Site	Product Category / Type	Template Type	Name	Created By	
<input type="checkbox"/>	03/07/20 05:29	Group	Fruit - Avocados	Negotiation	Hass Avacado	Steve Jones	<input checked="" type="checkbox"/> Edit & Send
<input type="checkbox"/>	26/06/20 14:21	Group	Meat & Poultry	Negotiation	Bacon - Smoked & Unsmoked	Steve Jones	<input checked="" type="checkbox"/> Edit & Send

Step 5: Updating:

If required update template settings

Purchasing - Abattoir 1 Beef Costing Model ← Back

Step 1: Template Information

Site: Group | Company Ref: FC 12345

Step 2: Product Information

Product Category: Meat & Poultry | Primary Yield Tree: Car 605 - Beef Carcass Steer/Heifer R4L 325kg - 299kg cw Carcass

Step 3: Delivery Dates

Delivery From: 24/02/2020 | Delivery To: 01/03/2020

Delivery Frequency: Weekly

Step 4: Costs & Credits

Costs	Use	Private	Credits	Use	Private
Animal Price	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Caul Fat	<input type="checkbox"/> No	<input type="checkbox"/> No
Direct Labour	<input type="checkbox"/> No	<input type="checkbox"/> No	Plucks	<input type="checkbox"/> No	<input type="checkbox"/> No
Direct Labour	<input type="checkbox"/> No	<input type="checkbox"/> No	Offal Credit (excluding Hide/Skin)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Dry Age Overheads	<input type="checkbox"/> No	<input type="checkbox"/> No	Hide/Skin Credit	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Maturation/Drip Loss	<input type="checkbox"/> No	<input type="checkbox"/> No	Liver	<input type="checkbox"/> No	<input type="checkbox"/> No
Additional Labour	<input type="checkbox"/> No	<input type="checkbox"/> No	Heart	<input type="checkbox"/> No	<input type="checkbox"/> No

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

Update the desired delivery dates and delivery frequency

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

☰ Step 5: Scenarios ➔ Add New Scenario

150 Units 150: Car 605 - Beef Carcass Steer/Heifer R4L 325kg - 299kg cw Carcass (Hot Weight: 343.0000 Cold Weight: 325.0000) 🗑

€ Step 6: Currency

Primary Currency British Pound

Alternative Currency - Don't Include - Alternative Currency Rate

Cancel Save

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.

Purchasing - Share Costing - Abattoir 1 Beef Costing Model ← Back

🔍 Search... ➔ Next

Supplier

- Internal Costing
- Meat Supplier
- Seafood supplier
- Bakery Supplier
- Fruit Supplier
- Veg Supplier

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

Click Next

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.

Purchasing - Share Costing - Abattoir 1 Beef Costing Model

Append Title e.g. Week 1 - Week 4

Must Respond By 15/07/2020 Prices to be Agreed By 22/07/2020

Include Livestock Prices Yes

Livestock Start 08/01/2020 Livestock End 08/07/2020

Notes This will create an internal version for the suppliers' giving them full access to trial figures without having to send responses.

Supplier	User	Margin	Supplier Only
Meat Supplier	Lauren Neill	2	<input type="checkbox"/>
Add Livestock Price(s)	Cattle - EU Reference Prices Cov	Denmark 50	<input type="button" value="Add"/>

Share

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.

Quality Management | Trading & Planning | More | Phillip

- Purchasing Tool**
 - Received Sales Offers
 - Activity Overview
- Order Tool**
 - Received Orders
 - Activity Overview
- Planning Tool**
 - Received Forecasts
 - Production Models
 - Stock Manager
 - Price Files
 - Cost Files
- Market Data Tool**
 - Received Data Models

Selling

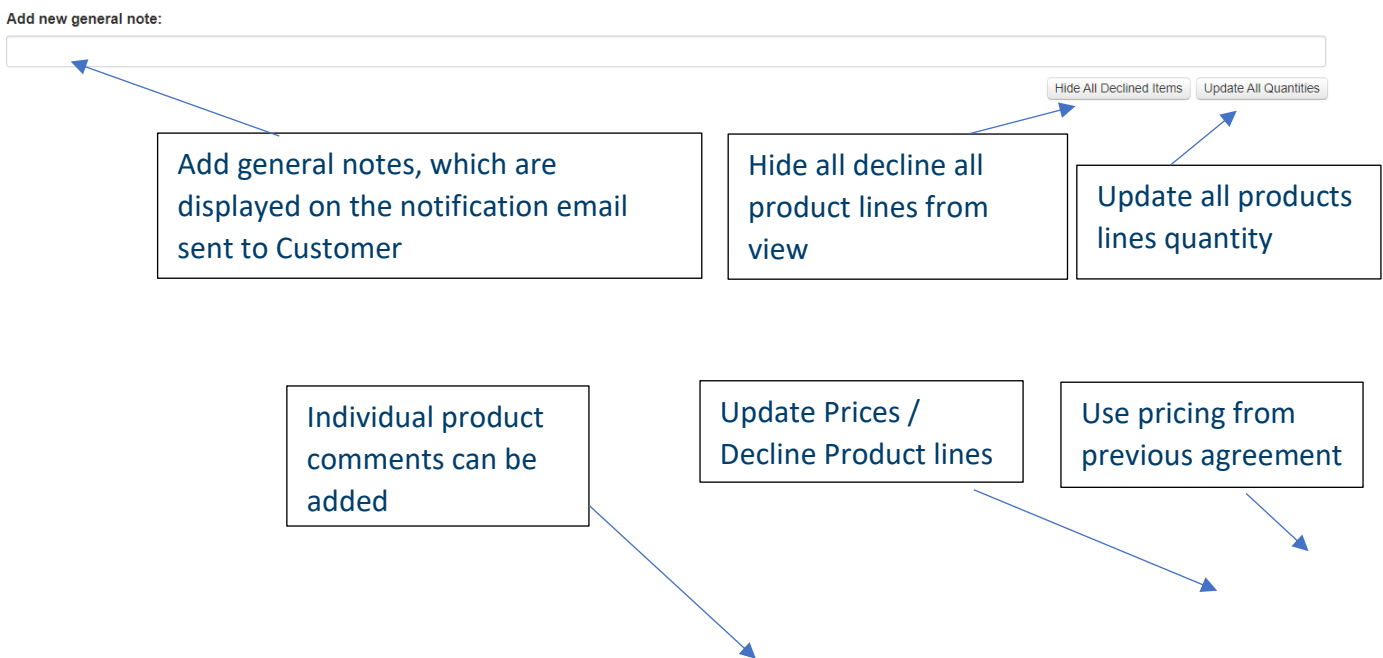
Templates → Sent Negotiations ← **Received Purchasing Enquiries** Activity

Received Between: [] [] From - Company: [All] From - User: [All] Sent To - Site: [All] Sent To - User: [All] Requested: [All] Type: [All] Status: [All] [Filter] [Clear Filters]

Excel Export Change Recipient(s) Viewing 4 results | Page 1 of 1

Rec'd. Date	Purchasing Enquiry Name	From	Sent To	Must Respond By	Prices to be Agreed By	Status	Line Items			Actions
							A	D	C	
<input type="checkbox"/> 03/07/2020	Hass Avacado - Week 1-4	Steve Jones Demo Co	Sean Pearse Group	28/07/2020	30/07/2020 12:31	Requires Your Action	0	0	1	View Status Respond Decline
<input type="checkbox"/> 06/05/2020	Hass Avacado - Avocado - Hass	Steve Jones Demo Co	Sean Pearse Group	13/05/2020	13/05/2020 12:31	Closed - Deals Agreed	1	0	0	View Status Amend

Step 2: Updating (Negotiations, Promotions & Contracts)



Other Vegetables

Product	Previous Deals	Quantity	Price \$	Comments
8345 Avocado	20/05/20: \$5.20/Kg ▶	5000 <small>SJ: 5000 Kg</small>	8.45 / Kg <small>SJ: \$8.45</small>	Additional comments...

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

Other Vegetables

Product	Previous Deals	Quantity	Price \$	Comments
8345 Avocado	20/05/20: \$5.20/Kg ▶	5000 <small>SJ: 5000 Kg</small>	8.45 / Kg <small>SJ: \$8.45</small>	Additional comments...

Cancel Save Draft Preview & Send Response

Confirm Response

Name: Hass Avacado - Week 1-4
Originally Sent From: Steve Jones - Demo Co
Originally Sent To: Sean Pearse - Veg Supplier
Prices To Be Agreed By: 30/07/2020 11:31

Other Vegetables

Product	Quantity	Price	Change from Last Agreed	Comment
8345 - Avocado	5000 Kg	\$ 8.45 / Kg	3.25	

Cancel Confirm & Send Response

Step 4: Updating & Sending (Costings).

The screenshot shows a web application interface for managing costs. It features a table with sections for 'Costs' and 'Credits'. Annotations with arrows point to various elements: 'Export to Excel' points to a button; 'Re-Use Previous Costs' points to a button; 'Enter Costs & Credits' points to input fields; 'Click Save & Send Response' points to a dropdown menu; and 'Save & Send Response' points to a specific option in the dropdown menu.

Costs £ / Kg	
Carcass charge	£/Kg
Deboning charge	£/Kg

Credits £ / Kg	
Bonus credit	£/Kg
Offal Credits	£ NaN / Unit

£ Margin Price (2.00%)	Cost Per Kg:
Ex-Margin Price	£NaN
	£NaN
	Total Cost:
	£NaN
	£NaN

Save ▾
Save
Save & Exit
Save & Send Response

3.2. NEGOTIATIONS

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.

Quality Management	Trading & Planning	More	Steve
Purchasing Tool	Sales Tool	Order Tool	
Purchasing Templates	Sales Offer Templates	Order Templates	
Sent Negotiations	Sent Negotiations	Sent Orders	
Sent Promotions	Sent Promotions	Received Orders	
Sent Contracts	Sent Contracts	Activity Overview	
Sent Costings	Sales Calendars	Planning Tool	
Purchasing Calendars	Sales Pricing Grids	Forecasts	
Purchasing Pricing Grids	Sent Costings	Production Models	
Received Sales Offers	Received Purchasing Enquiries	Stock Manager	
Activity Overview	Activity Overview	Price Files	
Reports		Cost Files	
		Market Data Tool	
		Templates	

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 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

<input type="checkbox"/>	Sent Date	Name	Sent To	Sent From	Start Date	End Date	Must Respond By	Prices to be Agreed By	Status	Line Items		
<input type="checkbox"/>	03/07/2020 05:29	Hass Avacado - Week 1-4	Sean Pearce Veg Supplier	Steve Jones	03/08/2020	05/08/2020	28/07/2020	30/07/2020 12:31	Requires Your Action	0	0	1
<input type="checkbox"/>	06/05/2020 12:42	Hass Avacado - Avocado - Hass	Sean Pearce Veg Supplier	Steve Jones	13/05/2020	20/05/2020	13/05/2020	13/05/2020 12:31	Closed - Deals Agreed	1	0	0
<input type="checkbox"/>	05/09/2019 13:16	Potato Negotiations - Week 36	Sean Pearce Veg Supplier	Steve Jones	06/09/2019	19/09/2019	06/09/2019	06/09/2019 12:23	Closed - Deals Agreed	1	0	0

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

- View Status
- Respond
- Amend
- Close
- Finalise
- Amend Recipient
- Update Details
- Assign Receipts

Add new general note:

[Text Input Field]

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.

Other Vegetables ✎ ✓ ✖ C ▾

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**

Confirm Response ✕

Name: Hass Avacado - Week 1-4

Originally Sent From: Steve Jones - Demo Co

Originally Sent To: Sean Pearse - Veg Supplier

Prices To Be Agreed By: 30/07/2020 11:31

Other Vegetables

Product	Quantity	Price	Change from Last Agreed	Comment
8345 - Avocado	5000 Kg	\$ 8.60 / Kg	3.40	

Cancel **Confirm & Send Response**

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

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: All Sent By: All Filter Clear Filters

Compare Selected Delete Selected Update Dates Viewing 12 results | Page 1 of 1

Sent	Name	Sent From	Sent To	Must Respond By	To Be Agreed By	Status	
<input type="checkbox"/>	11/07/2020 Abattoir 1 Beef Costing Model - sds	Steve Jones	Lauren Neill Meat Supplier	15/07/2020	22/07/2020	Requires Your Action	View

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

Total Cost:
€146,812.77
€143,934.09

Accept Scenario
Edit Units

Request Supplier Review

Comment:

Close Request Review

To accept submitted prices select Accept Scenario and select Accept

Purchasing - Abattoir 1 Pork Costing Model

Overview Costing Scenarios

		1,000 i
Costs £ / Kg		
Carcass charge	<input type="text" value="2.45"/>	£ 166.60 / Unit
Deboning charge	<input type="text" value="0.75"/>	£ 51.00 / Unit
Credits £ / Kg		
Bonus credit	<input type="text" value="0.32"/>	£ 21.76 / Unit
Offal Credits	<input type="text" value="0.2"/>	£ 13.60 / Unit

£ Margin Price (2.00%)
Ex-Margin Price

Cost Per Kg:
£2,734
£2,680

Total Cost:
£185,884.80
£182,240.00

Accept Scenario
Edit Units

Accept Costing Scenario

Units:

Total Cost: £185,884.80

Cost Per Kg: £2,734

Include Message
Optional

Cancel 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 carcass model.

Edit Product Confirmation

- Title:** Amend the title of the cost model
- Reference Number:** Enter Reference Number (if required)
- Units Source:** Units will be populated from the costing Scenario
- Delivery From:** Start date for costings
- Number of Weeks:** Number of weeks costing will be applied over
- Alternative Currency:** Additional Currency
- Sell off Remaining Volume:** Negotiate prices for unassigned quantities

Buttons: Delete, Cancel, Save

Select Save to progress to balance the carcass model

Balance the carcass model with required volumes.

View Yield Tree

- Export to PDF**
- Export to PDF** (dropdown)
- See Product Yield Tree**
- Expected Yield %:** 100.00 %
- Tree(s):** 100: Car 603 - Lamb Carcass - 22.4kg cw Carcass (Hot Weight: 0.0000 Cold Weight: 22.4000)

Actions:

- Collapse product lines**
- Reorder by yielded price**
- Export to Excel**

Populate prices from previous cost model

Abattoir 1 Lamb Costing Model

31/10/2019 - 27/11/2019 (In Progress)

	Primary Yield	% of Scenario	Volume	Price (£)	Value	Supplier Sell	Yielded Price
144 - Lamb Shoulder	34.76 %		0.00			<input type="checkbox"/>	
118 - Lamb Shoulder Square Cut MW/VAC Carton	24.70 %	100.00	2,213	5.98	£ 13,234.70	<input type="checkbox"/>	£ 4.64
146 - Lamb shank - FQ	3.53 %		0.00			<input type="checkbox"/>	
139 - Lamb Shank - FQ/HQ VAC Carton				3.83	£ 1,210.74	<input type="checkbox"/>	£ 3.83

Update details

Enter % of scenario for required volumes and update prices

If product not required select for supplier to sell

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 %

Balance confirmation by updated yields and prices to ensure associated costs and prices are balanced.

The warning will appear if all yields have not been assigned. A confirmation cannot be sent / confirmed until assigned

Save

- Save
- Save & Exit
- Save & Send to Supplier**
- Save & Confirm

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

The screenshot shows the 'Costing Scenarios' interface. At the top, there are tabs for 'Overview', 'Costing Scenarios', and 'Product Confirmations'. Below this is the 'Product Information' section, including 'Tree(s)' and 'Expected Yield %'. The main area displays a table of costing scenarios for '150 - Car 605 - Beef Carcass Steer/Heifer R4L 325kg - 299kg cw Carcass'. The table has columns for 'Primary Yield', '% of Scenario', 'Volume', 'Est. Units', 'Price (£)', and 'Value'. Callouts point to various features: 'View Yield Tree' and 'Export to PDF' at the top; 'Collapse product lines' and 'Export to Excel' near the table controls; 'Enter Comments' pointing to a comment box for the '21 - B Topside' row; 'Reorder by yielded price' pointing to the 'Price (£)' column; and 'Enter prices' pointing to the 'Price (£)' column for the '1002 - Silverside' row.

3.3. CONFIRMING

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.

The screenshot shows the 'Trading & Planning' menu. The menu is divided into three columns: 'Purchasing Tool', 'Sales Tool', and 'Order Tool'. Under 'Purchasing Tool', 'Sent Negotiations', 'Sent Promotions', and 'Sent Contracts' are highlighted with red boxes. Under 'Sales Tool', 'Sent Negotiations', 'Sent Promotions', and 'Sent Contracts' are also highlighted with red boxes. Other items in the menu include 'Purchasing Templates', 'Sales Offer Templates', 'Order Templates', 'Sent Orders', 'Received Orders', 'Activity Overview', 'Planning Tool', 'Forecasts', 'Production Models', 'Stock Manager', 'Price Files', 'Cost Files', and 'Market Data Tool'.

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.

Purchasing

Templates → Sent Negotiations → Sent Promotions → Sent Contracts → Sent Costings ← Received Sales Offers → Calendar → Pricing Grids → Activity → Reports → Admin

Sent Between: [] Site: 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	
<input type="checkbox"/>	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	Closed - Deals Agreed	1	0	0	View Status
<input type="checkbox"/>	06/05/2020 12:42	Hass Avacado - Avacado - 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	Respond Amend Close Finalise Amend Recipient Update Details Assign Receipts
<input type="checkbox"/>	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	

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

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

Purchasing

Templates → Sent Negotiations → Sent Promotions → Sent Contracts → Sent Costings ← Received Sales Offers → Calendar → Pricing Grids → Activity → Reports → Admin

Sent Between: [] Site: All Sent To: All Company: All Sent By: All Filter Clear Filters

Compare Selected Delete Selected Update Dates Viewing 12 results | Page 1 of 1

	Sent	Name	Sent From	Sent To	Must Respond By	To Be Agreed By	Status	
<input type="checkbox"/>	11/07/2020	Abattoir 1 Beef Costing Model - sds	Steve Jones	Lauren Neill Meat Supplier	15/07/2020	22/07/2020	Requires Your Action	View

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 %

Ensure associated costs and prices are balanced.

Save

Supported By Invest

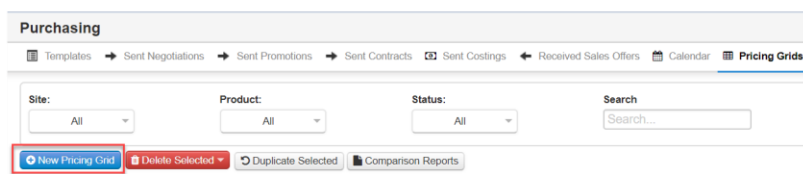
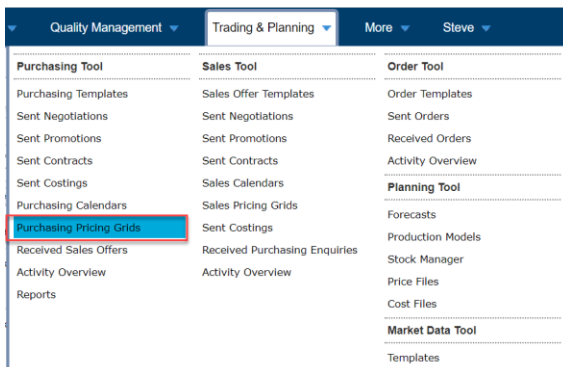
- Save
- Save & Exit
- Save & Send to Supplier
- Save & Confirm

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

Purchasing - Create Pricing Grid

Grid Details | Grid Setup | Additional Condemned/Penalty Categories (0) | Dirty Animal Penalties (0) | Quality Penalties

Site: Demo Co (Group) **Select the company site**

Title: **Add a title**

Company Product: Car 606 - Beef Carcass Standard
 Car 605 - Beef Carcass Steer/Heifer R4L 325kg
 Car 601 - Butcher Cow FQ
 Car 602 - Butcher Cow HQ
 Car607 - Chicken Carcass
 Car 603 - Lamb Carcass
 Car 604 - Pig Carcass
Pricing Grids must be linked to the company products it will be used to calculate detail on

Start Date: 03/07/2020 **Set End Date?** No **Select the date the pricing grid is valid from and too. You can set no end date.**

Currency: GBP **Set the default currency**

Send Reminders To: ---None--- **You can select a user to receive reminders if the end date is selected**

Show Value History: No

Comment(s): **You can add commentary to be displayed with the pricing grid**

Step 3: Grid Setup

Grid Details | **Grid Setup** | Additional Condemned/Penalty Categories (0) | Dirty Animal Penalties (0) | Quality Penalties

Species: Beef **Set the species, this will affect the intake information fields available on the excel export.**

Rows: Weight | Range (Min and Max values) **Configure the Rows and Columns index and how the data is managed**

Row Options: --None-- | --None--

Columns: Grade | Range (Min and Max values)

Click Save, to display further configuration **Click Save, to display further configuration**

Rows - Weight (1) Columns - Grade (0) Grid Bonuses / Penalties (0)

Rows - Weight

<input type="checkbox"/> Order	Min Value	Max Value	Label	
<input type="checkbox"/> 1	100	150	Cattle 100-150kg	<input type="checkbox"/> Edit

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

Add Pricing Grid Row (Weight)

Min Value

Max Value

Order

Label (Optional)

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

Rows - P2 Fat (5) Columns - Weight (7) Grid Bonuses / Penalties (6)

Values

<input type="checkbox"/> Value	Agreed Price	Colour	
<input type="checkbox"/> 0.25	No		<input type="checkbox"/> Edit
<input type="checkbox"/> 0	Yes		<input type="checkbox"/> Edit
<input type="checkbox"/> -0.1	No		<input type="checkbox"/> Edit
<input type="checkbox"/> -0.15	No		<input type="checkbox"/> Edit
<input type="checkbox"/> -0.2	No		<input type="checkbox"/> Edit

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

Add Pricing Grid Value

Value

Colour

Standard Colours:

Recent Colours: (Clear)

Custom:

Agreed Price No

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.

Grid Details	Grid Setup	Grid Values	Additional Condemned/Penalty Categories (1)	Dirty Animal Penalties (0)	Quality Penalties	Max Penalties	
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

Cancel Save

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.

Grid Details	Grid Setup	Grid Values	Additional Condemned/Penalty Categories (1)	Dirty Animal Penalties (0)	Quality Penalties	Max Penalties
<input type="button" value="Add Category"/> <input type="button" value="Delete Selected"/>						
<input type="checkbox"/>	Category Name	Price Penalty	Requires Medical File			
<input type="checkbox"/>	Black Hair	0.00	No			

Pork Pricing Grid - Copy - Add Condemned Category / Additional Penalty

Category Name

Penalty / Kg

Requires Medical File No

Add category name

Add penalty amount if applicable / this will be calculated per kg

Select if medical file is required. This will trigger that a file will need to be attached if the animal meets that criteria

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.

Purchasing - Edit Pricing Grid ← Back

- Grid Details
- Grid Setup
- Grid Values
- Additional Condemned/Penalty Categories (1)
- Dirty Animal Penalties (0)**
- Quality Penalties
- Max Penalties

[+ Add Dirty Animal Penalty](#) [Delete Selected Penalties](#)

<input type="checkbox"/>	Grade	Value	Deduction Type
There are currently no dirty animal penalties added for this pricing grid...			

Pork Pricing Grid - Copy - Add Dirty Animal Penalty

Grade

Value

Deduction Type

Add grade name

Add value amount

Select if the deduction type

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).

Purchasing - Edit Pricing Grid

- Grid Details
- Grid Setup
- Grid Values
- Additional Condemned/Penalty Categories (1)
- Dirty Animal Penalties (0)
- Quality Penalties**
- Max Penalties

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

<input type="checkbox"/>	Penalty	Rules
There are currently no quality penalties added for this pricing grid...		

Pork Pricing Grid - Copy - Add Quality Animal Penalty

Penalty / Kg

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).

The screenshot shows the 'Quality Penalties' configuration interface. At the top, there are tabs for 'Grid Details', 'Grid Setup', 'Grid Values', 'Additional Condemned/Penalty Categories (1)', 'Dirty Animal Penalties (0)', 'Quality Penalties', and 'Max Penalties'. Below the tabs are buttons for 'Add New' and 'Delete Selected'. A table lists penalties with columns for 'Penalty' and 'Rules'. Two 'Add Rule' buttons are highlighted with a red box. A callout box points to these buttons with the text: 'Multiple rules can be combined to the same penalty'. Below the table is a 'Pork Pricing Grid - Copy - Add Quality Rule' form. It has three sections: 'Quality Factor' with a dropdown set to 'Weight', 'Compare Operator' with a dropdown set to 'Equals', and 'Lower Value' with a text input set to '0.0'. A red arrow points from the 'Compare Operator' dropdown to a callout box that says: 'Select the quality factor the rule is applied to'. To the right of the form is a 'Rules' dropdown menu with options: 'Equals', 'Not Equals', 'Greater Than or Equal to', 'Less Than or Equal to', and 'Between'. A callout box points to this menu with the text: 'Configure the calculations'. At the bottom of the form are 'Cancel' and 'Save' buttons. A callout box points to the 'Save' button with the text: 'Click Save'.

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.

The screenshot shows the 'Max Penalties' configuration interface. At the top, there are tabs for 'Grid Details', 'Grid Setup', 'Grid Values', 'Additional Condemned/Penalty Categories (1)', 'Dirty Animal Penalties (0)', 'Quality Penalties', and 'Max Penalties'. The 'Max Penalties' tab is highlighted with a red box. Below the tabs are buttons for 'Add New' and 'Delete Selected'. A table lists penalties with columns for 'Penalty' and 'Rules'. One penalty is listed with a value of '1.00' and a rule of 'Weight Equals 0.00'. Below the table is a 'Pork Pricing Grid - Copy - Add Quality Rule' form. It has three sections: 'Quality Factor' with a dropdown set to 'Weight', 'Compare Operator' with a dropdown set to 'Equals', and 'Lower Value' with a text input set to '0.0'. At the bottom of the form are 'Cancel' and 'Save' buttons.

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

Purchasing - Edit Pricing Grid ← Back

Grid Details | Grid Setup | Grid Values | Additional Condemned/Penalty Categories (1) | Dirty Animal Penalties (0) | Quality Penalties | Max Penalties

Site: Demo Co (Group) [v]

Title: Pork Pricing Grid - Copy

Company Product:
 Car 606 - Beef Carcass Standard
 Car 605 - Beef Carcass Steer/Heifer R4L 325kg
 Car 601 - Butcher Cow FQ
 Car 602 - Butcher Cow HQ
 Car607 - Chicken Carcass
 Car 603 - Lamb Carcass
 Car 604 - Pig Carcass

Start Date: 29/05/2019 [calendar] Set End Date? Yes No 01/07/2020 [calendar]

Currency: GBP [v]

Send Reminders To: Steve Jones [v]

Show Value History: No

Comment(s): [Rich text editor with Source, Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List icons]

Cancel **Save** [v]
Save
Save & View
Save & Exit

FOODS Quick Links Supported By

4.2. APPROVAL

If within 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.

Purchasing

Templates → Sent Negotiations → Sent Promotions → Sent Contracts → Sent Costings → Received Sales Offers → Calendar → **Pricing Grids** → Activity → Reports → Admin

Site: All Product: All Status: All Search: copy Filter Clear Filters

+ New Pricing Grid Delete Selected Duplicate Selected Comparison Reports

Valid From	Valid To	Site	Title	Product	Status
29/05/2019	01/07/2020	Group	Pork Pricing Grid - Copy	Car 604 - Pig Carcass	Draft

Requires Approval From:
- Steve Jones ✕
- Tom Stanton ✕
Approve Grid

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.

Date 30/09/2019 - 31/10/2019 Save

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.

+ New Pricing Grid Delete Selected Duplicate Selected Comparison Reports

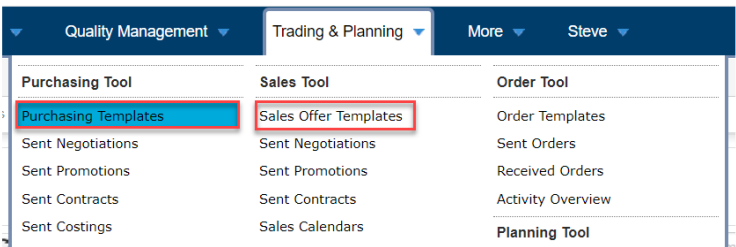
Valid From	Valid To	Site	Title	Product	Status
29/05/2019	01/07/2020	Group	Pork Pricing Grid	Car 604 - Pig Carcass	Inactive 03/07/20 05:52
29/05/2019	01/07/2020	Group	Pork Pricing Grid - Christmas	Car 604 - Pig Carcass	Inactive 03/07/20 05:52
18/08/2019		Group	Lamb Pricing Grid	Car 603 - Lamb Carcass	Active

Edit Details View Grid

5. Reporting

5.1. BUYING PERIOD REPORTS

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



The screenshot shows the 'Trading & Planning' dropdown menu. The 'Purchasing Tool' section has 'Purchasing Templates' highlighted with a red box. The 'Sales Tool' section has 'Sales Offer Templates' highlighted with a red box. Other options include 'Order Tool', 'Sent Negotiations', 'Sent Promotions', 'Sent Contracts', 'Sent Costings', and 'Sales Calendars'.

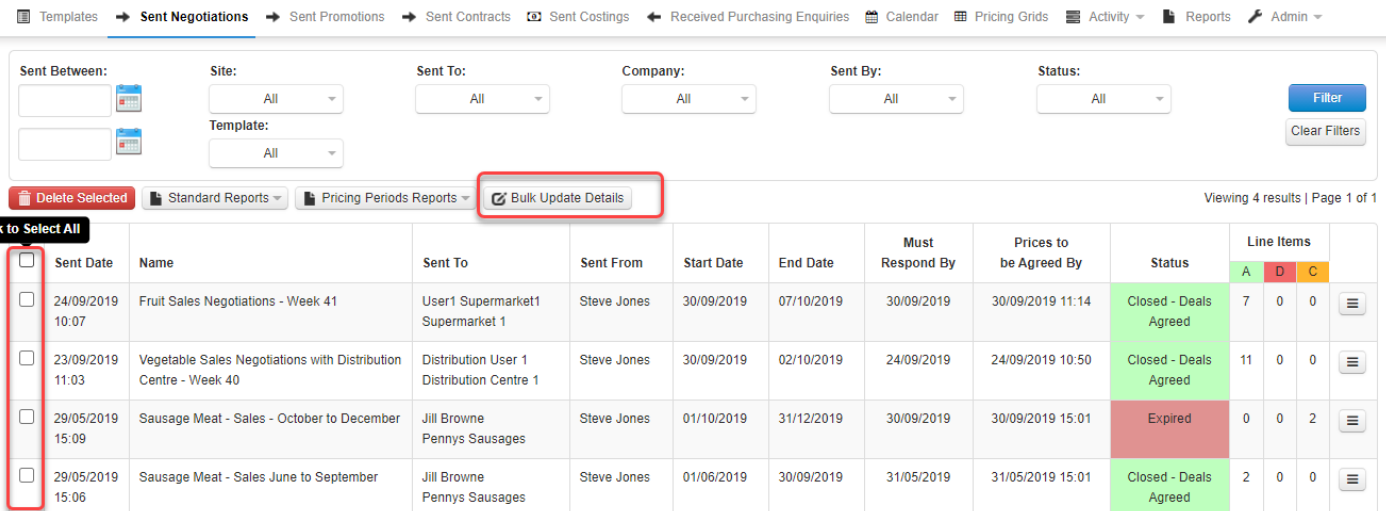
Purchasing

Templates → Sent Negotiations → Sent Promotions → Sent Contracts → Sent Costings ← Received Sales Offers → Calendar → Pricing Grids → Activity → Reports → Admin

Site: All | Created By: All | Product Category / Type: All | Template Type: All selected (4) | In Use: Yes | Filter | Clear Filters

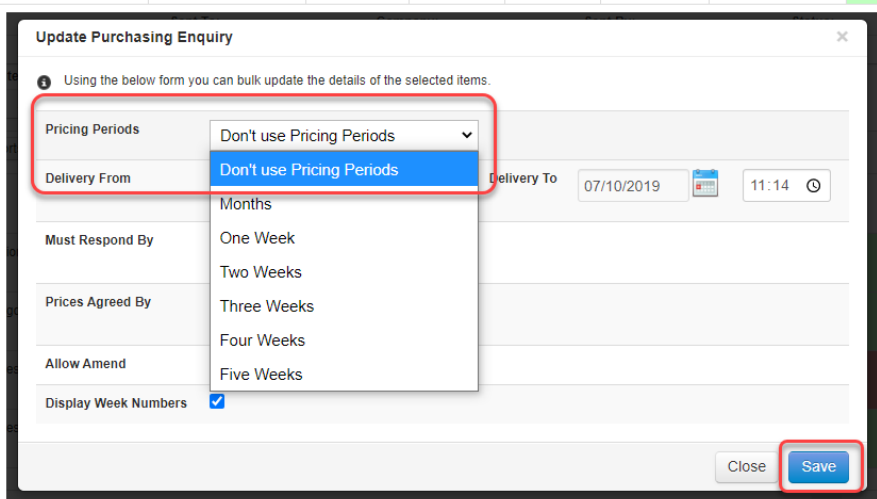
+ New Template | Delete | Import / Export | Duplicate | Update Dates | Quick Send | Search Templates...

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



The screenshot shows the 'Sent Negotiations' section. The 'Bulk Update Details' button is highlighted with a red box. Below the filters is a table with 11 columns: Sent Date, Name, Sent To, Sent From, Start Date, End Date, Must Respond By, Prices to be Agreed By, Status, and Line Items (A, D, C). The first four rows are selected with checkboxes.

to Select All	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
<input checked="" type="checkbox"/>	24/09/2019 10:07	Fruit Sales Negotiations - Week 41	User1 Supermarket1 Supermarket 1	Steve Jones	30/09/2019	07/10/2019	30/09/2019	30/09/2019 11:14	Closed - Deals Agreed	7 0 0
<input checked="" type="checkbox"/>	23/09/2019 11:03	Vegetable Sales Negotiations with Distribution Centre - Week 40	Distribution User 1 Distribution Centre 1	Steve Jones	30/09/2019	02/10/2019	24/09/2019	24/09/2019 10:50	Closed - Deals Agreed	11 0 0
<input checked="" type="checkbox"/>	29/05/2019 15:09	Sausage Meat - Sales - October to December	Jill Browne Pennys Sausages	Steve Jones	01/10/2019	31/12/2019	30/09/2019	30/09/2019 15:01	Expired	0 0 2
<input checked="" type="checkbox"/>	29/05/2019 15:06	Sausage Meat - Sales June to September	Jill Browne Pennys Sausages	Steve Jones	01/06/2019	30/09/2019	31/05/2019	31/05/2019 15:01	Closed - Deals Agreed	2 0 0



The screenshot shows the 'Update Purchasing Enquiry' dialog box. The 'Pricing Periods' dropdown menu is open, showing options: 'Don't use Pricing Periods', 'Months', 'One Week', 'Two Weeks', 'Three Weeks', 'Four Weeks', and 'Five Weeks'. The 'Don't use Pricing Periods' option is highlighted with a blue background and a red box. The 'Save' button at the bottom right is also highlighted with a red box.

Update Purchasing Enquiry

Using the below form you can bulk update the details of the selected items.

Pricing Periods: Don't use Pricing Periods

Delivery From: [] Delivery To: 07/10/2019 11:14

Must Respond By: []

Prices Agreed By: []

Allow Amend: []

Display Week Numbers:

Close Save

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

Selling

Templates → Sent Negotiations → Sent Promotions → Sent Contracts → Sent Costings → Received Purchasing Enquiries → Calendar → Pricing Grids → Activity → Reports → Admin

Sent Between: [] Site: All Sent To: All Company: All Sent By: All Status: All [Filter] [Clear Filters]

Template: All

Delete Selected Standard Reports Pricing Periods Reports Bulk Update Details

Viewing 4 results | Page 1 of 1

Sent Date	Name	Sent From	Start Date	End Date	Must Respond By	Prices to be Agreed By	Status	Line Items		
								A	D	C
24/09/2019 10:07	Fruit Sales Negotiations - Week 41	User1 Supermarket1 Supermarket 1	30/09/2019	07/10/2019	30/09/2019	30/09/2019 11:14	Closed - Deals Agreed	7	0	0
23/09/2019 11:03	Vegetable Sales Negotiations with Distribution Centre - Week 40	Distribution User 1 Distribution Centre 1	30/09/2019	02/10/2019	24/09/2019	24/09/2019 10:50	Closed - Deals Agreed	11	0	0
29/05/2019 15:09	Sausage Meat - Sales - October to December	Jill Browne Pennys Sausages	01/10/2019	31/12/2019	30/09/2019	30/09/2019 15:01	Expired	0	0	2
29/05/2019 15:06	Sausage Meat - Sales June to September	Jill Browne Pennys Sausages	01/06/2019	30/09/2019	31/05/2019	31/05/2019 15:01	Closed - Deals Agreed	2	0	0

Step 4: Enter required report Details and select Save

Create Pricing Period Report

Optional Columns

Please Note: You must select both 'Previous' options to see summary 'Last Price COGS', 'Change COGS' and '% Change' figures.

Previous Prices

Previous Quantities

Requested Quantities

Previous Prices / Quantities: Last Period

Supplier Ordering

Supplier Ordering has not been set up. Upon setting up a Supplier Order for Pricing Period Reports export, the ordering will be stored and will be used for future exports by your company. Click here to set up Supplier Ordering...

Selected Suppliers - Order: Supermarket 1

Group Handling: Ignore Grouping

Supplier Group Totals

Best Buying Option

Percentage Splits

Zero Left to Buy Entries

Close Create

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

The screenshot shows the system dashboard with the 'Trading & Planning' menu open. The 'Reports' option is highlighted with a red box. The dashboard also displays 'Overall Compliancy Levels by Supplier' with a pie chart showing 88.6% compliance and a table with the following data:

Compliance Status	Count
Compliant	372
Non-Compliant	33
Requires Action	15

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

The screenshot shows a list of reports under the heading 'Supplier Pricing Comparison - Saved Reports'. The 'Product Volume Summary' report is highlighted with a red box. The list includes the following reports:

- Supplier Pricing Comparison - Saved Reports**: Comparisons of the price per kg change of product(s) from negotiations sent to Suppliers
- Costing Comparison - Saved Reports**: Analysis of completed Supplier costings scenario pricings
- Costing Scenario Analysis**: Analysis of completed Supplier costings scenario pricings
- Supplier Pricing Review**: Summarizes the price per kg change of product(s) for a given date range for multiple Suppliers
- Purchasing Agreement**: Summarizes agreed volumes & prices across Sent Negotiations, Promotions, Contracts & Costings - Product Confirmations
- Product Volume Summary**: Summarizes the volume received of product(s) for a given date range for multiple sites.
- Volume Summary**: Summarizes the volume received by supplier(s) or their countries for a given date range for multiple sites.
- Total Value Summary**: Summarizes the volume received by supplier(s) or their countries and it's total cost for a given date range for multiple sites.
- Weighted Average Price**: Summarizes the weighted average price of product(s) received for a given date range for multiple sites.
- Weighted Average Price Comparison**: Compare weighted average prices (and volumes) for multiple suppliers/products received for a given date range for multiple sites.
- Weighted Average Price and Volume**: Summarizes the weighted average price of product(s) with their total volumes received for a given date range for multiple sites.
- Cost Of Goods Analysis**: Summarizes the change in Cost of Goods of products for a given date range and multiple sites.
- Cost Of Goods Analysis Comparison**: Compares multiple changes in Cost of Goods of products for a given date range and multiple sites.
- Product Yielded Price Comparison**: Compares product yielded prices for a given date range against weighted average prices.

Receipt data must be included to complete reports highlighted