Instruction Manual

BuyingClubSoftware.com

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Settings

Manage Settings

Here are settings to help run the software and are key to running a smooth buying club with the software.

Communication - Help

- Club Support Email Address
  - This is the designated email address for your club administrator, who will receive emails when shoppers click 'Help' and fill out the form. Failure to fill out this information will result in not receiving emails sent through the 'Help' link in the navigation.

To update the email address:
1. Click ‘edit’
2. Add the email address of the recipient for 'Help' emails (usually the Administrator)
3. Click ‘submit’

Customized Text

This section allows you to customize text or HTML that is displayed to members in various parts of the software to facilitate club administration and order management.

- Club Name
  - This is displayed as your club name to members and throughout the software.

- Homepage Notes
  - This text your homepage in the software. It’s what members see after logging in, and whenever they click Home.

- Product Notes
  - This text is displayed at the top of the product page

- Basket Notes
  - This text is shown in a shoppers Basket on the right side of the page.

To change any of this text:

1. Click 'edit'
2. Put text/HTML as you wish
3. Click 'submit'
4. Check your work

Finance - Sales Tax (%)

- Sales tax will be calculated and recorded in all areas of the software.

To update the sales tax:

1. Click ‘edit’
2. Ender the desired sales tax percentage
3. Click ‘submit’

Markups/Discounts

If used, this feature adds a line item showing a markup or discount on a shopper's entire order

To apply a Markup or Discount:

1. Click ‘edit’
2. Enter the markup or discount name and value (e.g., 10 for a 10% markup; -10 for a 10% discount).
3. Click 'Submit'.
4. Add an item to your basket and verify the changes.

Custom Checkout Line Items

Custom Checkout Line Items are for financial items that couldn't be predicted, separate from the order itself but needing to be calculated within a member’s checkout.

- You may add as many as you need, and it will clearly show through the software process.

- These amounts are added as final totals but are not part of the order necessarily.
- These are often membership fees, bottle deposits, a club charity, maybe another order in the buying club.

To add a new Custom Line Item:

1. Click ‘+ add new’
2. Enter the display name (e.g., Member Fee).
3. Click ‘Submit’
4. Verify the item in receipts

To edit a Custom Line Item that already exists:

1. Click 'edit'
2. Type the name you wish to display
3. Click 'submit'

To delete a Custom Line Item

1. Click 'delete'
2. Choose Yes to confirm delete
3. You should no longer see the Custom Line Item in the list

Membership

This is where you manage details of your Admins and Members.

Manage Members

+ add new

- Used to add new Members and Admin
  - Beware of who you make Admin. They have the same access to the software as you do. They can change passwords or anything.

sample member spreadsheet

- Only applicable during setup and gives you a spreadsheet we will upload for you if you like.

You currently have (X) members

- This tells you how many total members are in the software.

Admin users

- These users can see the Admin link, which is the door to all the admin functions. Be sure these are trusted people helping to run your operation.

Member users

- These users can only shop and do not see the Admin link in the navigation. They also see their basket from the previous order when logging in without a running order.

To add a new Member/Admin:

1. Click '+ add new'
2. Choose Member or Admin
3. Username
    a. Enter a unique username (we recommend using email addresses).
4. Password
    a. We suggest picking a 'default' password like 'golocal' that’s easy and you can give to everyone at first, or when they have to reset it
    b. Members can change their password if they wish under Account in the navigation. People sometimes lock themselves out and the Admin must reset the password for them.
5. Balance
    a. As the admin, if a user carries a previous balance you wish to include in the next order’s checkout, you can put it here to be labeled Previous Balance in receipts, etc.
    b. Balances are mostly managed in Manage Member Balances and would show here, but it works wherever you put it.
6. User can order?
    a. If yes, check the box.
    b. If no, uncheck the box. This is for removing members from orders but not deleting them.
7. Click Submit

Manage Member Balances

This tool manages all members' 'Previous Balance' in one place and in bulk.

- If you put in a balance in the member's individual profile, it will show up here and vice-versa.
- Member balances must be managed manually each order. Thus the 'reset' tool.

To reset all balances to zero:
1. Click 'reset balances'
2. Confirm by clicking 'Yes' in the popup window

To set member balances:
1. Enter the member's balance for each member
2. Click 'Save'

Manage Order

This is everything for managing your order cycle.

Products

You are able to manage products one at a time, or you may upload a spreadsheet. The system is made to be cyclical so you can upload or download a product database in whatever way makes sense for you.

You can manage products individually or upload a spreadsheet, allowing flexibility in your order processing.

upload product database

To upload a product database, you'll save your product spreadsheet as a CSV file in whatever software you are using.

- If you are using Excel and get an error, you can download [OpenOffice.org] or use Google Docs as solutions we know are free and work.

- These instructions assume you can make the CSV file.
- If using product photos, those get uploaded individually after uploading your database

To upload a product database:

1. Using the [sample product database] as an example, make your own using products from your vendors.
    a. Instructions for each column of the spreadsheet are shown by hovering over the first cell of each column.
2. Save your spreadsheet as a CSV file
3. In Products, click ‘upload products database’
4. Click ‘Choose file’
5. Choose your CSV file and click ‘Submit’
6. Confirm the upload and check for new products

NOTES

- Uploading replaces the product database that was there. Make sure you are done with the previous order processing before starting the new one.

To upload a product image:

1. Go in to Products and click ‘edit’ for any product you have a picture for
2. Where you see a button saying Choose File, click and choose your picture file
    a. Image can not be larger than 500kb or 1024x768
3. Check site to see if you see the picture

download product database

This downloads the products currently in the software.

view split products

Here you see a list of all the products involved in splits to help find errors.

product database template

This downloads our example product format spreadsheet we give people to use as a guide and manual.

+ add new

This initiates a blank form to input a single product. You do not need to use a spreadsheet unless you have many changes from order to order. Do what's comfortable for you and stick to it.

To add a product:

1. Click + add new
2. Category:
    a. choose from dropdown, you can program this in Product Categories
3. Brand/Farm:
    a. Put in the farm or distributor you wish to show members
4. Name:
    a. we recommend descriptive names because it is such a prevalent thing throughout the software.
    b. The example product format spreadsheet shows how we recommend doing it for the best listing in the software
5. SKU:
    a. if a product has no sku, use words (example: bigsfarmrainbowcarrot10bag)
        i. You MUST have a SKU number for the software to work as expected
6. Description:
    a. This is text only shown on the individual product page. The reality is most the time people do not look at that unless you give them a reason to.
7. Tool Tip:
    a. This is shown as a blue circle with an 'i' in it next to a product. We recommend people use this more than description because it is shown on the product list.
8. Inventory:

    a. Enter ‘-1’ for no inventory, or put in the proper inventory. If you enter 10, and sell 10, it will stop taking orders for that product.

9. Unit:
    a. Enter the appropriate text of whatever your unit is.
        i. Examples: 12oz Jar, 25# Bag, 1#
10. Unit Price
    a. Enter your price per unit, or each. If this is a case of something, it is what you are selling out of the case as a unit.
11. Units/Case
    a. If this is a case, enter the size as a number
        i. Examples: 12 jars of something, 5 pounds of something you sell per pound)
    b. If this is not a case, enter ‘0’(zero)
12. Min. Purchase Amount
    a. This is only a suggestion to members and does not affect anything. Some don’t use it.
13. Image
    a. Click to upload an image and you’ll be guided to upload from your computer
14. Meat/Chease?
    a. This is also called 'variable weights'
    b. Check the box if this is a product where the final weight is not known at the time of ordering, but will be weight at pickup and charged accordingly.
15. Is Taxable?
    a. Check the box if the product should be charged tax
16. Show product?
    a. Check the box if you would like to display this product for ordering
17. Click ‘submit’
18. Sale Item
    a. Put the sale price in the Unit Price
    b. Check the box if you wish to put the item on sale
    c. Put the original price in the box under the checkbox. This will be shown with a cross through it next to the sale price.
19. Check your work

Product Categories

Categories are shown to members while shopping and assist Admins when editing a product. You are initially given some categories that you may edit and sort to your liking.

You may also delete them all, or add to what's there, whatever you wish. This is a flexible and simple tool doing a very complex task.

To edit a Category

1. Click 'edit'
2. Make the necessary changes and click 'submit'
    a. Never have the same category ID. Unless you have a good reason to change what is there, we suggest you do not.

To add a new Category

1. Click '+ add'
2. Parent Category
    a. Leave as none, unless you want it to be a subcategory.
        i. Subcategories are mostly useful for large catalogs but under 500 products is probably not necessary.
3. Type in the name
4. Click 'Submit'

To sort categories:

1. Click 'sort categories'
2. Hover over a category where your cursor changes
3. Drag and drop to the position you wish
4. Click 'save'

Order Cycles

This is where you open, close, and 'Commit' order cycles once orders are complete.

To add a new order:

1. Click 'Add New'
2. Enter a unique name for the order with dates or another identifier.
3. Indicate if the order is open or closed
4. Click 'Submit' to save
    a. If the order is open, you should see it on the top right of the software
    b. If the order is closed, you will not see it, and only you the Admin can see the product catalog

To close the order:

1. Click 'Edit' next to the order name
2. Choose the option 'Closed'
3. Click Submit and the order will be closed
    a. This is shown by no longer seeing the name of the order on the upper right of the software.
    b. Members can no longer shop

You must close and commit the order before using 'Compile' or any tools on the right of the page. If you see any old order name, it is the old data and your latest order was not Compiled

'Commit' the order:

1. Make sure the order is Closed. If not, close the order
2. Click ‘commit order’
3. Say ‘yes’ if you are ready when the window pops up
    a. There is no going back from here
    b. You can edit everything using the tools on the right side of Admin after committing
4. The order will show in the list below of 'Committed' orders and you should now see the order you just closed display next to 'Compile' on the upper right of the Admin screen.

View Open Order

This shows the live order as it happens, helping identify issues while it's open.

- You can not edit anything here, but you will be able to when the order is closed and committed. While the order is open, take notes to deal with later.

- To see who has ordered a product and how much, click on a product.

Compile

This is where you prepare the order for vendors, making any necessary adjustments.

1. If you see the name of your order next to Compile, click 'Compile Order'
    a. If you do not see the right order name, go back to close/commit under Order Cycles
2. On this page you can grab the information from the order to send or deal with in whatever way works for you.
    a. Cut and paste the text on the page
    b. Click ‘get file’ on the lower right to download a spreadsheet file
    c. Click ‘get CSV backup file’ if for some reason that format did not work for you
3. Send to your farmers and vendors.

Edit Baskets

Here is a list of all members who have ordered, with tools for editing orders and adding a new member basket.

To edit a member’s order:

1. Click ‘edit member basket’ next to the member you wish to edit
2. Make changes and click ‘update order’

To add a new basket/order:

1. On the right, choose the member to create a basket for
2. Select a product to add to the order
3. Type a quantity and click ‘Create’

To update a product quantity:

1. Click ‘edit member basket’ next to the member you wish to edit
2. Change the quantity for the product(s) you wish to change
3. Click ‘Update Order’
4. You should see your changes

To add a new product to a basket/order:

1. Click ‘edit member basket’ next to the member you wish to edit

2. On the upper part of the page click '+ add product to invoice'
3. Search for the product somehow using any field you wish
4. Click the product you wish to add to the basket
5. Type in how many you want
6. You will see the new product in the basket

To delete a product:

1. Click 'edit member basket' next to the member you wish to edit
2. On the right of each product is a red X. Click it
3. A window pops up to make sure you want to do this, click Yes
4. The product should be gone from your basket

Edit Splits

1. Click Edit Splits to see a list of products involving splits from the order
2. Click 'edit split' for whichever product you wish to make a change to
3. If you are already a part of the split
    a. Change the amount next to your name
    b. Click Save
    c. You should now see this full case in Compile
4. If you are adding to it with a new user, under Create Order on the left choose the user adding to the split.
    a. Type in the quantity to add to the split
    b. Click 'create' to create the order for the new user being added to the split.
    c. Under Unattached Orders, you should now see the order you just made.
    d. Drag and drop the order box created in to the box of the split on the right
    e. Click Save
    f. You should now see this full case in Compile
5. If you are adding multiple people to a split including you who is already part of the split, refer to whichever technique you need above.

Compile Order

1. Click Compile
2. Wait while the system creates a Purchase Order on the screen

3. Ideally, go through the order if you feel you need to or move on
    a. You could print out or make a PDF of this page
4. Click the link at the bottom to download a spreadsheet file of this page
    a. You can send the spreadsheet by email, split it up in to individual orders to different suppliers, whatever you need to do.

Prep for Delivery, Splits & Checkout

Receipts

1. Click Receipts
2. Choose how you would like to print the page
    a. **Save Time or Paper with Page Breaks?**
        i. No Page Breaks
            1. Uses less paper
        ii. Several Receipts per page
            1. Uses less paper
        iii. One receipt per page
            1. gives you something to give out or just be orgranized that way.
        iv. Include Checkout Line Items
            1. This includes line items normally seen at checkout that may include adjustments. If this is the final receipt going to the customer, you may want to include this.

Split Sheet (who gets what list - list of orders by product)

1. Click Split Sheet
2. Print it, make a PDF and email it, or have everyone access it with whatever device they are using to carry out the split process.

Update Taxable Products

1. Click Update Taxable Products to see all the products that are a part of the order
2. Check the boxes on products you wish to collect tax on and click Save
3. Those products will update with the tax calculation for every user who ordered one of those products based on the tax amount you put in Settings

Checkout

Update Orders Pre-checkout

1. Click Adjust Weights by Product
2. Click ‘update product’ for the product you want to update the weight or price for
3. Adjust Weight
    a. In the list of users who ordered the product on the left, update the weight
    b. Click Save & Continue to stay on the page, Save & Done to go back to the product list
4. Product Changes?
    a. Make changes to the unit or price/unit here
    b. Click Save & Continue to stay on the page, Save & Done to go back to the product list
5. You should now see adjustments on the users you just updated in Receipts & Checkout

Updating Undelivered Products

When a product was ordered but does not arrive, there are two options for handling it. Make your choices, and click Process Selected.

1. **Delete** When deleting a product, it will not show up in receipts or during checkout and each member's invoice will be adjusted appropriately.
2. **Out of Stock** When a product is marked as out of stock, it will be shown with a line through it and the cost will be zeroed out. Showing the customer the product was ordered but not delivered.

After making the change, you can look at Receipts and Checkout to make sure all is well for the customer’s arrival to pickup.

Checkout Order

All final reconciling of a member's order and payment is recorded here. If you need to add a product that is not shown here, click 'add product to invoice'. To edit the quantity and save the financial changes below, click 'Save Order' after you make changes.

1. Click ‘checkout member’, or Create New Basket (below)
    a. _ add product to invoice
        i. Search to find a product to add
        ii. Click the product you wish to add in the search result

        iii. Enter the amount you want to order and click Add Product
        iv. You should see it on the checkout/receipt now
    b. These fields are for you to address other accounting needs and can be customized to reflect your group specifically
        i. Pre-Subtotal Adjust
            1. Adds to the sub-total before the markup/discount is adjusted
                a. If you are not doing a markup/discount leave empty
        ii. Previous Member Balance
            1. If the member owes for a type of dues. An accountant-role person can put this into the system anytime before the pickup/checkout or added on the spot.
        iii. Final Adjustment
            1. Any other non-order
        iv. Other custom line items you can create to deal with any situation the group may want to look at on receipts and in records of the order. Like Bottle Deposits or Membership Dues or chipping in for a big party.
    c. Record the payment type and amount
    d. Enter any checkout notes
    e. Save & Continue to stay on the page, Save and Done to return to the list of checkouts, Print for a printout a receipt, or Email to email a receipt.

Create New Basket

Used for any member who did not take part in the original order being dealt with.

1. Using the drop-down menu, choose the member to create a basket for
2. Click Create
3. See previous instructions for building this new order at Checkout time

Post-checkout Money Management

Get Exports

This spreadsheet serves as a backup to the order, providing detailed information for any accounting role to work with.

1. Click Get Exports
2. *Wait for the system to collect data.*
    a. If you have a big order and lots of members, this may take some time be patient
3. Click ‘get completed order backup’ that will download the spreadsheet to use as your backup and/or financial record