



## **WNC Farm To Table Local Food Connect User Manual**

**\*Note: This is currently a live document**

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## Benefits of Going Online:

- More exposure: new and larger network of customers
- Maximize your productivity: managing your sales and products all in one place will consolidate your data and save you time
- Manage inventory of in-person and online markets all in one place
- Get paid faster and more reliably
- Grows and strengthens the local food ecosystem
- Consolidated harvest lists





## Weekly Shopping Cycle Schedule

	Monday	Tuesday	Wednesday	Thursday	Fri	Sat	Sunday
PRODUCER	Pick tickets are sent to your email around 5 AM	You deliver packed orders to WNC food hub	You enter your new products and adjust inventory by Wednesday midnight	Shopping window is open- you can still update product availability during this time if you wish, but you cannot change prices for listed products			
CUSTOMER	Ordering closes Monday at 12:30 AM	Final order confirmation sent Tuesday 12:30 AM	Pick up orders, customers are sent reminders at 12:05 PM	Ordering window opens Thursday 12:30 AM			Unconfirmed order reminder sent at 8 AM
HUB	Aggregation day	Aggregation day	Distribution day for customers	Run credit card transactions for past period's orders			

## Creating an Account:

In order to add you as the first producer for your storefront, we have to do so from the admin back end. We will add the point of contact who is setting up the account as the first account user. You can add your additional users later on and there is no limit on the number of users per farm. Once we add you as a user, you will receive this email:

 Print  Close

### WNC Farm to Table Invitation

WNC Farm to Table <support@wncfarmtotable.com>

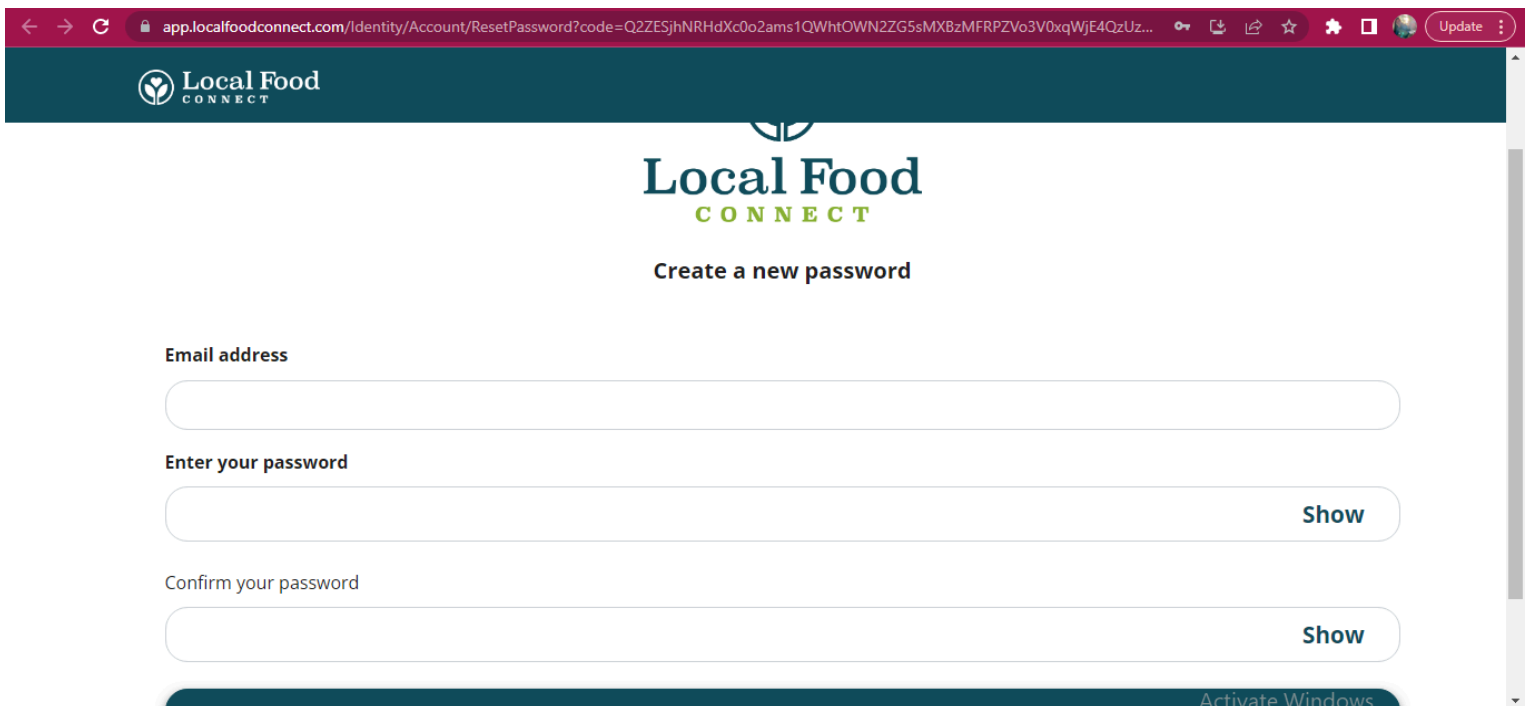
Thu 7/27/2023 12:41 PM

To: E. Claire Leipold <claire@wncfarmtotable.org>


An administrator at WNC Farm to Table has sent you a request to join the site. [Click here](#) to setup a password and log in.

The link in this email will expire after 24 hours. If your link has expired, please contact the Market Manager of the site for another invitation email, or use the Reset Password page <https://app.localfoodconnect.com/Identity/Account/ForgotPassword> to generate a new email.

Click where it says, “Click here” and it will take you to [this page](#) below to create an account:



app.localfoodconnect.com/Identity/Account/ResetPassword?code=Q2ZESjhNRHdXc0o2ams1QWhtOWN2ZG5sMXBzMFRPZVo3V0xqWjE4QzUz...



**Local Food**  
CONNECT

Create a new password

Email address

Enter your password Show

Confirm your password Show

Activate Windows

We recommend you bookmark this tab so it's easy for you to find again in the future. Once you create your login, please put in the required information. You can edit this information later.

# DASHBOARD

When your account is set up, you will be taken to your dashboard, or “Home”:

The screenshot displays the Local Food Connect dashboard for user L McBride. The interface includes a navigation sidebar on the left with icons for Home, Sell, Harvest, Pack, and Distribute. The main content area shows the following information:

- Home**: L McBride
- Sales to be distributed**: 7/27/2023 - 8/2/2023
- Sales Activity**: 7/20/2023 - 7/26/2023
- WNC FARM TO TABLE**: \$0.00, 0 orders

At the bottom of the dashboard, it indicates "Year to date" and "Activate Windows".

The dashboard provides the following information:

- Orders that are to be distributed in the upcoming week. You can click on the amount in that field to be taken to the Harvest report.
- Your sales activity from the most recent period and the year-to-date
- Any products with low availability (defined as any item with a quantity less than 5 units remaining)

# SELL PAGE

The Sell page is where you can list your products and the quantity of each product you have for sale in each market. Here is also where you add new products to sell and edit your existing products. You can also add markets. Initially, the “All Markets” tab is selected, showing all products you have for sale in every market. The “Show unlisted products” button/ slider can be used to look at only listed products, which may be useful if you have a long list of products that changes throughout the seasons.

Your support admin at WNC Farm to Table may have already assigned products to you, and these will show up here.

The screenshot displays the 'Sell' page of the Local Food Connect application. The browser address bar shows 'app.localfoodconnect.com/sell'. The page header features the 'Local Food CONNECT' logo and user information for 'L McBride'. A sidebar on the left provides navigation options: Home, Sell (active), Harvest, Pack, and Distribute. The main content area includes a 'Show unlisted products' toggle (currently turned on), a search bar, and a dropdown menu for 'All Products (10)'. Below this, a list of products is shown, each with its name, quantity, and availability status:

Product Name	Quantity	Availability
Carolina Gold Rice	2 Cup Bag, 2 lb Bag	None available
Eggs, Chicken	Dozen	None available
Ground beef		None available
Lions mane		None available

An 'Activate Windows' watermark is visible in the bottom right corner of the screenshot.

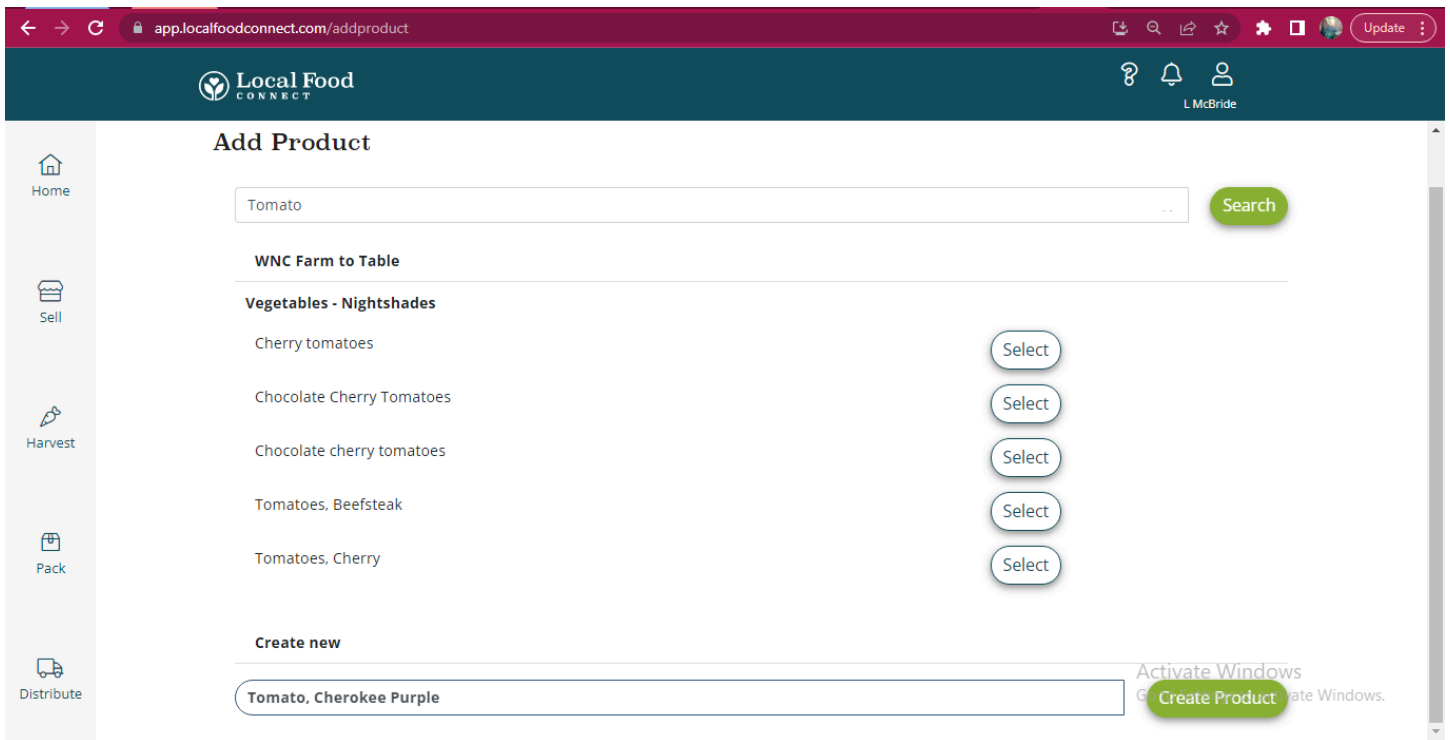
**To add a product to your markets**, hit the plus button in the top right corner of your sell page.

In this example, I am selling Cherokee Purple Tomatoes. When first searching, please use the most generic word possible, in this case, “Tomato”. This will pull up all products already created in the system (this catalogue is called the Global Product List). Doing this helps us because it ensures there aren’t multiple repeats of the same product in the system, and it helps you by creating more accurate reports. It also saves you time, as the selling units may already be set up in the way you prefer. Here you can see there are two copies of “chocolate cherry tomatoes”, which may cause inaccurate reporting data later.

The screenshot shows the 'Add Product' interface in the Local Food Connect application. The browser address bar indicates the URL is `app.localfoodconnect.com/addproduct`. The page header includes the 'Local Food CONNECT' logo and user information for 'L McBride'. A sidebar on the left provides navigation for 'Home', 'Sell', 'Harvest', 'Pack', and 'Distribute'. The main content area is titled 'Add Product' and features a search input field containing 'Tomato' with a green 'Search' button. Below the search results, a section titled 'WNC Farm to Table' lists products under the category 'Vegetables - Nightshades'. The products listed are: 'Cherry tomatoes', 'Chocolate Cherry Tomatoes', 'Chocolate cherry tomatoes', 'Tomatoes, Beefsteak', and 'Tomatoes, Cherry'. Each product entry includes a 'Select' button. At the bottom of the page, there is a 'Create new' section with a search input field containing 'Tomato' and a green 'Create Product' button. A Windows watermark is visible in the bottom right corner of the screenshot.



Since “Cherokee Purple Tomatoes” don’t exist in our global products list yet, go ahead and type it into the “Create New” bar and hit “Create Product”



**NOTE:** Our products are sorted into categories, and any products you create need to be approved and put into a category by a market admin before they will show up on the market storefront website. You will receive a little pop up message telling you so, just click it and it will go away.

**NOTE:** If the product you’re searching for does exist and is in the list, please skip to the “ADDING A PRODUCT THAT ALREADY EXISTS IN THE GLOBAL PRODUCT LIST” section

Next it will ask you to assign this product to a market. Here you can only choose one, but you can add this product to multiple markets later on.



Next it's time to set up your product. Below are definitions to each section.

**Tagline:** The title of your product and what people will see first beneath the picture.

**Harvest Unit:** The harvest unit is what you and your crew use to quantify how much of a product to harvest when you need to fill orders. For example, if you sell potatoes in 5lb bags, 20lb boxes, and 800lb bins, you might harvest those in terms of “pounds”, “bushels”, “bins”, or something else. The harvest page will convert orders for all your different selling units of a product into a single quantity of harvest units needed to fill those orders.

**Tags:** Tags allow you to filter your product list based on tags you assign to products. You can make up any tags you want, and they will need to be assigned to products one by one. You can then filter for all products with a given tag on the Harvest and Pack pages.

**Edit Photo:** Product images are specific to each market; adding or changing an image for one market will not affect any other markets. Click the market name above the product image to check and edit the product image for that market. NOTE: ALL photos, representing products being sold, must be owned/ taken by the producer. Producers are not permitted to use stock photos, as this could be a violation of copyright laws. Any producer found using stock photos will be notified, and the photo replaced with the default WNC Farm to Table logo.

**Product Information:** Where you can edit the product details that affect how the product shows up on LFM Market storefronts. These include Pricing Method (aka Product Type), Base Unit, Tagline, Description, Deposit, Attributes, and Subperiods.

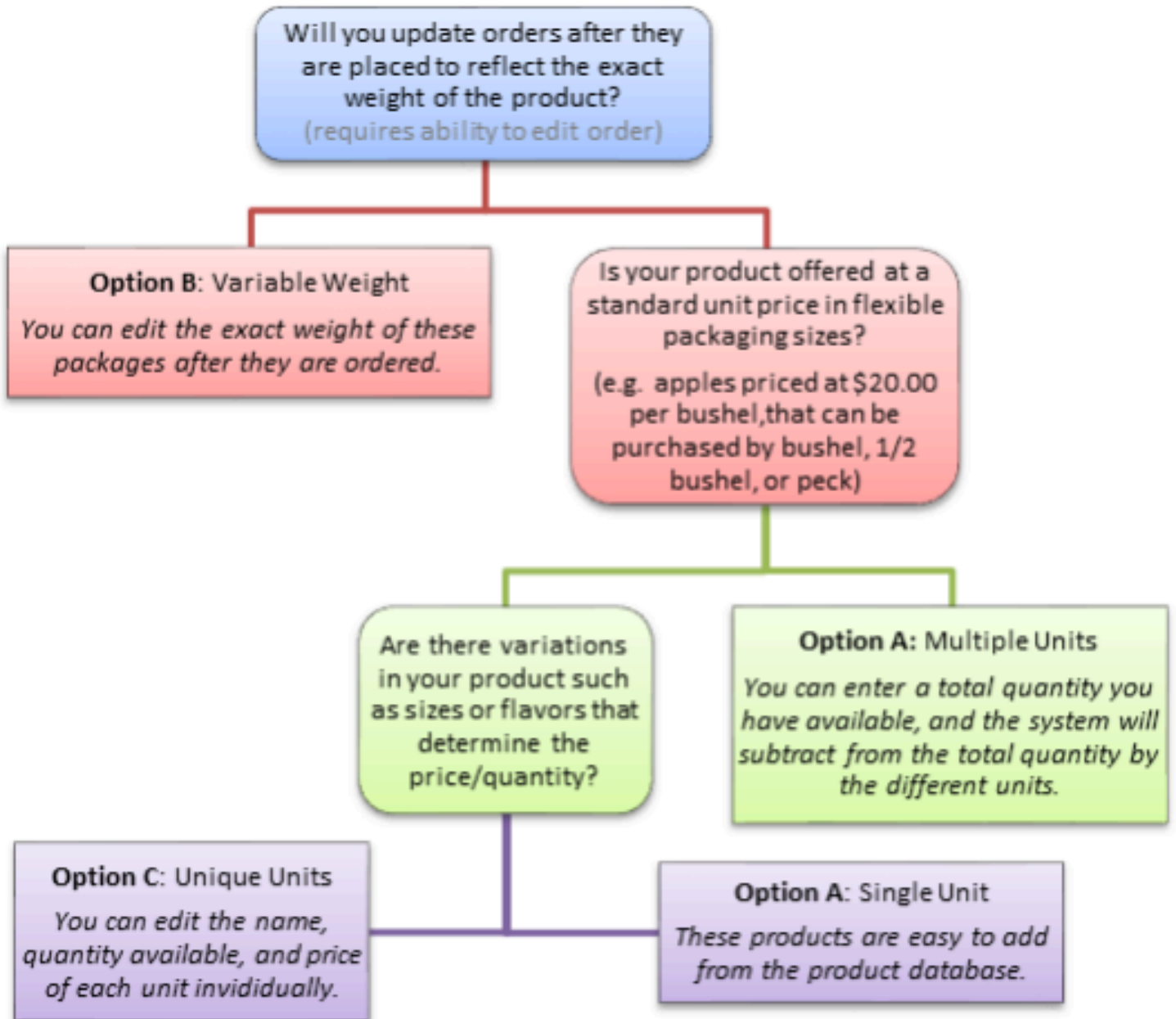
The screenshot shows the 'Local Food CONNECT' interface. The top navigation bar includes a home icon, a search icon, a notification bell, and a user profile icon labeled 'L McBride'. The left sidebar contains icons for Home, Sell, Harvest, Pack, and Distribute. The main content area is divided into sections: 'Product Type' (set to 'Type C'), 'Use Harvest Unit and Multiplier in Harvest Reporting' (checkbox), 'Tagline' (text input: 'Tidewater Grain Carolina Gold Rice the oldest medium-grain rice grown in the Americas', character limit 85/100), and 'Description' (text input: 'The oldest medium-grain rice grown in the Americas, grown right here in North Carolina!', character limit 85/100). A Windows watermark is visible in the bottom right corner of the description area.

### Pricing Method/ Product Type:

- **Type A:** One shared inventory with multiple selling units
  - Recommended for most produce
- **Type B1:** individual selling units weighed separately, you will enter an estimated weight and go back and edit the exact weight after it is purchased
  - Recommended for meats and cheeses (or other pre-packaged products)
- **Type B2:** one unit of sale, multiple ordered quantities
  - Recommended for bulk produce
- **Type C:** multiple selling units each with its own availability and price
  - Recommended for things like eggs, jam, honey, and bread

Please refer to the flow chart below if you still are not sure how to classify your product:

## Guide to Choosing your Product “Type”



## Use Harvest Unit and Multiplier in Harvest Reporting: Check this box

**Base Unit:** Describes the selling units of a product.

- “Each”: Selling units that describe specific quantities
  - Examples: “Head”, “1 lb. Jar”, or “12 ct. Case”
- “Pounds”: Selling units that describe weights
  - “25 lb. Case”, “1 lb. Package”, or “8oz. Bag”
- When creating a product, you need to specify a base unit. Availability of Type A products is determined by their base unit. Products that need to be sold for their exact weight (using Type B pricing) need to have “Pounds” as their base unit.



Summer Squash - Zucchini, assort...

*Against the Grain*

Great for sautes or the grill

1 lb - \$4.06

**Tagline:** This is confusing, but this tagline is different than the first tagline(/title). This one is the first line the customer sees, as seen in the image to the right.

**Description:** The customer will see this when they click on your product. Here you can add a little more about your product if you wish, such as specific farming or harvesting practices, recipes you could use it in, your favorite ways to eat it, really whatever you want. You also don't have to put anything if you choose.

**Deposit:** An additional amount of money that will be collected for each unit of the product sold. All product units have the same deposit amount. Taxes and markups do not apply to deposits. Deposits show up as separate amounts in Revenue reports and the Deposits Collected by Producer report.

**Storage:** Storage needs can unfortunately only be edited by admin at this time, so if the preset storage need is incorrect, please let us know.

**Attributes:** Certifications or specific aspects of the product that customers can search products by. Please only select attributes that are accurate for your products and make sure we have copies of the appropriate certifications if necessary. Our current attributes are SNAP/EBT Eligible, Double Up Food Bucks Eligible, USDA Certified Organic, Certified Biodynamic, Certified Naturally Grown, Animal Welfare Approved, Vegan, GMO Free, American Grassfed Association, Gluten Free, Organic Uncertified, Pesticide Free, Hydroponic, Conventional. Customers can search through products listed on our page by specific attributes.

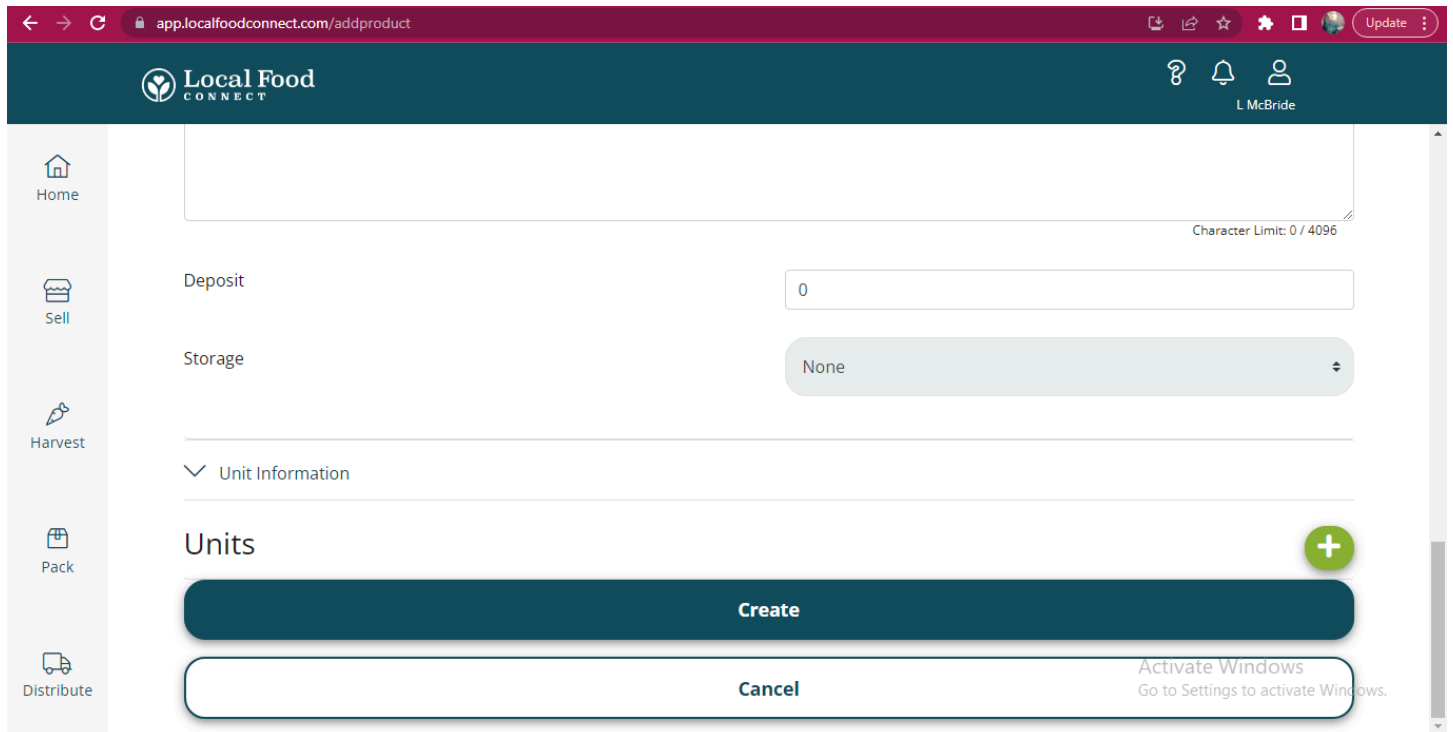
The screenshot displays the 'Local Food CONNECT' user interface. At the top, there is a navigation bar with a home icon, a help icon, a notification bell, and a user profile icon labeled 'L McBride'. Below the navigation bar is a sidebar with icons for 'Home', 'Sell', 'Harvest', 'Pack', and 'Distribute'. The main content area shows configuration options for a product:

- Deposit:** A text input field containing '0.00'.
- Storage:** A dropdown menu currently set to 'None'.
- Attributes:** A row of 15 circular icons representing different certifications. From left to right, the icons are:
  - USDA Certified Organic (unchecked)
  - Certified Biodynamic (checked)
  - Certified Naturally Grown (unchecked)
  - Animal Welfare Approved (unchecked)
  - American Grassfed Association (unchecked)
  - Gluten Free (unchecked)
  - Organic Uncertified (checked)
  - Pesticide Free (unchecked)
  - Hydroponic (checked)
  - Conventional (checked)
  - SNAP/EBT Eligible (checked)
  - Double Up Food Bucks Eligible (checked)
  - USDA Organic (unchecked)
  - VEGAN (checked)
- Participating Sub-periods:** A list with 'Wednesday' checked.
- Unit Information:** A dropdown menu currently set to 'Unit Information'.

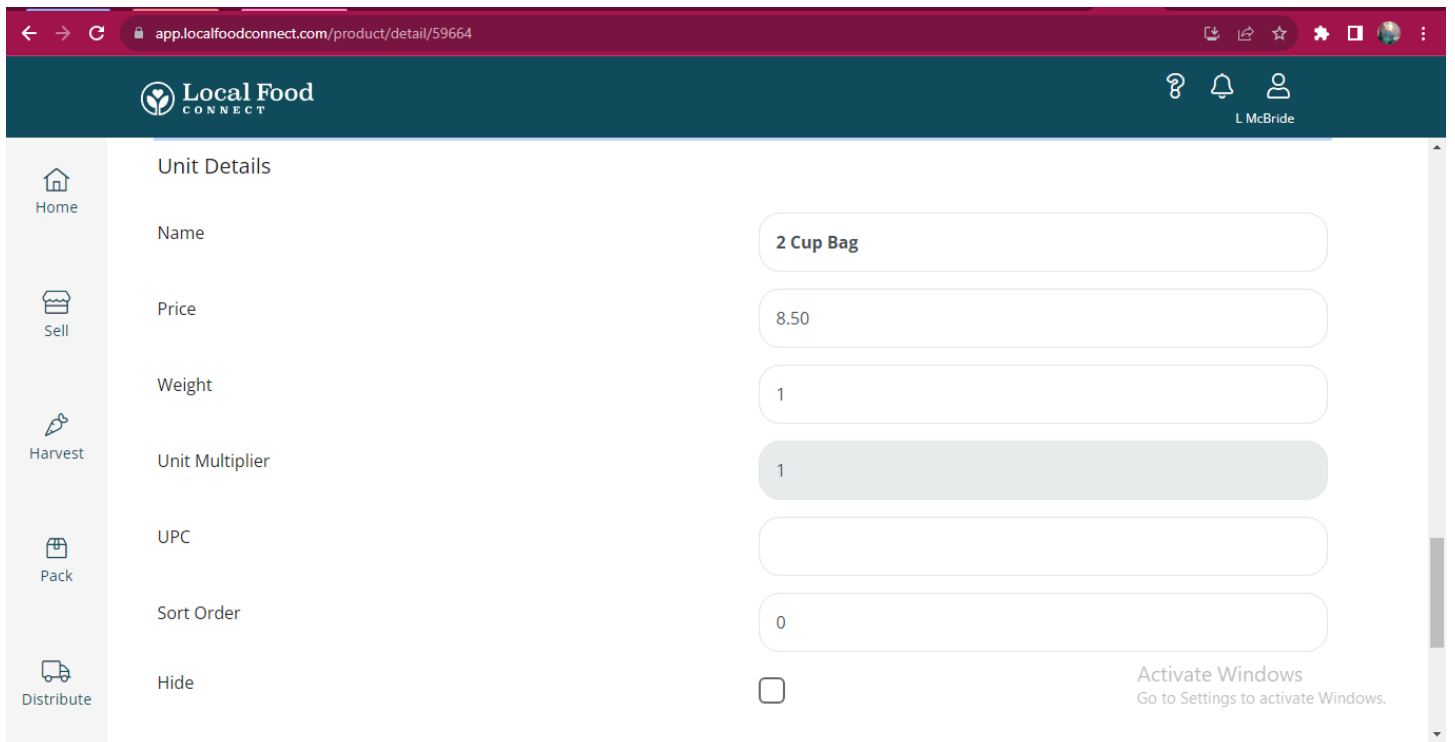
At the bottom right of the interface, there is a message: 'Activate Windows. Go to Settings to activate Windows.'

**Subperiods:** For LFM markets that have multiple distribution days for each period, a sub-period represents a specific distribution day during that period. For example, a market delivering on Tuesday, Thursday, and Saturday will have a specific sub-period for each of those days. Sub-periods may have a unique ordering window and often will have unique aggregation days as well. This is not relevant to WNC Farm to Table as of right now.

**Unit Info:** allows you to edit the information for each individual selling unit. Hit the green plus button to create your individual units of sale for each product.



For each unit, you'll set up it's details.



## Unit Details:

**Name/ Selling Unit:** Describes how and what the customer will purchase. You can create multiple selling units, as seen in our examples.

Lettuce: “Head” and “12 ct. Case”, “Bag”, “1/2 lb. Bag”

Ground Beef: “1 lb. Package” and “5 lb. Package”

Different selling units can also be used to offer a variety of colors, flavors, etc. When creating a product you’ll need to set up at least one selling unit.

**Price:** This is the price you want to be paid by WNC Farm to Table for your product. We will mark it up a little differently for each customer on their end.

### Weight:

- For Type B products: the unit weight is multiplied by unit price to get the total price. We recommend entering the highest possible weight so the approximate price for customers will only ever stay the same or decrease rather than increase when it comes time to pick up and pay. Once selling units are sold you can edit the actual weights of each specific unit to get accurate weight-based prices on the order.
- For Type A and C products, you don’t have to enter a weight here but can if you want to use that data in reporting (such as product reports showing total pounds of products sold).

**Unit Multiplier:** used when listing Type A products. Multipliers describe how much of the base unit is used up by the selling unit. In other words, the unit multiplier is how much you want to be taken out of your total inventory when someone purchases one of this selling unit. In the example of lettuce, the base unit is “each” and a “24 ct. Case” uses up 24 of those base units. The other selling unit, “head”, uses up just one base unit, so we set the unit multiplier to one so it will pull one from your total inventory every time someone purchases the selling unit of one “head”.

- Another example: red potatoes. A base unit of pounds with the selling units of 5 lb. Bag, 20 lb. Case, and 50 lb. Case. We would set the multipliers accordingly
  - 5 lb. Bag= Multiplier of 5
  - 20 lb. Case= Multiplier of 20
  - 50 lb. Case= Multiplier of 50
  - This way, you can enter the total number of pounds you have available and the system uses these multipliers to determine how many of each selling unit is available.

**UPC:** This is just an optional informational field that market admins can choose to make visible on customer invoices. You can ignore this section for now.



**Sort Order:** Determines the order in which the selling units appear under the product name on market storefront websites. If units have the same sort order number they are sorted alphabetically. Our default sort order for all products is the number 99.

**Hide:** Checking this box hides this selling unit from all customer types, which can be useful if you are out of that selling unit currently but will have it again in the future, or if you want only certain types of customers (like wholesalers or restaurants) to see it. Only admins can control the customer types that see that selling unit, so please reach out if this applies to you.

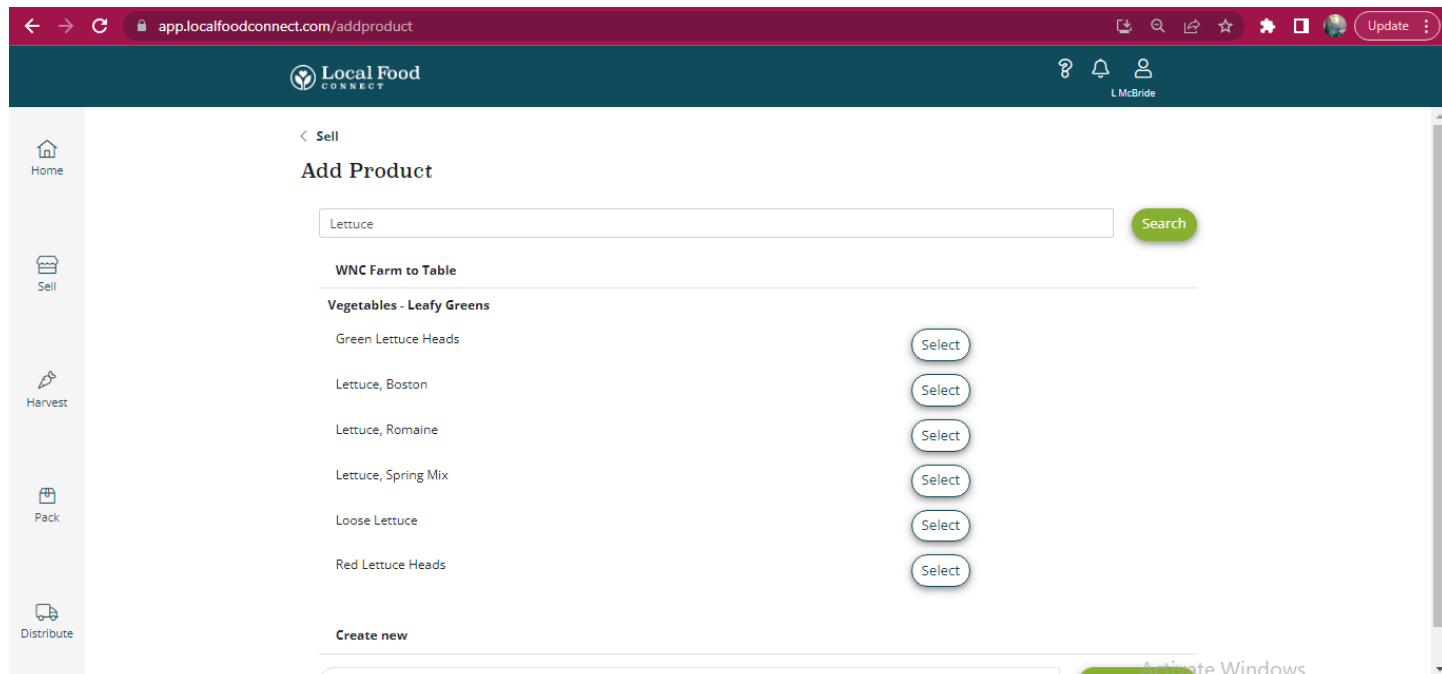
### **Harvest Details:**

**Harvest Unit:** You already set this up in the beginning of editing your product.

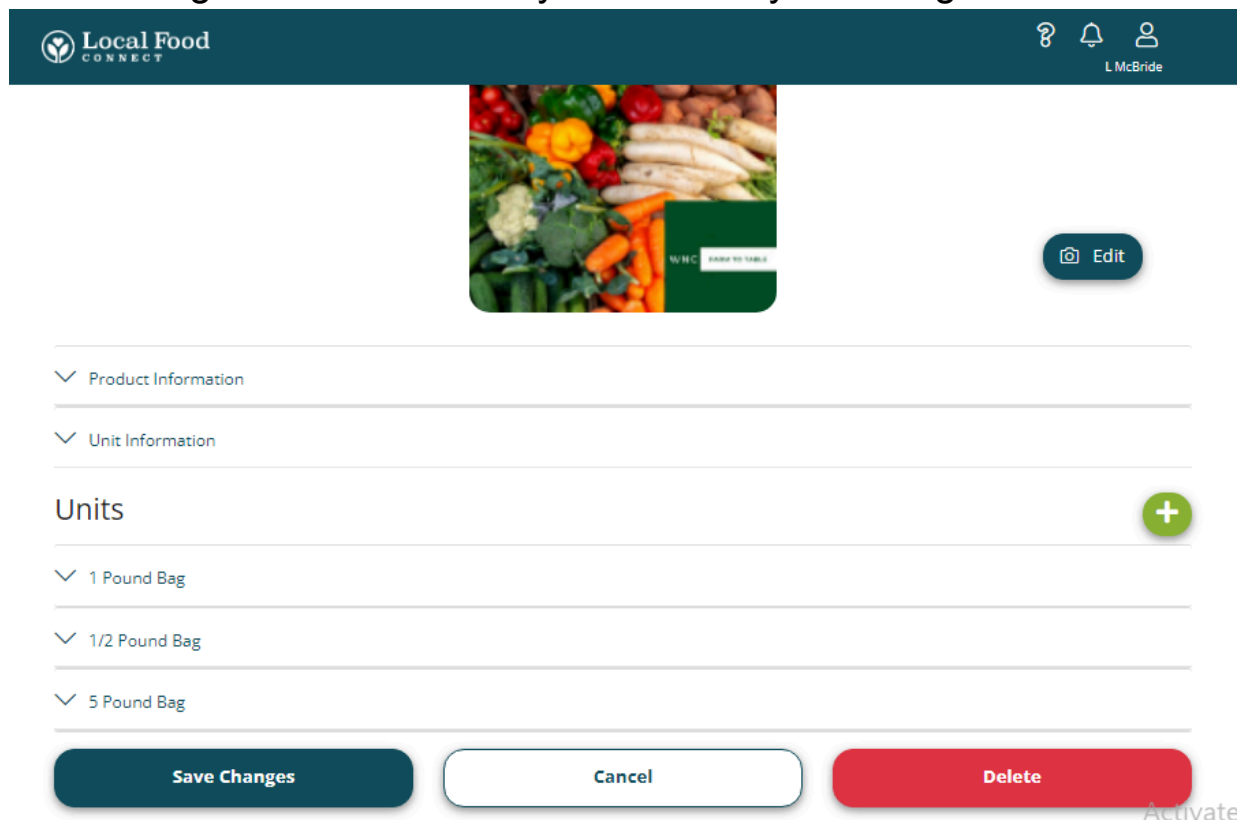
**Harvest Multiplier:** Defines how many harvest units this selling unit requires. Example: you harvest lettuce in totes that hold 96 heads, so a 24 ct. Case requires 0.25 of a harvest unit. Your selling unit of one Head requires 0.01 of a harvest unit. On the Harvest page all of the sold units will be combined according to their harvest multiplier and combined into a total number of Harvest Units needed for harvest day.

## ADDING A PRODUCT TO YOUR MARKET THAT ALREADY EXISTS IN THE GLOBAL PRODUCT LIST:

For this example, I'm selling bags of spring mix. First, I search a generic word, "Lettuce" and see what comes up.



The product I want to sell already exists in our system, so I go ahead and select "Lettuce, Spring Mix". Next, it'll take you to the page to edit your product information. The only difference will be that units already exist for this product. You can change these units to fit your needs by selecting each one.



## LISTING AND UPDATING PRODUCT AVAILABILITY:

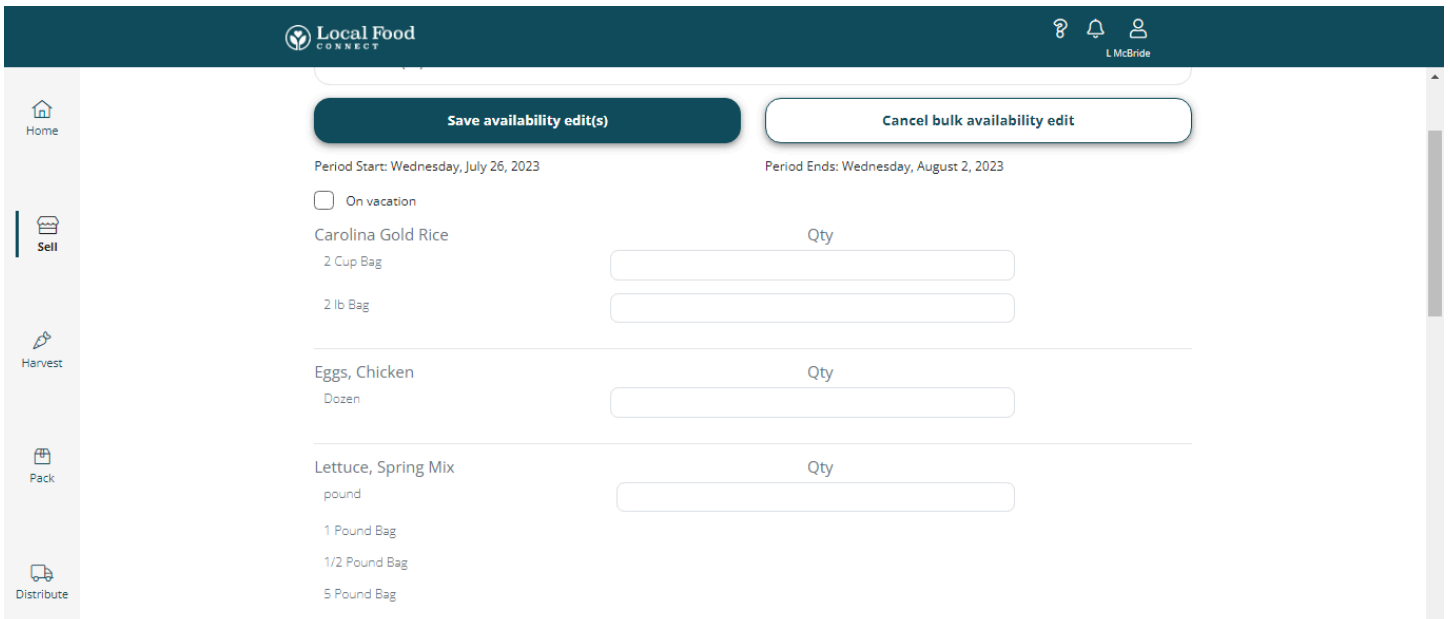
Select the market you would like to update availability for, and you can either choose “Bulk Update Availability” to update availability of each product you’re selling in that market, or select the > arrow on the product itself to update just that product’s availability across every market it’s in.

The screenshot shows the 'Local Food Connect' dashboard. At the top, there's a navigation bar with the logo and user name 'L McBride'. Below that, a toggle switch is set to 'On' with the label 'Show unlisted products'. The main content area has tabs for 'All markets', 'WNC Farm to Table Third Thursday Market' (which is selected), and 'Add Market'. A dropdown menu shows 'All Products (10)'. A 'Bulk Update Availability' button is highlighted. To its right, a date selector shows 'View prior availability: 7/26/2023'. Below this, the period is defined as 'Period Start: Wednesday, July 26, 2023' and 'Period Ends: Wednesday, August 2, 2023'. A list of products is shown, all with 'None available' status:

- Carolina Gold Rice  
2 Cup Bag, 2 lb Bag  
None available
- Eggs, Chicken  
Dozen  
None available
- Lettuce, Spring Mix  
1 Pound Bag, 1/2 Pound Bag, 5 Pound Bag  
None available
- Lions mane

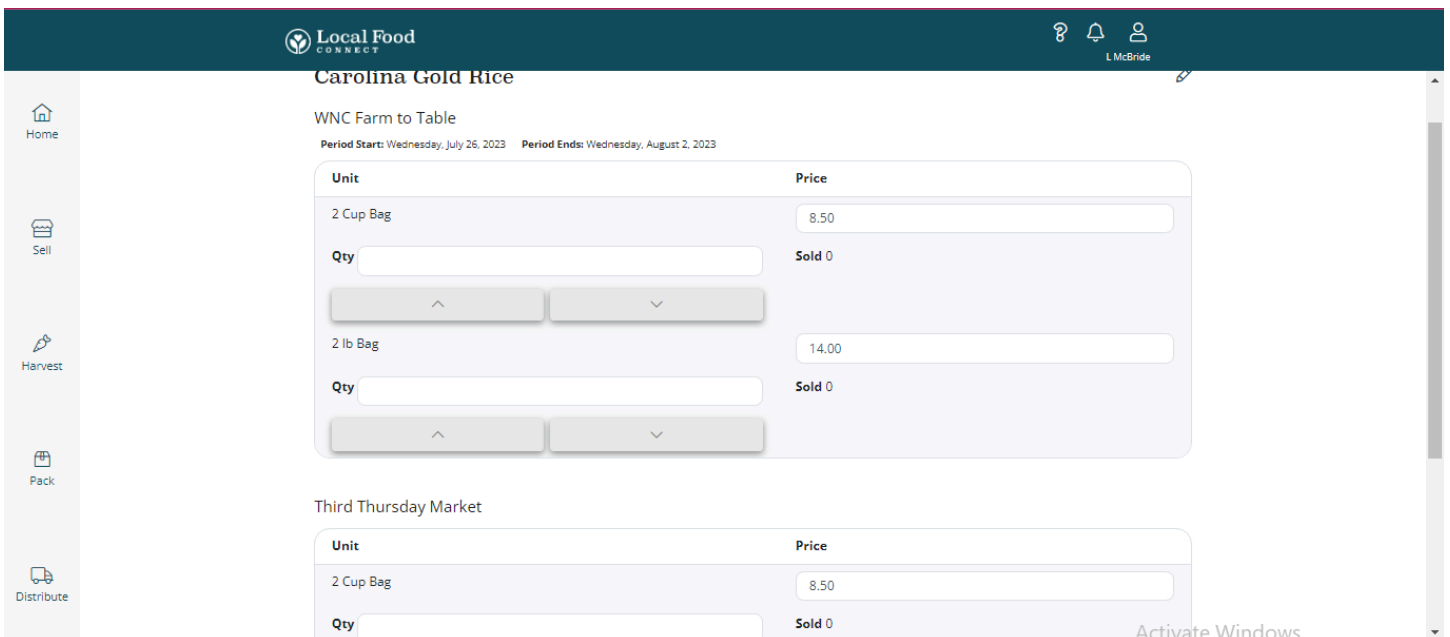
An 'Activate' button is partially visible at the bottom right of the product list.

NOTE: when a product sells out on the storefront, you’ll be notified by email. Upon logging in, sold out products appear in red on the dashboard, and you can select it to update the availability for that product.



If you hit “Bulk Update Availability”, it will take you to this page. Above you see Carolina Gold Rice, Chicken Eggs, and Bags of Spring Mix. Rice is classified as a Type C product because each selling unit has its own quantity. The spring mix is a Type A product, so each selling unit will pull from the total quantity you put in.

If you hit the arrow to update just one product at a time across multiple markets, it will take you to this page, where you can also edit the prices of your products:



## EDITING PRODUCTS:

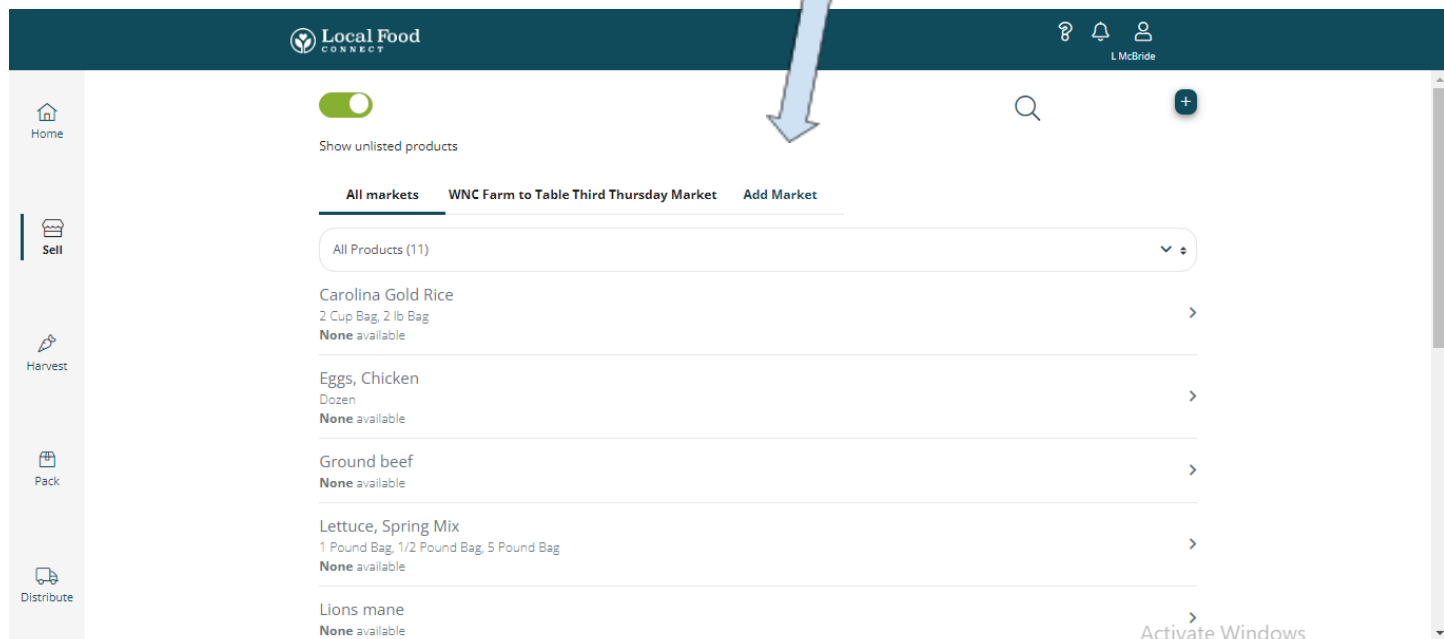
If you need to edit any information about your products or add pictures, start from your sell page. Select any product in your list and it will bring you to this page, where you will select the pencil icon in the top right corner. This will bring you to the product set-up page you saw when you first created your product. Here you can edit any details you need.

The screenshot shows the 'Local Food CONNECT' interface. At the top, there is a dark teal header with the logo on the left and user information 'L McBride' on the right. A left-hand navigation menu includes icons for Home, Sell, Harvest, Pack, and Distribute. The main content area is titled '< Sell' and features the product 'Eggs, Chicken' with a blue arrow pointing to a pencil edit icon. Below the product name, it lists 'WNC Farm to Table' and the period 'Period Start: Wednesday, July 26, 2023' to 'Period Ends: Wednesday, August 2, 2023'. Two product entry cards are visible: one for 'WNC Farm to Table' and another for 'Third Thursday Market'. Each card has a 'Unit' dropdown set to 'Dozen', a 'Price' input field with '4.00', a 'Qty' input field, and a 'Sold 0' indicator. A vertical scrollbar is on the right side of the page.

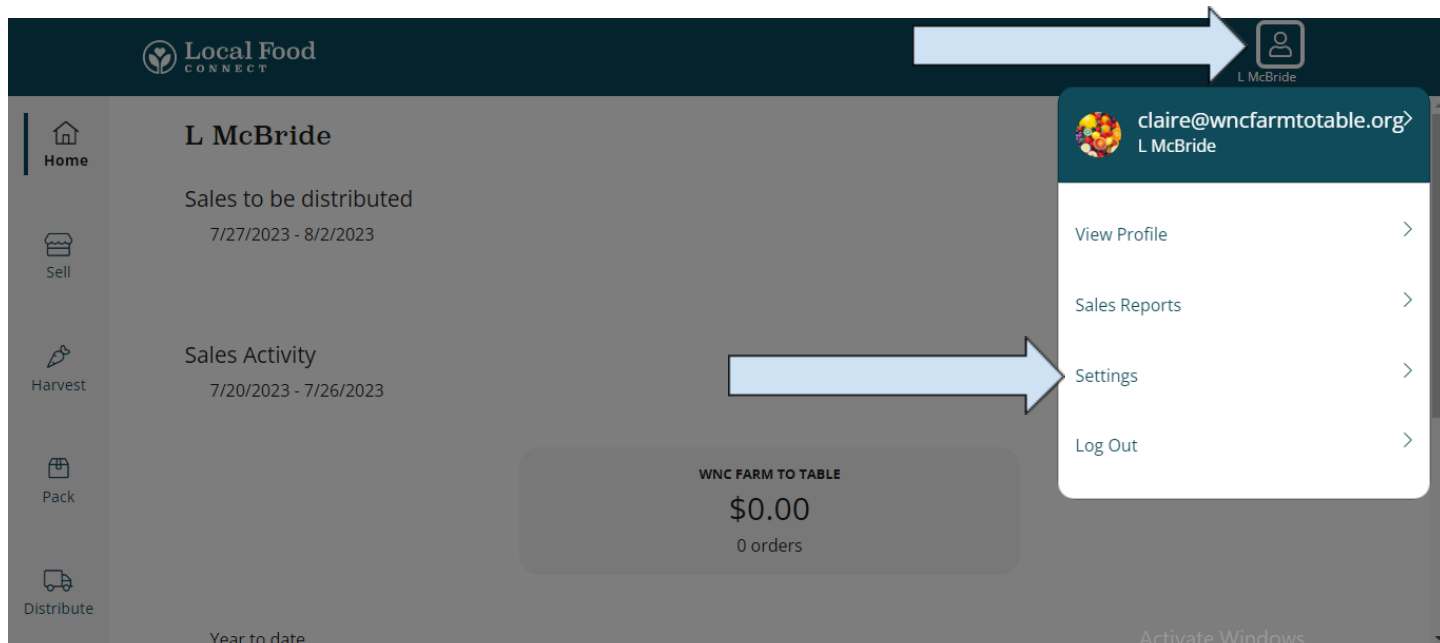
Activate Windows

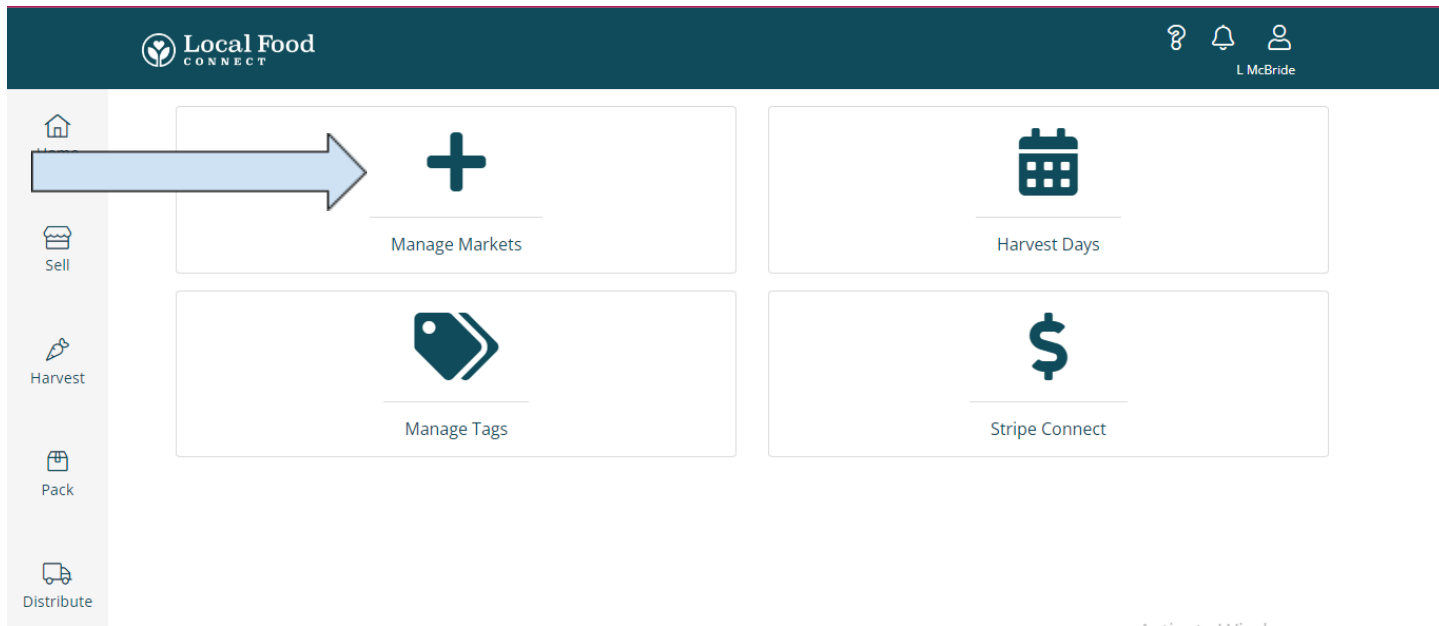
## MANAGING YOUR MARKETS:

You can reach this page either by selecting “Add Market” in the Sell page or through your settings (select your profile figure in the top right corner of your screen to access settings).

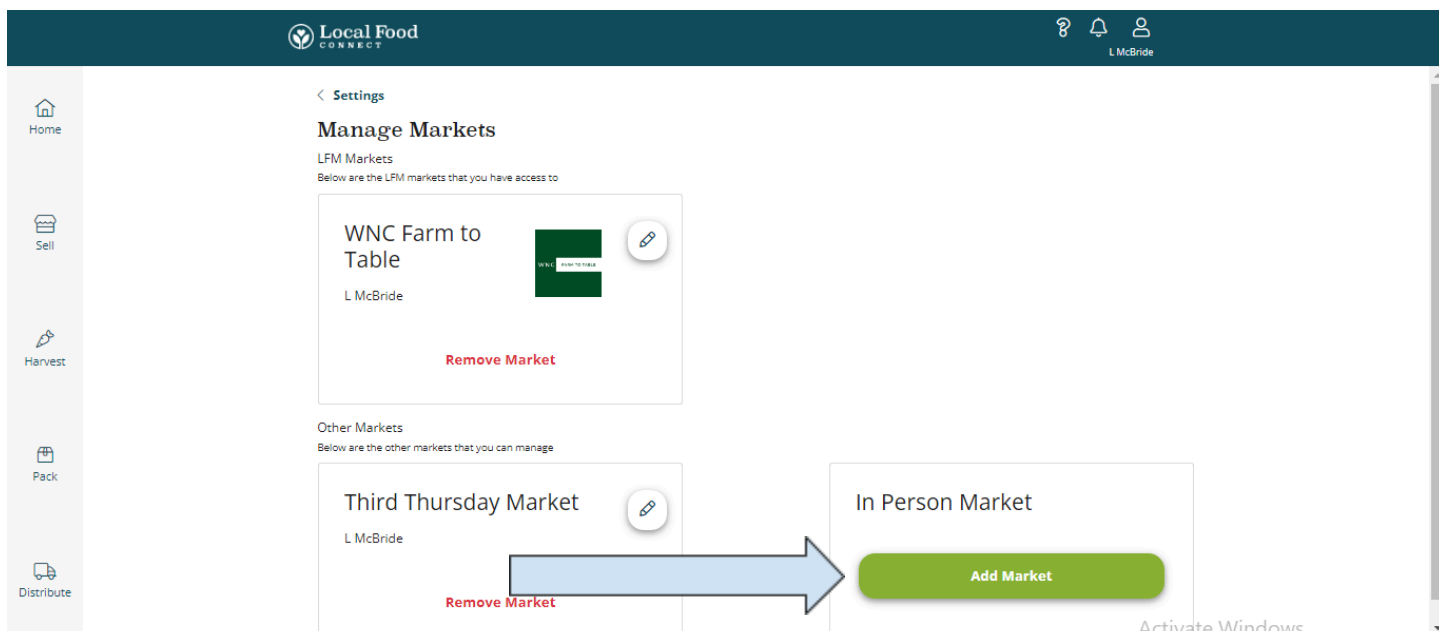


OR





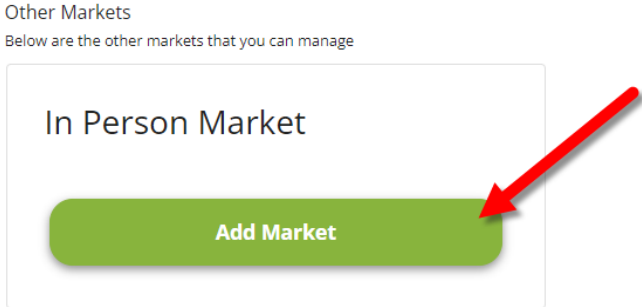
Either way will bring you to this page seen below, where you can add a market, delete a market, and edit existing markets. We recommend that you put all your avenues of selling into this page, so you can streamline your inventory and keep track of everything in one place.



## ADDING A MARKET:

In Person Markets allow you include products you want to harvest and pack for your direct sales in with the harvesting and packing you are doing for your LFM markets.

To add an In Person Market click the person icon on the top right and select Settings→Manage Markets, or use the Add Market link on the Sell page, as shown in the “Managing Your Markets” section above. At the bottom of the Manage Markets page is the Other Markets section where you can add an In Person Market.



- Assign the new In Person Market a market name and market day, and an address if you want to
- Next you will choose the Harvest Day for the market.
- Finally you will choose which of your products you want to make available in this market.


A screenshot of a web application interface for managing markets. At the top left is a green toggle switch labeled "Show unlisted products". To the right are a search icon and a plus icon. Below these are several market tabs: "All markets", "Beta2", "Off the Farm Sales" (which is underlined), "Mail Order", "Tail Gate", and "Add Market". A dropdown menu shows "All Products (2)". Below the tabs is a "Bulk Update Availability" button. The "Next Market Date" is listed as "Saturday, February 19, 2022". A list of products follows: "Apple, Granny Smith" (20 lb. Case, Bushel, Pound) with "None available" and a right arrow; and "Apple, McIntosh" (40 lb. case) with "None available" and a right arrow.



You can set up as many In Person Markets as you want, naming each one for each of your direct sales outlets and giving it a different market and harvest day, or you can just use one In Person Market for all of your direct sales. Once your In Person Market is set up you can allocate products to it each week on the Sell page.

## Pack



 Selected harvest date 2/16/2022

Use the calendar to change the selected harvest date.

Markets/Distribution Days ▼

Category/Tag ▼

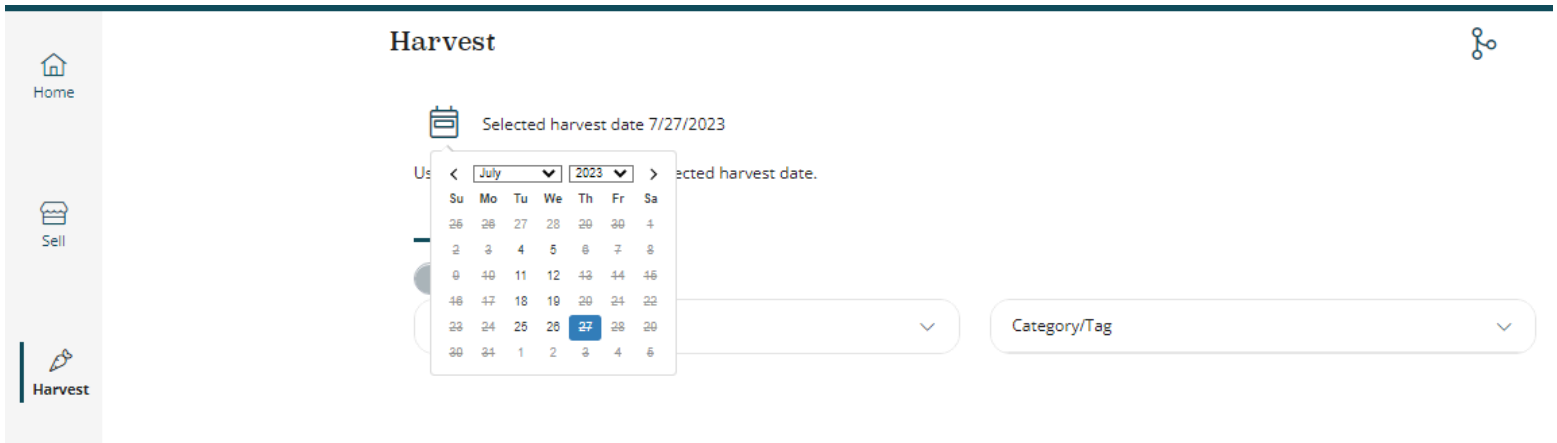
Product	Order		
<input type="checkbox"/> Apple, Granny Smith 13 Sold	20 lb. Case Packed <input type="checkbox"/>		
	<b>Order</b>	<b>Qty</b>	<b>Weight</b>
<input type="checkbox"/>	62941	3	
<input type="checkbox"/>	Saturday, February 19, 2022	10	

For In Person Markets, unlike LFM markets, all quantities you make available on the Sell page automatically get added in full to the Harvest and Pack pages. For example, if we want to harvest and pack ten 20lb cases of Granny Smith Apples for the in person market called "Off the Farm Sales" in the example above, we would make ten cases available prior to the harvest day of that market. Then those ten cases will appear, along with and LFM market sales, in our Harvest and Page pages and reports for that harvest day. In the example below, Order 62941 is an order from and LFM market and "Saturday, February 19, 2022" is the quantity we allocated to our in person market on the Sell page.

# HARVEST PAGE

The Harvest page allows you to generate pick lists for your harvest crews to use in the field. The pick list presents your products in terms of the total number of harvest units needed to fill that order. The instructions for your pick ticket are created by you in the product details, and you can go back and change them at any time.

At the top of the Harvest page is a calendar icon which you use to select the harvest date you want to work on.



**Harvest Date:** the day designated for harvesting the products you've sold. Yours are set automatically based on WNC Farm to Table's aggregation days (the days we expect you to deliver the product you have sold). You can change your harvest day in your settings if you have different days you need to harvest for different markets. The Harvest days you choose will determine how order information is aggregated into harvest reports and pick lists. If you assign all distribution days to the same harvest day, then your harvest reports will combine orders from all distribution days together.

Once you have selected a harvest date the page will display the products in the orders for the subperiod(s) assigned to that harvest day.

You can filter this list by market (if you participate in more than one), category, and by whether the product has already been harvested. The quantities listed here are in terms of Harvest Unit, which initially will be the same as the product's base unit.

**Harvest**

---

Show harvested

Markets ▼      Category/Tag

Product Name	Qty.	Harvested
<input type="checkbox"/> Apple, Granny Smith pound	440	<input checked="" type="checkbox"/>
<input type="checkbox"/> Beef, Ground 5 lb. Package	10	<input type="checkbox"/>
<input type="checkbox"/> Beef, Ground 1 lb. Package	10	<input type="checkbox"/>
<input type="checkbox"/> Lettuce, Butterhead, Green each	144	<input checked="" type="checkbox"/>

For example, the apples above have a harvest unit and base unit of a pound, so we know that 440 pounds need to be harvested total to make up all the bushels, half bushels, and single pounds that may have been ordered. You can redefine the harvest unit to match what your harvest crew uses. For example, we could set the apple harvest unit to be in terms of bushels so that the harvest crew doesn't need to try to harvest a certain number of pounds. See the section on Editing Products for instructions on changing your harvest units.

You can check the boxes next to each product as it is harvested to record that the harvest of that product has been completed. Print using the "share" icon in the top right corner.

Harvest



# PACK PAGE

Once you have your products harvested you can use the Pack and Distribute pages to help get your orders packed and to market. First you'll select the Harvest Day you want to pack for using the calendar icon at the top. You can use the Market/Distribution Days filter and the Category/Tag filter to limit which items show up if desired. Categories are determined by admins (if you have questions or suggestions about how products are categorized, please let us know!) and tags are set by you in your product details.

**Best Farm**

Sales to be distributed  
11/8/2022 - 11/14/2022

**HARVEST DAY: TUESDAY, NOVEMBER 8, 2022**

**\$1,262.25**  
3 orders

Sales Activity  
11/1/2022 - 11/7/2022

Year to date

## Pack



Selected harvest date 2/9/2022

Use the calendar to change the selected harvest date.

Markets/Distribution Days ▼

Category/Tag ▼

The Pack page itself can be used as a packing list, with checkable boxes next to each selling unit. If you click the down arrow by each selling unit you can see the list of orders that include that selling unit with a check box next to each order number.

### Pack



1 Selected harvest date 11/15/2022

Use the calendar to change the selected harvest date.

2 Markets/Distribution Days

Category/Tag

**Product**      **Order**

✓ Apple, Granny Smith      20 lb. Case  
2 Sold      Packed  3

4 ✓ Apple, Granny Smith      Pound  
3 Sold      Packed

	Order	Qty	Weight
<input type="checkbox"/>	71786	3	

For products that are priced by weight (Type B products), you can edit the weights of each unit sold by clicking the drop down arrow to the right of the selling unit name and entering each unit's weight there.

✓ Beef, Ground      5 lb. Package  
15 Sold      Packed

	Order	Qty	Weight
<input type="checkbox"/>	71784	1	<input type="text" value="5.1"/>
<input type="checkbox"/>	71784	1	<input type="text" value="4.92"/>
<input type="checkbox"/>	71784	1	<input type="text" value="5"/>
<input type="checkbox"/>	71784	1	<input type="text" value="5"/>
<input type="checkbox"/>	71784	1	<input type="text" value="5"/>

If you prefer to pack each order one by one, click the **Orders tab** to see each order in your chosen Harvest Day. Clicking the right arrow by each order brings up a single order packing list. If you choose to group by order, you will see each order listed under its market.

**Pack**



Selected harvest date 11/15/2022

Use the calendar to change the selected harvest date.

Markets/Distribution Days ▼      Category/Tag ▼

**Product**      **1 Order**

Beta2

Customer	Items	Total	Packed	
A Nice Store	14	\$502.50	<input type="checkbox"/>	> 2

You can check the box by the order to mark it packed, or you can click the right arrow > to reveal each sales unit on the order and mark each unit as packed one by one.

**Pack**



Selected harvest date 2/9/2022

Use the calendar to change the selected harvest date.

Markets/Distribution Days ▼      Category/Tag ▼

**Product**      **Order**

Beta2

Customer	Items	Total	Packed	
A Nice Store	1	\$150.00	<input checked="" type="checkbox"/>	>
Best Customer	2	\$204.00	<input type="checkbox"/>	>

Off the Farm Sales

Market Date	Items	Total	Packed	
Saturday, February 12, 2022	3	\$2,040.00	<input type="checkbox"/>	>

If you **group by product**, each sales unit will be listed along with the total number of that sales unit needed for that harvest day. Clicking the down arrow by the sales unit name reveals each order for that sales unit. You can mark each sales unit total or each order of a sales unit as packed by checking the box.

### Pack



Selected harvest date 2/9/2022

Use the calendar to change the selected harvest date.

Markets/Distribution Days ▼      Category/Tag ▼

Product	Order	Pound Packed
✓ Apple, Granny Smith 97 Sold		<input type="checkbox"/>

	Order	Qty	Weight
<input type="checkbox"/>	62895	77	
<input type="checkbox"/>	Saturday, February 12, 2022	20	

At the top right of the page is a printer icon which allows you to print a packing report, a customer report or the large and small packing labels familiar to Local Food Marketplace users.

The screenshot shows the 'Local Food Connect' interface. At the top right, a printer icon is circled in red. Below it, the 'Pack' section shows a selected harvest date of 11/15/2022. A dropdown menu is open, listing the following options: 'Print - Packing Report (Detailed Pick List)', 'Print - Customer Report', 'Print Large Label(s)', and 'Print Small Label(s)'. A 'Close' button is at the bottom of the menu. The background shows a list of products: Anaheim Peppers (1 Sold), Baby Collard Greens (6 Sold), and Kale (4 Sold), each with a 'Pound Packed' checkbox.

## Example of a Packing List:

Local Food CONNECT							?	🔔	👤
Home  Sell  Harvest  Pack  Distribute	< Pack <span style="float: right;">🖨️</span>						Beta1 <span style="float: right;">11/15/2022</span>		
	Customer	Order No.	Product	Selling Unit	Qty	Weight	Packing Status		
	Aly, Kate	43131	Baby Collard Greens	1 bunch	3	0	<input type="checkbox"/>		
	Aly, Kate	43131	Kale	1 Bunch	2	0	<input type="checkbox"/>		
	Anonia, Jen	43132	Anaheim Peppers	Pound	1	0	<input type="checkbox"/>		
	Anonia, Jen	43132	Baby Collard Greens	1 bunch	3	0	<input type="checkbox"/>		
Anonia, Jen	43132	Kale	1 Bunch	2	0	<input type="checkbox"/>			

## Example of a Customer Report:

Local Food CONNECT							?	🔔	👤
Home  Sell  Harvest  Pack  Distribute	< Pack <span style="float: right;">🖨️</span>						Beta1 <span style="float: right;">11/15/2022</span>		
	Order No.	Product	Selling Unit	Qty	Weight				
	43131	Baby Collard Greens	1 bunch	3	0				
	Aly, Kate								
	43131	Kale	1 Bunch	2	0				
	Aly, Kate								
43132	Anaheim Peppers	Pound	1	0					
Anonia, Jen									
43132	Baby Collard Greens	1 bunch	3	0					
Anonia, Jen									
43132	Kale	1 Bunch	2	0					
Anonia, Jen									



## DISTRIBUTE PAGE

This page currently only allows you to print the Pick List that will be emailed to you at the end of each ordering period. This is a list of all the products your market expects to receive on its aggregation days. By clicking the down arrow on the market you can select for a specific period and distribution days you want to print the pick list for. On this page you can see a Summary Pick List, a Detailed Pick List, or a Revenue Pick List.

The screenshot displays the 'Distribute' page in the Local Food Connect application. At the top, there are three tabs: 'Pick List' (selected), 'Purchase Orders', and 'In Person'. Below the tabs, there is a search bar containing 'Beta2'. To the right of the search bar are three icons: a red circle with the number '3', a share icon, and a red circle with the number '1'. Below the search bar, there are two dropdown menus: the first contains '11/7/2022' and the second contains 'Distribution Days'. A red circle with the number '2' is positioned to the right of the second dropdown menu.

The main content area shows a list of markets. The first market is 'Beta1'. To the right of 'Beta1' is a share icon circled in red. Below the market list, a dropdown menu is open, showing three options: 'Summary Pick List', 'Detailed Pick List', and 'Revenue Pick List'. A 'Close' button is located at the bottom of the dropdown menu. The dropdown menu is highlighted with a red border.

The application header includes the 'Local Food CONNECT' logo and navigation icons for Home, Sell, Harvest, Pack, and Distribute. The 'Distribute' icon is highlighted in the bottom left corner.

Future features for this page also include access to Purchase Orders and reports on In-Person sales.

## **Pick Lists:**

As customers place orders, the products they've ordered automatically populate in pick lists. Pick lists are organized by delivery day. You can see a tally of the orders you've received on your dashboard, and by clicking the number of orders in the period or sub-period, you'll be taken directly to the pick list, which breaks down what customers have ordered from you.

## **Summary/ Standard vs. Detailed:**

**Summary:** includes the totals of ordered products and is ideal for gathering and organizing ordered products. If you have Type B products for sale, they will appear grouped together in the pick list, but as you edit the weights of each individual item they will separate out into distinct lines for each item.

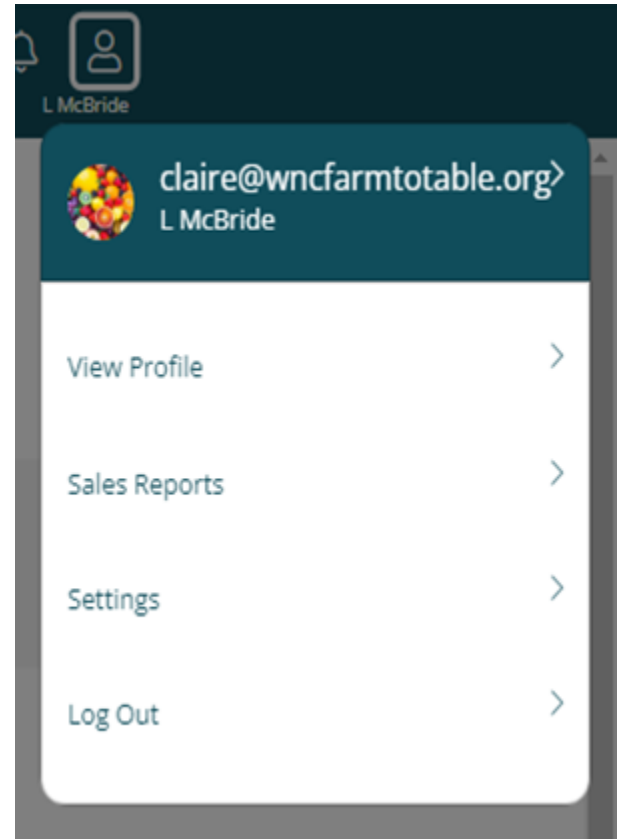
**Detailed:** includes the Summary list at the top for reference, and then shows a product-by-product break-down of what each customer has ordered from you. Customer names are also included next to the items they've ordered.

You can choose which pick list you would like to receive in your settings [logistics](#)

# Sales Reports

To access reports, click the person icon in the top right corner and select sales reports.

1. Choose whether to view sales from all markets, or one market at a time if applicable.
2. Choose whether your date range is based on the date the orders were placed or the date they were distributed. Select a start and end date.
3. Choose which categories and tags of products you want to include in the report.
4. Choose which of the preset report templates you want to use.



 A screenshot of the 'Local Food Connect' report generation interface. The top navigation bar features the 'Local Food CONNECT' logo on the left and a help icon, notification bell, and user profile icon on the right. Below the navigation bar, there are four numbered steps:
 

- 1 All markets**: Three radio button options: 'All markets' (selected), 'Beta2', and 'Beta1'.
- 2 Order Date**: A toggle switch is currently turned off, favoring 'Distribution Date'. Below the toggle are two date picker icons, both showing 'Selected start date 10/24/2022' and 'Selected end date 10/24/2022'.
- 3 Category/Tag**: A dropdown menu with a downward arrow.
- 4 Sales Summary**: A dropdown menu with a downward arrow and a plus sign.

 At the bottom of the form is a large, dark teal button labeled 'Run Report'.

The report generated has a printer icon at the top right that allows you to print the report or export it as a csv file.

[← Sales Reports](#)



Beta2

Product Name	Selling Unit	Weight	Qty	Taxable Sales	Pay To Producer
Bee Honey	Squeeze bottle	0.00	5	\$2,500.00	\$2,500.00

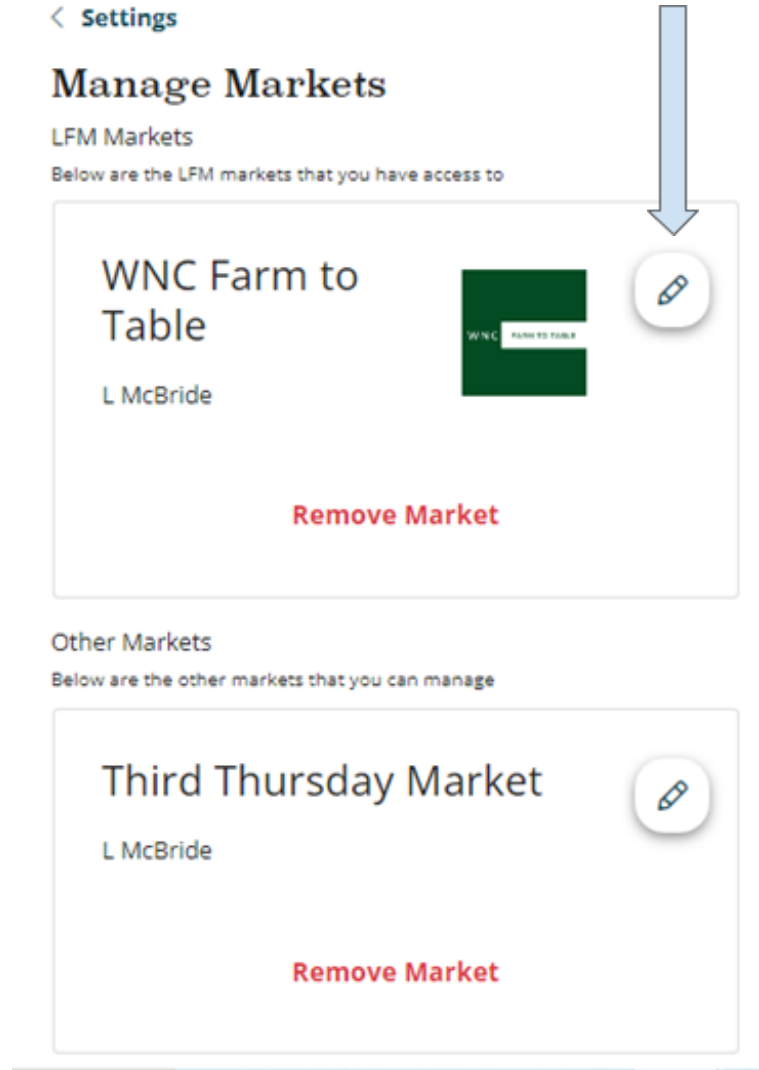
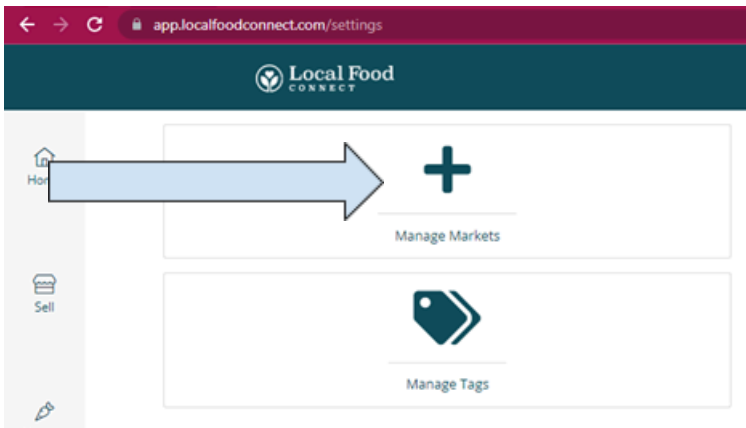
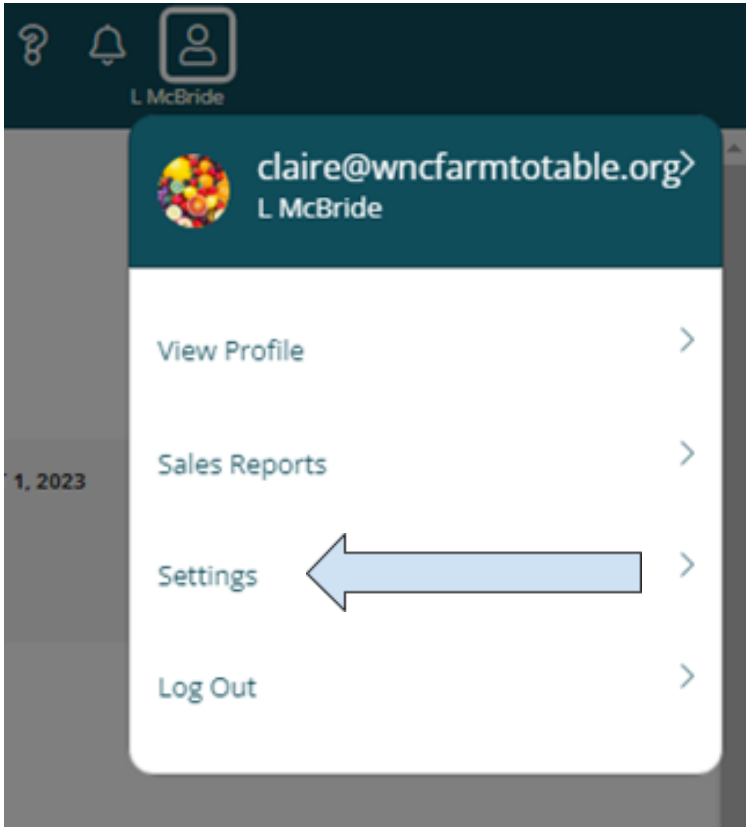
Sales reports are currently available in four different templates through Connect.

The preset report templates are:

1. Sale Summary - compiles total quantity and dollar value of each sales unit ordered or distributed within the chosen date range.
2. Sales by Month - compiles all sales within each month in the chosen date range
3. Sales by Product by Month- compiles monthly sales for each selling unit
4. Customer Order Detail - provides every line item from each order in the chosen date range including customer name and order location

# Settings

Editing Producer Profile, Settings, and Users:



You can add and edit information in your producer profile, change logistics settings, and add or remove account users for each producer and market you manage with Connect. Each Market and Producer that is active will have a pencil icon that allows you to edit it. After making any changes be sure to save before leaving the page.

A little more information about each tab:

**Contact Tab:** The information supplied in the Contact tab will be visible to the market admins, and some of it will show up on your market's Meet the Producers page. The fields that show up on the Meet the Producers page are Producer Name, Owners, Address, Phone, and Website Address, so only put information there that you want publicly available.

**Info Tab:** The info you input here will all appear on the storefront Meet the Producers page. The "Producer Profile Page" link at the top right of the tab will take you to the public facing page so you can see how it looks

**Logistics:** On this tab, you can change the settings about where you will deliver your products, which subperiods (the market's different distribution days) you will sell products for, which email addresses you will get your pick lists sent to, and whether your emailed pick list is detailed or summary. It's usually best to check with your market manager before making changes to your logistics settings.

**Users:** If you have multiple users who will log in and use your account, you can add and remove users here. You can use the three-dot icon to send invite emails and reset password emails to your users and to edit or remove them as well.

## Getting Paid

WNC Farm to Table's current method of paying producers is by check, which will be in a file in the office for you to pick up the the first Wednesday of the month for last month's invoices. We will gladly mail them to you at your request.