SUPPLIER SELF SERVICE PORTAL

Welcome to the new Supplier Self Service Portal.

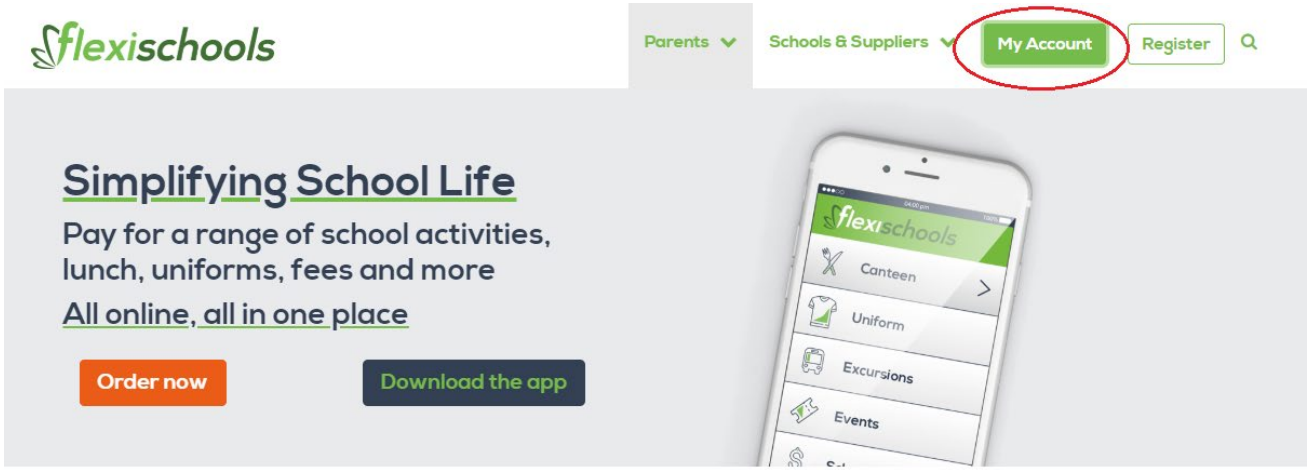
Below is a cheat sheet on how to do common tasks:

Glossary:

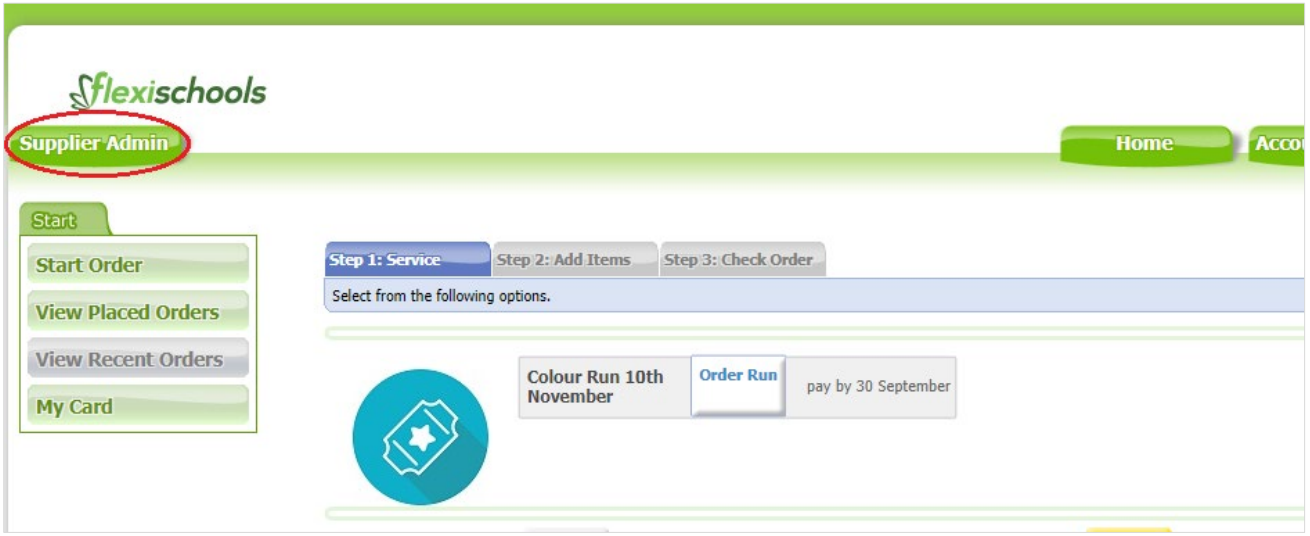
SSSP	**S**upplier **S**elf **S**ervice **P**ortal - the new supplier portal
Service Categories	Flexischools offers services to collect payment under the following service categories: • **Food** - canteen and special food services like Mexican Thursday or a sports carnival sausage sizzle • **Shop** - uniform and merchandise sales • **Events** - event sales like fetes, musicals and school camps • **Fee Collection** - school fee and tour payments and other payments that would normally appear on the school account • **Other Payments** - Any other type of payment like print account top-ups, fundraising, term sport payments/enrolments
Services	These are services (like lunch & recess) that you are offering customers
Supplier	A supplier is an entity providing the actual product or service to the end customer. We have set you up on our system with your bank account to pay your funds to. You may only provide canteen services to a school or you may be the school itself who runs the canteen, but also collect payments for all other type of services. As a supplier you may have multiple bank accounts, but you are considered a single business entity.
Items	These are the items you are selling
Item Category	The grouping of items you are selling. For example, Hot Food, Snacks and Drinks.
Options	When an item has additional options that can be included. For example, an item might be ‘Make your own Sandwich’ and the options are all the possible ingredients to put on the sandwich.
Option Set	A logical grouping of options. For example, ‘Salad items’ or ‘Sauces’. Each set contains the options that a customer can choose. By grouping them in a set you can decide if the customer can choose only 1 of the available choices or multiple.
Item Availability	A configuration on an item which determines when an item is available for ordering. By default, it is available whenever the service is available. However, configuring item availability on an item means you can limit when an individual item can be ordered. You can choose a date range and/or certain days of the week. When item availability is configured on an item you can see a visual indicator (a cog wheel) on the item list.

Accessing the Portal

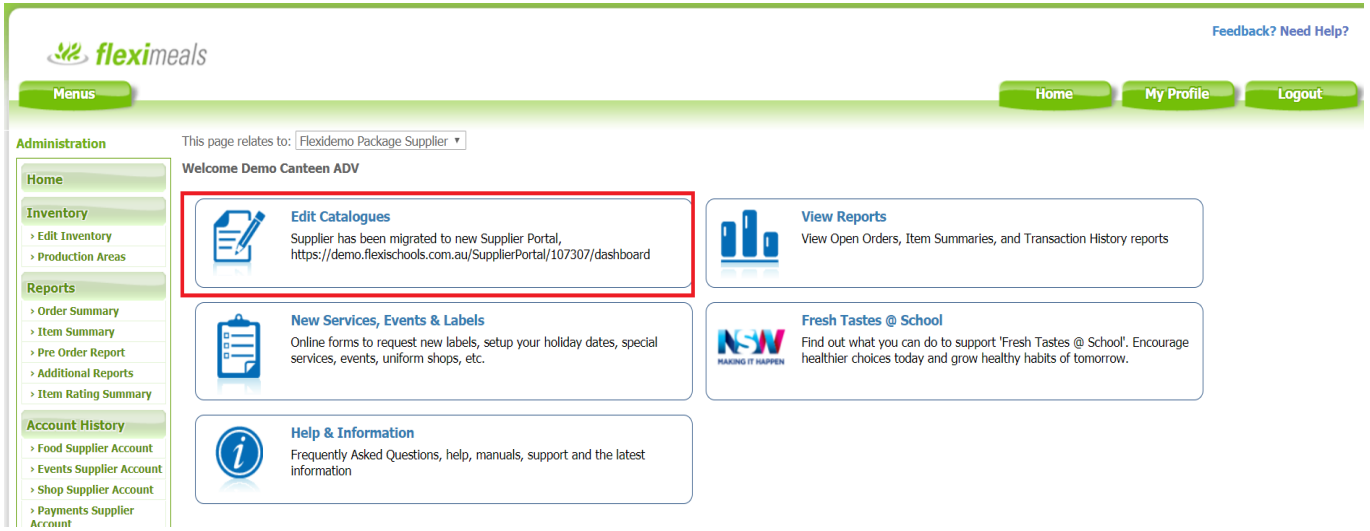
Login at www.flexischools.com.au



Click on **'Supplier Admin'** in the top left-hand corner:



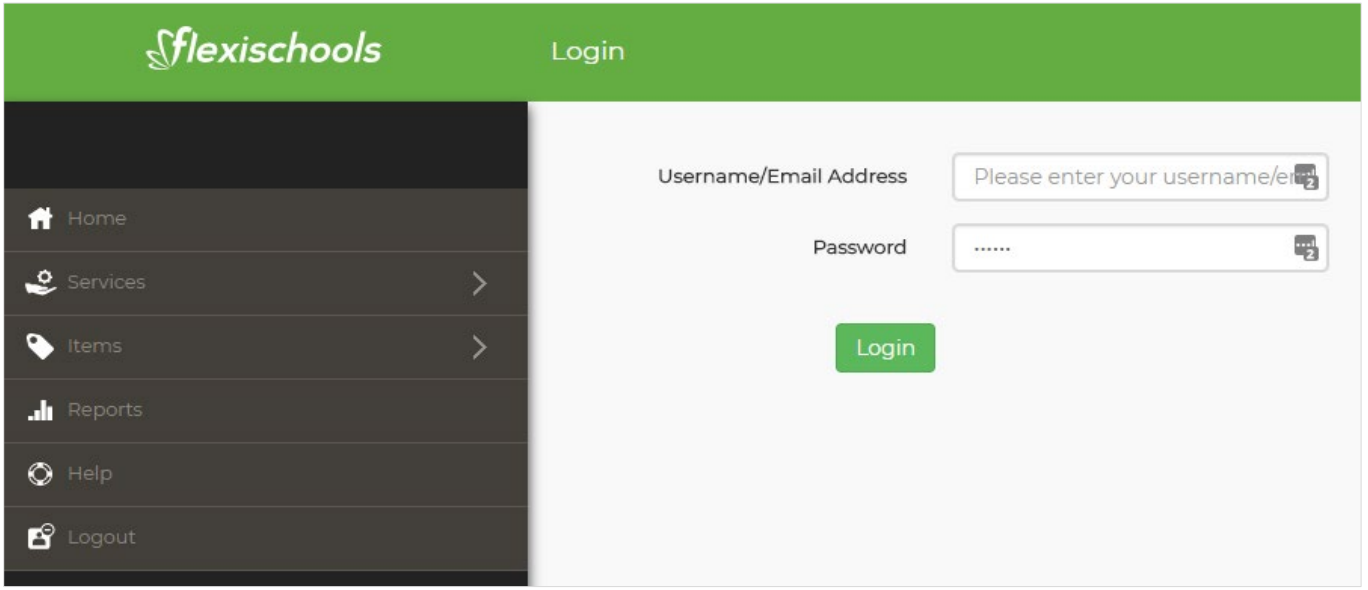
To access the supplier portal, click on **‘Edit Catalogues’**



Login

Enter your username/email and password

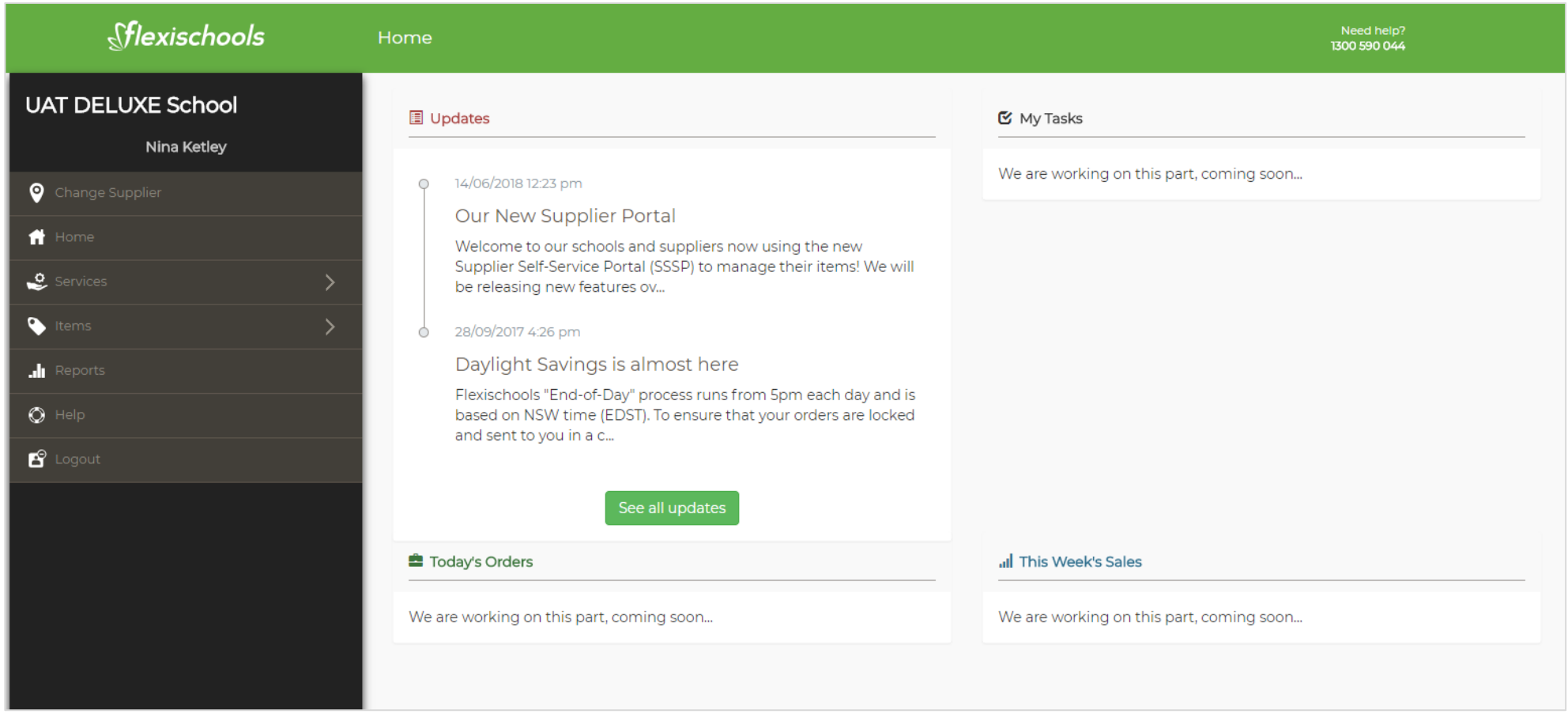
This will be the same username and password which you used to access the old site.



The Homepage

After you have logged in you will be taken to the homepage.

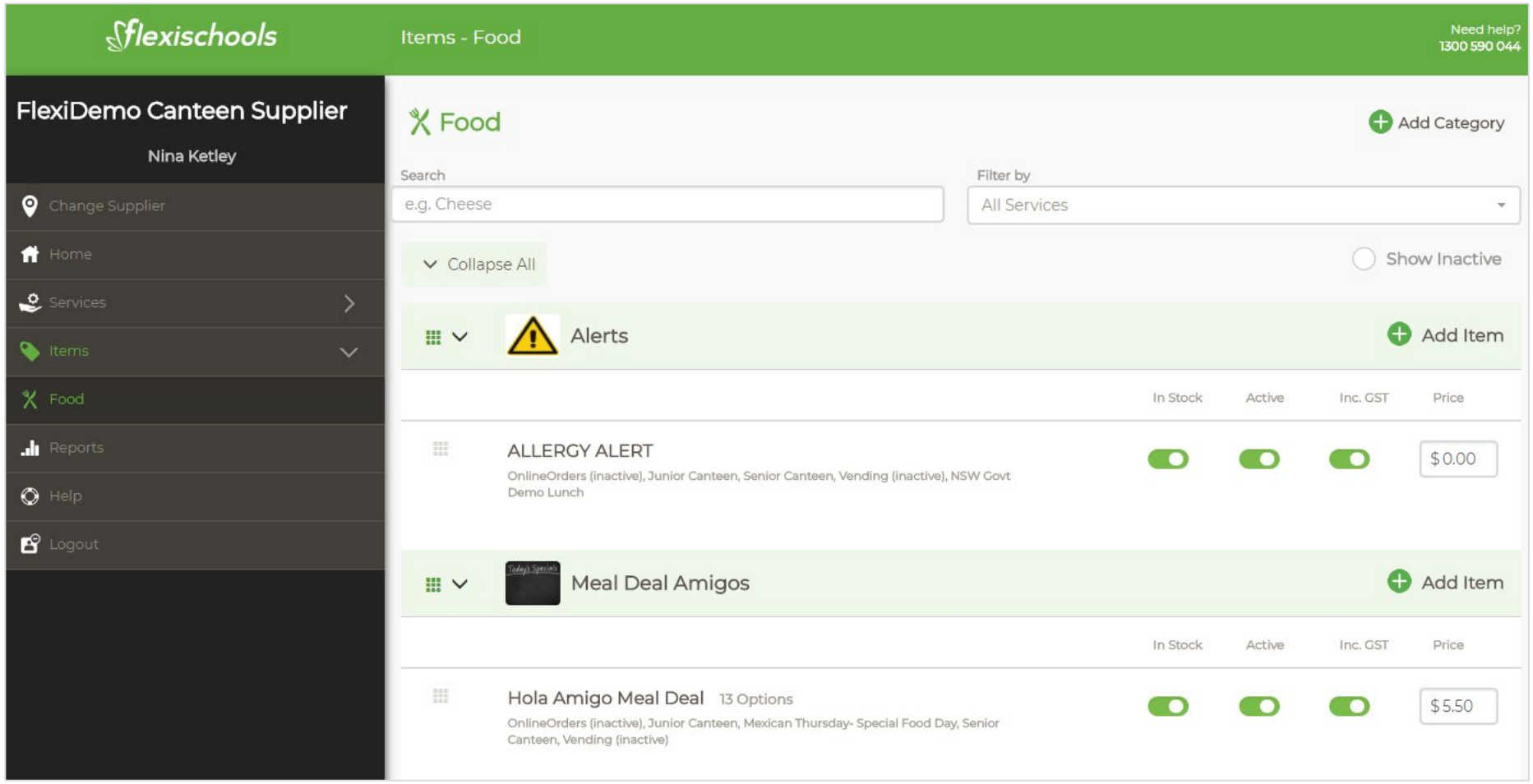
We are developing further features currently under development, but you will see the ‘updated’ panel where we will share important news and information to you.



Where is my menu?

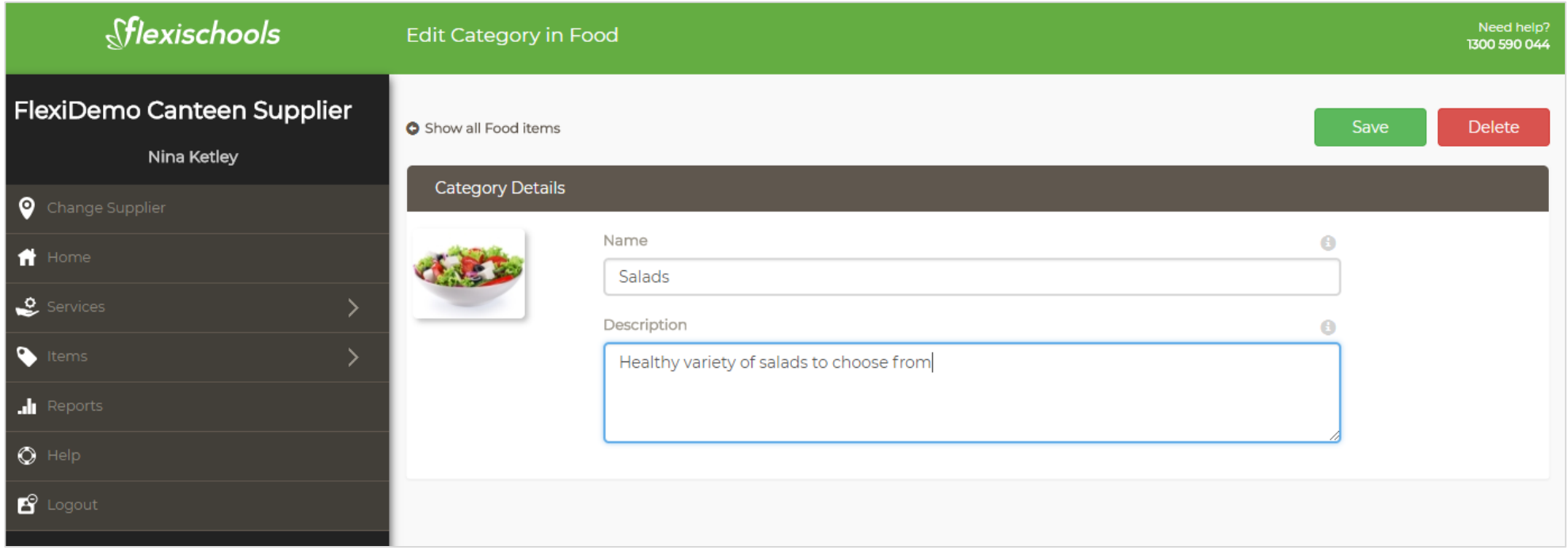
Our new portal is organised by service type so if you would like to edit your menu (items in your menu), go to Items then Food, in later releases you will also be able to manage other service items here like events, shop and payments.

From here you can ‘Add Categories’ or ‘Add Items’ within a category by clicking the plus button.



Editing Item Categories

You can edit a category name, description or image by clicking on the category name which will bring you to the edit category screen. To change the image, click on the image and a box with available images to choose from will appear.

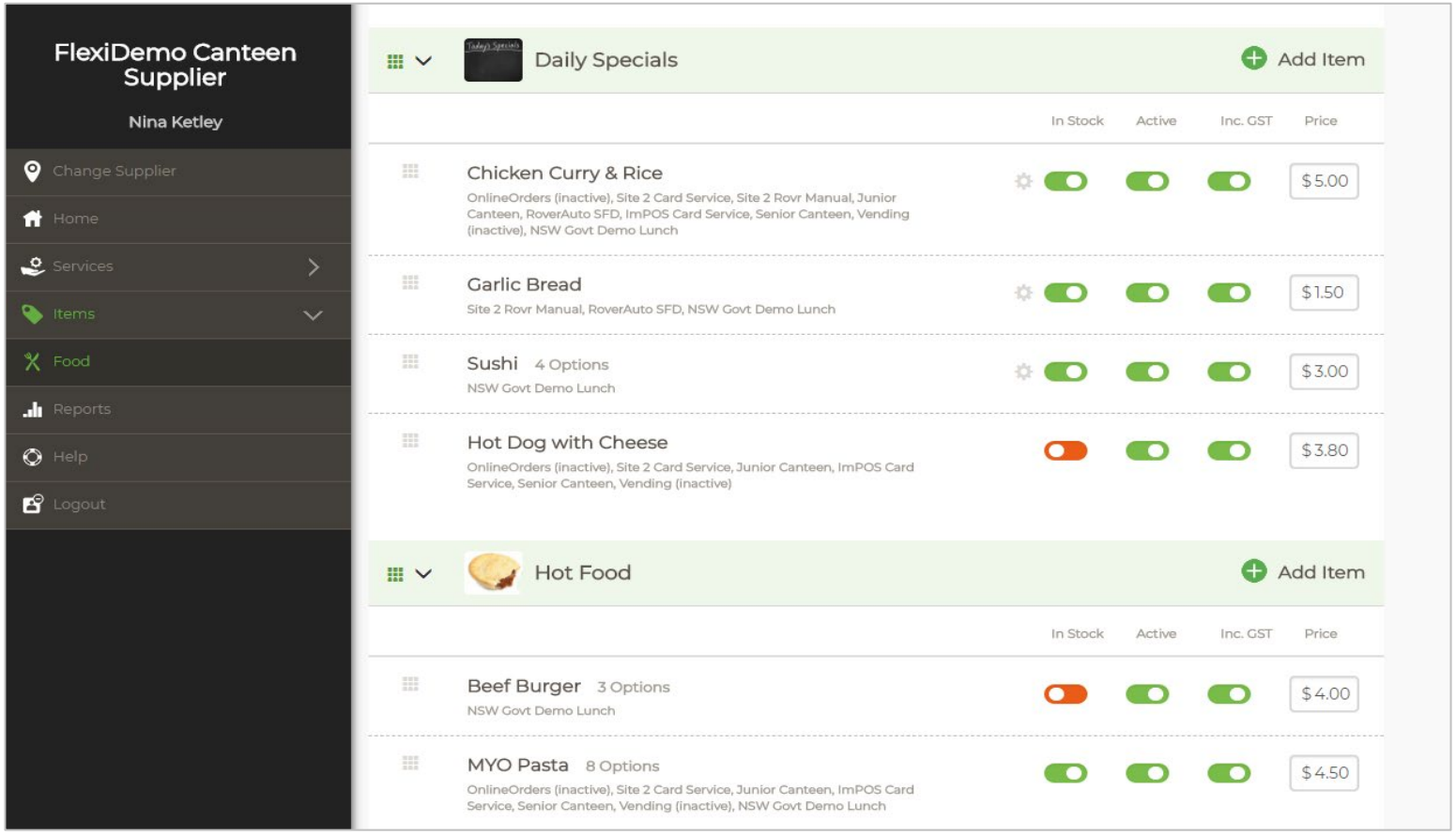


Editing Items

The main listing of items will allow you to quickly change the most common things like whether an item is in stock, active (inactive items will not show on the ordering site) includes GST and price of the item.

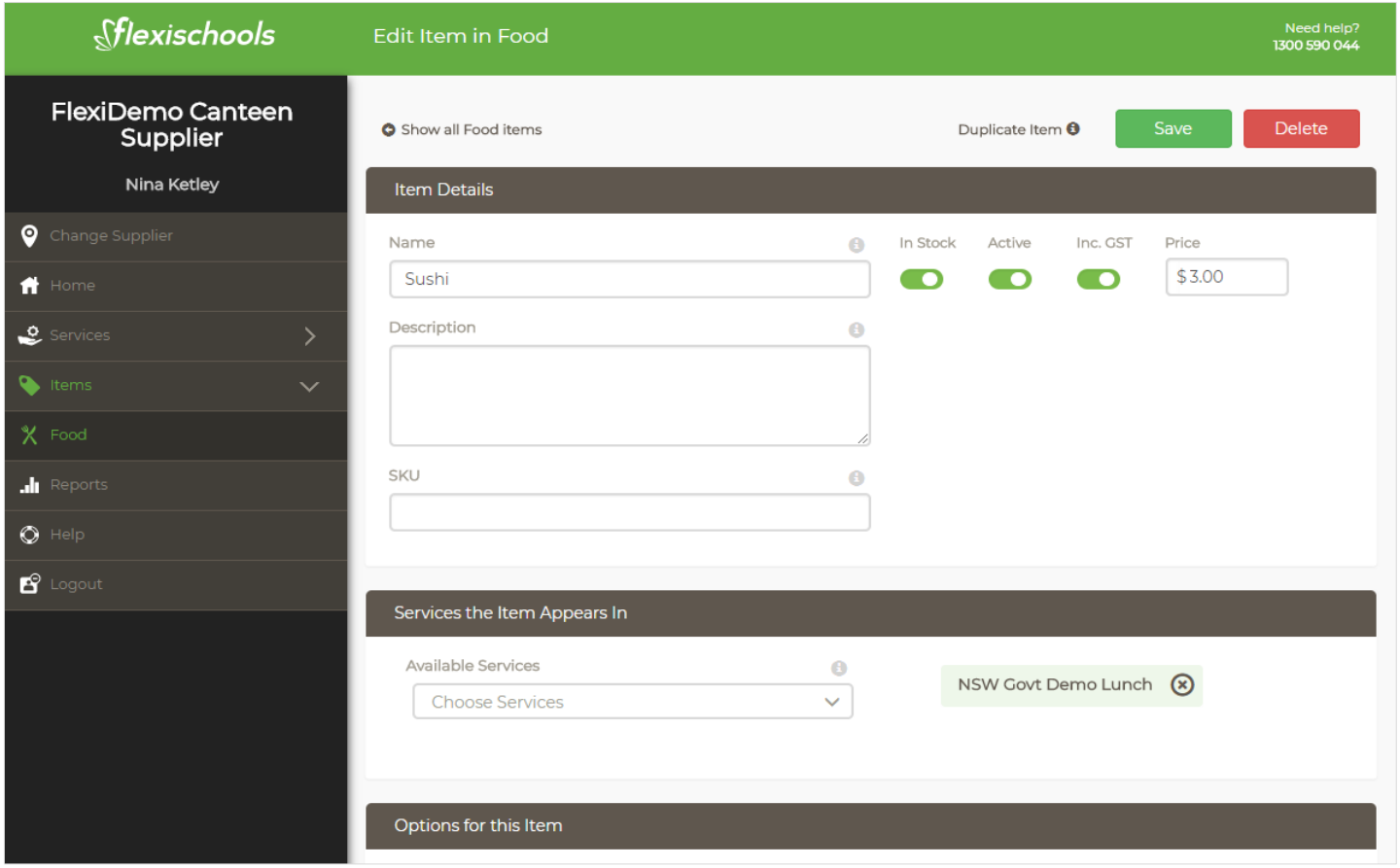
The item list shows the name of the item, then how many (if any) options are configured on the item.

Options are possible additions to an item (like a meat pie with an option of tomato or BBQ sauce). It will also show a visual indicator if there are availability configurations on this item (a cog wheel will show)



To edit further elements of an item, click on the item name, this will take you to the item edit screen, here you can update:

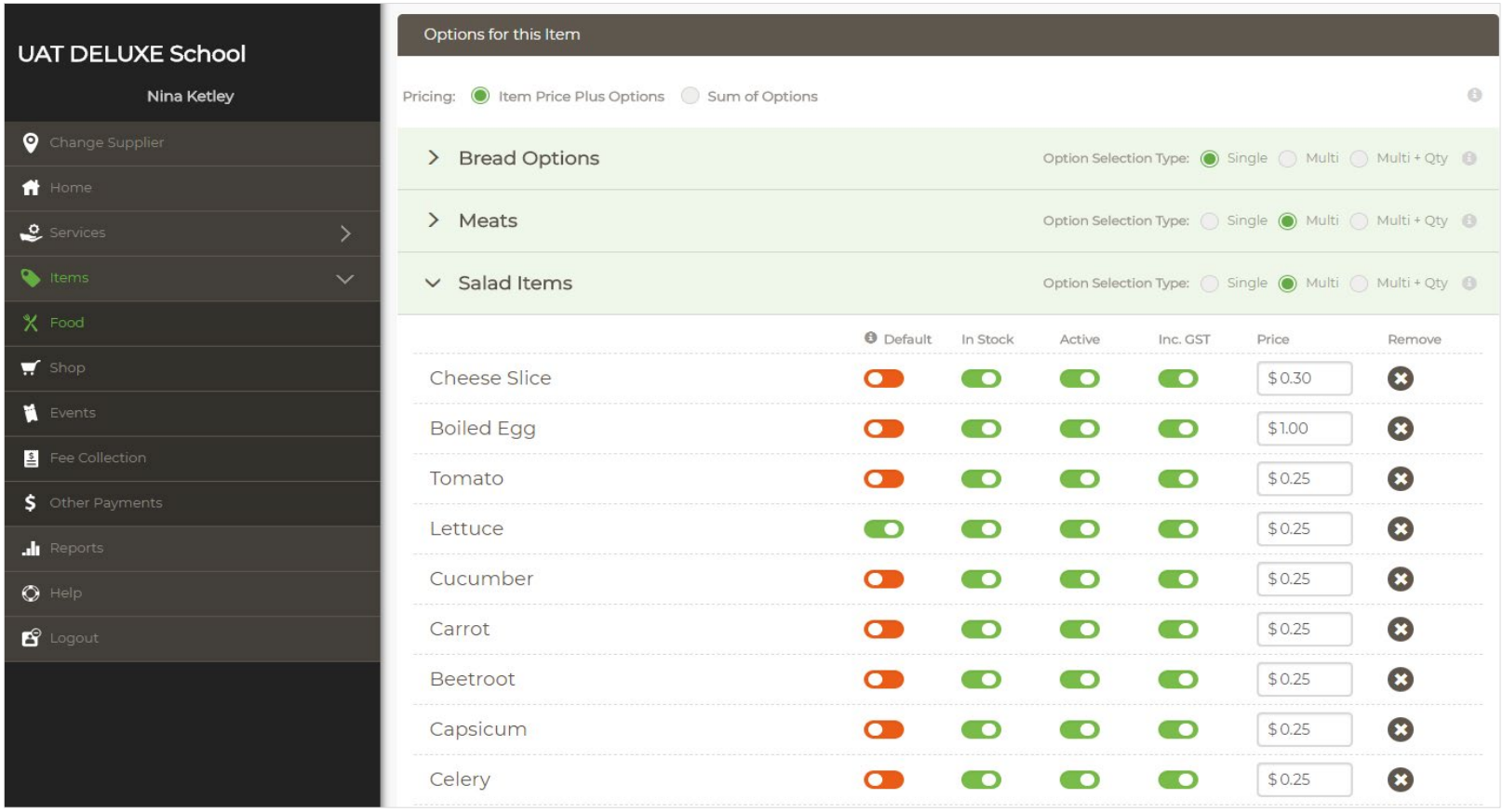
- **Description** - the item description which appears on the ordering screen
- **Services the item appears in** - which services sell this item
- **Options for this item** - what additional options can be sold with this item
- **Availability** - when this item is available for ordering



Configuring Item Options

When in the item edit screen, you can add options to an item (scroll down past services linked). Options are grouped by an **option set**, you must create an option set first to group your available options. You may want multiple sets for a single item depending on what type of choice you want to give the customer. The option set allows you to define if you want to allow only a single selection (radio button selector shown on the ordering screen) or the ability for multiple selections (check boxes shown on the ordering screen) or quantity choices/multi + qty (drop down quantity boxes shown on the ordering screen).

For example, you might have a ‘make your own sandwich’ item where the customer can choose a single bread option and also multiple meat or salad items:

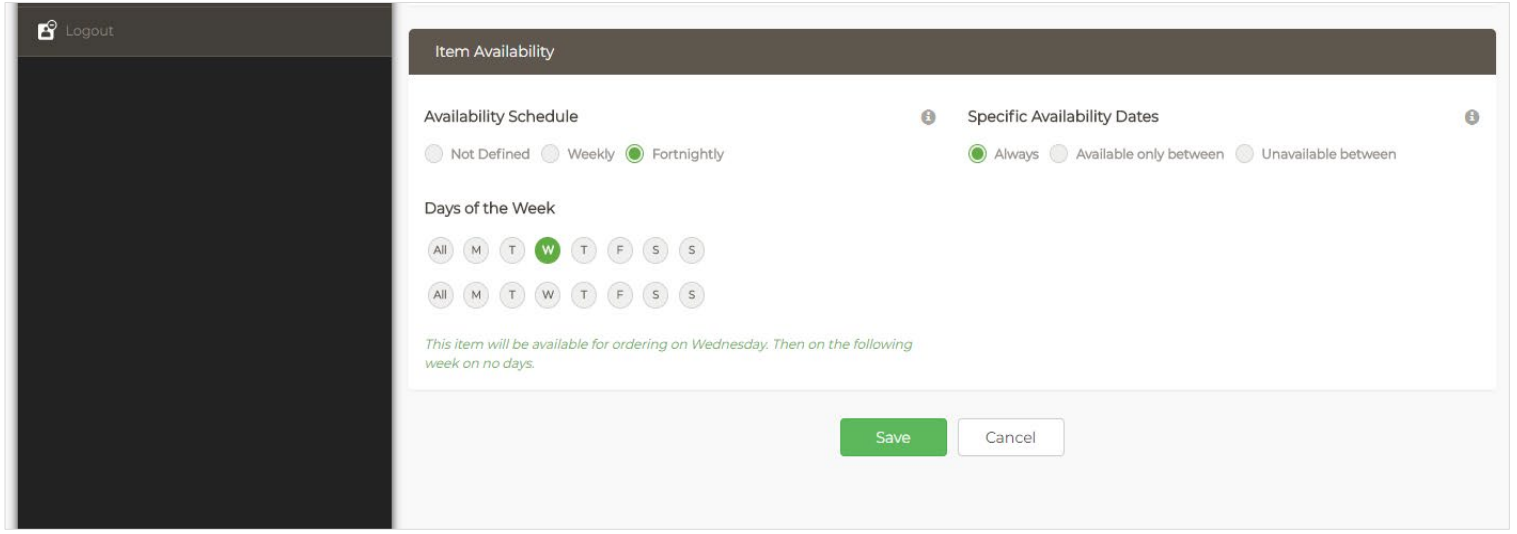


1. Choose your pricing - either item price plus options OR sum of options
2. Click ‘Add option set’ to create a new group of options – like ‘Sauces’ or ‘salad items’, give your option set a name
3. click ‘Add option’ to create a new choice for that set.
4. Add a price for the option (if you want) or leave it at $0 if adding this option does not increase the price of the item.

Each option in the set can be configured to be in-stock, active and its GST status and price. Additionally, if you choose ‘multi’ or ‘multi + qty’ you can opt to make an option default (included with the item) by turning the default slider to ON (green).

This will include this option in the order automatically and a customer can remove it if they do not want the option. An example of this would be ‘Salad sandwich’ to include lettuce, tomato, cucumber unless a customer specifically removes it.

Note: removing options with pricing does not reduce the amount of the item, it remains the same price

Configuring Item Availability

Below options configuration is the item availability section (on the item edit screen). Here you can configure when an item is available for ordering. You can choose a day of the week or fortnight and/or a specific date range where the item is available or not available. When item available configured on an item you will see a little cog wheel on the main items list screen.