

BYU Dining Services

Standard Operating Procedures

BP0013: Managing Packages

Business Process ID: [BP0013](#)
SOP Collection: [Eatec SOPs](#)
Last Updated: August 22, 2024
URL: </policy/eatec/packages>

SOP Owner: Douglas Walker
Accountable Group: Dining Accounting
Collaborative Business Process

Purpose

Packages are used as a way of grouping items, recipes, customers, suppliers, or products. Packages are mainly used for ordering through requisitions, transfers, and PO's. This standard operating procedure outlines the scope and use of packages for BYU Dining. It outlines instructions for naming, creating, and modifying a package.

Responsibilities

Area Responsibilities	Centralized Responsibilities
<ul style="list-style-type: none">• Creating and maintaining their own packages• Deactivating Packages when they are no longer in use	<u>Dining Accounting</u> <ul style="list-style-type: none">• Deactivating unused packages• Resolving area conflicts or concerns between package issues.

SOP User Guide

Definitions

Package Name: Name of the package, the beginning name of a package should distinguish the location of the package (this code will be unique for your location, and should be the only code used for that location)

Inventory Package Type: Used for all inventory related functions including importing packages into recipes, products, requisitions, transfers, spoilage and loss

Recipe Package Type: An additional type that can be imported into recipes, products, spoilage and loss

Customer Package Type: A type of package used for customers. Customers must be in a Transfer Out Package to be a valid transfer out customer

Product Package Type: used for package import into Quick Orders, Cycle Plans, and Batch Order Processing, sales orders

Supplier Package Type: A type of package used for suppliers. This type is generally not used.

Creating New Packages

1. Navigate to Packages

- Click Masters -> Packages -> New Package

2. Specify Package Details

- Enter a name for the package. The name of the package should start with the location code (MTC, LEG, CSC), then can be named whatever after the code. This name is important as it is used to search the package after it is created. Ex: CSC Grain Mon/Wed
- An optional description can be added to provide additional detail if desired
- Type. The type determines what kind of things the package will group. Packages can only hold one type of thing at a time. For example, if an item type is inventory item, it can only be a package of items, it cannot contain recipes as well. See type definitions above.
- Remarks are optional as well

3. Add Items to a Packages List

- Once the name and type are selected, click the blue carrot '>' at the top right to navigate to the item list
- In the top right corner, there is a search bar that will search through the bank of the selected type. Ex: if supplier type was selected, the search bar will only search suppliers
- Click the 'Inventory - Items' button next to the search bar to search via items, packages, classes, or types.
 - **Items:** the most common way to search for an item either by its name, number, or something in its description.
 - **Packages:** Adding the items of entire packages to a package (Useful if you are making a parent package only to house items of multiple child packages)
 - **Class:** Adds the items of an entire class to the package *Generally, too large of scope to be useful*
 - **Type:** Adds the items of an entire type to the package. *Generally, too large of scope to be useful*
- Once Items are checked using the search bar, you must click the 'Select' button to add items to the item list. Repeat this process until all items are added.

Signature: 
Douglas Walker (Sep 13, 2024 15:24 MDT)

Email: dcw5@byu.edu

Signature: 

Email: omni@byu.edu

Signature: 
Cole Kan Madsen (Sep 13, 2024 09:08 MDT)

Email: madsenj2@byu.edu