

BYU Dining Services

Standard Operating Procedures

BP0007: Managing Eatec Products

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SOP Collection: [Eatec SOPs](#)

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Accountable Group: Dining Accounting

Collaborative Business Process

Purpose

This standard operating procedure explains the proper steps of creating and modifying Eatec products including the naming of a product, its assignment of class, type, subtype, description(s) and alternate ID, and assigning pricing. Products are used in Eatec to sell our good to outside customers/entities.

Responsibilities

Area Responsibilities	Centralized Responsibilities
<ul style="list-style-type: none">Managing department-owned products following the processes outlined in this SOP.Collaborate with product users from other departments in managing inventory items used in multiple departments ("global products").	<p><u>Dining Accounting</u> Doug Walker</p> <ul style="list-style-type: none">Resolve differences in the setup of global products.Train users and answer questions.

SOP User Guide

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Definitions

Location Code: the location code assigned to your location, or to the global class DS (CSC, MTC, CANN, etc.)

Brand Name: The brand by which the name is called (Ex: BYU, Blue diamond, Great Value). This is an optional field depending on if it’s necessary to accurately describe the product.

Category: The type of product being produced. (Specific to nonretail items involving type and subtype; Ex: Spice, Dairy, Meat, etc.)

Item Name: The basic name of the item without further modifying descriptions (Ex: Almond, Lemon Bread, Strawberry)

Essential Description: An included description of the product with which the product could not be identified otherwise. (Ex: Roasted, Finely Ground, Gluten-Free). This is an optional field depending on if it’s necessary to accurately describe the product.

Unit: The manner in which the product is measured (Ex: serving, fl ounce, each)

Dietary Preference: A selectable option to indicate an applied preference to the product (Ex: Vegan, Gluten-Free, Vegetarian)

Size: The total quantity of product provided when purchased (includes package counts and pack sizes; oz, count, lb., etc.) EX: 4 packs of 6 sharpies each, 2 40lb bags, 4 pack of 12-ounce bottles

Types: Would be a broad category for what the type of product it is. (Ex: dairy, supplies, juice, paper goods, etc.)

Subtypes: Would describe the type, such as seasonal, Christmas, valentine, beef, cheese, etc.)

Classes: Classes are the location that utilizes the product, that location is considered the main ‘owner’ of the product, *For items frequently transferred there would be no main owner rather a global class would be assigned such as “Dining Services”; (Ex: Creamery on Ninth, Food to Go, Legacy Grille, etc.)

Depletion Cost: This is an automatic field reflective of the cost of the good being sold

Price: This is the selling price set by the location that matches the assigned class (for more information on inputting multiple prices please refer to the “Pricing” section further down this SOP)

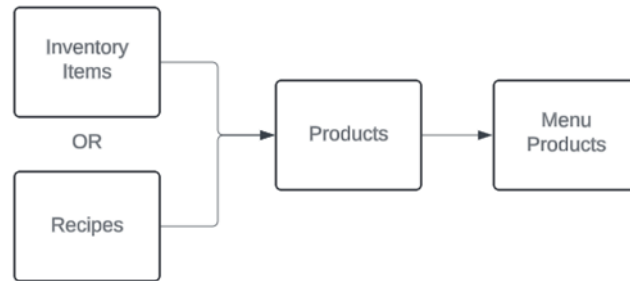
Cost%: Automatically set field reflective of amount of cost % related to the set price.

Description (Free Field): Anything that you would need to search for that is not the other searchable fields (Possible options include Ex: Main supply item #, Lot number, special order item)

Alternate ID: The full name of the product that a customer would typically see on a receipt (this currently shows on Quick Orders, Sales Orders, menu boards for Cannon and MTC, and BYU Dining’s websites displaying dietary information).

Creating New Products



The term ‘Product’ as used in Eatec and Dining Services refers to anything that we sell to external entities or customers (Not to be confused with inventory items). To deplete inventory items through sales, the inventory items must be connected to a Product either directly, or through a recipe.



There are three ways to create products in Eatec. The three ways are: 1) Define a product directly from an inventory item, 2) Define a product directly from a recipe, or 3) Create a product from scratch and physically link the inventory item/recipe to the product. Menu products are a specific type of product that is comprised of other products rather than items or recipes.

Products are found in Quick Orders, Sales Orders, and Cycle Plans in Eatec.

Defining a Product from an Inventory Item

1. **Navigate to Inventory List**
 - Click Masters -> Inventory List
2. **Select the Item**
 - Search using the search bar or using the advanced search button () to find the inventory item
3. **Manage the Item**
 - Select the Manage icon at the top right ( Manage )
 - A drop down will appear, select ‘Define Product’
 - If a product is already linked to this item, a confirmation pop-up will appear saying “A product linked to this item already been defined. Define anyway?”. If you wish to create a new product, click ‘Confirm’.
 - **Please review the product(s) already linked and see if you can use the existing products.**
 - The best way to view linked products is in the ‘Cross Reference’ tab, using the ‘Products’ drop down.
4. **Define Product Information**
 - After you hit confirm, Eatec will automatically load to a the ‘New Product –F&B’ screen
 - The name, number, unit, description, price, and linked item details will be auto filled
5. **Name the Product**

- Follow the naming format below for naming products, see examples below. For definitions of what each component of the name means, see the definition section.
 - **Location Code – Brand Name (if applicable) – Item – Essential Description (if applicable) –Size—Unit**
 - Ex: CRM Blue Diamond Almonds Whole 6oz
 - Ex: CE Blue Food Club Red Raspberries Frozen 6oz
 - Ex: BL Skittles Original 2.17oz
 - Ex: F2G Cougar Tracks Ice Cream ½ Gallon
 - Ex: SW Spicy Italian 6’
- If the product is global, add ‘DS’ for Dining Services
- The units originally listed in the name may not accurately reflect what is sold, if this occurs edit the size to reflect what is sold.
 - This can occur when the item is defined as a 24 pack but is sold by the bottle. For example, ‘Beverage Coke 20oz Coca Cola 24-20oz bt per case’ would be changed to ‘DS Coca Cola Coke 20oz bottle’

6. Number the Product

- The number of the product will auto-populate with the number of the item.
 - If this is the first product linked to that item, then leave the number alone, do not change it.
 - If this is not the first product linked to that item, then add a ‘1’ to the end of the product number. This is because Eatec will not allow multiple products with the same product number to exist so we must make the number unique.
 - **If this is not the first product linked to that item, examine the existing product(s) to see if you can use an existing product before creating a new one.**
 - In very rare cases an AFS product number will align with another BYU product number. In these cases, the AFS product number takes precedent as these numbers are required for the current AFS interfaces.

7. Enter the Product Type & Subtype

- The type field is the broad category for what the product is. Pick the most applicable from the drop-down list.
- If the product is going to be sent to Infor via the Eatec to Infor API, then the type also represents the Major Group and Family Group in Infor.
 - The two upper-case characters at the start of the type are the Major Group
 - The remaining characters/words are the Family Group
- For product that are defined in Infor and Eatec, please ensure that the type in Eatec matches the Major and Family Groups in Infor
- The subtype field more narrowly describes what the product is and should be more specific than the type. Pick the most applicable from the drop-down list.
 - Managers of each respective areas will have the ability to add their own subtypes. If you feel that you need another subtype, please talk to your manager.

8. Verify the Unit

- The unit will auto populate. Verify that the unit matches the unit in which the product is sold
- If the product is going to be sent to Infor via the Eatec to Infor API then the unit must match the inventory barcode unit that you want to send to Infor.

- Ex: An inventory item pack of Coke can have a pack barcode and a bottle barcode. If the product being sold is a bottle, ensure that the unit matches the bottle barcode.

9. Enter the Class

- The class field represents which location “owns” the product. The class should match the area code in the Product Name.
 - If it is a general product that will be sold from multiple locations, select “DS” (Dining Services).
 - User access will be restricted by class, so users will only be able to view and edit products that have classes they have access to.
 - Ex: F2G classed products will only be viewable by Food-To Go employees.

10. Enter the Alternate ID

- The full name of the product that a customer would typically see on a receipt (this currently shows on Quick Orders, Sales Orders, and menu boards for Cannon, MTC, and Cougareat)
 - **This name should not have the location code**
 - Ex: Vitamin Water Zero Calorie Squeezed 20 oz

11. Select Dietary Preference

- A selectable option to indicate an applied preference to the product (Ex: Vegan, Gluten-Free, Vegetarian). Choose which option, if any, apply.

12. Do not check Menu Product check-box

- This box is only selected if you are creating a “Menu Product”, meaning this product is only linked to other products. **If defining from an Inventory item, this should not be selected.**

13. Enter the Description

- The description auto-populates from the inventory description box. Add any additional notes as needed to help describe the product, its use, and any other helpful information. This field is searchable.
 - For retail uses, it can be very helpful to enter the barcode into the description.

14. Enter the Selling Price

- Under the ‘Product Details’ tab, enter the selling price in the ‘Price’ field.
 - The auto-populated price is the Weighted Average Cost.
- **If your area is the Creamery on Ninth (grocery), Creamery at Helaman (grocery), Outlet Creamery, Wyview Creamery, Food To-Go, Cougar Express, Harvey’s, Blue Line Deli (retail), Library Cafe (retail), or Vending Micro Markets you must see the ‘Product Pricing’ section of the SOP to learn how to set location specific pricing for Infor**

15. Enter Remarks

- Put any other desired remarks. This field is typically used to document old pricing and new pricing along with a date for changes and user initials.


16. Verify the Linked Item

- Under Linked Items tab, verify that the item being linked is correctly pulling in with the desired qty, unit, and conversion.

17. Set POS Settings

- Specific POS settings will be determined at a later point in time.

18. Save the Product


- Click the ‘Save’ button () at the top right corner to save the product.

Defining a Product from a Recipe



1. Navigate to Recipes

- Click Masters -> Recipes

2. Select the Recipe

- Search using the search bar or using the advanced search button () to find the recipe.

3. Manage the Item

- Select the Manage icon at the top right ( Manage )
- A drop down will appear, select 'Define Product'
 - If a product is already linked to this recipe, a confirmation pop-up will appear saying "A product linked to this item already been defined. Define anyway?". If you wish to create a new product, click 'Confirm'.
 - **Please review the product(s) already linked and see if you can use the existing products.**
 - The best way to view linked products is in the 'Cross Reference' tab, using the 'Products' drop down.

4. Define Product Information

- After you hit confirm, Eatec will automatically load to a the 'New Product –F&B' screen
- The name, number, unit, description, price, and linked item details will be auto filled

5. Name the Product

- Follow the naming format below for naming products, see examples below. This field should auto populate. Please ensure it follows this naming format:
 - **AREA CODE —Recipe Name—Size—Unit**
 - Ex: SW Sandwich Turkey 6-in
 - Ex: MTC Orange Chicken 4oz SV
 - Ex: CT Chicken Cordon Bleu 5oz sv
- The recipe name should already include the area code. If it does not, please add the area code to the product and reach out to the recipe owner to get the area code added to the recipe
- F2G Salad Green w/ Dressing - 25svIf the product is global, add 'DS' for Dining Services
- The units originally listed in the name may not accurately reflect what is actually sold, if this occurs edit the size to reflect what is sold.
- This occurs more with inventory items, but can also happen with recipes—especially when the unit being sold is in servings and the recipe unit is a batch qty.

6. Number the Product

- The number of the product will auto-populate with the number of the item.
- If this is the first product linked to the recipe, then leave the number alone, do not change it.
- If this is not the first product linked to the recipe, then add a '1' to the end of the product number. This is because Eatec will not allow multiple products with the same product number to exist so we must make the number unique.
- **If this is not the first product linked to the recipe, examine the existing product(s) to see if you can use an existing product before creating a new one.**

- In very rare cases an AFS product number will align with another BYU product number. In these cases, the AFS product number takes precedent as these numbers are required for the current AFS interfaces

7. Enter the Product Type & Subtype

- The type field is the broad category for what the product is. Pick the most applicable from the drop-down list
- If the product is going to be sent to Infor via the Eatec to Infor API, then the type also represents the Major Group and Family Group in Infor.
 - The two upper-case characters at the start of the type are the Major Group
 - The remaining characters/words are the Family Group
- For product that are defined in Infor and Eatec, please ensure that the type in Eatec matches the Major and Family Groups in Infor
- The subtype field more narrowly describes what the product is and should be more specific than the type. Pick the most applicable from the drop-down list.
 - Managers of each respective areas will have the ability to add their own subtypes. If you feel that you need another subtype, please talk to your manager.

8. Verify the Unit

- Managers of each respective areas will have the ability to add their own subtypes. If you feel that you need another subtype, please talk to your manager.
- If the product is going to be sent to Infor via the Eatec to Infor API then the unit must match the inventory barcode unit that you want to send to Infor.
 - Ex: An inventory item pack of Coke can have a pack barcode and a bottle barcode. If the product being sold is a bottle, ensure that the unit matches the bottle barcode.

9. Enter the Class

- The class field represents which location “owns” the product. The class should match the area code in the Product Name.
 - If it is a general product that will be sold from multiple locations, select “DS” (Dining Services).
 - User access will be restricted by class, so users will only be able to view and edit products that have classes they have access to.
 - Ex: F2G classed products will only be viewable by Food-To Go employees.

10. Enter the Alternate ID

- The full name of the product that a customer would typically see on a receipt (this currently shows on Quick Orders, Sales Orders, and menu boards for Cannon, MTC, and Cougareat)
 - This name should not have the location code
 - Ex: Vitamin Water Zero Calorie Squeezed 20oz

11. Select Dietary Preference

- A selectable option to indicate an applied preference to the product (Ex: Vegan, Gluten-Free, Vegetarian). Choose which option, if any, apply.

12. Do Not check Menu Product checkbox

- This box is only selected if you are creating a “Menu Product”, meaning this product is only linked to other products. **If defining from a recipe, this should not be selected.**

13. Enter the Description

- The description auto-populates from the inventory description box. Add any additional notes as needed to help describe the product, its use, and any other helpful information. This field is searchable.

14. Enter the Selling Price

- Under the 'Product Details' tab, enter the selling price in the 'Price' field.
 - The auto-populated price is the Weighted Average Cost.
- **If your area is the Creamery on Ninth (grocery), Creamery at Helaman (grocery), Outlet Creamery, Wyview Creamery, Food To-Go, Cougar Express, Harvey's, Blue Line Deli (retail), Library Cafe (retail), or Vending Micro Markets you must see the ['Product Pricing'](#) section of the SOP to learn how to set location specific pricing for Infor**

15. Enter Remarks

- Put any other desired remarks. This field is typically used to document old pricing and new pricing along with a date for changes and user initials.


16. Verify the Linked Recipe

- Under Linked Items tab, verify that the item being linked is correctly pulling in with the desired qty, unit, and conversion.

17. Set POS Settings

- Specific POS settings will be determined at a later point in time.

18. Save the Product

- Click the 'Save' button () at the top right corner to save the product.

Creating a Linked Product Directly from the Product Module

While most products are defined from an inventory item or recipe, not all products are created that way. Products can be created directly through the Product module and linked to a desired item or recipe during the creation process.

1. Navigate to Products

- Click Masters -> Products

2. Create a New Product

- Click 'Create New' in the top right corner to create a new product.

3. Name the Product

- Enter a name for the product you are creating. Follow the naming format below for naming products, see examples below:

If linking to an inventory item: Location Code – Brand Name (if applicable) – Item – Essential Description (if applicable) –Size – Unit

If linking to a recipe: AREA CODE—Recipe Name—Size—Unit

- Ex: CRM Blue Diamond Almonds Whole 6oz
- Ex: CE Blue Food Club Red Raspberries Frozen 6oz
- Ex: BL Skittles Original 2.17oz
- Ex: F2G Cougar Tracks Ice Cream ½ Gallon
- Ex: SW Spicy Italian 6"

- Ex: DS Water Dasani Coca-Cola 20oz by the bottle

If the product is global, add 'DS' for Dining Services for the location code.

4. Number the Product

- When creating a product from scratch, Eatec will automatically generate a number. Do not enter anything into this field.

5. Enter the Product Type & Subtype

- The type field is the broad category for what the product is. Pick the most applicable from the drop-down list.
 - If no type accurately fits your product, please contact Dining Accounting to discuss adding a Product Type.
- If the product is going to be sent to Infor via the Eatec to Infor API, then the type also represents the Major Group and Family Group in Infor.
 - The two upper-case characters at the start of the type are the Major Group.
 - The remaining characters/words are the Family Group.
- The subtype field more narrowly describes what the product is and should be more specific than the type. Pick the most applicable from the drop-down list.
 - Managers of each respective areas will have the ability to add their own subtypes. If you feel that you need another subtype, please talk to your manager.

6. Enter the Unit

- Ensure the unit matches the unit in which the product is sold.
- If the product will be linked to an inventory item and is going to be sent to Infor via the Eatec to Infor API then the unit must match the inventory barcode unit that you want to send to Infor.
 - Ex: An inventory item pack of Coke can have a pack barcode and a bottle barcode. If the product being sold is a bottle, ensure that the unit matches the bottle barcode.
 - The most common unit is 'Each' for things that are harder to classify, but something like Milk might be better as gallon.

7. Enter the Class

- The class field represents which location "owns" the product. The class should match the area code in the Product Name.
 - If it is a general product that will be sold from multiple locations, select "DS" (Dining Services).
 - User access will be restricted by class, so users will only be able to view and edit products that have classes they have access to.
 - **Ex: F2G classed products will only be viewable by Food-To Go employees.**

8. Enter the Alternate ID

- The full name of the product that a customer would typically see on a receipt (this currently shows on Quick Orders, Sales Orders, and menu boards for Cannon, MTC, and Cougareat)
 - **This name should not have the location code.**
 - Ex: Vitamin Water Zero Calorie Squeezed 20oz

9. Select Dietary Preference

- A selectable option to indicate an applied preference to the product (Ex: Vegan, Gluten-Free, Vegetarian). Choose which option, if any, apply.

10. Do not check Menu Product check-box

- This box is only selected if you are creating a “Menu Product”, meaning this product is only linked to other products. **See the ‘Creating a Menu Product’ section of the SOP if you want link products to products.**

11. Enter the Description

- Add additional notes as needed to help describe the product, its use, and any other helpful information. This field is searchable.
 - For products connected to items, having the item’s barcode in the description can be helpful.

12. Enter the Selling Price

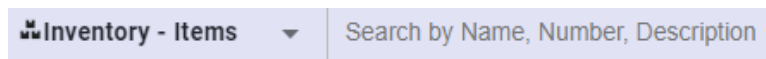
- Under the ‘Product Details’ tab, enter the selling price in the ‘Price’ field.
 - The auto-populated price is the Weighted Average Cost.
- **If your area is the Creamery on Ninth (grocery), Creamery at Helaman (grocery), Outlet Creamery, Wyview Creamery, Food To-Go, Cougar Express, Harvey’s, Blue Line Deli (retail), Library Cafe (retail), or Vending Micro Markets you must see the ‘Product Pricing’ section of the SOP to learn how to set location specific pricing for Infor.**

13. Enter Remarks

- Put any other desired remarks. This field is typically used to document old pricing and new pricing along with a date for changes and user initials.

14. Linking Items or Recipes

- Under the ‘Linked Items’ section of the ‘Product Details’ tab, there is a search bar used to find Inventory Items and Recipes.




- Click ‘Inventory -Items’ to enable a drop down to search for inventory items by name, packages, class, and type and to search for recipes by name, packages, class, and type.
- Use the search bar to find the inventory item or recipe that you would like to link to the product. Click the inventory item or recipe and click ‘Select(1)’ at the bottom of the search.
- After the item or recipe is added, enter the Qty and Unit.

15. Set POS Settings

- Coleman and the INFOR, IG team need to finalize what we are doing for this section

16. Save the Product

- Click the ‘Save’ button () at the top right corner to save the product.

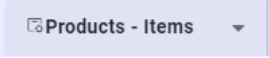

Creating a Menu Product

Menu products are unique products because they link to other products rather than an inventory item or recipe. Menu products are used when we want to sell a group of products as a single product, and the guest can choose what items will be included in the main product.

For example, a 5dz Assorted Cookie Tray can be customized by the guest. Menu Products are used to accommodate this. In the 5dz cookie, the main product would be “F2G Cookie Tray 5dz”. The tray, lid inventory items would be linked to this product. In addition, the following PRODUCTS would also be linked to it: “F2G Cookie dz Chocolate Chip”, “F2G Cookie dz Mudslide”, etc. While ordering, the guest

can choose which custom assortment of cookies they like and order them through the “F2G Cookie Tray 5dz” menu product.

NOTE: MRP will only pull the inventory items linked to the products that are ONLY linked to recipes/inventory items. For example, if the Menu Product is called “Garden Salad”, and then the only products linked to the menu product are the salad dressings, MRP will only auto-order the dressings and not the ingredients to the salad.

1. **Follow Steps 1-9 of the ‘Create a Product Directly from the Product Module’ section above**
 - Steps 1-9 will be the same as creating a product from scratch
2. **Check Menu Product check-box**
 - Check the box titled ‘Menu Product’ (Menu Product)
 - Checking this box will change the ‘Linked Items’ search bar to change from searching inventory items and recipes to products only
3. **Follow Steps 11-13 of the ‘Create a Product Directly from the Product Module’ section above**
 - Steps 11-13 will be the same as the section above
4. **Link Products to the Menu Product**
 - Use the search bar to find Products  This is only enabled if the ‘Menu Product’ checkbox is checked. See step 2.
 - Click ‘Products - Items’ to enable a drop down to search for products by name, packages, class, and type.
 - Click the product from the search and click ‘Select(1)’ at the bottom of the search.
 - After the product(s) is added, enter the Qty and Unit.
5. **Set POS Settings**
 - Coleman and the INFOR, IG team need to finalize what we are doing for this section
6. **Save the Product**
 - Click the ‘Save’ button () at the top right corner to save the product.

Editing Products

Editing products follows the same rules as above for creating products, ensure that the **Name, Unit, Type, (opt. Subtype), class, alternate Id, (opt. Dietary preference), linked items** are all filled in and correct before saving the product.

Product Pricing

The following locations use Eatec as the pricing master:

- Creamery on Ninth (grocery)
- Creamery at Helaman (grocery)
- Outlet Creamery
- Wyview Creamery
- Food To-Go
- Cougar Express
- Harvey’s (retail)
- Blue Line Deli (retail)
- Library Cafe (retail)

- Vending Micro Markets

For these locations the Eatec to Infor API will create a product in Infor once pricing under the 'Pricing' tab on a product has been set for a specific location. **If your location was listed above, each product sold must have location specific pricing setup in Eatec to sell at an Infor register. If no pricing is set, the product will not ring up at the register.** See instructions below for how to set location specific pricing:


1. Navigate to Products

- Click Masters -> Products

2. Select a Product

- Use the search bar to search for a product that you would like to add pricing to

3. Edit the Product

- Click 'Edit' ( Edit) at the top right corner.

4. Add New Pricing

- Click the 'Pricing' tab
- Click 'ADD NEW' next to 'Pricing' (Pricing **ADD NEW**)

5. Enter Pricing Details

- A pop-up will appear to enter specific pricing by location.
- Enter the desired sales price.
 - If the price is set to \$0.00, then the price of the product sent to Infor will be the price set on the Product Details tab.
- Enter the Effective Date. This will be the day the pricing starts.
- Enter the Expiration Date. This will be the day the pricing ends.
 - If there is no known end date for the price, do not enter an expiration date. Eatec will set this to open and it will remain open indefinitely
- Enter the location you want this pricing to be at.
- Do not enter any Concept, Minimum Retail Price, or Royalty Rate.
- Remarks are optional to add additional information.
- Click 'Add'.
 - Pricing dates cannot overlap for the same location. For example, the Creamery on Ninth cannot have a pricing record for 8/20-8/25 and one for 8/24-8/30. For these to be valid dates, it would have to be 8/20-8/25 and 8/26-8/30.

6. Save Changes

- Click 'Save' in the top left to save all pricing.
 - Once the pricing has been updated, the Eatec to Infor API will update any current pricing in Infor.

Viewing/Managing Products

After products are created, more viewing options and analysis is available. The following functions become available after products are created:

- **Managing Products**

- Enables adding a product to a package, printing product nutrition, printing nutrition labels, and run analysis on items used to create a shopping cart.

- **Editing Products**

- **Copying Products**

- **Printing out Product Details**
- **Deactivating**

In addition to the product details, settings, and nutrition tabs, four new tabs become available to use to help manage products after a product is created:



- **Pricing**
 - See Pricing section of SOP for more details.
- **Cross Reference**
 - Enables the user to see what packages, QO's, Sales Orders, Sales Plans, or Cycle Plans contain the product.
- **Item Sales**
 - Shows sales history of the item.
- **History**
 - Enables the user to see who and what changes have been made to a product.
-

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